A close up of a sign

Description automatically generated

Migrate to SuperOffice 10 – Onsite Subscription

Quote for: **{name}**

Date: **{sdat}**

{name}  
{addr}  
{zipc} {city}

{attn}

{sdat}

**Proposal to upgrade to SuperOffice CRM version 10.x Onsite Subscription**

Further to our recent discussions in relation to an upgrade to the latest SuperOffice CRM version, please find attached our quotation for upgrading your installation to version 10.x, which also implies that you are moving from paying a yearly maintenance to one where you pay for an onsite subscription solution.

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}  
E-post: {auem}  
Mobil: {aupc}

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# Transition to SuperOffice 10

In order to upgrade to SuperOffice 10, you can either move to the cloud or host the solution yourself:

**Alt. 1: Moving to the cloud**

We recommend that all our on-premises customers evaluate moving to our cloud solution. By going to the cloud, we will take care of the hosting, operations, maintenance, security and upgrades for you so you don’t have to worry about it.



The following are some of the benefits of moving to a cloud solution:

## Mobile CRM included for all users

* No hardware costs
* IT resources can focus on other key areas of the business
* No or very low costs associated with storing of data
* Automatic software updates – always the latest version with no extra costs
* Predictable costs – simply adjust the user plans to suit current business requirements
* Accessible from anywhere
* Security
* Efficient and secure backup routines
* Access to the available modules, integrations and enhancement via the [SuperOffice App store](https://online.superoffice.com/appstore)
* Simplified, robust and cost-effective integrations to most major ERP solutions
* Additional solutions for cloud-to-cloud office integrations if opt to use Microsoft cloud solution [Office 365](https://products.office.com/en/business/explore-office-365-for-business)

In addition to all this, it may be worth noting that some of the SuperOffice CRM functionality is available for the cloud platform. Examples include:

* Office integration capabilities like video integration and Microsoft Sharepoint Integration
* SuperOffice AI

## Alt. 2: Hosting yourself

If you decide to continue hosting SuperOffice CRM yourself, or with a hosting partner appointed by you, you will need to move to the Onsite subscription price model for SuperOffice G9. On this price plan, your current solution will be available at an annual subscription cost equal to what you currently pay for annual software maintenance. SuperOffice CRM 10 is available for web only and your SuperOffice windows product are no longer compatible.

**The remainder of this proposal is based on alternative 2 where you continue to host the solution yourself.**

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# Prices for SuperOffice CRM Onsite Subscription

When buying **new and additional users** to your solution, the standard prices for Onsite Subscription (depicted in the table below) will apply\*. For all **existing users** your current users are converted to Sales Premium, Service Premium and SuperOffice Marketing and will be given a discount which ensures that your yearly subscription cost for SuperOffice CRM version 10.x is equal to the yearly maintenance cost that you pay today; xxxx,-.

In effect, {name} is offered a special discount of 20% on all current existing user licenses when you move these to the SuperOffice Onsite Subscription agreement. This discount on these existing user licenses have no end-date. The only condition to receive this special discount is that number of users of your installation is not reduced.

The special discount applies to all licenses installed at the time of migration to SuperOffice Onsite Subscription and to these only. Future additional subscriptions to plans or add-ons follows the current price list, available in Community.superoffice.com.

The new agreement includes net-based support via our online support center.



Exchange Synchronizer GBP 3.69 Per user/month

## User plans

Under the condition that your current licenses are converted to Onsite Subscription licenses, the following image is depicts the user plans you will need:

(Copy and paste in image from the migration calculation:



## Description of proposed products

(Delete the products not included)

**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.

|  |
| --- |
| 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.

|  |
| --- |
| 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.

|  |
| --- |
| 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.

|  |
| --- |
| 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 multi-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 Center =>Customer Engagement Platform** (a companywide license)

If you today have the license for Customer Center, this is migrated into the add-on named Customer Engagement Platform. 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)

If you today have Chat, this will be included as a stand-alone add on/in the Customer Engagement Platform product 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)

If you today have Forms, this will be included as a stand-alone add on/in the Customer Engagement Platform product 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 Expander Services => 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. |

**3rd party products**

If you have other 3rd party products running with your SuperOffice CRM solution, you are responsible for ensuring that these are compatible running with the latest version of SuperOffice CRM.

## Invoicing

You may choose between different invoicing intervals: monthly, every 3rd month, every 6th month 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:

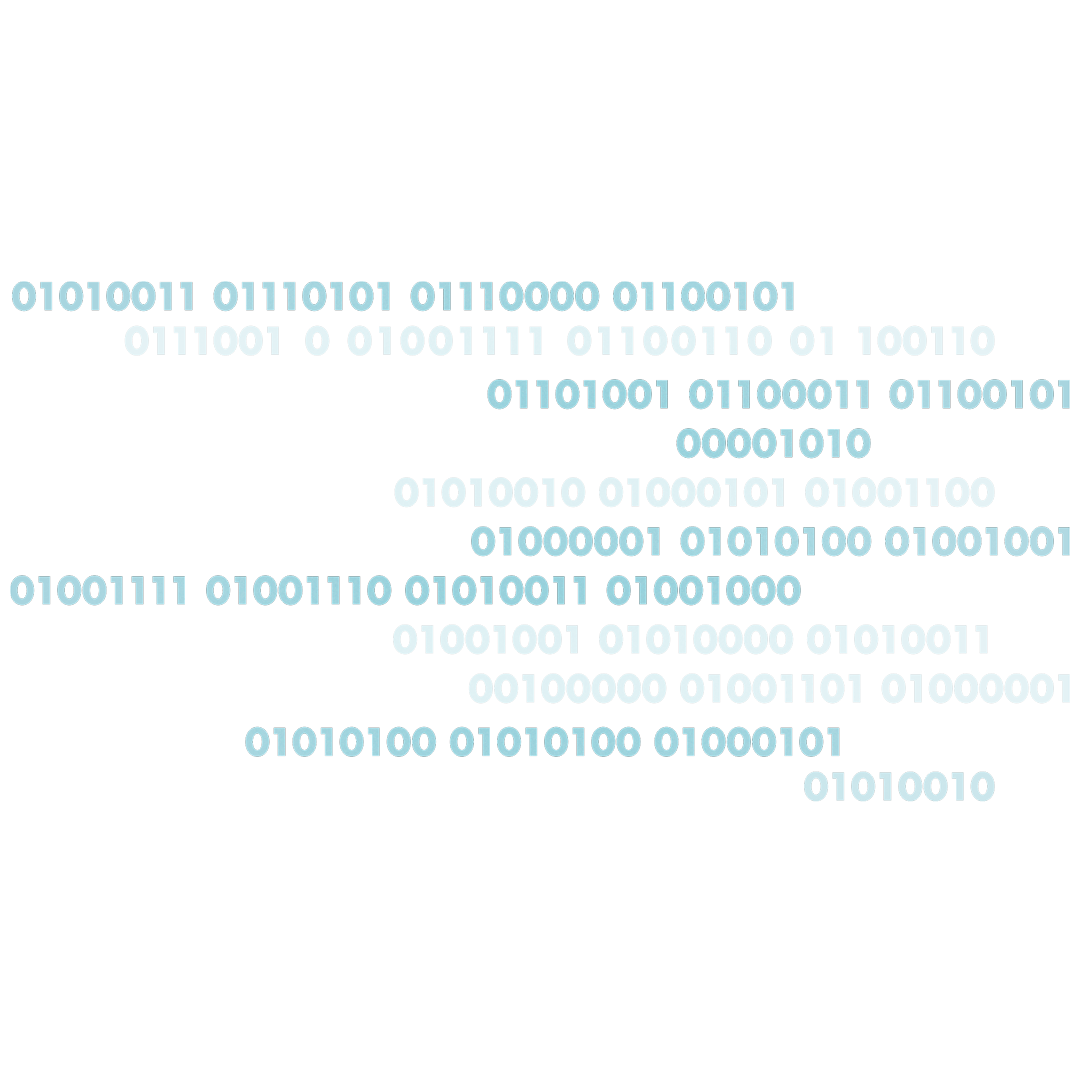
|  |  |  |
| --- | --- | --- |
| Invoicing interval | Number of invoices per year | % markup on user price |
| Annual | 1 | 0 % |
| Six-monthly | 2 | 4 % |
| Quarterly | 4 | 8 % |
| Monthly | 12 | 12% |

**Your first invoice**

Maintenance already paid for the remainder of the year will be deducted from your first invoice. We will invoice according to your chosen interval. Hence your first invoice will contain your subscription costs equivalent to the number of month of your chosen invoicing interval, reduced by maintenance paid for the number of remaining months of the year.

# Proposed solution – Services

## Upgrade of SuperOffice CRM

The following set of services has been created to ensure a smooth transition to the latest version of SuperOffice CRM.

### Technical clarifications

Technical clarification together with a consultant from SuperOffice. The consultant need to consult with the person(s) responsible the solution at your end, and/or any IT supplier you use. We will discuss the steps necessary to upgrade your solution and clarify if there are any customizations, integrations or other issues that needs to be taken into consideration before or during the upgrade. Technical clarification is done over the telephone and if possible via remote access (TeamViewer).

### Upgrade of SuperOffice CRM

Upgrade of current solution to the latest version of SuperOffice CRM. Our consultant need access as agreed upon during the technical clarification and any preparations needs to be done before the upgrade can commence. The SuperOffice application will be available for users during the actual upgrade.

### Upgrade of Exchange Synchronizer

Upgrade of your current Exhange Synchronizer to the latest version.

### GO-Live assistance

Consultant from SuperOffice will assist with the set-up of WebTools and MailLink that handle documents and emails in the upgraded solution. In addition, having a consultant at your disposal to handle any questions that arise will ensure a smooth start-up of the new upgraded CRM solution.

|  |  |  |  |
| --- | --- | --- | --- |
| Task |  | Est. time | Est. cost |
| Technical clarification and preparations |  | 2 hours | GBP XX |
| Upgrade of SuperOffice CRM |  | 1 day | GBP XX |
| Upgrade of Exchange Synchronizer |  | 4 hours | GBP XX |
| Go-Live assistance |  | 2 hours | GBP XX |
|  | **Total** | **2 days** | **GBP XX** |

*Note! Expect a full day of down-time of your SuperOffice CRM application during the upgrade.*

# Costs

## Software costs

«QuoteDetails»

## Payment and delivery terms

All prices are quoted ex-VAT.

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.

The Onsite Subscription includes online support via our online support center.

Payment terms are net 15 days.

**SuperOffice CRM Onsite Subscription   
Initial Order Form**

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customer details** |  | | | |
| Organisational/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 |

The standard SuperOffice CRM Onsite Subscription Agreement applies to 3rd party product from Business Analyze AS. Additional data sources may apply.

By signing this Initial Order Form, you accept the [**SuperOffice CRM Onsite Master Subscription Agreement**](https://www.superoffice.com/trust-center/agreements/osa/)1 and [**Data Processing Agreement**](http://www.superoffice.com/trust-center/agreements/dpa-s/) **for Support and Consultancy** 2 .  
These documents and all revisions are available in the [**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 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 **SuperOffice CRM Onsite Master Subscription Agreement**www.superoffice.com/trust-center/agreements/osa/

2 **Data Processing Agreement for Support and Consultancy**www.superoffice.com/trust-center/agreements/dpa-s/

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

3 [**Expander Services Terms of Service**](http://www.superoffice.com/trust-center/ES-TOS)   
www.superoffice.com/trust-center/ES-TOS