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Migration to SuperOffice CRM Cloud subscription

Quote for: **SuperOffice AS**

Date: **28.11.2022**

SuperOffice AS  
Nordbråtenveien 16B  
1410 KOLBOTN

Miriam Eirin Hiorth Johnson

28.11.2022

**Proposal to migrate to SuperOffice CRM version 10.x Cloud Subscription**

Further to our recent discussions please find attached our quotation for migrating your SuperOffice solution to the cloud. We propose a well tested and quality proven solution that is adapted to SuperOffice AS needs.

Among our many reference customers you’ll find reference name, reference name and reference name

Thank you for allowing me to 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 AS

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**Table of Contents**

[1 Migrating to SuperOffice CRM Cloud subscription 4](#_Toc98338201)

[1.1 Prices for SuperOffice CRM Cloud Subscription 5](#_Toc98338202)

[**2** **Description of proposed products** 6](#_Toc98338203)

[2.1 SuperOffice add-on products - description 10](#_Toc98338204)

[2.2 Invoicing 14](#_Toc98338205)

[2.3 Reference 14](#_Toc98338206)

[**3** **Proposed solution – Services** 15](#_Toc98338207)

[3.1 Migration to SuperOffice CRM Cloud 15](#_Toc98338208)

[**4** **Premium Support Agreement** 21](#_Toc98338209)

[**4.1** **Premium Support – Extended Opening Hours** 21](#_Toc98338210)

[**4.2** **Classification of Requests** 21](#_Toc98338211)

[4.3 Premium Support Service Levels 22](#_Toc98338212)

[**4.4** **Follow-up and Reporting** 23](#_Toc98338213)

[**4.5** **General terms for SuperOffice support** 23](#_Toc98338214)

[**5** **Costs** 24](#_Toc98338215)

[5.1 Software costs 24](#_Toc98338216)

[5.2 Terms for discount and future purchase 24](#_Toc98338217)

[5.3 Prices of pay-per-use (metered) services 25](#_Toc98338218)

[5.4 Implementation costs 26](#_Toc98338219)

[5.5 Payment and delivery terms 27](#_Toc98338220)

[**6** **SuperOffice CRM Cloud Subscription Initial Order Form** 28](#_Toc98338221)

# Migrating to SuperOffice CRM Cloud subscription

SuperOffice CRM Cloud subscription is our SaaS solution. Cloud computing is a general term for the provision of hosted services online. 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 and can focus on your core business.

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SuperOffice CRM Cloud is available as a subscription per user per month. This 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. And by using the cloud offering you can access your SuperOffice CRM solution from anywhere and anytime.

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
  1. Prices for SuperOffice CRM Cloud Subscription

A picture containing graphical user interface

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Exchange Synchronizer GBP 3.89 Per user/month

SuperOffice AS is offered a special discount of 20% of the prices above on all current existing user licenses when you move these to the SuperOffice Cloud 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 Cloud Subscription and to these only. Future additional subscriptions to plans or add-ons follows the current price list, available in Community.superoffice.com.

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

(Copy and paste in image from the migration calculation:

Graphical user interface, application

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1. **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.

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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, videointegration, 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 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 SuperOffice AS, 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.*

* 1. SuperOffice add-on products - description

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**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 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 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)

SuperOffice AS 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 SuperOffice AS the following apps are particularly relevant:

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

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

* 1. 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.

* 1. Reference

SuperOffice AS will be a part of SuperOffice's reference program, and SuperOffice is allowed to use company name and logo for public material.

Use of extended information can only happen after agreement with SuperOffice AS

1. **Proposed solution – Services** 
   1. Migration to SuperOffice CRM Cloud

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

Diagram

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**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).

**Migration of solution to SuperOffice CRM Cloud**

Migration 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 migration can commence. The SuperOffice application will not be available for users during the actual migration.

**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 | EUR XX |
| Upgrade of SuperOffice CRM |  | 1 day | EUR XX |
| Upgrade of Exchange Synchronizer |  | 4 hours | EUR XX |
| Go-Live assistance |  | 2 hours | EUR XX |
|  | **Totale:** | **2 days** | **EUR XX** |

**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.

**Company-Specific Courses (CSC)**

SuperOffice creates a training program for SuperOffice AS 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.

**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.

**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.

1. **Premium Support Agreement**

This Agreement is an Addendum to the SuperOffice CRM Online Master Subscription Agreement (MSA). The terms of this Addendum supersede the terms of Chapter 6 in the MSA.

The Premium Support Agreement is an extension of the SuperOffice support services that includes extended opening hours, specified service levels on SuperOffice’s time to reply, and structured follow-up and reporting on the support services delivered.

Premium Support also includes online case submission – via the CRM Online Service or via the SuperOffice Customer Community.

## **Premium Support – Extended Opening Hours**

* Working Days 07.00 – 21.00CET
  + UK 06.00 – 20.00 GMT
* Weekends 10.00 – 20.00 CET
  + UK 09.00 – 19.00 GMT

Working days are all workdays except 24, 25 and 26 December, New Year’s Day and Easter Day

## **Classification of Requests**

When a support request is submitted by the customer it must include a Severity Level Classification. The Classification shall be made in accordance with the table below. Only requests registered via the Help / Support function in the product or via the Customer Centre Portal shall count against the service level. Other sources (email, chat, telephone) will not be included in measurement of the service level.

The Requests shall be classified according to the table below.

|  |  |  |
| --- | --- | --- |
| **Severity Level** | **Description** | **Example of issues** |
| Critical | A Request should be categorized with the priority "Critical" if the problem has very serious consequences for normal business processes or IT processes related to core business processes. Urgent work cannot be performed | No users can log in to the system  Users cannot open or create documents  Customer is reporting large amount of lost data  Emails are not being imported into Service Module  Emails are not being sent from Services/Mailings  Poor performance – system unavailable for practical purposes |
| Medium | A request should be categorized with the priority "Medium" if normal business processes are affected. The problem is caused by incorrect or inoperable functions in the SuperOffice service. | I have a technical problem |
| Normal | A request should be categorized with the priority "Normal" if the problem has little or no effect on normal business processes or relates to seeking assistance on finding out how to perform a function. The problem is caused by incorrect or inoperable functions in the SuperOffice service that are not required daily or are rarely used by the Customer. | I would like to know how to perform a task |

For avoidance of doubt the classification shall be based on the description of the Request and not limited to the examples that are given in the table above.

## Premium Support Service Levels

The Time to Reply is the time duration from when a Request has been registered in the SuperOffice Request Management System until SuperOffice starts acting to resolve the Request. The Time to Reply is calculated within the Extended Opening Hours.

For the avoidance of doubt, the Time to Reply is not the same as the resolution time. Resolution time would be the time frame, starting from when a Request has been registered via the correct channel, until it has been resolved*.* Premium Support does not include service levels on resolution time. SuperOffice always seeks to minimize the resolution time as far as possible.

|  |  |
| --- | --- |
| **Severity Level** | **Time to Reply** |
| Critical | 1 hour |
| Medium | 4 hours |
| Normal | 12 hours |

## **Follow-up and Reporting**

**Follow Up Meetings on Critical Requests after resolution**

After resolution of a Critical Request, SuperOffice Support agent will contact the Customer, to explain the root cause and resolution and to give guidance around any measures to be taken to avoid the problem reoccurring.

**Quarterly Report**

Premium Support includes a quarterly report containing information about the past quarter’s Requests, Response Times and other statistics.

*If SuperOffice fails to deliver on the guaranteed response time, and Customer has followed the defined rules for reporting the Premium Support Request, Customer can claim a proportionate reduction of the subscription fee calculated for the month in which the Request was filed in the support system.*

*The reduction is calculated against the monthly subscription fee for Premium Support, based on the delay in response per hour relative to the number of Premium Service opening hours which is 344 hours per month.*

*Reduction = (Delay in hours (rounded up)/344 hours)\*Monthly subscription fee for Premium Support*

## **General terms for SuperOffice support**

When entering into the Premium Support Agreement, please observe that the terms for Support as stated in Chapter 6 of the MSA are still in effect, except for section two.

1. **Costs**
   1. Software costs

«QuoteDetails»

## Terms for discount and future purchase

The discount stated in this offer is based on the number of licenses and scope stated in the offer and shall be revised if the number of licenses / users is downgraded.

In the event of a future increase in the number of users, this is based on the current list price.

* 1. 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.

* 1. Implementation costs

Paste in completed calculation here.

Paste in calculation for training

* 1. 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 outside X shall be refunded against receipts.
* The standard hourly rate is charged for travelling time between 08.00 - 16.00. Travel outside of core working hours is charged at 50% of the hourly rate.
* Attendance will be charged at EUR X.
* 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 (08.00 - 16.00) will be subject to a 100% surcharge.

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

Payment terms are net 15 days.

1. **SuperOffice CRM Cloud Subscription   
   Initial Order Form**

between **SuperOffice AS** (“SuperOffice”) and **SuperOffice AS** (”Customer”)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customer details** |  | | | |
| Organisational/VAT no: | 956753104 | | | |
| Company name: | SuperOffice AS | | | |
| Address: | Nordbråtenveien 16B, 1410 KOLBOTN | | | |
| Company phone: | +47 23354131 | | | |
| **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: |  | | | |

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

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

Paste in Software cost

|  |  |
| --- | --- |
| **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 Online 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 Online Master Subscription Agreement**](https://www.superoffice.com/trust-center/agreements/msa/)1 and [**Data Processing Agreement**](http://www.superoffice.com/trust-center/agreements/dpa-s/) **for Support and Consultancy** 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 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 Online Master Subscription Agreement**](https://www.superoffice.com/trust-center/agreements/msa/)www.superoffice.com/trust-center/agreements/msa/

2 [**Data Processing Agreement for Support and Consultancy**](http://www.superoffice.com/trust-center/agreements/dpa-s/)www.superoffice.com/trust-center/agreements/dpa-s/

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