TERMS OF ENGAGEMENT

Thank you for considering FWRD Rewarding Databases to meet your CRM requirements.

To commence our engagement, please confirm that you are in agreement with and bound by the terms of this engagement letter by signing the online document which will be stored as a virtual agreement of our service obligations.

Who is Zoho?

Zoho currently has 30 million users worldwide accessing their web (cloud) based Business, Collaboration and Productivity applications. It was the fastest growing cloud based CRM (Client Relationship Management) program last year, with an 81% growth rate.

This rapid rate of growth is due to the flexibility of the software, its ability to integrate with many of the major software applications and its comparatively low subscriptions fees.

Simply put, Zoho offers apps that help small-medium businesses get more sales, get paid, manage their staff, support their customers and become more productive.

Who is FWRD?

FWRD is a CRM strategy and implementation consultancy that supports the small business community. Our aim is to automate and simplify your business systems whilst improving your sales, marketing and account management processes. Zoho is the tool we use to achieve these objectives.

While we are an accredited partner of Zoho, and therefore deemed qualified to customise the software for our clients, we are not directly employed by Zoho. We simply chose to specialise in this software as we feel confident it will meet the vast majority of our target market's needs. This is our experience based on the many successful implementations we have delivered.

Or core team is based in Perth - Western Australia, although we work alongside a global team of developers specialising in the many Zoho applications. We are careful to select these developers to ensure the service delivered is of the highest standard. We have confidentiality agreements in place with each of these developers to ensure your data and intellectual property is protected.

Project Scope

Our packages have been uniquely designed and priced with a small business in mind. In alignment with your completed Business Diagnostic and the requirements discussed, we believe that our Accelerate package will more than achieve the objectives you set out to us.

If however, you are looking to take your business to the next level of success and achieve a complete birds-eye view of your organisation, your data and your key performance indicators, we highly recommend you consider the Full-Scale Package.

FULL-SCALE
For Zoho CRM

$1995USD

Accelerate Package Features +
Advanced Sales Funnel Management
Marketing Measurement & Reporting
Database List View & Segmentation
Construct Advanced Custom Reports
Set-up of Automated Workflows
Creation of Individualised Web Forms
Integrate Zoho CRM & Zoho Reports
Custom Sales Workflow Training Video
90 Min Team Training Session
Optional Access to Online Training

ACCELERATE
For Zoho CRM

$995USD

Account Branding Package
Team Members User Set-Up
Data Reformat and Import
Implement Your Sales Process
Home Page Customisation
Customised Leads Module
Customised Contacts Module
Customised Accounts Module
Customised Deals Module
Customised Campaigns Module
Deactivation of Non-Essential Modules
Simplify & Reformat Module Layout
Remove Unnecessary Data Fields
Website Integration with Web Form
Streamline Your Internal Processes
Optional Access to Online Training

For a full-breakdown of what's included in each of these packages; visit www.fwrdcrm.com/zoho-crm. If you decide to commit to the Accelerate package now but would like to upgrade to the Full-Scale package at a later date, the price of the upgrade will rise to $1250 USD ($250 USD increase).

Based on the points we discussed in our meeting and the details outlined in your Business Diagnostic, the price quoted is based on the information we have at this stage, therefore we consider this to be phase 1 of the project.

It is important to remember that at this stage, we can only go on the information we have been provided. You don't know what you don't know, and we don't know what you don't know, so there is a possibility your requirements might alter over time.

The remaining information required for your customised CRM set-up will be taken via a series of online questionnaires. The aim of these questionnaires is to better understand the customisation requirements for your specific industry and your specific business.

We will do the best we can to accommodate these requirements under your chosen package. Should your requirements change or we deem them to be out of project scope, additional charges may apply.

3 Week Set-Up Process

- **STEP 1** – You will be asked to complete a comprehensive online questionnaire which will provide us with around 80% of the overall data required to complete your system set up.

- **STEP 2** – FWRD will take 7 days to complete the framework set-up of your CRM based on the initial information provided. If we have received your database, this will also be imported for you.

- **STEP 3** – Following the initial 7-day implementation period, we will meet with you again remotely to present what we have achieved so far. This is an opportunity for you to give us your initial feedback which may result in some minor change requests that will be completed immediately.

- **STEP 4** – During the review/testing period, you'll be given access to the new system to explore and review what we have achieved so far. At this stage, we will ask you to make notes on any updates or changes you require and submit them via an online survey at the end of the week.

- **STEP 6** – At the end of the week, we'll schedule another quick remote meeting to give us the opportunity to discuss these changes and finalise the system structure.

- **STEP 7** – During the next 7 days FWRD will implement the required changes (provided they fall under project scope), set you and your team up as users, integrate your emails and any other required software before we sign off the project.

- **STEP 8 –** You'll be given access to the training vault to learn how to use and maximise the potential of your new system.

Personalised Training

In the interest of keeping the upfront costs down, we have not included face to face training sessions in the initial proposal. You will however be able access the FWRD online training vault giving you on-demand access to a plethora of videos and user guides.

Once you've had the chance to master the basics, we STRONGLY recommend that you make a commitment to engaging FWRD to conduct 1-2-1 training sessions so we can help you move onto more advanced functions.

In our experience, the most successful implementations result from the organisations that make a commitment to ongoing training which ensures you and your team are using the system to its maximum capabilities.

Online Training

The subscription fee to access the training vault is taken as a recurring monthly payment directly from your bank account. We require that all clients make a commitment to accessing any level of the vault for a **minimum of three months** under your agreement with FWRD.

BRONZE PACKAGE
For Zoho CRM

$20 USD / month

100+ Videos & User Guides
Account & Homepage Setup
Managing your User Settings
Lead Tracking & Conversion
Managing your Accounts
Looking after your Contacts
Tracking your Deals
Database Segmentation
Activity Management
Document Manager
Record Searching
Email Templates

SILVER PACKAGE
For Zoho CRM

$30 USD / month

+ INCLUDES ALL FEATURES OF
BRONZE PACKAGE, PLUS:

Track & Manage Marketing Campaigns
Manage your Products & Services
Create Custom Price Lists in Pricebooks
Raising & Sending Quotes + Invoices
Customer Service Cases & Solutions
Build up your Intellectual Property
Accounting Integration Options
Sending Purchase & Sales Orders
Keeping track of your Vendors

GOLD PACKAGE
For Zoho CRM

$50 USD / month

+ INCLUDES ALL FEATURES OF
SILVER PACKAGE, PLUS:

Admin Account Management
Creating & Updating Fields
Rearranging Module Layouts
User Set-Up – Profiles & Roles
Custom Module Creation
Web Form Strategy & Roll-Out
Create & Manage Email Templates
Mail Merge & Label Options
Importing & Exporting Data

Additional Training

Additional training is available at the rate of $120 USD per hour for remote meetings. Travel expenses will apply if in-house training is required.

Additional Support

As part of your subscription to Zoho you are entitled to contact the Zoho support team via phone, email, and instant message chat.

The Zoho team will only advise on support related issues; they will not make changes or upgrades to your system due to data security protection.

FWRD offer post implementation support which may be delivered remotely or onsite at a rate of $100 USD per hour charged in 15 minute increments.

Zoho Subscription Fees

STANDARD	PROFESSIONAL	ENTERPRISE	ULTIMATE
$12	**$20**	**$35**	**$100**
Per user/month billed annually	Per user/month billed annually	Per user/month billed annually	Per user/month billed annually
$15 month-to-month	$25 month-to-month	$40 month-to-month	
TRY NOW	TRY NOW	TRY NOW	CONTACT US
Includes all features in Free Edition +	Includes everything in Standard +	Includes everything in Professional +	Includes everything in Enterprise +
Sales forecasting	Email integration	Territory management	Sandbox
Scoring rules	Social CRM	Zia - Artificial intelligence	Dedicated Database cluster
Reports and dashboards	Google AdWords integration	Custom buttons	Priority support
Document library	Workflows and Macros	Blueprint	Advanced customization
Roles and profiles	Inventory management	Conditional fields	Advanced CRM analytics
Mass email	Unlimited records	Page layouts	Enhanced storage
Call center connectors		Custom modules	
100,000 records		Multiple currencies	

MOST POPULAR

Customised Vs Bespoke Software Systems

Zoho is an off-the-shelf software that we **customise** to meet your business needs and reflect your systems and processes. Whilst we do whatever possible to meet your requirements, we are bound by the parameters of the system to a certain degree. This means that while we can add, remove, integrate and tweak, we cannot change the fundamental framework of the software.

If your requests are not met by the standard Zoho functionality, we will always aim to implement a workaround and will consult with our team of developers for advice on specific requests. Our development team will provide us with a list of options which, where appropriate, we will discuss with you to ensure we provide the solution that best meets your requirements.

In some cases, these requests are just not technically possible so we will put them forward to Zoho as suggestions for the future system updates road-map. Zoho are continually improving and upgrading their software based on feedback from customers and Zoho partners. This highlights another benefit of using a web-based application; updates are made behind the scenes and rolled out across the board with no disruption to your service or additional charges.

Bespoke software or tailor-made software is specially developed for a specific organisation. It is often built from scratch and is consequently significantly more expensive than a customised system.

Since bespoke software is developed for a single customer it can accommodate that customer's exact preferences and expectations. Bespoke software may be designed, in stage by stage processes, allowing all nuances and possible eventualities to be taken into account.

It is important to highlight the difference between customised and bespoke software from the outset to avoid disappointment and unrealistic expectations. If you have any concerns or need any further clarification, please don't hesitate to discuss it with us.

Additional Development Charges

Changes or additional tasks, requested during the project, will be separately defined and costed with you approving any additional work required before proceeding. Occasionally it is necessary to engage the additional services of external developers to complete advanced or detailed job requests (over and above the scope of the original project). In this scenario we will obtain multiple quotes (where possible) to complete the additional tasks and give you the option of accepting the quote and proceeding with the work (at your expense) or exploring other workarounds that are within the budget and the original project parameters. The reason it is necessary to include this clause is that despite our best efforts to scope the project from the outset and quote accordingly, it can be difficult for both FWRD and our clients to detail every requirement before they have had the opportunity to test run the system.

Working with FWRD

Following the commencement our engagement marked by the signing of our agreement, FWRD will carry out instructions for adjustments and changes within the engagement terms only where an instruction is provided in person, by telephone or by e-mail and confirmed by FWRD.

Any services requested that are additional to the original engagement will be carried out at the discretion of FWRD and will be chargeable at the agreed hourly rate unless otherwise agreed.

Client Responsibilities

FWRD deliver our projects under a three-week turnaround timeframe. We aim to encourage timely completion of your engagement in order to achieve the stated timeframe. As the client, you are responsible for the timely supply and submission of all materials to complete the system set-up within the timeframe agreed for the project.

If there is a postponement of more than 15 days due to client delay in the provision of information required to complete the work, your projects allocated time slot may be filled by other client projects and delay your project completion.

Disclaimers

FWRD cannot be held responsible for events over which it has no control. Most notably, although FWRD uses Zoho software/server, they are independent companies and FWRD cannot be held responsible for any events or decisions that may affect the future use of Zoho services.

Confidentiality

We agree to respect the confidentiality of information provided by both parties to complete the Agreement.

Payment Conditions

FWRD request payment for our services in full prior to the commencement of your project. However, we are pleased to back all of our packages with a satisfaction guarantee. Following the 7-day review/testing period, if you feel we have completely missed the mark, not met your objectives and the system is not what you were expecting at all, we would be happy to refund this payment in full, guaranteed. If you're not satisfied, we're not satisfied.

Buy with confidence knowing that all of FWRD's Zoho CRM Packages are backed by a 14 Day Satisfaction Guarantee, or receive 100% of your money back!

N.B It is important that you complete your review/testing period within the allocated 7-day timescale in order to qualify for the money-back guarantee.

START DATE: Upon completion of the CRM Set-Up Questionnaire and receipt of the project fee.

COMPLETION DATE: Approximately 3 weeks depending on client's availability

To agree to the terms and conditions and proceed with the engagement of FWRD's services, please sign the online form included in the set-up questionnaire.