

Quotation for SuperOffice CRM solution - Cloud Subscription

Quote for: **{name}**

Date: **{sdat}**

{name}

{addr}

{zipc} {city}

{attn}

{sdat}

**Proposal for SuperOffice CRM Cloud Subscription**

Further to your recent enquiry in relation to SuperOffice CRM, please find attached our proposal.

SuperOffice CRM is a modern solution that is designed to fuel your **sales, marketing and customer service** processes.

As one of Europe’s leading CRM suppliers with over 30 years of continuous focused development experience, we welcome the opportunity to be your partner and help you grow through your use of our CRM solution.

Among our many customer references, you’ll find reference customer, reference customer and reference customer.

SuperOffice CRM is designed with the user in mind and to enable your employees to nurture and develop successful customer relationships. SuperOffice CRM is award-winning for its design and user-friendliness and it has been named as Best in Test several years in a row (Computer World).

If you’d like to read more about our Customers and our Awards, feel free to visit our website: [www.superoffice.com](http://www.superoffice.com)

Please do not hesitate to contact me should you have any questions regarding our proposal.

I look forward to hearing from you shortly.

Kind regards

SuperOffice Software Limited

{auth}

{atit}

Email: {auem}

Mobile: {aupc}

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# Summary

(Please insert reference to relevant information (goals, KPIs, solution aspects) that you have documented and presented to the customer in your Description of Solution (the table) as appropriate.

SuperOffice is a modern CRM solution that helps you build strong, long-lasting relationships and turn them into revenue.

Further to our previous correspondence, we understand {Name}’s main objectives for the introduction of SuperOffice CRM are to:

* **fuel your sales processes** and helps your sales teams keep their promises, offer value, close more deals, and exceed their sales targets using **SuperOffice Sales**.
* empower your marketing teams to deliver wide-scale, personalized **communication to the right customer with the right message at the right time**, as well as deliver higher returns on marketing investments with **SuperOffice Marketing**.
* enable your service teams to **capture and act upon any type of incoming request in a timely manner** and with the best possible solution, thus reducing customer churn and increasing loyalty using **SuperOffice Service**.

By implementing the solution on offer, you will be able to achieve the following positive effects:

1.

2.

3.

These potential benefits can be realised through the CRM solution we have suggested in this proposal.

## Validity

This quote is valid until {gexp}

# Proposed solution – products

In relation to {Name}’s key objectives, we recommend the following SuperOffice solution:

## SuperOffice CRM Cloud Subscription

  
SuperOffice CRM is a complete CRM platform that consists of feature sets, which are specifically designed to support the Sales, Marketing and Service processes in a company. The user interface and architecture are seamless across the three process areas because they are built on the same technology stack and together offer a complete CRM solution.

This means that companies can choose to subscribe to one or more plans for their users. When you subscribe to more than one plan, the users of each plan will, in addition to the feature set available in their subscription plan, also gain a "view only" access to the information and data generated by all users. This ensures a full overview of all your customer interactions (the 360 degree view of the customer), while improving customer-related insights and boosting operational capacity for all users.

Offering all the necessary integrations, customizations and add-ons, as well as advanced AI and automation functionality, SuperOffice CRM does not only increase productivity, but also helps to create positive customer experiences and build profitable and lasting relationships.

With a cloud subscription, SuperOffice, as the supplier, takes responsibility for uptime, backups, and the general maintenance of the solution. You simply log on. (Public cloud model).

Cloud computing is a general term for the provision of hosted services online. There’s no installation, you pay per user which makes it very scalable as you grow your business. Furthermore, you can rely on the world-class security and maintenance services for your data stored in our data center.

By using the cloud offering you can access your SuperOffice CRM solution from anywhere and anytime.

We recommend the following products, add-ons and apps, for {Name}:

## SuperOffice products - description

(delete those not included. Should match lines in SuperQuote.)

**SuperOffice Sales Essentials**

With this plan you have all the essential tools you need to gain control of your sales pipeline, improve your sales productivity and manage relationships better.

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| This plan includes core features such as, contact management, GDPR and privacy features, subscription management, email integration, diary, video integration, document management, most find and selection capabilities, standard reports and dashboard tiles, send emails and Mobile CRM\* which ensures a shared view of your customers, improves personal productivity and your collaboration across teams. Core to all plans are also access to our Help Center & Community with a range of digital learning resources, FAQ and the ability to ask and answer questions in forums. Also included is embedded Help documentation, web-based support and access to technical and API documentation.  In addition, your sales team will enjoy sales and opportunity management which includes the sales secretary feature, currency support, and sales forecasting capabilities. |

**SuperOffice Sales Premium**

SuperOffice Sales Premium provides you with everything you need to manage your prospects from quote to close, so that you have plenty of time to focus on turning relationships into revenue.

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| This plan includes core features such as, contact management, GDPR and privacy features, subscription management, email integration, diary, video integration, document management, most find and selection capabilities, standard reports and dashboard tiles, send emails and Mobile CRM\* which ensures a shared view of your customers, improves personal productivity and your collaboration across teams. Core to all plans are also access to our Help Center & Community with a range of digital learning resources, FAQ and the ability to ask and answer questions in forums. Also included is embedded Help documentation, web-based support and access to technical and API documentation.  In addition, your sales team will enjoy the full sales and opportunity management which includes the sales secretary feature, currency support, stakeholders, ability to create sales workflows (guide) and sales forecasting capabilities, the ability to create customized dashboards and use activity monitoring capabilities providing sales intelligence that let you turn insights into action. In addition, they benefit from the Quote management features such as creating quotes, product and pricelists, quote alternatives and versions, quote approval and quote documents. They will also enjoy the simple and effective project management capabilities such as project members, project workflows (guides) and the ability to define your own fields relevant to your projects. |

**SuperOffice Service Essentials**

Manage all types of incoming customer service requests with ease and efficiency, and retain more happy customers using this plan.

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| This plan includes core features such as, contact management, GDPR and privacy features, subscription management, email integration, diary, video integration, document management, most find and selection capabilities, standard reports and dashboard tiles, send emails and Mobile CRM\* which ensures a shared view of your customers, improves personal productivity and your collaboration across teams. Core to all plans are also access to our Help Center & Community with a range of digital learning resources, FAQ and the ability to ask and answer questions in forums. Also included is embedded Help documentation, web-based support and access to technical and API documentation.  In addition your customer service teams benefit from ticket management capabilities which includes the ability to define different categorization and ticket queues, creating your own fields relevant to tickets, find and creating selection of tickets, autoreply and reply templates as well as standard service dashboards and service statistics. |

**SuperOffice Service Premium**

This plans gives you everything you need to support your customers with smart, streamlined and automated processes, while you focus on delivering great customer experiences.

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| This plan includes core features such as, contact management, GDPR and privacy features, subscription management, email integration, diary, video integration, document management, most find and selection capabilities, standard reports and dashboard tiles, send emails and Mobile CRM\* which ensures a shared view of your customers, improves personal productivity and your collaboration across teams. Core to all plans are also access to our Help Center & Community with a range of digital learning resources, FAQ and the ability to ask and answer questions in forums. Also included is embedded Help documentation, web-based support and access to technical and API documentation.  In addition your customer service teams will benefit from the full ticket management capabilities which includes the ability to define different categorization and ticket queues, creating your own fields, find and creating selections of tickets, autoreply and reply templates, rule-based auto-assignment to agents, batch management of tickets, detailed change log, a SMS connector for Service, FAQ and Knowledge base, service statistics as well as standard and customized service dashboards. They will also enjoy the simple and effective project management capabilities such as project members, project workflows (guides) and the ability to define your own fields relevant to your projects. |

**SuperOffice Marketing**

Get the tools you need to better target and effectively dispatch your marketing communication, as well as initiate meaningful conversations that convert into revenue.

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| This plan includes core features such as, contact management, GDPR and privacy features, subscription management, email integration, diary, video integration, document management, most find and selection capabilities, standard reports and dashboard tiles, send emails and Mobile CRM\* which ensures a shared view of your customers, improves personal productivity and your collaboration across teams. Core to all plans are also access to our Help Center & Community with a range of digital learning resources, FAQ and the ability to ask and answer questions in forums. Also included is embedded Help documentation, web-based support and access to technical and API documentation.  In addition, users of the Marketing plan gain access to the full email marketing features; such as the ability to create and send personalized emails, subscription management, a free mailing template library and the ability to create your own mailing templates, a built-in free image library, responsive design capabilities, Google Analytics tracking, tracking of links, the ability to create custom actions on link-clicks, social media links, bounce management, spam complaints management, a SMS connector to send mass-texts, mailing reports and the ability to create custom dashboard reports. The Marketing users can also create and add online forms to any web page or email, enjoy the free form template library, add double opt-in and landing pages, manage consents (GDPR) via forms, as well as manage form submissions and add custom actions and workflows. They will also enjoy the simple and effective project management capabilities such as project members, project workflows (guides) and the ability to define your own fields relevant to your projects. |

**Combination of plans for** m**ulti-plan users**

Empower individual users or even all users with everything by combining more than one plan. By subscribing to more than one plan, the users gain not only access to not only view information but to use the capabilities available in the plan selected.

For {Name}, we recommend X users to combine XXX plan and YYY plan …. (write what has been discussed)

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| While all users within Sales, Service or Marketing have to be on the same plan, you can mix essentials and premium plans between Sales, Service and Marketing. For example, you may select Sales Premium and Service Essentials.  Whatever combination you choose, the multi-plan users will have full use of the capabilities available in the selected plans.  Users of multiple plans will get a reduced price on plan 2\* and 3\*\*.    \* For users of 2 plans, the subscription price is reduced by approximately 50% on the lowest priced plan, depending on what price plans are combined.  \*\*For users of 3 plans, the price is reduced by approximately 70% on the lowest priced plan and by approximately 50% of the second lowest priced plan. The final discount levels depend on what plans the user wants to combine. Note that there are no such discounts on site licenses. |

***\* SuperOffice Mobile CRM*** *provides the entire CRM solution in 'pocket' format. Get information from SuperOffice available directly on your mobile. Mobile CRM gives access to online data in real time, presented in easy-to-read graphics. Mobile CRM is included in the price for all user plans.*

## SuperOffice add-on products - description

​

**Synchronizer** (licensed per user and follows the total number of users for SuperOffice)

Synchronizer lets you synchronize diary and contacts between SuperOffice and Outlook or Google Apps. This allows you to exchange agreement information with employees within your organization who do not use SuperOffice.

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| Synchronizer for SuperOffice runs in the cloud, and synchronization is automatic without user involvement, which ensures that the SuperOffice diary and calendar in Outlook or Google Apps are always synchronized. It's also easy to synchronize with most calendars on mobile units. Synchronize all types of appointments two ways, including private appointment and automatically synchronize contact information based on appointments. Synchronizer supports Office 365, Exchange, Gmail and Outlook and your Outlook categories and colors are matched when appointments are synchronized from Outlook into SuperOffice CRM. |

**Customer Engagement Platform** (a companywide license)

Customers expect to have access to a variety of service options, and self-help is among the most popular. TheCustomer Engagement Platformis a bundle of self-service tools that enable you to communicate, interact and engage with your customers through digital channels. To use all the aspects available it requires the SuperOffice Service Premium plan.

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| It contains the standardized customer facing apps for Chat, Forms, and Customer Center that can be used out of the box and made to fit your brand experience. ​The platform include external user authentication and multiple language management to enable self-service for ticketing and knowledgebase. No external websites or hosting are needed.​ |

**Chat** (a stand-alone customer facing app - CFA)

Chat is faster than email and more efficient than phone, live Chat provides an even better and easier way to connect with customers. The Chat widget can be placed on your webpages and improves customer service and customer loyalty, increases sales and makes your business stand out in the crowd.

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| Chat embedded in SuperOffice allows you to view all available CRM data whilst chatting, thereby increasing your ability to service your customers. Add an unlimited number of chat widgets to your webpages, including your customer center. Assign chat capabilities to other team members and define chat availability that defaults to an off-line form when no agents are available. Transfer chat conversations to other agents if needed, or turn a chat into a request ticket. Use FAQs, autoreplies and quick reply templates in chats and draw reports and insights from your chat conversations to improve your services. |

**Forms** (a stand-alone customer facing app - CFA)

Make it easy to get in touch via online forms. With no coding required, forms in SuperOffice let you gather high quality data, automatically update your CRM database, and create targeted follow-up actions.

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| Add online forms to any webpage or email and capture data that is automatically stored in your CRM database, including your up-front GDPR consent. Select from a library of ready Forms templates or use these as a starting point for your own. Add extra layer of security with double-opt and landing pages in to reduce spam. Define rules for how form submissions are handled and add customized actions and workflows to save time and optimize customer experiences. |

**SuperOffice AI Platform and Services** (a companywide license)

SuperOffice AI Platform activates the power of AI embedded in SuperOffice CRM and allow you to add a set of AI services of your choice. Available AI services suggested include **Request Text Analysis**, **Request Categorization** and a **Chatbot Connector** all of which connect mature artificial intelligence and machine learning technologies to SuperOffice CRM and enables you to automate your different services and provide better services with without scaling up your team.

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| The SuperOffice AI Platform service provides administration, provisioning and account management. The Platform is required in order to activate any of the additional services available.  The Request Text Analysis service include sentiment analysis to analyze the text of incoming service tickets and capture the mood of the sender to help you prioritize your queues. It also includes language detection and automatic translation of incoming request text allowing you to service tickets in more languages.  The Request Categorization service uses machine learning to assist your queue optimization of incoming requests allowing you to prioritize tickets faster and better.  The Chatbot Connector includes infrastructure, services and APIs for Chatbot support and allow you to choose your Chatbot vendor of choice.  Both Request Categorization and the Chatbot connector require implementation services and Request Text Analysis and Request Categorization activates metered (pay-per-use) services for overage use. |

**Development Tools** (a companywide license)

[SuperOffice Expander Services](https://docs.superoffice.com/admin/license/expander-services/) is a set of tools that enables sustainable customization of your CRM solution. The Development Tools include a range of customization tools that allow you to optimize, customize and expand your CRM solution to fit your business. All customizations created with these tools are automatically deployed and operated on the platform ensuring your customizations are sustainable and robust over time.

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| Within the Development Tools you get the ability to create workflows using **Macros,** a ready set of “if-this-then-that” rules within SuperOffice, or you can use the embedded **CRMScripting,** a more flexible and advanced workflow engine. You are also able to **expand the table** structure and open up for even more dimensions for case and relationship handling. **Custom screens** tools also makes it possible to adapt and build new screens in the solution, and to embed logic required to automate processes/events and **Configurable Screens** feature lets you define the main screens within SuperOffice CRM. These development tools can be accessed via the Settings and maintenance client and require little or low level of technical skills. Using the well documented **APIs** you can create your own integrations and applications that works together with SuperOffice and develop and test these with a **Sandbox tenant** in our Development Environment. Note API usage (a metered costs) is activated by the use of some of these tools. |

**Databridge** (a companywide license)

Another useful tool available in the [SuperOffice Expander Services](https://docs.superoffice.com/admin/license/expander-services/) toolbox is Databridge. Databridge lets you import and export anything between SuperOffice CRM and your other cloud solutions once or as many times you need, which ensures data consistency, data quality and saves you time from otherwise manual processes.

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| Databridge lets you define data to flow between your systems on an ad-hoc basis or set up scheduled integration routines to fit your business workflows. The tool handles duplicates automatically and support multiple formats, including Excel and Google Sheets formats, and multiple cloud storage services, including Dropbox, Google Drive, Microsoft One-Drive, (S)FTP and email. Databridge interface allow regular CRM administrators to use the tool as well as your IT personnel or consultants. |

**Cross-domain Identity Management (SCIM)** (a companywide license)

Use your current user admin tool to manage users in SuperOffice CRM. SCIM saves your IT administrators time, streamlines your user-management and reduces the risk of errors.

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| SCIM is a cloud-only feature and requires Azure Active Directory (Azure AD) or Google. Available upon request. |

**Production Sandbox Environment** (optional number of plans)

A Sandbox in the Production Environment provides you with a copy of your company’s database, including configuration and data, which you can then test, explore new configurations, new apps and integrations as well as use for training purposes without the risk of disturbing your current use of SuperOffice CRM. A Sandbox gives you the testing ground to ensure that your plans for your CRM strategy can be optimised before you onboard your users.

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| It is entirely up to you how many and the type of plans you add in a Production Sandbox tenant. The test tenant is a copy of your actual production database at a given time, and regular updates of your data is included in the subscription. |

**Apps from the SuperOffice App Store** (3rd party applications)

{name} can choose from a range of additional 3rd party apps available from the SuperOffice App Store. The apps available from the store are standardized applications that allow you to connect with other busine ss applications used in your company or to expand and widen the capabilities in your CRM solution. Typical apps used by customers include ERP integrations, digital signature, BI and gamification tools, data prospecting and enrichment tools to advanced marketing and productivity tools.

For {name} the following apps are particularly relevant:

* App name and link 1
* App name and link 2
* App name and link 3

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| Products and services purchased via the App Store are regulated by separate agreements between {name} and 3rd party suppliers to regulate the purchase. Coordination, delivery and invoicing according to these agreements will be a direct matter between {name} and the relevant 3rd party suppliers. |

# Description of proposed services

After several thousand CRM implementation projects, we have gathered substantial knowledge of how to do things right. This is what we will share with you when working together.

We also know that success with CRM does not just depend on the software, but on how we as the CRM-provider helps you to translate your CRM-ambition, challenge you to be pragmatic, helps you focus on supporting the processes and ensures that your people are involved and on board.

So, when you buy into SuperOffice, you also buy into a partnership with people who truly understand your business and are there to help you **maximize the value of our CRM solution**.

Starting with our method for implementing new projects, to help you onboard and provide various learning materials to provide you help and support as and when you need it.

## SuperOffice Implementation Method

The SuperOffice Implementation Method (SIM) is the result of many years of experience with implementation of SuperOffice CRM for customers with a number of different requirements.

With over 30 years of experience, the SuperOffice Implementation Method (SIM) is an established set of best practices that represents the best way to implement the SuperOffice CRM solution.

SIM is directly linked to SuperOffice and can be **scaled and adapted to the specific requirements** of any customer. All activities performed will therefore be key to ensuring a user-friendly and correct solution. We remove anything superfluous, and apply a professional and proven approach to everything from workshops to configuration.

We provide the services necessary for our customers to achieve their business objectives. No more! No less!

A picture containing timeline

Description automatically generated

## Description of suggested services

For {Name} we recommend the following services:

(Delete irrelevant products. Should match lines from calculator)

**Requirement analysis** (Pre-Solution Evaluation)

A walkthrough and analysis of the requirements in detail. The outcome is a solid understanding and alignment of the project scope.

**Project planning**

A Project Definitions Document (PDD) is jointly compiled with the customer. This will determine the different roles and responsibilities of the project members and helps to define resource allocation i.e. who is responsible for each specific action, and at what stage. A detailed project plan will be agreed.

**Kick-off meeting**

The project starts with a joint working meeting where the project team members are introduced and the actions of each member are reviewed. This is simply a reconfirmation of roles, responsibilities, start dates/times etc. and can be conducted via phone/video conference or face-to-face.

**Process Specification** (Business Analysis)

This workshop is conducted over 1 day (although this could be more depending on the number of business processes being considered). Two SuperOffice consultants facilitate the workshop according to the Brown Paper method (an interactive workshop process that enables the views of all the participants to be reflected, visualised and documented.) The objective is to jointly identify the work processes in the solution, with a specific focus on the success criteria for one or more work process (i.e. sales, marketing or service). The Business Analysis workshop is used as the basis for further detailed descriptions and the configuration of the solution.

A preparation document is sent to all participants in advance. This enables the efficiency of the process to be maximised prior to (and on) the day of the workshop. The process is fully documented.

**Configuration Specification**

This workshop is conducted over 1 day with two SuperOffice consultants. The objective of the workshop is to determine the best possible design and configuration for SuperOffice CRM. We focus on the system supporting the selected business processes (as defined in the Business Analysis workshop) and explore the requirements for end user support and reporting.

A preparation document is sent to all participants in advance. This enables the efficiency of the process to be maximised prior to (and on) the day of the workshop. The process is fully documented.

Alternative 1 instead of BA and CS

**Energizer Workshop**

This workshop is suitable for customers who want to revitalise an existing solution. E.g. looking at market changes, product or personnel changes and ensuring the current SuperOffice implementation supports these. Two SuperOffice consultants facilitate this workshop over 1 to 2 days. The objective is to bring the CRM functionality in line with the current working processes of the business and vice versa. The process is fully documented.

Alternative 2 instead of BA and CS

**On-site Configuration**

This activity presumes that no work process / work flow will be defined, or that the customer already has decided / have a clear idea of what will be configured in the solution. Our consultant will work directly in the Administrator client with a representative of the customer. The solution will then be configured directly during the meeting. The customer will document.

**Initial import of customers and contacts**

Import of contacts and contact personnel. The import file must be sent to SuperOffice prior to importing to be checked. Any additional requirements will require an Import Specification.

**Import Specification**

A working meeting whereby we spend 0.5 day analysing the import requirements. The objective is to collaboratively define a list of fields which are to be imported and how these fields will be reflected in SuperOffice CRM. Actual importation will be estimated on the basis of this activity.

**CRMScript Specification**

The objective of the script workshop is to jointly identify your needs for process automation, to ensure data quality and special customisation of SuperOffice. Development of the script will be estimated on the basis of this activity.

**Synchronization Specification** (Databridge)

The goal of the Synchronization specification is to align and clarify your needs for regular exchange of data (files) between SuperOffice CRM and your other cloud applications with the use of Databridge tool. Configuration and set up of Databridge for export/import is based on this activity.

**Report Specification** (Service)

The objective of the Report Specification is to jointly identify the reporting requirements in SuperOffice Service. Development of reports will be estimated on the basis of this activity.

**Specification of Screen Design** (A Development Tool for SuperOffice Service)

The objective of Screen Design Specification is to jointly identify the customised screen requirements (e.g. “new support case via phone”) in the solution. Development of screens will be estimated on the basis of this activity.

**Customer Engagement Platform Specification** (Customer Center and SuperOffice Service)

The objective of this workshop is to jointly identify your requirements for customised setup and functionality for the Customer Centre in specific. This will be documented and any development needed estimated on the basis of this activity.

**Chat configuration and training**

We help you configure your Chat solution and enable this on your webpage. We then train you in using this feature.

**Forms configuration and training**

We help you understand how you can create Forms and publish these on your webpage. We then train you in using this feature.

**Setup and Training of SuperOffice Marketing** (Mailings)

Setup, run-through, and training.

**Prototype presentation**

The configured solution will be presented to the customer and the defined working processes/flows demonstrated. Approval of the solution, requirement for any changes are defined.

**Activity Monitors** (SAINT feature available for SuperOffice Sales Premium/SuperOffice Service Premium or SuperOffice Marketing)

SAINT is a sales intelligence tool which helps you to monitor missing activities. This service contains the setup of criteria for status monitors/graphics in relation to the various statutes represented on the customer card. It can be set up to monitors activities within your Sales, Service or Marketing processes.

**Test of solution based on business process**

At this stage, SuperOffice test the solution and make any adjustments necessary to ensure the optimum support of the defined working processes.

**Assistance for acceptance test**

This stage occurs before the project is fully signed-off. It represents the opportunity to ensure all users are happy before sign-off.

**Assistance for setting up templates**

The objective is that we jointly look at the templates you may want in SuperOffice. We assist with getting template variables in place so that information is automatically entered when printing documents from SuperOffice.

**Import of contacts and personnel.**

The objective of this activity is to import your contacts and personnel into SuperOffice. Import will either be based on an Excel file of contacts and personnel, or directly from Outlook/Google mail.

**Go-Live Assistance**

The objective of this activity is to get all users confidently working with the solution. If anything arises during start-up, a consultant will be present or available remotely to assist if necessary, or you need any other form of consultancy during the start-up phase. (This service is normally required for larger projects.)

**Delivery coordination/project management/Sign Off**

Coordination of delivery to the customer's project manager or person responsible, and signing-off as confirmation that delivery is complete.

## Services linked to 3rd party products:

(Delete irrelevant vendors/products)

All 3rd party products are bought directly from the 3rd party supplier via the SuperOffice App Store. Subsequently you will enter into a 3rd party agreement regarding services, delivery and maintenance directly with the supplier concerned. In this case: NN.

## Training

(Delete irrelevant products. Should match lines from calculator)

We recommend that all users receive at least one day of company-specific training. In addition, we recommend a short refresher course after 3-6 months. This type of training can either be supplied as a paid service from SuperOffice, or performed by superusers (responsible for the SuperOffice solution at their own company). All superusers should perform administrator review.

Company-Specific Courses (CSC)

We will recommend compiling a training program for {name} that is specific to your organisation. The course leader will write a draft course based on the requirements you have defined. Our experience indicates that the best results are achieved when the course is held on a dedicated database.

Administrator review (1/2 day)

A half day review that provides insight into how SuperOffice CRM can be customised for optimised use in your company. Themes: maintain status and licence details, user rights for employees, user interface, user-defined fields, import, web panels and document templates.

User course

Half- or whole-day review of standard SuperOffice functionality. Includes Standard CRM and can go into detail for Sales, Service or Marketing.

**Train the Trainer**

A course intended for superusers who will train SuperOffice CRM users internally within the organisation. As a result of this course, the participants will know SuperOffice so well that they will be able to set up Best Practices for taking courses and develop a specific agenda for their users.

# Implementation

## Resources and hourly rates

|  |  |  |
| --- | --- | --- |
| **Role** | **Description** | **Hourly rate** |
| Senior Project Manager  Senior Consultant | * The Senior Project Manager and Senior Consultant have broad experience in business processes, change management, CRM strategy and implementation projects. * The resource has experience of support- and service processes, change management, service strategy and implementation projects, and minimum 5 years of experience from a similar position. | xx |
| Senior Consultant | * A Senior Consultant has extensive experience from large-scale CRM projects. * They are specialists in SuperOffice software and how the solutions are used by various customers. * Minimum 3 years' experience from a similar position. | xx |
| Consultant | * Experience from similar projects. * They are specialists in SuperOffice software and how the solutions are used by various customers. | xx |

# Milestones and activities

Change according to delivery

|  |  |  |
| --- | --- | --- |
| **Milestones and activities** | **Week** | **Responsible** |
| Contract signed | Week | SuperOffice/{name} |
| Delivery start | Week | SuperOffice/{name} |
| Definition of detailed delivery and scope | Week | SuperOffice/{name} |
| Perform configuration based on the processes selected | Week | SuperOffice/{name} |
| Configuration of software |  | SuperOffice/{name} |
| Completion of delivery | Week | SuperOffice/{name} |
| SuperOffice solution ready to use at {name} | Before week | SuperOffice/{name} |
| Acceptance test | Week | {name} |
| Sign-off delivery | Week | SuperOffice |

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| Note: All 3rd party products are bought directly from SuperOffice App Store, and agreements for them are a direct transaction with the 3rd party supplier concerned and {name}. |

# Costs

## Licence costs

«QuoteDetails»

## Prices of pay-per-use (metered) services

Please note that metered services are invoices monthly in arrears. Agreed discounts apply.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Description** | **Included**  **1-50 users** | **Included**  **51-150 users** | **Included**  **151-250**  **users** | **Included**  **251-500 users** | **Included**  **500+ users** | **Extra package size/month** | **Extra package price/month** |
| Storage | Data and document storage. | 50 GB | 100 GB | 200 GB | 400 GB | 600 GB | 50 GB | 25.32 |
| Mailings | Number of campaign email volume per month. | 10.000 | 10.000 | 10.000 | 10.000 | 10.000 | 10.000 | 42.92 |
| Customer Engagement Platform log-ins | Number of customer logins to the Customer center per month. | 1.000 | 2.000 | 4.000 | 5.000 | 6.000 | 1.000 | 25.32 |
| Chat sessions | Number of chat sessions. Total number per month. | 1.000 | 2.000 | 2.500 | 3.000 | 3.500 | 1.000 | 25.32 |
| Form submissions | Number of form submissions. Volume per month. | 1.000 | 2.000 | 3.000 | 4.000 | 5.000 | 1.000 | 25.32 |
| AI Service: Request Text Analysis calls | Number of calls. Total volume per month. | 1.000 | 1.000 | 1.000 | 1.000 | 1.000 | 5.000 | 6.87 |
| AI Service: Request Categorization calls | Number of calls. Total volume per month | 500 | 500 | 500 | 500 | 500 | 2.500 | 6.87 |
| Databridge rows | Number of rows. Total volume per month. | 50.000 | 50.000 | 50.000 | 50.000 | 50.000 | 50.000 | 26.87 |

New metered service may be added to this list and prices and will be communicated upfront according to the Subscription Master Agreement.

## Implementation costs

Paste in completed calculation here.

Paste in calculation for training

## Payment terms and Support

All prices are ex-VAT.

Regarding your Online subscription payments, you can choose from the following invoicing intervals:

* every month
* every 3 months
* every 6 months
* or annually.

The prices stated above are based on annual invoicing. If you require more frequent invoicing, an invoice fee will be payable according to the table below:

|  |  |  |
| --- | --- | --- |
| Invoicing interval | Number of invoices per year | % markup on user price |
| Annual | 1 | 0 % |
| Six-monthly | 2 | 4 % |
| Quarterly | 4 | 8 % |
| Monthly | 12 | 12% |

The Online subscription includes online support via our online support centre.   
Payment terms are net 15 days.

## Delivery terms

* Services are invoiced monthly according to time and material when executed. Please note that all prices for services are estimates only.
* The cost of travel and accommodation shall be quoted.
* The standard hourly rate is charged for travelling time between 09.00 - 17.00. Travel outside of core working hours is charged at 50% of the hourly rate.
* When cancelling a consultancy booking within less than 5 working days before the task, 100% of the agreed price will be charged.
* Consultancy work outside the core times (09.00 - 17.00) will be subject to a 100% surcharge.

**SuperOffice CRM Cloud Subscription  
Initial Order Form**

between **{onam}** (“SuperOffice”) and **{name}** (”Customer”)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customer details** |  | | | |
| Organizational/VAT no: | {orgn} | | | |
| Company name: | {name} | | | |
| Address: | {addr}, {zici} | | | |
| Company phone: | {phon} | | | |
| **Contact information** | *Name* | *Title* | *Email address* | *Mobile no* |
| Agreement responsible: |  |  |  |  |
| System Administrator: |  |  |  |  |
| Security responsible: |  |  |  |  |
| Accounting (Billing): | *Company uses E-invoice*: | | *Billing email address here …* | |
| **System Language** | *Please define main language for the SuperOffice database* | | | |
| Main system language: | English | | | |

|  |  |
| --- | --- |
| **Authorized Reseller** | *If agreement is through a SuperOffice partner, please specify* |
| Reseller Company Name: |  |
| Reseller Contact Person: |  |
| Contact Person email: |  |

|  |
| --- |
| **Plans and add-ons:** |

«QuoteDetails»

|  |  |
| --- | --- |
| **Special Conditions:** |  |

|  |  |  |
| --- | --- | --- |
| **Invoice interval:** *The prices above require yearly invoicing, for increased invoice frequency choose below:* | *% added to invoice* | *Choose one alternative* |
| 6 months interval (invoicing twice a year) | 4 % |  |
| 3 months interval (invoicing four times a year) | 8 % |  |
| 1 month interval (invoicing 12 times a year) | 12 % |  |

|  |  |
| --- | --- |
| **Agreement terms:** | *This Agreement is valid from date* |
| Agreement date: | DDMMYY |

By signing this Initial Order Form, you accept the [**CRM Online Master Subscription Agreement**](https://www.superoffice.com/trust-center/agreements/msa)1 and [**Data Processing Agreement**](https://www.superoffice.com/trust-center/agreements/dpa) 2 When using the SuperOffice App Store you accept the [**App Store Terms of Use**](https://www.superoffice.com/trust-center/agreements/apps)3. These documents and all revisions are available in SuperOffice Trust Center (<https://www.superoffice.com/trust-center>).

The person who signs the Agreement on behalf of the Customer confirms having read and accepted the above mentioned documents 1 2 3 and warrants having the necessary authority to enter into this Agreement on behalf of the Customer.

Place and Date,

|  |  |
| --- | --- |
|  |  |
| **for Customer** | **for SuperOffice** |
|  |  |
|  |  |
|  |  |
| **Signature by person with authority** | **Signature SuperOffice representative** |
|  |  |
| **Name:** | **Name:** |
|  |  |
| **Position:** | **Position:** |

**References**

1 [**CRM Online Master Subscription Agreement**](https://www.superoffice.com/trust-center/agreements/msa)www.superoffice.com/trust-center/agreements/msa

2 [**CRM Online Data Processing Agreement**](https://www.superoffice.com/trust-center/agreements/dpa)www.superoffice.com/trust-center/agreements/dpa

3 [**SuperOffice App Store Terms of Use**](https://www.superoffice.com/trust-center/agreements/apps)www.superoffice.com/trust-center/agreements/apps

**By ordering these Products you accept the following additional terms:**

4 [**Expander Services Terms of Service**](https://www.superoffice.com/trust-center/agreements/es-tos)   
www.superoffice.com/trust-center/agreements/es-tos

5 [**Data Mirroring Service Terms of Service**](https://www.superoffice.com/trust-center/agreements/mirror)   
www.superoffice.com/trust-center/agreements/mirror