

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 Upgrade 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, Go Paperless, or upgrade to our Customer Journey plan.

Available Core Pricing Plans:

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

Recommended Upgrade Path

The best transition for your business is from the **Paperless Office (Legacy)** plan to the **Go Paperless** plan. Upgrading to the Go Paperless plan enables access to the new licensing model and adds compatibility with Commusoft's newest features.

Commusoft's Go Paperless plan helps your business collect better site data, improves customer communication capabilities, and provides more insights into your business performance.

Upgrade Path Overview	Your Current Plan: Paperless Office	Upgrade to: Go Paperless
Price	£42.35/User/Month	£45/License/Month* (without discount)
Storage	50GB/Account	10 GB/License

Our client success team is here to make this move as easy as possible so your daily work isn't interrupted. If you choose to upgrade now, we are offering the chance to **keep your current price for another year if you upgrade by 2 November 2026. This allows you to lock in a better rate and gain access to our latest features before the Legacy Plans are retired in 2027.*



Why Businesses Love Go Paperless

- **Consolidated Invoicing:** Combine and send multiple invoices for different jobs in one go to a single customer.
- **Custom Form Marketplace:** Access a library of peer-vetted, industry specific service templates to standardise your workflows.
- **Site Survey Forms:** Standardise site survey questions to ensure your engineers collect the data you need to form a winning quote.
- **Price Books:** Create highly customised price books with modified rates for individual customers.
- **Analytics:** Access advanced reporting and real-time dashboards.
- **Two Way Email Sync:** Sync Outlook or Gmail automatically to both send and receive customer emails directly through Commusoft.
- **Public Holidays:** Organise your calendar with customisable holiday events to avoid scheduling issues.
- **Integrate Payments:** take payments via Stripe and GoCardless on Commusoft

Our New Licensing Model

Everyone who accesses Commusoft needs a license. Think of a licence 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 or occasional workers.

Frequently Asked Questions

Will additional training be required?

No training is required if upgrading from **A Paperless Office** to **Go Paperless**. However, upgrading to **Customer Journey** does require training to cover additional features and capabilities.

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 an older "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 provide the best possible security and performance, we are moving all accounts onto our modern Core platform. This means we will eventually stop supporting Legacy plans to focus on a single, improved system for all clients. If you choose not to transition to a new Core plan, your access to Commusoft will ultimately be discontinued.



Page 1: Feature Comparison

Comparing Features	Your Current Plan: Paperless Office	Upgrade to: Go Paperless
Customer Database	✓	✓
Service Reminders	✓	✓
Assets / Appliances	✓	✓
Proposals		✓
Good/Better/Best Option templates		✓
Add-on options		✓
Create and Manage Jobs	✓	✓
Mobile App	✓	✓
Parts Management	✓	✓
Job Costing	✓	✓
Job Stages		✓
Custom Forms		✓
Certificates	✓	✓
Add/Edit Custom Certificates		✓
Analytics		✓
Schedule & Dispatch	✓	✓



Page 2: Feature Comparison

Comparing Features	Your Current Plan: Paperless Office	Upgrade to: Go Paperless
Survey Templates		✓
Job Arrive/Leave Workflow		✓
Service Windows	✓	
Customer Invoicing & Payments	✓	✓
Supplier Purchase orders	✓	✓
Financial Reporting	✓	✓
Consolidated Invoicing		✓
Skills	✓	✓
Subcontractor Billing		✓
Fleet		✓
Self-Service Invoicing	✓	✓
Self-Service After-Sales Care		✓
Self-Service Quoting		✓
Access to SMS+		✓
Accounting Integration	✓	✓
Stripe Integration	✓	✓
Office 365/Google Mail Integration	✓	✓



Page 3: Feature Comparison

Comparing Features	Your Current Plan: Paperless Office	Upgrade to: Go Paperless
Office 365/Google Calendar Integration	✓	✓
SumUp Integration	✓	✓
Zapier Integration	✓	✓
GoCardless Integration		✓
Mailchimp Integration		✓
Wolseley Integration		✓
City Plumbing Integration		✓
Spruce Integration		✓
Heat Engineer Integration		✓

