Foxtrot for NDIS: Plans & (Indicative) Pricing *as at 1 July 2023*

Please Note: Final pricing is negotiated with each client depending on final requirements and configuration. Prices below are per month + GST.

Module/Function	**Micro** *Organisation* Single User **$169**	**Small** *Organisation* <=5 users **$369**	**Medium** *Organisation* <= 20 users **$849**	**Large**, *Enterprise* > 20 users **$NEG**
Modules & Features				
Participants/Customers/Clients Management/CRM	✓	✓	✓	✓
Unlimited Participant File and Case Notes	✓	✓	✓	✓
Create Unlimited File Note & Appointment templates	✓	✓	✓	✓
Advanced Filtering and Search functions	✓	✓	✓	✓
Manage Plan Managed, Agency Managed and Self-Managed Participants	✓	✓	✓	✓
Real-Time Plan Budget Management	✓	✓	✓	✓
PRODA Interface, Payments Exports for NDIS Portal Upload	✓	✓	✓	✓
Automated Billing for Agency, Plan and Self-managed Participants	✓	✓	✓	✓
Financial Management *(Debtors Management, Invoicing, Receipting)*	✓	✓	✓	✓
Groups Management	✓	✓	✓	✓
Appointments and Scheduling			✓	✓
Rostering and Timesheets				✓
Bulk Messaging (Email and SMS), e-Newsletters and Email Templates	✓	✓	✓	✓
Personalised Messaging	✓	✓	✓	✓
Messaging History	✓	✓	✓	✓
Data Audit Tracking	✓	✓	✓	✓
Flexible Security Access Management / User Management	✓	✓	✓	✓
Calendar, Tasks & Reminders	✓	✓	✓	✓
Prospects and Contacts Management	✓	✓	✓	✓

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Feature				
Xero Interface / Integration	✓	✓	✓	✓
MYOB Interface / Integration	✓	✓	✓	✓
Securepay integration for e-Commerce	✓	✓	✓	✓
IntelliSMS integration for SMS/Text messaging	✓	✓	✓	✓
OZone (Online Zone/Portal for Staff and/or Participants)			✓	✓
OZone App *(coming soon)*			✓	✓
Staff Apps for Rostering, Timesheets and Appointments			✓	✓
Simple Events Management				✓
Documents - *attach Documents & Files to Participant records*	✓	✓	✓	✓
Membership Actions – *custom processes for complex actions*				✓
Reporting and Dashboards	✓	✓	✓	✓
Foxtrot Business Intelligence (FBI) via Microsoft PowerBI			✓	✓
Custom Data Module / Unlimited Custom Data Fields			✓	✓
Custom Online Registration, Intake Processes & Other Forms			✓	✓
Custom Configurations and Enhancements				✓
Custom Reporting and Dashboards	✓	✓	✓	✓

Foxtrot Pricing				
Monthly Fee *($AU per month + GST, payable quarterly in advance)*	**$169**	**$369**	**$849**	**POA**
Set Up Cost *($AU + GST, payable on completion of trial period)*	**$900**	**$1350**	**$1790**	**POA**
Additional Users *($AU per month per user)*	**25**	**18**	**15**	**Neg.**
Included Help Desk Support *(hours per month total)*	**1**	**3**	**5**	**Neg.**
One Month Free Trial Period	✓			N/A
Free Initial 2 hour Online Training Session (up to 8 people)	✓	✓	✓	**POA**
Migration of Legacy Data *(fees apply - see Note 6 below)*	✓	✓	✓	✓
Included Custom Reports, Exports or Dashboards	1	2	2	2
Included Storage Volume	20 GB	20 GB	20 GB	20 GB
Additional Storage Volume (per 10 GB per month)	$11	$11	$11	$11
e-Commerce Fees *(see Note 10)*				
SMS Transaction Fees *(see Note 11)*				

Note: All pricing excludes GST

1. Except for set-up costs, all items listed are optional.
2. All pricing is indicative as at the date shown. Final pricing is negotiated with each client depending on final needs and configuration.
3. All pricing is reviewed annually in June / July. Set up costs are payable on completion of set up work following approval to proceed.
4. For plans where a trial period applies, no set up fees are payable if use is discontinued before the end of the trial period.
5. Ownership of all client data rests with the client; ownership of all Foxtrot IP including meta-data rests with and is retained by Stepsoft.
6. Data migration is provided as an add-on service if requested. A separate quote is provided for this after examination of existing systems, structures and data quality. Data migration costs can vary widely depending on the quality of existing data and the format in which it can be provided.
7. Additional enhancement and other requests are quoted on individually and implemented on approval of quote.
8. A 'user' is any person with login access to the Foxtrot system.   OZone (Online Portal for Members/Staff/Clients) access has no user limit.
9. Fees are determined based on the number of registered and current users regardless of whether or not registered users use the system during the billing period.
10. Online payment services require a separate agreement with Securepay for the provision of e-Commerce services. Transaction Fees apply.
11. SMS transactions directly from Foxtrot requires a separate agreement with IntelliSMS. Transaction Fees apply.
12. See full license terms and conditions at: www.stepsoft.com.au/terms.html
13. See full privacy policy at: www.stepsoft.com.au/privacy.html

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