

Foxtrot for NDIS: Plans & (Indicative) Pricing as at July 2019

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 \$129 | Small Organisation <=5 users \$299 | Medium Organisation <= 20 users \$699 | Large, Enterprise > 20 users \$NEG |
|---|---|---|--|---|
| Modules & Features | | | | |
| Participants/Customers/Clients Management | ✓ | ✓ | ✓ | ✓ |
| Unlimited Participant File and Case Notes | ✓ | ✓ | ✓ | ✓ |
| Create Unlimited File Note & Appointment templates | ✓ | ✓ | ✓ | ✓ |
| Advanced Filtering and Search functions | ✓ | ✓ | ✓ | ✓ |
| Cater for Plan Managed, Agency Managed and Self-Managed Participants | ✓ | ✓ | ✓ | ✓ |
| Plan Budget Management | ✓ | ✓ | ✓ | ✓ |
| Agency Payments Export for NDIS Portal Upload | ✓ | ✓ | ✓ | ✓ |
| Automated Billing (r-Billing) for Plan and Self-managed Participants | | | ✓ | ✓ |
| Financial Management (<i>Debtors Management, Invoicing, Receipting</i>) | ✓ | ✓ | ✓ | ✓ |
| Groups Management | ✓ | ✓ | ✓ | ✓ |
| Appointments and Scheduling | | ✓ | ✓ | ✓ |
| Staff and Volunteer 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 | ✓ | ✓ | ✓ | ✓ |
| Automated, Configurable Email and SMS Alerts (<i>coming soon</i>) | | | ✓ | ✓ |

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| | | | | |
|---|---|---|---|-----|
| Prospects and Contacts Management | ✓ | ✓ | ✓ | ✓ |
| Xero Interface / Integration | ✓ | ✓ | ✓ | ✓ |
| MYOB Interface / Integration | ✓ | ✓ | ✓ | ✓ |
| Securepay integration for e-Commerce | ✓ | ✓ | ✓ | ✓ |
| IntelliSMS integration for SMS/Text messaging | ✓ | ✓ | ✓ | ✓ |
| Foxtrot Sharing + Facebook, LinkedIn, Twitter Integration | | | ✓ | ✓ |
| OZone (Online Zone/Portal for Staff and/or Participants) | | | ✓ | ✓ |
| OZone App (<i>coming soon</i>) | | | ✓ | ✓ |
| Staff Apps for Rostering, Timesheets and Appointments (<i>coming very soon</i>) | | | ✓ | ✓ |
| Simple Events Management | | | | ✓ |
| Shared Public Events Calendar | | | | ✓ |
| Documents - <i>attach Documents & Files to Participant records</i> | ✓ | ✓ | ✓ | ✓ |
| Documents Archiving (<i>coming soon</i>) | | | ✓ | ✓ |
| Multi-media - <i>save images, audio and video to Participant records</i> | | | ✓ | ✓ |
| Membership Actions – <i>custom processes for complex actions</i> | | | ✓ | ✓ |
| 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 | | | | ✓ |
| Customised User/Procedures manual | | | | ✓ |
| Footsteps Case Management / Help Desk management | | | | POA |

| Foxtrot Pricing | | | | |
|---|--------------|---------------|---------------|-------------|
| Monthly Fee (<i>\$AU per month + GST, payable quarterly in advance</i>) | \$129 | \$299 | \$699 | POA |
| Set Up Cost (<i>\$AU + GST, payable on completion of trial period</i>) | \$750 | \$1000 | \$1500 | POA |
| Additional Users (<i>\$AU per month per user</i>) | 15 | 12 | 10 | Neg. |
| Included Help Desk Support (<i>hours per month total</i>) | 1 | 3 | 10 | Neg. |
| One Month Free Trial Period | ✓ | ✓ | ✓ | N/A |
| Free Initial 2 hour Online Training Session (up to 8 people) | ✓ | ✓ | ✓ | ✓ |
| Migration of Legacy Data (<i>see Note 7 below</i>) | ✓ | ✓ | ✓ | ✓ |
| Included Custom Reports, Exports or Dashboards | 2 | 2 | 2 | 2 |
| Included Storage Volume | 100 GB | 200 GB | 500 GB | Unlimited |
| e-Commerce Fees (<i>see Note 10</i>) | | | | |
| SMS Transaction Fees (<i>see Note 11</i>) | | | | |
| | | | | |

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. Pricing is reviewed annually in June / July.
4. Set up costs are payable only on completion of the trial period. 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 Stepsoft.
6. Data migration is provided as an add-on service should it be requested. A separate quote based on Stepsoft standard hourly rates is provided for this after examination of existing systems, structures and data quality.
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. Online payment services require a separate agreement with Securepay for the provision of e-Commerce services. Transaction Fees apply.
10. SMS transactions directly from Foxtrot requires a separate agreement with IntelliSMS. Transaction Fees apply.

All plan and pricing enquiries to md@stepsoft.com.au or phone +61 02 62330900

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