

WORKBOOKS

Pricing

WORKBOOKS CRM EDITIONS

Annual pricing per user

	CRM \$360 \$30 per user per month	CRM Pro \$540 \$45 per user per month	Business \$780 \$65 per user per month	Business Pro \$960 \$80 per user per month
CORE FUNCTIONALITY	Different editions may be purchased for different users*.			
Account & Contact Management	✓	✓	✓	✓
Sales Management & Automation	✓	✓	✓	✓
Marketing Management	✓	✓	✓	✓
Customer Service Management	✓	✓	✓	✓
Order Processing	✗	✗	✓	✓
Invoicing & Credit Notes	✗	✗	✓	✓
Automation Engine & Workflows	✓	✓	✓	✓
Customizable Layouts	✓	✓	✓	✓
Security	✓	✓	✓	✓
Data Management	✓	✓	✓	✓
Reporting & Dashboards	✓	✓	✓	✓
Mobile	✓	✓	✓	✓
Sandbox & Testing	✓	✓	✓	✓
SUPPORT OPTIONS				
Workbooks Forum Support	✓	✓	✓	✓
Workbooks Phone/Email Support	✓	✓	✓	✓
EXTENSIONS	Extensions must be purchased for all users. Billed annually per user.			
Multi Company Extension	\$78	✓	\$78	✓
Multi Currency Extension	\$78	✓	\$78	✓
Advanced Security Extension	\$78	✓	\$78	✓
Multi Language Extension	\$78	✓	\$78	✓
Audit Extension	\$78	✓	\$78	✓
Custom Records	\$78	✓	\$78	✓
MODULES	Modules can be purchased for users who need them. Billed annually per user.			
Contract Management Module	\$78	✓	\$78	✓
Workbooks Exchange Server Sync	\$78	\$78	\$78	\$78
Workbooks Outlook Connector	\$78	\$78	\$78	\$78
Mapping Module	\$87	\$87	\$87	\$87
Events Module	✗	✗	\$87	\$87
ADDITIONAL STORAGE	10 GB included as standard.			
Additional Storage (in 5 GB increments)	\$174 per 5 GB per annum (\$14.50 per 5GB per month).			

The Workbooks service is purchased on a one, two or three year subscription and is billed annually.

*It is possible to mix CRM with Business. However, it is not possible to mix 'Core Editions' (Workbooks CRM and Workbooks Business) with 'Pro Editions'.



JumpStart

GET STARTED QUICKLY WITH PRE-BUILT SOLUTIONS

JumpStart for Marketing	\$8,400
JumpStart for Sales	\$9,800
JumpStart for Customer Service	\$9,800

Shared Success

WORKSHOP AND FREE IMPLEMENTATION

Co-funded workshop to define business outcomes	\$2,800 - \$4,200
Up to 20 days of free implementation services	\$1,500 of license annual revenue = 1 free day*

* Three year contract required, subject to minimum \$8k p.a licence investment

TRAINING

Courses Available

GET THE MOST FROM YOUR WORKBOOKS IMPLEMENTATION

System Administrator Training Course (2 days)	\$1,400 per attendee
Advanced System Administrator Training Course (1 day)	\$1,050 per attendee (£2,000 if purchased with above)
Developer Training Course (1 day)	\$1,400 per attendee



Consultancy Days

CONSULTANCY DAYS TO ENSURE YOUR CRM PROJECT IS A SUCCESS

½ day consultancy	\$825 + expenses
1 day consultancy	\$1,400 + expenses

Customer Success Plus

CONTINUED IMPROVEMENT TO YOUR DEPLOYEMENT

Customer Success Plus – 2 days per qtr	\$7,680 per annum (\$960 per day)
Customer Success Plus – 3 days per qtr	\$11,520 per annum (\$960 per day)
Customer Success Plus – 4 days per qtr	\$14,240 per annum (\$890 per day)
Customer Success Plus – 5 days per qtr	\$17,800 per annum (\$890 per day)
Customer Success Plus – 6 days per qtr	\$21,360 per annum (\$890 per day)

Advisory Packs

HELP WITH AD-HOC SMALL PROJECTS OR ENHANCEMENTS

8 points (0.5 days)	\$825 + expenses
16 (1 day)	\$1,450 + expenses
32 (2 days)	\$2,900 + expenses
48 (3 days)	\$4,350 + expenses
64 (4 days)	\$5,800 + expenses
80 (5 days)	\$7,250 + expenses

Packaged Services

PRE-PACKAGED SERVICES TO HELP YOU ON YOUR CRM JOURNEY

GDPR Readiness	Price on request
Workbooks Helping Hands (2 days)	\$2,800
Reporting Workshop (1.5 days)	\$2,100
Adobe Sign Integration (1 day)	\$1,400
Xero Integration with Zapier (1 day)	\$1,400



Workbooks Web Insights is billed annually based on the number of pages viewed on your website per month.

Page Views

Price

PER YEAR	PER MONTH	ANNUAL	MONTHLY
50,000	4,167	\$1,800	\$150
100,000	8,333	\$2,640	\$220
200,000	16,667	\$4,320	\$360
400,000	33,333	\$7,800	\$650
600,000	50,000	\$9,600	\$800
800,000	66,667	\$10,440	\$870
1,000,000	83,333	\$11,280	\$940
2,000,000	166,667	\$15,600	\$1,300
4,000,000	333,333	\$24,360	\$2,030
6,000,000	500,000	\$32,160	\$2,680
8,000,000	666,667	\$39,120	\$3,260
10,000,000	833,333	\$45,240	\$3,770

WORKBOOKS GATORMAIL

GatorMail licenses are sold on an annual basis. If you exceed your annual allowance, you can upgrade to the next tier.

Sends

Price

PER YEAR	PER MONTH	ANNUAL	MONTHLY
30,000	2,500	\$720	\$60
60,000	5,000	\$1,380	\$115
150,000	12,500	\$3,300	\$275
500,000	41,667	\$4,320	\$360
1,000,000	83,333	\$6,120	\$510
2,000,000	166,667	\$6,960	\$580
3,000,000	250,000	\$8,700	\$725
6,000,000	500,000	\$13,920	\$1,160
10,000,000	833,333	\$21,720	\$1,810
15,000,000	1,250,000	\$27,840	\$2320
20,000,000	1,666,667	\$33,060	\$2,755



GatorMail Optional Add-ons

ADD-ONS	PRICE PER YEAR
Advanced Inbox Checker	\$870
SendForensics	\$870
Advanced Email Workflow (10 active workflows)	\$1,740
Multiple Domains (Set-up fee for each additional domain)	\$145
Survey Tool	\$870

To find out more about Web Insights or GatorMail contact us on
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www.workbooks.com/try-now