

# SERVICE DESCRIPTION

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## WORKBOOKS CRM & BUSINESS EDITION SERVICE DESCRIPTION

The Workbooks CRM Platform is a feature rich, highly customisable cloud based solution for mid-size organisations. The platform is provided 'out of the box' with a fully working configuration toolkit which can be tailored and adapted by Workbooks consultants or customers themselves to meet their needs

This Service Description provides a summary of the functionality which is available on the platform. Some features may require an additional licence.

### 1.1. PRE-BUILT RECORDS

The platform is pre-built with all the CRM record types that you will need. Our CRM Edition includes:

- Organisation, People and Sales Leads
- Activities including Meetings and Tasks
- Online Activities, storing details about web page views, downloads, survey results, etc.
- Emails, which can be sent from Workbooks or synchronised from Outlook or Gmail
- HTML Email templates
- Marketing Campaigns, Mailshots and Mailing Lists
- Products, including pricing schemes for both customers and suppliers
- Opportunity and Quotation records

The Workbooks Business Edition includes all the record types in the CRM Edition plus:

- Customer Orders
- Supplier Purchase Orders
- Invoices and Credit Notes

In addition, you can purchase Customer Contracts as a separate module.

All records can be tailored to meet your business needs, with the ability to create different layouts, custom fields and record templates.

### 1.2. CUSTOM OBJECTS

You can create custom objects the Workbooks platform to store information which doesn't naturally fit within any of the standard objects. Custom objects can support custom fields, layouts and record templates.

Custom records can be connected to any parent record or remain standalone.

Custom records are included in the following Services:

- Custom Records Extension
- CRM Pro
- Business Pro

### 1.3. EVENTS

You can manage your Events within Workbooks using Event records, which include related record types for tracking Speakers, Sponsors, Sessions, Tickets and Attendees. You can manage paid or free Events, and take registrations and payment using an Integration with Stripe with our Event Management Online Portal.

Events are a chargeable product from Workbooks, and must be used in addition to the Business Edition.

Events Records are included in the following Services:

- Event Module
- Events Edition

### 1.4. REPORTS AND DASHBOARDS

You can build advanced Reports and Dashboards with our easy to use reporting tools. Out of the box, Workbooks provides a range of pre-built Reports and Dashboards that you can use and modify; or you can build your own to fit your own reporting requirements.

Key features include:

- **Powerful reporting engine, which allows you to easily build detailed reports and summary views**
- **Colour coding feature so you can visually identify and highlight key metrics**
- **Set targets and automatically track your achievements**
- **Build multiple views onto the same report, allowing you to easily 'slice and dice' your data**
- **Charting tools including pie, line, and dial charts**
- **Dashboards that bring multiple reports and charts together**
- **Share and publish Reports and Dashboards so everyone has the right information at their fingertips**
- **Schedule reports to be delivered via email automatically**
- **Connect your reports to TV screens around your office, using our automation engine**

Reports and dashboards are available in the following Products:

- Workbooks CRM & CRM Pro Editions
- Workbooks Business & Business Pro Editions
- Workbooks Event & Events Pro Editions.

## 1.5. OFFICE365 / OUTLOOK SYNCHRONISATION

You can synchronise Emails, Contacts, Tasks and Meetings directly with Outlook, Microsoft Exchange or Office365 using the Workbooks Exchange Server Sync production.

The Workbooks Exchange Server Sync (WESS): This is a cloud based service that connects Workbooks directly to Exchange or Office365.

The WESS includes an Outlook Add-in which can be deployed by your Exchange or Office365 Administrator which allows Outlook to surface Workbooks records inside Outlook.

The WESS is a chargeable product from Workbooks and is included in the following product:

- Workbooks Exchange Server Sync Module

## 1.6. MULTI-CURRENCY & MULTI-LANGUAGE

With Workbooks, you can easily configure which currencies you want to use. You can define exchange rates and exchange rate periods. Workbooks has the concept of a 'Home' currency and a 'Document' currency. The Home currency is your global consolidation currency so you can report across your CRM data in a single currency. The Document currency is the currency of the specific record. All records which support line items, like Opportunities and Invoices have a Document currency and a Home currency.

Workbooks is also available in different languages. Out of the box we provide support for English, American English, French, German and Spanish. Our platform however supports any language and customers are able to tailor their own translations, including field names and pick list values. Users can define their currency and language preferences so that teams around the world are able to work in their local currency and language.

Multi-Currency functionality is available in the following products:

- The Multi-currency Extension
- Workbooks CRM Pro Edition
- Workbooks Business Pro Edition
- Workbooks Events Pro Edition

Multi-language functionality is available in the following products:

- The Multi-Language Extension
- Workbooks CRM Pro Edition
- Workbooks Business Pro Edition
- Workbooks Events Pro Edition

## 1.7. AUTOMATION ENGINE & WORKFLOWS

Workbooks enables you to streamline common business processes using Workflow tools and the Automation Engine. Workbooks includes a set of useful tools such as queues, activities, views and status fields to build simple Workflows without complex configuration.

In addition, the Workbooks automation engine allows you to build scripts to support more complex processes. Automations use the Workbooks API and can access all Workbooks records and capabilities of the platform.

Automations run in a restricted environment to ensure security, but do have the capability to connect to other web based applications or MS-SQL or MySQL environments - allowing you to build Workflows not just within Workbooks but across third-party applications. The Automation engine supports processes such as:

- **Scheduled Processes:** These automatically run at a pre-set interval (e.g. every minute, hour, every Wednesday at 10am, etc.)
- **Process Buttons:** Processes connected to a specific button on a form
- **On-Change Processes:** Processes that fire when a record has been updated
- **Web Processes:** Processes that can be run through a Web URL

We provide a library of scripts for most common tasks that you can leverage and adapt, or you can write your own to fit your specific business requirements.

The automation engine is included in the following products:

- CRM & CRM Pro Editions
- Business & Business Pro Editions
- Event Management and Event Management Pro Editions

## 1.8. AUDITING AND AUDIT REPORTING

The Auditing Extension tracks every field change, including previous value, new value, date change and who made the change. Auditing takes place on all records and the configuration aspects of Workbooks. You can use this audit information as part of the reporting engine to track changes to records. E.g. report on which opportunities moved from Stage 2 to Stage 3 this week, or which opportunities reduced in value.

The Audit Extension is a chargeable product and is included the following products:

- The Audit Extension
- CRM Pro Edition
- Business Pro Edition

## 1.9. MOBILE, TABLET AND DESKTOP THEMES APPLICATION

Workbooks provides both a Web Desktop client for desktop/laptop users and a Mobile themes for phones and tablets. The Web Desktop is designed to look like a familiar desktop environment, allowing users to create shortcuts and pin records in.

The mobile themes provide the same core functionality as the desktop themes but designed for phones and tablet devices. The mobile themes are not designed to be used by Workbooks administrators for configuration of the Workbooks environment.

Themes are included in the following Services:

- CRM & CRM Pro Editions
- Business and Business Pro Editions
- Event Management & Event Management Pro Editions
- Business and Event Management editions of Workbooks.

### **1.10. PORTAL FRAMEWORK**

As part of our platform we provide a portal framework which allows Workbooks customers to build client portals. The framework includes basic portal functionality, including user management and authentication. We also provide base modules for a self-service helpdesk (case portal) and an events portal to online and 'real-life' events such as conferences. The framework can easily be extended to support other customer portal applications.

Themes are included in the following Services:

- CRM & CRM Pro Editions
- Business and Business Pro Editions
- Event Management & Event Management Pro Editions
- Business and Event Management editions of Workbooks.

### **1.11. DATA MIGRATION TOOLS**

Workbooks makes it easy to get your data in and out of Workbooks. We provide a comprehensive import tool, which allows you to upload data from .CSV (Excel) format files. The import engine allows you to create multiple record types at the same time (e.g. People and Organisations or People and Activities) and will automatically spot duplicate records.

You can define import field mappings and reuse these for regular imports. You can even automate an import using the automation engine if you regularly import data from the same source. Once data has been imported, we provide tools to validate it before you accept it into your database and you can also rollback an import if you change your mind.

We also allow you to easily export your data. We provide a complete database export – which will export your entire database in as a MYSQL database. You can also export any views or reports directly into Excel at a click of a button.

Data Migration tools are included in the following Services

- CRM & CRM Pro Editions
- Business and Business Pro Editions
- Event Management & Event Management Pro Editions
- Business and Event Management editions of Workbooks



## 1.12. SECURITY AND SHARING MODEL

Workbooks allows you to control which users can access information based on security rules. Workbooks has layered tools to enable you to create the right balance between easy access and solid security. Workbooks Capabilities control which users can access certain elements of the platform and Security Permissions control which records can be edited or viewed.

Each customer is supplied with a standard security configuration. This meets the needs of most clients. For even more granular control, the Advanced Security Extension can also be purchased.

Security & Sharing tools are included in the following Services:

- Advanced Security Extension
- CRM Pro & Business Pro
- Business and Business Pro Editions
- Event Management Pro Editions

## 1.13. PDF, WORD & HTML OUTPUT DOCUMENTS

You can create professional output documents directly from Workbooks in PDF, HTML, Microsoft Word or directly in Google Docs. Workbooks support output documents for the majority of records in Workbooks; the most commonly used ones are: Quotes, Orders and Invoices.

Our PDF generation engine allows you to embed logic into the document creation and merge content from Workbooks with external content such as images held online.

Common examples include:

- Merge product images onto a quotation record
- Create Orders including standard terms and conditions
- Embed logic to hide individual line item pricing
- Group product pricing together into sub totals based on their category

These Features are included in the following Services:

- CRM & CRM Pro Editions
- Business and Business Pro Editions
- Event Management & Event Management Pro Editions
- Business and Event Management editions of Workbooks

#### 1.14. Mapping

The Mapping Module of Workbooks allows you to represent any address information you have as a location on a map. Once enabled, the Mapping Module will show you Organisations and People 'nearby' the record you are viewing. So if you are off to see a client or prospect you can see who else is in the vicinity.

You can also see reports in 'map view', based on the criteria you want. For example you can create a report of customers in a specific vertical industry or who have purchased a specific product and see them plotted on a map.

These Features are included in the following Services:

- Mapping Module

#### 1.15. TESTING & DEVELOPMENT ENVIRONMENTS

All customers can have up to five different database environments within their Workbooks account at no additional charge. This enables clients to have a 'production' environment and additional training and development environments. We provide tools to enable you to copy databases, including configuration and control parameters.

Testing and Development Environments are available in the CRM, Business and Event Management Editions of Workbooks.

These Features are included in the following Services:

- CRM & CRM Pro Editions
- Business and Business Pro Editions
- Event Management & Event Management Pro Editions
- Business and Event Management editions of Workbooks

#### 1.16. EMAIL2CASE & EMAIL DROPBOX

The Email Dropbox feature makes it easy to get emails into Workbooks if you are not using the Outlook Connector or Exchange Sync. Once configured you can 'CC or BCC' a Workbooks email address and the message you send will be automatically processed by Workbooks and stored against the relevant records. Emails are automatically stored against People records by matching the email addresses on the distribution list to records in Workbooks.

The Email2Case automation can monitor a POP3/IMAP mailbox and automatically create a new case record or update an existing case with a new email. The Email2Case functionality is often used by customer services departments to automatically process enquiries, create cases, assign them to the right teams and provide the customer with a reference number.

These Features are included in the following Services:

- CRM & CRM Pro Editions
- Business and Business Pro Editions
- Event Management & Event Management Pro Editions
- Business and Event Management editions of Workbooks

### 1.17. INTEGRATION FRAMEWORK

To maximise business benefit, it is often the requirement that the CRM system becomes a hub for data and is integrated with other business applications. Workbooks has made this process easy by:

- Pre-building Workbooks with common record structures, such as Order and Invoice records, tax structures and accounting periods. This simplifies integration and reduces the cost.
- Providing a range of integration tools and approaches allowing total flexibility today and into the future.

Integration tools include:

- **Over 20 Pre-built connectors:** Pre-built connectors where the integration requirements across customers is common. For example, the Outlook Connector, Box Connector and MailChimp Connector.
- **Generic Connectors:** Connectors to common database formats, including Microsoft SQL, Azure, MySQL and Oracle.
- **Over 700 Integrations via Zapier,** a cloud-based integration platform designed to simplify the integration of different cloud applications. Workbooks has built a connector into Zapier which support 'Actions' and 'Triggers' for most Workbooks record types.
- **Web Services API:** A fully RESTFUL API that underpins all our integration options and provides a generic method to connect Workbooks to any application that has a corresponding API or SQL database.
- **Web Processes:** A set of scripts hosted inside the Workbooks environment that use the API build automations within Workbooks and also integrate with other platforms.

These Features are included in the following Services:

- CRM & CRM Pro Editions
- Business and Business Pro Editions
- Event Management & Event Management Pro Editions
- Business and Event Management editions of Workbooks

An additional licence may be required from Zapier or other third party platforms

### 1.18. TIBCO CLOUD INTEGRATION

Previously known as Scribe, TIBCO Cloud Integration is a cloud-based platform designed to integrate different applications for data migrations or integrations.

The TIBCO Cloud Integration consists of three elements:

- The Cloud Integration Platform: This is where you can define data flows and data mapping using a drag-and-drop editor.
- The Workbooks Connector: This is an Interface into the Workbooks API from the Cloud Platform, which allows you to create, update and delete records in Workbooks.
- Third-Party Connectors: Tibco provide a range of free and chargeable pre-built connectors which allow you to connect to numerous applications.

The Tibco Cloud Integration platform allows you to extract data from various systems, transform that data in ways and upload the data into the Workbooks platform. This process can be then run on a regular schedule enabling you to synchronise data between Workbooks and third-party software.

TIBCO Cloud Integration (Scribe) is a chargeable product from Workbooks. A single license from Workbooks allows customers to connect into the Workbooks platform and utilise one of the free connectors provided by Tibco. More than one connector will require an additional licence and third-party fees may also be payable to third-party connector providers.

A list of Tibco Scribe connectors is available [here](#)

## MARKETING AUTOMATION SERVICE DESCRIPTION

The Workbooks Marketing Automation builds upon the marketing functionality in the CRM platform to embed email marketing, website analytics and marketing automation tools within Workbooks.

### 1.19. EMAIL MARKETING

The Email Marketing Module provides a feature rich tool set to help you create compelling email content and deliver it successfully to your prospects and customers.

- Mailing Lists – including the ability to auto-populate Mailing Lists based on reports, e.g. customers due for renewal or prospects in the current pipeline
- A very easy to use ‘drag and drop’ editor for creating compelling email content for Mailshots
- Multi-Campaign types, such as workflows, recurring, campaign series
- A/B split testing
- A rich library of HTML and plain text templates
- Open/Click/Bounce management and analysis
- Dynamic content
- Multi language variants
- Inbox testing and anti-spam analysis
- Scheduled delivery
- A preference centre for managing email subscriptions and opt in/out

These Features are included in the following Services:

- GatorMail Edition

### 1.20. EMAIL AUTOMATIONS

Workbooks also provides an email Workflow tool which enables you to build advanced campaign workflows to meet your organisation’s needs. Workflows functionality includes:

- The ability to target specific segments of your database (audiences/lists)
- Actions: such as Send Email, Send Email Series, add to Group, add to a new workflow and update a contact field value
- Conditions enable you to build logic into your workflows, typical examples include:
  - Wait for x days

- Does a field value meet a condition e.g. renewal date is 30 days from today
- Did a recipient visit this page or download this content

Automations are designed using a 'drag and drop' editor to make even complex workflows simple to build.

These Features are included in the following Services:

- Advanced Workflows

## 1.21. WEB INSIGHTS

Web Insights combines website analytics with CRM to help marketing generate more leads and help sales teams close deals more effectively.

Web Insights works by adding tracking code to your website, analysing the visitor journey, and connecting that information directly into Workbooks CRM enabling you to:

- Turn anonymous website visitors into identified sales leads
- Enrich website visitor information automatically with details about their organisation
- Track which visitors are 'hot prospects' using page scoring
- Shorten sales cycles, by enabling sales teams to understand their prospects visitor journey and interest areas directly in CRM.

## Identifying Individual Website Visitors

Web Insights can identify visitors on your website and store their website journey on People or Lead records inside Workbooks CRM. Web Insights uses several different methods to identify visitors including:

- **Personalised URLs:** When combined with the Email Marketing Module of Workbooks, every email recipient is automatically identified when they click on any link within an email message.
- **Website Form Integration:** We can integrate Web Insights into any website form that includes an email address to identify the visitor.
- **Portal Integration:** If you use the Workbooks portal framework or have your own existing website with a login, it is possible to connect the login details with Web Insights to identify visitors.

Once this link between the visitor and a person or lead record in Workbooks has been established, it persists so that every website visit from that device is then tracked in CRM.

## IP Address Look-up

Web Insights also includes an extensive IP address database that enables Workbooks to identify Organisations visiting your website even when it can't identify the individual person. Workbooks will automatically create new leads for your sales team to follow-up or will connect the Online Activity against an existing organisation record if it can find a match.

## VISITOR SCORING & DATA ENRICHMENT

Web Insights enables you to 'score' the journey of any website visitors by using page scoring. By allocating a higher score to pages that indicate buying behavior, such as pricing pages for example you can identify which visitors are most engaged.

In addition, Web Insights can automatically enrich your CRM data based on the visitor; adding details about the organisation's revenues, industry, number of employees and profile. The combination of visitor scoring and data enrichment enables marketing and sales teams to spend less time capturing information and more time focusing on the high qualify leads and how to best engage with them.

These Features are included in the following Services:

- Web Insights

### 1.22. SURVEYS

Surveys allow to create interactive surveys which can be completed by your customers and staff.

Surveys are built using a drag and drop editor and are hosted in the cloud. Survey results can be analysed and are integrated into Workbooks CRM, Business and Events editions and appear as online activities.

These Features are included in the following Services:

- GatorMail Survey Tool

### 1.23. POP-UPS

Pop-up are a feature which allow you to place 'pop-ups' on your website to highlight key areas of content and improve website conversions.

These Features are included in the following Services:

- Web Insights Pop-ups

### 1.24. SMART FORMS

Smart Forms are form functionality provided by the GatorMail Edition.

They can be used for Contact Us forms, Mailing List Sign Up forms, or to gate content, and allow you to add the people into follow-on workflows.

The forms connect the populated personal details to people in your Mailing Lists, and create new people where they don't exist, therefore adding and updating these people in Workbooks.

These Features are included in the following Services:

- GatorMail Edition