

Understanding Your Upgrade Options

Commusoft introduced new plans with updated licensing models and pricing in October 2020. The plan you use predates that release, which means you're currently on what we call a **Legacy plan**.

Your Current Plan: Paperless Office Legacy Plan

Whilst Legacy plans still receive basic updates and maintenance, they are no longer compatible with new features, future Commusoft Core updates, or '+' add-ons. Furthermore, legacy users do not have access to the new licencing model, which offers various benefits and improves how you manage payments and contract renewals with Commusoft.

Commusoft Legacy User Options

Legacy Commusoft plans are being retired as we transition all clients to the Commusoft Core product. Within Commusoft's Core product you have the option to move to an equivalent plan or upgrade to our Customer Journey plan

Available Core Pricing Plans:

- **Go Paperless**
- **Customer Journey**

Preferred Upgrade Path

The best upgrade path for a business with more than 8 Commusoft users on the **Paperless Office (Legacy)** plan is to transition to the **Customer Journey** plan. Upgrading grants access to the new licensing model and adds compatibility with Commusoft's newest features.

Commusoft's Customer Journey plan helps your business grow to the next stage by improving customer satisfaction with self-serve options, opportunity tracking, and much more.

Upgrade Path Overview	Your Current Plan: Paperless Office	Upgrade to: Customer Journey
Price	£42.35/User/ Month	£59.00/License/Month
Storage	50 GB/Account	20 GB/License

*Our client success team is here to make this move as easy as possible so your daily work isn't interrupted. Please indicate your intention to upgrade **by 2 November 2026** following the instructions in your system notifications. Discuss terms and any questions directly with your Client Success Partner.*



Why Businesses of 8+ Love Customer Journey

- **Self-Service Portal:** offer appointment booking, payment and reporting experiences that keep customers informed and office staff unburdened.
- **Advanced Analytics:** access customisable reporting and real-time dashboards that effortlessly keep you appraised of your business performance.
- **Record Opportunities From a Site:** capitalise on engineer discoveries with direct synchronisation from field to office of any asset defects or site recommendations they identify.
- **Track Stock:** Gain immediate visibility on the location of every part you own, whether in the warehouse, office, or a specific van. Never arrive at a job without a part.
- **Access Job Views:** keep your jobs on track with customisable job stage views, enabling your team to identify bottlenecks and prioritise jobs the minute they require actioning.
- **Two Way Email Sync:** Sync Outlook or Gmail automatically to both send and receive all customer emails directly through Commusoft
- **Manage Your Fleet:** track routes, driving behaviour, vehicle maintenance and more.
- **Integrate Payments:** take payments via Stripe and GoCardless on Commusoft
- **Initiate Quotes:** build custom estimates with Good/Better/Best options.
- **Manage Service Contracts:** be notified when your PPM visits are due. Never miss an appointment or contractual obligation.

Our New Licensing Model

Everyone who accesses Commusoft needs a license. Think of a license as an available 'seat'. You can have spare seats ready for new staff and future growth, but you cannot create a user without a license to cover them.

1. **Contracted Licenses:** Committed for a 12-month period. Best for permanent staff.
2. **Monthly Rolling Licenses:** More expensive but can be added/removed monthly. Ideal for temporary or seasonal workers.
3. **Daily Licenses:** Day-by-day charges, perfect for subcontractors.

Frequently Asked Questions

Will additional training be required?

Yes. Additional training sessions are required when upgrading from A Paperless Office to Customer Journey as it introduces several new foundational features.

Do I need to sign a new contract?

Yes. Upgrading initiates a new 12-month agreement, so your pricing and license count are locked in for the year.

Why can't Commusoft add-ons be used with a legacy plan?

The "+" ecosystem requires our modern License-Based Model to function. Legacy plans operate on a "per-user" structure that cannot support the assignment or management of modular add-ons. To unlock these features, an account must first migrate to the modern licensing framework.

What if I don't plan to upgrade to Customer Journey?

That's completely fine. You will receive more information in the coming weeks about how to move to the Go Paperless plan before 2 November 2026.

[Upgrade to Customer Journey](#)



Page 1: Feature Comparison

Comparing Features	Your Current Plan: Paperless Office	Upgrade to: Customer Journey
Customer Database	✓	✓
Service Reminders	✓	✓
Assets / Appliances	✓	✓
Contracts (service & PPM)		✓
SLA		✓
Asset Configurator		✓
5 Custom Fields		✓
Proposal		✓
Good/Better/Best Option templates		✓
Add-on options		✓
Automatic Proposal Follow-Up		✓
Create and Manage jobs	✓	✓
Mobile app	✓	✓
Parts Management	✓	✓
Job costing	✓	✓
Certificates	✓	✓
Custom forms	✓	✓
Job Stages	✓	✓



Page 2: Feature Comparison

Comparing Features	Your Current Plan: Paperless Office	Upgrade to: Customer Journey
Add/Edit Custom Certificates		✓
Onsite tasks		✓
Stock control		✓
Job dashboard		✓
Analytics		✓
Schedule & Dispatch	✓	✓
Survey templates		✓
Job arrive/report template		✓
Job pipelines		✓
Customisable job views		✓
Assisted scheduling		✓
Service windows	✓	✓
Customer invoicing & payments	✓	✓
Consolidated invoicing		✓
Supplier purchase orders	✓	✓
Supplier invoicing and payments	✓	✓
Financial reporting	✓	✓
Automatic customer invoicing		✓
Recurring customer invoicing		✓



Page 3: Feature Comparison

Comparing Features	Your Current Plan: Paperless Office	Upgrade to: Customer Journey
Skills	✓	✓
Subcontractor Billing		✓
Timesheets		✓
Shifts		✓
Fleet		✓
Coming Soon: AI Job Report		✓
Coming Soon: AI Emails		✓
Coming Soon: AI Proposal		✓
Self-Service Invoicing	✓	✓
“On Our Way” SMS+	✓	✓
Self-Service After-Sales Care		✓
Self-Service Proposal		✓
Self-Service Website Booking		✓
Self-Service Payments		✓
Self-Service Statement		✓
Self-Service Service Reminder Booking		✓
Self-Service Appointment Booking		✓
Self-Service Rebook/Cancel		✓



Page 4: Feature Comparison

Comparing Features	Your Current Plan: Paperless Office	Upgrade to: Customer Journey
Advanced Website Integration		✓
Customer Login Portal		✓
Workflow Marketplace		✓
Accounting Integration	✓	✓
Stripe Integration	✓	✓
Office 365/Google Mail Integration	✓	✓
Office 365/Google calendar Integration	✓	✓
SumUP Integration	✓	✓
Zapier Integration	✓	✓
Heat Engineer Integration		✓
GoCardless Integration		✓
Mailchimp Integration		✓
Wolseley Integration		✓
City plumbing Integration		✓
Spruce Integration		✓

