

## B2B WEB PHASE 1 – PRICES AND INFORMATION (NOVEMBER 2017)

Phase 1 of our business to business web portal is based around providing financial information for account customers.

The screenshot shows the CounterAct web portal interface. On the left is a dark blue navigation menu with icons and labels for: DASHBOARD, PAYMENTS, ORDERS & RETURNS, INVOICES & CREDITS, STATEMENTS, ACCOUNT DETAILS, ADDRESSES, ONLINE ORDERS, PRODUCT REVIEWS, MY WISHLIST, and NEWSLETTER. The main content area is titled 'ACCOUNT : WEBSERVICE' and includes a 'SUMMARY' section with 'BALANCE £4,988.20', 'CREDIT LIMIT £6,000.00', 'OUTSTANDING £2,001.08', and 'WIP £2,987.12'. Below this are 'LATEST PAYMENTS' and 'LATEST ORDERS' tables. The 'LATEST PAYMENTS' table has columns for Date, ID, Amount, Status, and Actions, with three rows of data. The 'LATEST ORDERS' table has columns for Date, ID, Amount, Type, Status, and Actions, with three rows of data. Buttons for 'MAKE PAYMENT' and 'EDIT DETAILS' are visible below the summary section.

The portal is a Magento site that is linked to your CounterAct system. Account customers will be able to log into the portal via your website.

Portal account customer functionality includes:

- Current and aged breakdown of balances and credit limit.
- Control of how over credit limit or on stop is handled on the portal
- Statements – historic and current statements can be requested
- Details of invoices and credit notes can be seen and copies can be requested including POD.
- Drilldown to view payments allocated against invoices
- Customer can make a payment – full balance, aged balance or just an amount. Auto email to accounts option if a customer pays who was previously on stop.
- Option for a customer to dispute or undisputed an invoice
- Customer orders can be viewed from the customer’s perspective. IE: Any order the customer has placed that hasn’t been invoiced yet. Drilldown to list of products available.
- Quotations can be seen and copies requested

Portal Options:

Option 1 - Portal Link from your Existing Web Site

If you simply want a link through to the portal from your current website, we can style the look of the portal to fit in with the fonts and colour scheme of your existing site.

Option 2 - New Static Website with Portal

If you would like a new static website as well as the portal we can quote for the work depending on your requirements.

Option 3 - New Trading Website with Portal

If you would like a new website that allows you to sell products on-line (to cash customers) then we can design a new Magento website as well as provide the portal.

Costs: We have tried to make the portal a cost effective option for customers of all sizes. Pricing bands are based on the number of CounterAct licences a customer has.

Option 1 – Portal Link from your Existing Website

<u>CounterAct Licences</u>	<u>One off Portal Cost</u>	<u>Maintenance &amp; Hosting (per month)</u>
0 – 9	£1995	£60
10-50	£3995	£105
51-100	£5995	£151
100 Plus	£7995	£194

The one off Portal Cost includes styling of the portal to fit in with your current web site theme – IE: font, colours and logos. It does not include any changes to the standard portal layout.

The maintenance cost includes hosting of the site. We use a hosting provider (Nublue) specifically tuned for Magento websites. (See below for other costs to be aware of.)

Option 2 - New Static Website with Portal

Pricing bands are as Option 1 with some additional cost for the required static pages. This will be quoted for following discussion with the customer.

The portal will be styled to look the same as the static pages including colours font and layout.

Option 3 - New Trading Website with Portal

A quote will be produced based on your specific requirements.



## B2B Phase 2 – Coming in spring 2018

Phase 2 of the portal is scheduled to be released in the spring of 2018. It will include functionality to allow account customers to place orders via the portal for delivery or click and collect at their customer terms pricing.

Phase 2 will be priced up when it is released. However, the price of Phase 2 will be cheaper for early adopters of Phase 1. (IE. If you take phase 1 then phase 2 when it is released in 2018 it will be cheaper than waiting until 2018 and taking phases 1 and 2 together.)

## Maintenance

Maintenance covers the continued functioning of the site and installation of any necessary upgrades, new patches or new extensions. Maintenance also covers on-going support for user operation of the system. (It does not cover on-going training for any new users).

Users will be able to maintain customer access to the portal themselves.

The One off Portal Cost band is based on the number of CounterAct licences the customer has at the time of purchase. Maintenance is reviewed annually. Maintenance will also be altered if a customer moves into a different pricing band.

## Other costs to be aware of

**Sage Pay:** This is required if you wish to allow account customers to pay outstanding balances via the portal. (Integration with any other payment providers is not included and will need to be quoted.) We will recharge the one off cost of the Sage Pay Magento 2 extension (currently £250) and on-going maintenance (currently £70 per year).

**SSL Certificate and domain registration:** You will require a registered domain and SSL certificate for your portal site. This is an annual charge. (Price to be confirmed – approx. £100 per year.)

## Payment Schedule

We will invoice for the setup cost and begin maintenance once the site is live.

Notes on Quotation

You will need to be using DB Form & Mail on your CounterAct system to be able to easily email pdf copies of documents.

- i. All prices exclude VAT @ 20%
- ii. Prices are correct at time of publication but are subject to change.
- iii. This quote is subject to Border Merchant Systems Standard Terms & Conditions. These are available on request.
- iv. We will recharge the cost of maintenance on any Magento extensions required to operate the site. Please note that these are third part extensions so we don't not have control of pricing.
- v. Hosting is included in the maintenance fee. This is based on the standard NuBlue Magento Business Hosting package. If a user is consistently going above the standard storage and bandwidth limits for this package because of high levels of use on the site then we reserve the right to review the hosting package and increase the level and associated cost as necessary. (This would be done in consultation with the customer.)
- vi. Maintenance must be taken and paid via direct debit
- vii. E & OE.