



an  access company



Prospect CRM Service Catalogue

Services & Rates



About Service Catalogue Items

On top of the services included within the standard FlightPath packages, the table below highlights the additional value-added services that our consulting teams can provide.

Prospect Points are available to purchase in packs. With built-in scaling discounts, you can be sure to get the very best value for money. For more information on Prospect Points please [click here](#). Alternatively, you can purchase a Service Catalogue Item as per listed price.

Please take some time to review these.

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Data Import Services

Additional Service	Prospect Points	Price	Access Resource
Sales History Import Import your customer's sales to obtain a complete sales history within Prospect CRM, resulting in more reliable sales analysis such as RFM & Missing Orders. Please note: if your sales history is already in your integrated Inventory/Accounting System we do not need to complete a sales history import.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
Notes Import Our Notes Importer makes it easy to either pull across notes from a historic system or import notes provided by a third-party into Prospect CRM. Importing this information into Prospect CRM means that all your previous interactions with customers and prospects aren't lost.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
Opportunity Import When moving from a legacy CRM system, you may have open opportunities that you need transferred to Prospect CRM. Allow us to import these opportunities to avoid missing a potential sale.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
Task Import Import your open tasks from your legacy CRM system to ensure all follow-ups are transferred to Prospect CRM.	12 Points	£500.00 (exc VAT)	Professional Services
Equipment Import Equipment records allow you to record the details of products that your customers have, either under a service Contract with you, or on lease. If you have an inventory list of these already, we can import these for you in bulk.	12 Points	£500.00 (exc VAT)	Professional Services
Contract Import Import pre-existing contractual agreements between you and your customers, to record information, such as contract renewal dates and who the main contact is for the contract.	12 Points	£500.00 (exc VAT)	Professional Services



Problem Import When selling products, it's inevitable that issues will arise. Whether it be a damaged pallet on delivery or a complaint about an item being faulty, it's important to log all interactions about the issue to ensure it's resolved as quickly and professionally as possible. We will import all open & historic problems to help you get started.	12 Points	£500.00 (exc VAT)	Professional Services
Bulk Import of Product Upsell The Upsell Manager in Prospect CRM makes it easier for your customer-facing teams to add more products to a customer's order in a helpful, intelligent way, based on what they're already ordering. By setting this up, you can create links between multiple products that should/can be sold together to help increase average order values. Allow us to import the product upsell links.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
CRM Special Prices Import Before considering the Special Prices Import, it's important to know whether this functionality is right for your business. If you're using special pricing set up in your Accounts System and it's working perfectly fine for you, then you should continue using this form of special pricing. If not, then we can complete an import of special prices either as Pricing Bands or individual Customer Special Pricing.	12 Points	£500.00 (exc VAT)	Professional Services
Bespoke Data Imports If you are not able to import your data via our normal import tools, then this service allows you to import data that cannot be handled using our tools.	24 Points	£1,000.00 (exc VAT)	Professional Services
Bespoke Data Imports with Advanced Deduping Rules When importing large amounts of data into the CRM with already lots of data, it can be important to ensure duplicates are not created. This service allows us to reduce the duplicates imported in your system. No amount of dedupe rules can guarantee 100% duplicate free data, but this will keep it to a low number.	48 Points	£2,000.00 (exc VAT)	Professional Services



Training Services

Additional Service	Prospect Points	Price	Access Resource
Document Template Training With our Document Template training, you'll be able to confidently create your own document templates, reducing the amount of admin time spent communicating with your customers. The training will also cover things like how to create email and Word templates, and how to convert Word templates to PDF attachments.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
CRM Marketing Training (Mailchimp Integration & Prospect Campaigns) Using Prospect CRM's Contact data, you can develop relevant email marketing content, resulting in more personalised emails and fewer unsubscribes! Learn how to do this with our Mailchimp integration and Prospect Campaigns.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
1x CRM Training Session One & Session Two Repeat Our Prospect CRM training is designed for beginners, providing attendees with the essentials on Prospect CRM. CRM Training Session One & Two are included as part of FPB & FPC, but this item is for additional sessions if you would like multiple training sessions. This item is ideal for those with bigger teams who need the training repeated OR for those with smaller teams who need phone cover during training.	12 Points	£600.00 (exc VAT)	Onboarding Consultant
Q&A Workshop Allows the customer to come along and ask any questions they have on Prospect CRM.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
CRM Report Training We will run through the available reports, what they should be used for and how you can edit and build your own reports.	4 Points	£200.00 (exc VAT)	Onboarding Consultant



Other Services

Additional Service	Prospect Points	Price	Access Resource
Migration from 3rd Party Inventory System Usually, your previous Inventory System will contain your sales history. Rather than losing this sales history, we can migrate Prospect CRM from one Inventory System to another – meaning you keep your full sales history within Prospect CRM.	24 Points	£750.00 (exc VAT)	Professional Services
Companies & Contacts Bulk Update via Excel Keeping your CRM data as accurate as possible is really important. Allow us to quickly update your Contact and Company information in bulk, rather than individually, line by line. For example, you may re-allocate your customer accounts within your Sales team.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
Custom Bulk Updates via Excel Keeping your CRM data as accurate as possible is really important. Allow us to quickly update your Opportunities, Problems, Equipment Items etc. in bulk, rather than individually, line by line. For example, you may need to bulk update the statuses of your opportunities.	12 Points	£500.00 (exc VAT)	Professional Services
Creation of Custom Quote & Quote Grouping Require a more complex design for your quote template? Provide our consultants with an example of your required design and we will use this to set up a custom quote template.	8 Points	£400.00 (exc VAT)	Onboarding Consultant
Creation of Enquiry Web Form CRM Enquiry Web Forms allow you to create embeddable forms that you can add to your website. These forms can then be used to gather details and automatically create Enquiries in Prospect CRM for your team to review and convert into Opportunities. We will create the Enquiry Web Form via Prospect CRM based on your requirements, so you can embed this onto your website.	4 Points	£200.00 (exc VAT)	Onboarding Consultant



Creation of Template Quote Sometimes you can find yourself creating a Quote containing the same Quote lines for multiple Contacts within the CRM, such as a standard opening order. Instead of completing the entire Quote process from the beginning each and every time, we can set up Template Quotes.	4 Points	£200.00 (exc VAT)	Onboarding Consultant
Bulk Update of Product Restrictions Product restrictions can be really useful in a number of distribution or manufacturing scenarios to ensure you sell the right products to the right customers – such as having authorised dealers, needing customers to be trained and qualified, and when selling customer branded products. We will bulk add products to product restrictions and bulk assign these restrictions to customers.	6 Points	£250.00 (exc VAT)	Professional Services
Zapier Projects Use Zapier to integrate Prospect CRM to third-party applications that we don't offer standard integration support to. Please note: the third-party application needs to support Zapier.	POA	POA	Professional Services
Power BI Dashboard Our CRM Report Builder gives you great insight into a list report format. But if you want to create your own custom visual graphs and dashboards, Microsoft's Power BI is the way forward. We can help you build your first Power BI Dashboard using Prospect CRM data.	POA	POA	Professional Services
Power BI Report Assistance Assistance and training from our consultants on adding filters to your report to make it specialised to your needs.	24 Points	£1,000.00 (exc VAT)	Professional Services
Data Exports Including Notes and Documents To get data out your ProspectSoft CRM system in a format to allow you to import into another system.	24 Points	£1,000.00 (exc VAT)	Professional Services
Advanced Report Writing Consultancy for writing a report using our report builder. As well as training you on how to use our report builder.	6 Points	£250.00 (exc VAT)	Professional Services



Custom AMEs (May incur additional monthly subscription) If you don't see any options to advance your system above, please contact your account manager for further details.	POA	POA	Professional Services
Consultancy Consultancy for any needs you may require helping solve any business issues.	18 Points	£750.00 (exc VAT)	Professional Services



eCommerce Services

(Only available for customers with ProspectSoft eCommerce)

Additional Service	Prospect Points	Price	Access Resource
Project Management Time set aside for meetings and communication during eCommerce Project. For regular communication between yourself and the Professional Services team.	24 Points	£1,000.00 (exc VAT)	Professional Services
Site Design (Header and Footer) Using your current website template or a new design template to create an updated, unique and modern website design.	POA	POA	Professional Services
Menu Creation The creation of the header menu including drop downs. Creating a manageable menu design making the website easy to use for your customers.	30 Points	£1,250.00 (exc VAT)	Professional Services
Attribute Management To deploy attribute management to your site which makes the products filterable. To provide a filtering tool for your customers to use to find products quicker and more easily within the website.	60 Points	£2,500.00 (exc VAT)	Professional Services
Import of Product Data and Images To help your customers navigate their way through the products related on the website with all the information about the product and images. Using a spreadsheet of the product codes and images zip codes will be pulled from your inventory management system to import your product data and images from the product tree.	30 Points	£1,250.00 (exc VAT)	Professional Services
Plug in Options The site can be open or closed – an open website means your customers can see the products but must log in to see prices and add to basket. A closed website means the customer will have to log in from the start. Having an open or closed website depending on your needs and how you sell your products to your customers.	24 Points	£1,000.00 (exc VAT)	Professional Services



CMS Training The users required to be trained in how to use the CMS editor tool within the CRM. The user will understand how to use the CMS editor to be able to update the site in the future once it has been created by ProspectSoft Consultant.	12 Points	£500.00 (exc VAT)	Professional Services
Go Live Time set aside for the Go Live of the eCommerce project. To publish the site, live so the customer's clientele can access the new website for orders.	6 Points	£250.00 (exc VAT)	Professional Services
Website Migration We can copy over your variety of displays from your current website to your new website.	POA	POA	Professional Services