

ATSS Specification and Charges for Quick Start Packages

Hosted CRM 4 Quick Start Package:

The Hosted CRM 4 Quick Start Package is delivered by Genesis's CRM Integration Partner, The CRM Business, and provides the following:

1 Day for setting up and configuring CRM Clients and importing existing customer data into the CRM 4 system:

- Installation and configuration of up to 6 Desktop Outlook CRM Clients and up to 3 Notebook Outlook CRM Clients.
- Initial import of up to 250,000 Contact and Company records into the CRM 4 system

1 Day for configuring the Sales Quotation template, customising fields within standard entities and creating custom workflow rules:

- Sales Quotation Template - allows quotes from CRM to be generated in a branded Microsoft Word document – inclusion of a company logo, company strapline, address / contact information and standard text at the start / end of the quote.
- Up to 20 changes to standard entities, i.e. Account, Contact and Opportunity.
- Addition of up to 10 custom fields for each entity, i.e. Account, Contact and Opportunity.
- Development of up to 3 automated business workflow rules, with each rule containing no more than 5 steps each.

2 Days specialist CRM 4 end user and administrator training:

- Remote training for 1 administrator and 1 end user
 - a) 'Introducing Microsoft Dynamics CRM 4' training course (full details provided).
 - b) 'CRM 4 Advanced User Training and Core CRM Administration' training course (full details provided).

Training Course: Introducing Microsoft Dynamics CRM 4

Course Objectives:

On completion of the course, delegates will be able to:

- Access CRM in a browser or in Outlook
- Understand basic synchronisation between CRM and Outlook and the difference between online and offline working
- Be able to access, create and edit core CRM records
- Be able to create and track activities in CRM
- Understand Core Sales functions including Leads and Opportunity Management
- Be able to create quotes and print quotes for customers
- Be able to create Quick Campaigns and have an appreciation of Full Campaign Functionality
- Be able to create Cases and have an appreciation of Contract Management
- Be able to access and use the Knowledge Base
- Understand the concept of Service Scheduling and use the scheduling function with a pre-existing service activity
- Apply relationships between records

Course Outline:

The following core functionality will be covered as part of the 'Introducing Microsoft Dynamics CRM 4' training course:

- Microsoft CRM User Interface and application terminology
- Basic and advanced navigation and record maintenance
- Core Record Management: Account, Contact, Lead, Opportunity and Activity Record Management
- Hierarchical Relationships between Accounts & between Accounts & Contacts
- Microsoft CRM Client for Outlook functionality - working online & offline
- Synchronising CRM & Outlook
- Setting Options & preferences
- Managing CRM Activities in Outlook – email, appointments, tasks, phone calls
- System Scope – Sales, Marketing & Service
- Relationships between records
- Mail Merge
- Using the Resource Centre (including other resources)
- Workflow – introduction to concept and typical uses
- Queues – overview of queue functionality & typical uses

Training Course: CRM Advanced User Training and Core CRM Administration

Course Objectives:

On completion of the course, delegates will be able to:

- Know how to navigate to System Administration functions
- Understand how to configure core administration options
- Have an appreciation of Customisation capabilities
- Be able to create simple workflow rules
- Be able to view and edit Data Duplication Settings

It should be noted that full Administrator competency will require consolidation of the material covered in this course and further advanced training.

Advanced User Training:

The following functions will be covered within the Advanced User Training element of this course:

- Bulk Email
- Merging Records
- Using Excel to analyse CRM Data
- Creating Reports with Report Wizard
- Creating, storing and managing Sales Literature within the CRM system
- Creating, storing and managing Competitor information within the CRM system

System Administration Training:

Administration

- System Settings
- Security Roles
- Managing Users
- System Settings
- Auto-Numbering
- Understanding and Managing Teams

Business Management

- Fiscal Year
- Facilities & Equipment
- Resource Groups
- Sales Territories
- Sites
- Currencies
- Business Closures
- Managing Queues
- Sales People & Quotas
- Services - Managing Subject Hierarchy and Setting Relationship Roles

Templates

- Knowledge Base Articles
- Email – creating & using templates
- Contracts
- Mail-Merge

Product Catalogue

- Price Lists
- Volume Discounts
- Unit Groups
- Products

Data Management

- Data Duplication Management
- Data Maps

Workflow

- Creating Simple Workflow Rules
- Viewing Workflow progress

Customisation

- Overview of capabilities

Hosted CRM 4 Quick Start Package Pricing Schedule:

Hosted CRM 4 Quick Start Package	
One-off Price	£2,987.00*

*Price exclusive of VAT

Hosted Exchange 2007 Quick Start Package:

Two package options are available for the Hosted SharePoint 2007 Quick Start Package:

- **Exchange 2007 Quick Start Package**
- **Exchange 2007 Quick Start Package Plus**

Both Quick Start Packages will be delivered through a combination of remote and onsite work at the customer's premises to install and configure the Genesis Hosted Exchange system for up to 25 mailboxes, plus the migration of email data from the customer's old email platform to the new Hosted Exchange 2007 system.

Hosted Exchange 2007 Quick Start Package

The Hosted Exchange Quick Start Package will provide up to 4 days of engineer time (of which up to 2 days will be onsite) and will include the following:

- Export of 1 month's mailbox data for up to 25 users (up to 250 MB per mailbox) from the customer's old email system
- Archive of remaining mailbox data for up to 25 users (up to 4 GB per mailbox, inclusive of up to 250 MB exported)
- Installation of Microsoft Outlook 2007 on each user's desktop PC or laptop, as required, and configuration of the hosted Exchange 2007 service for each user
- Import of up to 1 month's mailbox data to the Genesis hosted Exchange system for up to 25 mailboxes, up to a maximum of 250 MB per mailbox. Any additional mailbox data over and above the 250 MB per user and up to a maximum of 4 GB per user will be archived locally on the user's desktop, or alternative storage space as provided by the customer.
- Migration of calendars, tasks and address book data for up to 25 existing Microsoft Exchange users to the customer's new hosted Exchange 2007 system. The combined mailbox storage including emails, public folders, calendars, tasks and address book data must not exceed the maximum of 250 MB per mailbox.
- Migration of public folders (including shared calendars and contacts) for existing Microsoft Exchange users up to a maximum size of 100MB per organisation.
- Basic control panel training for up to 5 administrators for the Genesis Hosted Exchange 2007 service to cover the following:
 - Adding and removing users
 - Setting user preferences
 - Re-setting passwords
 - Re-setting access levels
 - Setting up distribution lists
 - Setting up folders / public folders
 - Viewing users' emails

Hosted Exchange Quick Start Package Plus

The Hosted Exchange Quick Start Package will provide up to 4½ days of engineer time (of which up to 2 days will be onsite) and will include the following:

- Installation of Microsoft Outlook 2007 on each user's desktop PC or laptop, as required, and configuration of the hosted Exchange 2007 service for each user. Work carried out at the customer's premises (at one agreed site only).
- Export of mailbox data (emails, calendars, tasks and address books) for up to 25 users (up to a maximum of 4GB per mailbox) from the customer's previous email system.
- Import of mailbox data (up to 4GB) into the Genesis hosted Exchange system for up to 25 users / mailboxes. The last 7 days of mailbox data will be imported whilst onsite at the customer's premises. This allows users to continue working with access to their most recent emails until the full migration is complete.
- Migration of public folders (including shared calendar and contacts) for existing Microsoft Exchange users up to a maximum size of 100MB per organisation.
- Basic control panel training for up to 5 administrators of Exchange 2007 at the customer's premises (head office or one other nominated office only) to cover the following areas:
 - Adding and removing users
 - Setting user preferences
 - Setting up distribution lists
 - Setting up folders / public folders
 - Viewing users' emails
 - Re-setting passwords
 - Re-setting access levels

Customer Requirements:

- The Hosted Exchange 2007 Quick Start Package can be delivered to customers using existing Microsoft Exchange 2003 / 2007 mailboxes, Microsoft Outlook (including Microsoft Outlook Express), POP3 or IMAP email. The service cannot be delivered to customers using any other email system, including but not limited to Novell GroupWise and Lotus Notes.
- Customers must provide both physical and administrator access to all desktop PCs or laptops (on the agreed delivery dates) that will be configured as part of the Hosted Exchange 2007 Quick Start Package.
- Customers' desktop PCs and laptops must be in a business ready condition and there must be a business broadband connection in place at the customer's site (with a recommended upload speed of 2Mbps). Where there is a slower broadband connection in place or where the performance of the customer's desktop PCs or laptops is excessively slow, it may adversely affect the delivery of the service. Under these circumstances, the customer will be informed and an alternative course of action agreed.

Terms:

- The total email data to be imported into the new Genesis Hosted Exchange system as part of the Quick Start Package will not exceed 6.25 GB across all mailboxes (i.e. 25 mailboxes x 250MB), not including public folders, and 100GB for the Quick Start Package Plus (i.e. 25 mailboxes x 4GB). Where a customer has less than 25 mailboxes, the maximum amount of data that will be migrated into the new Genesis Hosted Exchange system must not exceed 250MB per mailbox for the Quick Start Package and 4GB per mailbox for the Quick Start Package Plus.
- The maximum time to deliver the Hosted Exchange 2007 Quick Start Package will be 4 days (or 7 days for the Hosted Exchange Quick Start Package Plus), of which up to 2 days will be onsite at the customer's premises. The total

delivery time will be dependent on the number of mailboxes being migrated, the speed of the customer's desktop PCs / laptops and the speed of the broadband Internet connection that is in place at the customer's premises.

- When exporting mailbox data from the customer's old email system, all data to be imported into the new Genesis Hosted Exchange 2007 system will be temporarily backed up for the duration of the migration process. This is a best endeavor process to ensure that a copy of the data is available in the event of the local copy being deleted or corrupted during the migration process. Upon completion of a successful migration, Genesis will delete all customer data that has been backed up during the delivery.
- There is a chance that emails could be lost during the migration process. Genesis will not be held responsible for any data loss or corruption that may occur when delivering the Hosted Exchange Quick Start Package, whether this is the email data being migrated or any other customer information or data held on the customer's PCs, laptops or systems. In addition, Genesis will not be responsible for any faults or relating to the customer's hardware (i.e. desktop PCs and laptops) or any software that may be installed on the customer's hardware.
- Where the customer's existing email client (e.g. Microsoft Outlook 2003) is integrated with other business systems, such as a Customer Relationship Management (CRM) system, Genesis will not install Microsoft Outlook 2007 as part of the Hosted Exchange Quick Start Package. However, Genesis will migrate mailbox data from the customer's old email system and configure the existing email client to work with the Hosted Exchange 2007 service.
- All work and/or training carried out at the customer's premises will be at one customer site only and agreed in advance between Genesis and the customer. Genesis will not carry out work at more than one customer site or office, or at multiple geographic locations.
- The training delivered as part of the Hosted Exchange 2007 Quick Start Package will cover the use of the administrator control panel only. Genesis will not provide end user training in relation to the use of Microsoft Outlook 2007 client or Microsoft Outlook Web Access (OWA).

Hosted Exchange 2007 Quick Start Package Pricing Schedule:

Hosted Exchange 2007 Quick Start Package Options		
Quick Start Package	<i>For up to 25 mailboxes, the service includes the installation of Microsoft Outlook 2007, configuration of the Exchange mailboxes, migration of calendars, tasks, address books and up to 1 month's worth of email data (up to 250MB per mailbox), migration of public folders (up to 100MB per organisation) and basic control panel training for up to 5 users / administrators.</i>	£1,967.00 + vat*
Quick Start Package Plus	<i>For up to 25 mailboxes, the service includes the installation of Microsoft Outlook 2007, configuration of the Exchange mailboxes, migration of calendars, tasks, address books and emails (up to 4GB per mailbox), migration of public folders (up to 100MB per organisation) and basic control panel training for up to 5 users / administrators.</i>	£2,467.00 + vat*

*Price exclusive of VAT

Hosted SharePoint 2007 Quick Start Packages:

Two package options are available for the Hosted SharePoint 2007 Quick Start Package:

- **SharePoint 2007 Quick Start Package**
- **SharePoint 2007 Quick Start Package Plus**

Hosted SharePoint 2007 Quick Start Package:

The Hosted SharePoint 2007 Quick Start Package provides **customised site branding** and **end user training** for the customer's SharePoint solution.

Site Branding:

The branding of the SharePoint site will be delivered for the following pages:

- Top and side menus
- Login pages
- Homepage
- Search pages and results pages
- Document library pages
- Team discussion pages
- Team project pages
- SharePoint Wiki
- All standard lists
- All standard web parts

These pages will be delivered with documented CSS style sheets and master pages, and all designs will be implemented within the new Hosted SharePoint site. The customer's external website will be used as the basis for this with input from the customer. The branding will incorporate a company logo and any corporate colours, styles and imagery that form part of the organisations' corporate brand guidelines.

Training:

Basic training is included as part of the Hosted SharePoint Quick Start Packages, designed to introduce users to the Microsoft SharePoint environment. It provides an introduction to setting up and managing a SharePoint site along with the fundamentals associated with managing documents and information.

SharePoint training will be delivered for up to 5 users at the customer's premises (at one location to be agreed between Genesis and the customer) and will last approximately 3 hours.

Unless otherwise agreed between Genesis and the customer, the training for the Hosted SharePoint 2007 Quick Start Packages will cover the following elements.

1) Navigation of the SharePoint Site:

- Navigating the Home Page
- Navigating the Site Hierarchy
- Browsing Lists on the SharePoint Site
- Browsing Document Libraries
- Customising the Top Navigation Area
- Customising the Left Navigation Panel
- Understanding the Web Part Pages
- Using the Recycle Bin

2) Creating and Managing Sites:

- Creating Sites
- Managing Users and Permissions
- Creating a Departmental or Group Workspace
- Changing a Site's Theme
- Saving and Using a Site Template
- Managing Site Features

3) Creating and Managing Libraries:

- Creating Document Libraries
- Creating Form Libraries
- Creating Picture Libraries
- Adding Documents
- Adding Pictures
- Creating a New Folder in a Library
- Checking Documents in and out from the Document Library (and from the 2007 Microsoft Office Suite if applicable)
- Working with Version History
- Deleting Documents

Hosted SharePoint 2007 Quick Start Package Plus:

The Hosted SharePoint 2007 Quick Start Package Plus includes all **Site Branding** and **End User Training** delivered as part of the standard Quick Start Package, plus an additional **Document Approval Workflow** module.

Document Approval Workflow:

Genesis' custom workflow module allows automated document approval workflows to be implemented within a Hosted SharePoint site.

A new document library template will be installed on the customer's SharePoint site, which will allow the customer to set-up customised approval workflows for all of their documentation. These will trigger automatically when a major version of a document is checked in, at which time the customer/user will be able to specify the following:

- Which SharePoint list the workflow is added to
- Where the workflow history is stored
- The specific properties of the document, including the version number and revision number
- Which individuals are required to approve the document, including whether the approvals are to be carried out in parallel or in succession
- Any explanatory notes relating the document for those people within the approval process.

Once a document has been approved and accepted by the relevant approver(s), the document will automatically be published and made available to all other SharePoint users.

Hosted SharePoint 2007 Quick Start Package Pricing Schedule:

Hosted SharePoint 2007 Quick Start Package Options		
Quick Start Package	<i>Includes customised branding of the SharePoint site and end user training</i>	£2,467.00*
Quick Start Package Plus	<i>Includes customised branding of the SharePoint site, document approval workflow module and end user training</i>	£3,457.00*

*Price exclusive of VAT