

Workbooks Price List

(Effective: 1st October 2016)

The Workbooks service is typically purchased on a one, two or three year subscription.

Workbooks Editions Different editions may be purchased for different users if required		
Edition	Description	Price per user
Workbooks CRM	Marketing, Sales Force Automation & Customer Support, Pricing Schemes	\$360 per annum (\$30 per month)
Workbooks Business	CRM Edition + Sales Order Processing, Purchase Ordering, Invoices & Credit Notes	\$840 per annum (\$70 per month)
Workbooks CRM Pro	CRM Edition + Multi Currency, Audit, Multi Company, Multi Language, Advanced Security & Contracts	\$600 per annum (\$50 per month)
Workbooks Business Pro	CRM Business + Multi Currency, Audit, Multi Company, Multi Language, Advanced Security & Contracts	\$1032 per annum (\$86 per month)
Workbooks Extensions Extensions must be purchased for all licensed users		
Extension	Description	Price per user
Multi Company	Enables you to add multiple 'own organisations'. Own organisations are typically used to support different VAT schemes, important if you invoice in multiple regions.	\$78 per annum
Multi Currency	Enables you to create transaction documents (e.g. quotations and orders) in multiple currencies and automatically convert the amount into your 'home' currency for reporting.	\$78 per annum
Advanced Security	This enables you to change the sharing policy so you can restrict access to specific records. This is most commonly used if you want to allow some users to see some records but not all. For example, the UK sales team can see UK Opportunities, but not US Opportunities.	\$78 per annum
Multi Language	This enables your users to use different languages within the Workbooks environment. Record names, field names, pick list values and other entities in Workbooks are translated in different languages, the language displayed to the user is based on their preference. Workbooks is shipped with English, English American, French, German and Spanish, more languages can be provided on request.	\$78 per annum

Audit	The Audit extension audits every change to a record including changes to individual fields within a record. This enables you to see which changes a user has made to a record. The Audit module can also be used to track the status of a record as it moves through a life cycle. So you can for example, report on all cases which have been in a specific state for a time period. This is often used to track SLA metrics.	\$78 per annum
Workbooks Modules Modules can be purchased for those users who need them.		
Contract Management	Create contract records and raise cases against specific contracts and contract line items.	\$78 per annum
Workbooks Exchange Server Sync (WESS)	The Workbooks Exchange Server Sync synchronises emails, meetings, tasks and people between Microsoft Exchange and Workbooks.	\$78 per annum
Workbooks Outlook Connector (WOC)	A plug-in for Microsoft Outlook that allows you to synchronise contacts and tasks between Workbooks and Outlook and also enables you to share emails from Outlook into Workbooks with a single click.	\$78 per annum
Workbooks Mapping Module	The Workbooks Mapping Module allows you to plot records from within Workbooks on a map. You can change the view of a Workbooks grid to a map view and use the filtering capabilities to identify records you want to plot.	\$90 per annum (\$7.50 per month)
Additional Storage	Each paid account is provided with 10GB of storage. If you need more storage you can purchase it in 5GB increments e.g. 5GB, 10GB etc.	\$195 per 5GB per annum (\$16.50 per month)

Annual List Pricing Per User	Editions			
	CRM	CRM Pro	Business	Business Pro
Annual Price Per User	\$ 360	\$ 600	\$ 840	\$ 1,032
<i>Equates to PUPM</i>	\$ 30	\$ 50	\$ 70	\$ 86
Core Functionality				
Contact Management	Y	Y	Y	Y
Salesforce Automation	Y	Y	Y	Y
Marketing Automation	Y	Y	Y	Y
Customer Services Management	Y	Y	Y	Y
Order Processing	N	N	Y	Y
Invoicing & Credit Notes	N	N	Y	Y
Extensions (Required for all users)				
Multi Company Extension	\$ 78	Included	\$ 78	Included
Multi Currency Extension	\$ 78	Included	\$ 78	Included
Advanced Security Extension	\$ 78	Included	\$ 78	Included
Multi Language Extension	\$ 78	Included	\$ 78	Included
Audit Extension	\$ 78	Included	\$ 78	Included
Modules (Can be purchased for individual users)				
Contract Management	\$ 78	Included	\$ 78	Included
Workbooks Exchange Server Sync (WESS)	\$ 78	\$ 78	\$ 78	\$ 78
Workbooks Outlook Connector (WOC)	\$ 78	\$ 78	\$ 78	\$ 78
Workbooks Mapping Module	\$ 90	\$ 90	\$ 90	\$ 90

Subscription Add-ons	Price
Additional Storage - Sold in 5GB increments	\$195 per 5GB per annum
Customer Success Plus - 2 day per quarter	\$960 per day (\$7,680 per annum)
Customer Success Plus - 3 day per quarter	\$960 per day (\$11,520 per annum)
Customer Success Plus - 4 day per quarter	\$920 per day (\$14,720 per annum)
Customer Success Plus - 5 day per quarter	\$920 per day (\$18,400 per annum)
Customer Success Plus - 6 day per quarter	\$920 per day (\$22,080 per annum)

Workbooks Training Courses	Price
System Administrator Training Course (2 days) UK Office	\$1,400 per attendee
Advanced System Administrator Training Course (1 day)	\$1,050 per attendee (or \$2,000 if purchased with above)
Developer Training Course (1 day) UK Office	\$1,400 per attendee

Professional Services	Price
1/2 Day Consultancy	\$825 + Expenses
1 Day Consultancy	\$1,400 + Expenses

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

***Please note:** 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. For example, it is not possible to mix Workbooks CRM with Workbooks CRM Pro.