ToolGPA

NOVEMBER 2026

Workbooks

The Insider's Guide

UK-built CRM covering sales, marketing, service and order processing



Every plan, grade, refund rule and rival among CRM tools, read from Workbooks's own pages.

Made by Workbooks Online Inc · checked Nov 12, 2026 · toolgpa.com

2.2
GPA



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Who made this guide, what else is on the site, and how to cite it

ToolGPA put this guide together from Workbooks's own pages, its app-store listings and our grades. Every fact in it is on Workbooks's page too, where it is kept up to date. Checked Nov 12, 2026.

Welcome

What it is, who it suits, its grades and the ten things to know first

2.2

GPA, above 22 of the 72 other CRM tools we grade

Workbooks is a CRM sold in editions that add orders, invoices and contracts on top of core sales and service features. It also offers marketing automation, sales forecasting, project management and dashboards. Licenses are bought by the year, with implementation services sold alongside.

> **Implementation is a separate paid service.**
>
> From our grade for ease of use

To get you started, here are **9 things to know about Workbooks**, taken from its own pages and our grades.

1 **Best for CRM, orders and invoicing in one system**

Workbooks is a CRM from $47 a user a month with orders, invoices and ticketing, on annual licences.

2 **Paid plans start at $47 a month for each person**

As its pricing page puts it: $47 per user / month.

3 **You can try it first**

A free trial is offered; its length is not stated on the pricing page

4 **It runs on Web**

Web.

5 **Pipeline and quotations**

The CRM edition manages opportunities and the pipeline and creates quotations, with a 360-degree view of each customer.

6 **Orders, invoices and contracts**

The Business edition adds sales order processing, invoices and credit notes, and integration with accounting and ERP software.

7 **Marketing automation**

The vendor lists automated campaigns and customer journeys as a product area alongside the CRM.

8 **A 2.2 GPA, above 22 of 72**

That is against the other CRM tools we grade, on value, the free plan, features, ease of use and platforms.

9 **Keep it**

To replace Workbooks you would be making email sent in volume that still reaches the inbox. That is not a weekend's work, with an AI app builder or without one.

Workbooks at a glance

PRICING
Free trial, from $47 per user / month

FREE PLAN
No

FREE TRIAL
A free trial is offered; its length is not stated on the pricing page

RUNS ON
Web

MADE BY
Workbooks Online Inc

CATEGORY
CRM Software

OUR GRADE
2.2 GPA, fair

The report card

Best for CRM, orders and invoicing in one system

Workbooks is a CRM from $47 a user a month with orders, invoices and ticketing, on annual licences. Orders and invoices need the $97 edition, and set-up help starts around $3,600.

TOOLGPA REPORT CARD

Workbooks

Graded Nov 12, 2026

SUBJECT	GRADE	COMMENT
Value for money	C	$47 a user a month for CRM Edition on a licence of at least 12 months. Orders and invoices need Business at $97.
Free plan and trial	D	A free trial is offered, but the pricing page doesn't give its length or say whether a card is needed.
Features	B	Pipeline, quotations, orders, invoices, marketing automation, ticketing and forecasting. Nothing in the listing is missing.
Ease of use	C	No store rating on record. Implementation is a separate paid service.
Platforms and integrations	B	Web, with Microsoft Office 365 and Outlook, and links to accounting and ERP software on Business.

Grade point average — Fair, out of 4.0 **2.2**

An A is worth 4 points, a B 3, a C 2, a D 1 and an F nothing. The GPA is the average of the five.

Who Workbooks is for

- ✓ Fits if you want CRM, orders and invoices in one system
- ✓ Makes sense if you want the vendor to run the implementation

Who it is not for

- ✕ Tight if you want to commit lightly, as the minimum term is 12 months
- ✕ Pricey if you add options: audit trail is $9.50 and Outlook sync $11 per user a month
- ✕ Watch out: implementation packages are separate, such as SelfStart at $3,600
- ✕ Skip it if you want phone support outside weekday office hours

Good to know

Good for

- ✓ Mid-sized businesses that want CRM, orders and invoicing in one system
- ✓ Consultancies, publishers and manufacturers it names as target industries
- ✓ Teams that want vendor-run implementation and managed services

Worth knowing

- ⓘ Minimum subscription is 12 months, with 2, 3, 5 and 7-year terms also sold.
- ⓘ Add-ons are priced per user per month, for example audit trail $9.50 and Outlook sync $11.
- ⓘ Implementation is separate: the calculator lists SelfStart at $3,600 and JumpStart for Sales at $6,300.
- ⓘ Support is by phone or email on weekdays 9am to 5:30pm, and 100GB of storage is included.

PART 02 · PRICING

What it costs

Every plan, the free plan, ways to pay less and how prices have moved

$47

A month to start, for each person

Workbooks is a paid product with a free trial, starting at $47 per user / month.

> **A free trial is offered, but the pricing page doesn't give its length or say whether a card is needed.**
>
> From our grade for free plan and trial

CRM EDITION

$47

per user / month, from; annual license

Pipeline, quotations, ticketing and case management, and Office 365 integration. Options are extra.

BUSINESS EDITION

$97

per user / month, from; annual license

Adds orders, invoices, credit notes and links to accounting and ERP software.

Trying it first

A free trial is offered; its length is not stated on the pricing page

Read from workbooks.com on Nov 12, 2026.

What it does

Its main features, where it runs, what it works with and who makes it

1

Place it runs: Web

UK-built CRM covering sales, marketing, service and order processing. Here is what it does, as its own site describes it, and what it covers: AI features, sales pipeline, marketing automation, workflow automation, invoicing, reports.

> **Pipeline, quotations, orders, invoices, marketing automation, ticketing and forecasting.**
>
> From our grade for features

Pipeline and quotations

The CRM edition manages opportunities and the pipeline and creates quotations, with a 360-degree view of each customer.

Orders, invoices and contracts

The Business edition adds sales order processing, invoices and credit notes, and integration with accounting and ERP software.

Marketing automation

The vendor lists automated campaigns and customer journeys as a product area alongside the CRM.

Ticketing and case management

Customer service teams can track support cases and tickets inside the CRM edition.

Reports, dashboards and forecasting

Dashboards and analytics, plus sales forecasting to monitor and plan against targets.

Paid options

Audit trail, custom records, multi-currency documents, advanced security, mapping, Outlook sync, project management and events are add-ons.

Where it runs

Web

What it works with

Microsoft Office 365

Outlook

Workbooks is made by Workbooks Online Inc.

PART 04 · STANDING

Where it stands

Its grades against its category, and whether to keep it or make your own

22/72

Other CRM tools it is graded above

Workbooks's GPA of 2.2 is higher than 22 of the 72 other CRM tools we grade, and level with 18.

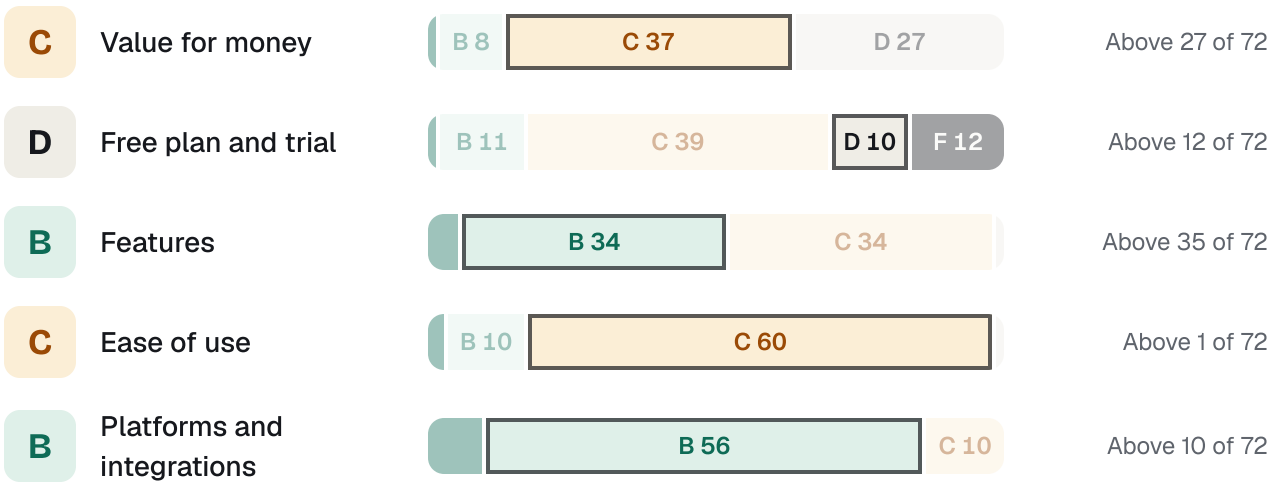
It stands best on features (B, above 35 of 72) and worst on free plan and trial (D, above 12).

Its paid plans start at $47 a month for each person, against a middle price of $27.92 for the category: 46 of the 66 others that charge start lower.

On features, ease of use and platforms it scores 2.7 out of 4. 7 tools score higher and cost less.

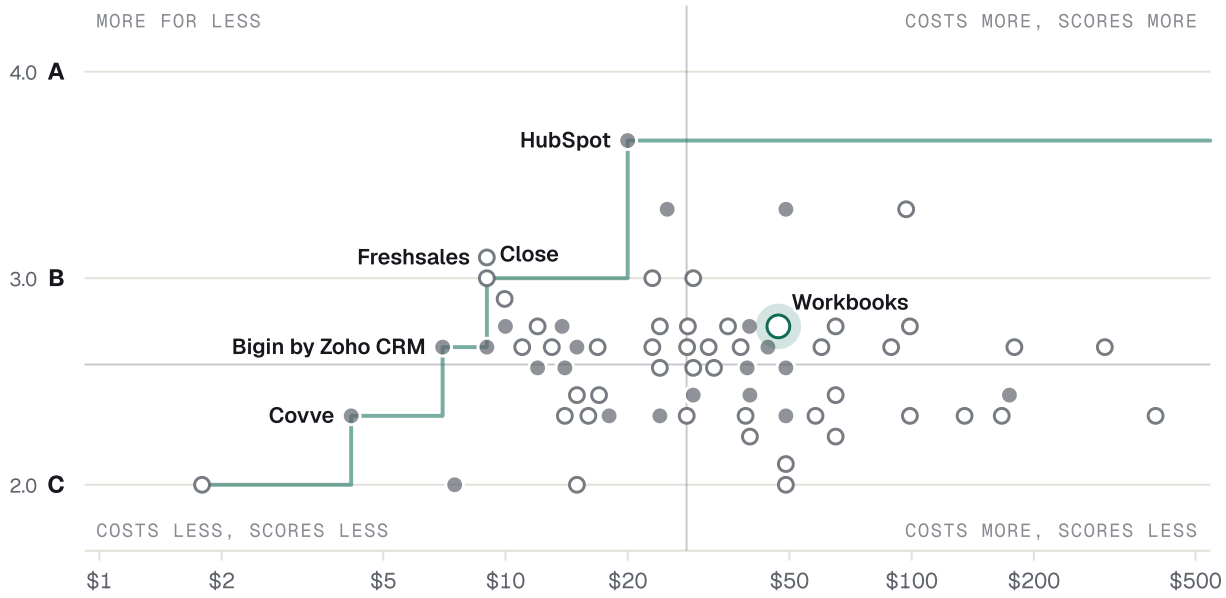
Each grade against the category

Every bar is all 73 CRM tools we grade, cut by the letter each got. Workbooks's own letter is outlined.



Price against what you get

Each dot is one of 67 CRM tools. Further left costs less; higher up scores better on features, ease of use and platforms. Workbooks is the marked dot.



What paid plans start at, a month (each step along is roughly double)

Keep it, or make your own?

Whether this is something you could build for yourself with an AI app builder, and what you would give up.

Keep it

To replace Workbooks you would be making email sent in volume that still reaches the inbox. That is not a weekend's work, with an AI app builder or without one.

That makes this kind of software worth paying for, not this one in particular: 32 of the 72 other CRM tools grade higher. It costs $564 a year.

What you could make

- Sales pipeline, reports and invoicing: an app builder makes these well.

What you could not

- Email sent in volume that still reaches the inbox.

- Connections to other products, each kept working as those products change.
- It is priced for each person, which means accounts and billing for a team.
- AI features, unless you pay a model provider for each request yourself.
- The depth: we grade its features B, which means it covers the whole job.

What this rests on. Workbooks's listing: what it does, where it runs, what it plugs into and what it costs. It is a judgement about the kind of software this is. We have not built a replacement for it, and making your own means looking after it too. How we decide, and every tool's verdict.

The alternatives

The tools it is most often weighed against, side by side



Salesforce, Zoho CRM, Microsoft Dynamics 365 Sales, Creatio and Pipedrive

The 5 tools Workbooks is most often weighed against, with where each one differs from it.

2.8 GPA

Salesforce

Free plan · from $25/mo

CRM platform for sales teams with AI agents and a free 2-user suite.

- Salesforce has a free plan. Workbooks does not, though it has a free trial.
- Only Salesforce lists iOS and Android apps.
- Only Salesforce lists a browser extension.

Workbooks and Salesforce compared in full

2.6 GPA

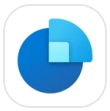
Zoho CRM

Free plan · from $14/mo

Sales CRM with a free edition, process automation and Zia AI.

- Zoho CRM has a free plan. Workbooks does not, though it has a free trial.
- Only Zoho CRM lists iOS and Android apps.
- Workbooks also covers marketing automation, invoicing and reports.

Workbooks and Zoho CRM compared in full



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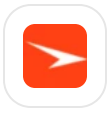
Microsoft Dynamics 365 Sales

Free trial · from $65/mo

Microsoft's sales CRM with Copilot and prebuilt sales agents.

- Only Microsoft Dynamics 365 Sales lists iOS and Android apps.
- Workbooks also covers marketing automation and invoicing.
- Microsoft Dynamics 365 Sales also covers AI agents.

Workbooks and Microsoft Dynamics 365 Sales compared in full



1.8
GPA

Creatio

From $40/mo

No-code platform with sales, marketing and service CRM products.

- Workbooks also covers invoicing and reports.
- Creatio also covers no-code and help desk.

Workbooks and Creatio compared in full



2.2
GPA

Pipedrive

Free trial · from $14/mo

Sales CRM organized around visual deal pipelines.

- Only Pipedrive lists iOS and Android apps.
- Workbooks also covers marketing automation, invoicing and reports.
- Pipedrive also covers transcription and kanban boards.

Workbooks and Pipedrive compared in full

PART 06 · QUESTIONS

Quick answers

The questions people ask about it, each answered in a line or two

12

Questions, each answered in a line or two

The short version of everything above, for when you only need the answer. Each one is told in full in its part of the guide.

Is Workbooks free?

No, Workbooks is a paid product, but you can try it first. A free trial is offered; its length is not stated on the pricing page.

How much does Workbooks cost?

Workbooks lists 2 plans. CRM Edition: $47 per user / month, from; annual license.

What platforms does Workbooks work on?

Workbooks is available on Web.

Does Workbooks have an Android app?

No Android app was listed when its pages were read on Nov 12, 2026. Workbooks is listed for Web.

Does Workbooks have an iPhone app?

No iPhone app was listed when its pages were read on Nov 12, 2026. Workbooks is listed for Web.

Is Workbooks open source?

Workbooks is not described as open source on its own site, as read on Nov 12, 2026.

What does Workbooks integrate with?

Workbooks's listing names Microsoft Office 365 and Outlook. A listing names up to eight integrations, so it may connect to more.

Who makes Workbooks?

Workbooks is made by Workbooks Online Inc.

What are the alternatives to Workbooks?

The closest alternatives to Workbooks in our directory are Salesforce, Zoho CRM, Microsoft Dynamics 365 Sales, Creatio and Pipedrive.

How does Workbooks compare with other CRM tools?

Workbooks's GPA of 2.2 is higher than 22 of the 72 other CRM tools we grade, and level with 18.

Is Workbooks good value for money?

ToolGPA grades Workbooks C for value for money. Its paid plans start at $47 a month for each person, against a middle price of $27.92 for the category: 46 of the 66 others that charge start lower.

Could I make my own version of Workbooks?

To replace Workbooks you would be making email sent in volume that still reaches the inbox.

Where this guide comes from

The prices, plans, platforms and features were read from Workbooks's own pages on Nov 12, 2026, and the grades were given on Nov 12, 2026. Graded from this listing, whose facts were read from Workbooks's own pages on 12 November 2026. Not based on using the product, and shorter than our full reviews.

Every tool we list gets five grades, A to F, each with its reason, and a GPA that averages them. How each is decided is at toolgpa.com/grades. This guide is ToolGPA's own work; it is not made, paid for or approved by Workbooks Online Inc. Prices change, so check workbooks.com before you buy.

workbooks.com/workbooks-calculator/ workbooks.com/

PART 07 · ABOUT

About ToolGPA

Who made this guide, what else is on the site, and how to cite it

5,038

Tools graded, in 95 categories

ToolGPA grades software the way a school report grades a pupil: five subjects, a letter for each with the reason written beside it, and a GPA that averages them. Prices, plans and platforms are read from each maker's own pages and dated, so you always know how fresh a figure is.

Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Every tool on the site has a guide like this one, free to download and pass on. It all lives at **toolgpa.com**.

5,038	95	739	579
tools graded	categories	price changes on record	apps priced in 12 countries

What else is on toolgpa.com

Workbooks, kept up to date

Everything in this guide, with prices and grades as they are today

toolgpa.com/tools/workbooks

How grades are given

The rules behind every letter and every GPA

toolgpa.com/grades

Value charts

What each tool costs against what it scores, for every category

toolgpa.com/charts

Compare

Any two tools side by side, plan by plan

toolgpa.com/compare

Price changes

Every price rise and cut on record, each with its source

toolgpa.com/price-changes

Prices by country

What apps cost on the App Store in 12 countries

toolgpa.com/prices-by-country

Pay less

Every public discount: yearly billing, students, nonprofits

toolgpa.com/save

Keep or make

Which tools are worth paying for, and which you could build yourself

toolgpa.com/keep-or-make

Scan for the live page

Prices and grades as they are today

Quoting this guide?

Please name ToolGPA and link to the live page, so readers can check the figures for themselves:

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ToolGPA, "Workbooks: The Insider's Guide",
checked Nov 12, 2026.
https://toolgpa.com/tools/workbooks
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Know someone choosing between CRM tools?

Send them this guide:
toolgpa.com/tools/workbooks/guide

ToolGPA elsewhere: youtube.com/@toolgpa

See our other guides

The best-graded CRM tools after Workbooks, each with an Insider's Guide of its own.

CRM Software Insider's Guide

Every one of the 73 CRM tools we grade, compared

HubSpot Insider's Guide

Free CRM at the center of a marketing, sales and service suite

3.2 GPA

Bigin by Zoho CRM Insider's Guide

Pipeline-based CRM from Zoho for small businesses

2.8 GPA

Bitrix24 Insider's Guide

Flat-priced CRM with tasks, chat, video calls and a site builder

2.8 GPA

ToolGPA

Choosing software? Every tool graded, every price dated.

Compare tools at toolgpa.com ›

Everything in this guide is ToolGPA's own summary of what Workbooks's pages, its app-store listings and public reviews said on the dates shown. Grades are our judgement under the rules at toolgpa.com/grades. Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Workbooks is a trademark of its owner, and this guide is not made, paid for or approved by Workbooks Online Inc. Prices and plans change: check workbooks.com before you buy.