

WORKBOOKS

Pricing

WORKBOOKS CRM EDITIONS

Annual pricing per user

| CRM | CRM Pro | Business | Business Pro |
|-------------------------|-------------------------|-------------------------|-------------------------|
| \$360 | \$540 | \$780 | \$960 |
| \$30 per user per month | \$45 per user per month | \$65 per user per month | \$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

| | |
|--|-------------------|
| Co-funded workshop to define business outcomes | \$2,800 - \$4,200 |
|--|-------------------|

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 |

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 | \$2,320 |
| 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