

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	✓	✓	✓	✓	
Events Management	✗	✗	\$*	\$*	
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	\$87	\$87	\$87	\$87	
Workbooks Outlook Connector	\$87	\$87	\$87	\$87	
Mapping Module	\$87	\$87	\$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 1, 2, or 3-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'.

\$*: Events Management: for the Business Edition the total license cost is \$1,680 per user per annum (\$140 per user per month) and for the Business Pro Edition it is \$1,854 per user per annum (\$154.50 per user per month). These licenses are only needed for the users who require access to the Events Management functionality.



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	\$4,200
Up to 20 days of free implementation services	\$2,000 of license annual revenue = 1 free day*

* 3-year contract required, subject to minimum \$10k p.a license investment

TRAINING

Courses Available

GET THE MOST FROM YOUR WORKBOOKS IMPLEMENTATION

System Administrator Training Course (2 days)	\$1,400 per attendee
Reporting Training Course (2 days)	\$1,400 per attendee
Developer Training Course (2 days)	\$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

Customer Success Plus

	BRONZE	SILVER	GOLD
Customer Success Manager	✓	✓	✓
Consultancy days (inclusive per annum)	8 days	16 days	24 days
Package day rate	\$975	\$925	\$875
Additional consultancy days rate (purchase as needed in the year at this discounted rate)	\$1,175	\$1,125	\$1,075
Regular Shared Success reviews with your CSM	Half-yearly	Three per year	Quarterly
Strategic Business Review Workshop	✗	Annually	Annually

Packaged Services

PRE-PACKAGED SERVICES TO HELP YOU ON YOUR CRM JOURNEY

GDPR	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