

Case Manager

Standard License Fee

License Fee per User	£	1,100
	£	330

Request Channel

Primary Channel - Mail / Message / API

Channel Partition

Deployment

Tenancy

Security

Partition

Geographic Region

Availability

Standard Features

Omni-channel Case Inbox

Nested Cases with Merge & Split

Case Comments

Configurable Case Attributes

Manual Assignable Tasks

SLA Monitoring & Alerts

Standard Management Dashboard

Management Reporting API

Counterparty Reference Data

AI Models

Request Type Classification

Additional Features

Set-up

Translation

Inbound message translation - Cat A languages

Inbound message translation - Cat B languages

Outbound message translation - Cat A languages

Outbound message translation - Cat B languages

Additional AI Models

Additional Classification

Case Attribute Recognition (NER)

T&M with examples

Additional Request Channels

Internal Message - Case Initiated

Internal Message - Message Initiated

Web Portal / API - Separate

Web Portal / API - Correlated

Agentic Tasks / Automation

Agentic Tasks per User

Task Automations per Agent

Deployment variations

Single-tenant

+ 10%

Client Managed

+ 10%

Non-standard & Large Language Models

Large Models

+ 10%

Generative Models

+ 10%

Complex multi-model model configurations

£ 5,000

Context Vault [Reference Library?] (RAG)		
Initial set-up and document processing	£	10,000
Additional documents batch processing	£	5,000
Natural Language		
Natural Language Case Queries		+ 10%
Email Chain Summaries		+ 10%
Case Activity Analysis		+ 10%
Agent Assist		
Smart Reply		
Smart Fill		
Smart Documents		
Attachment OCR + Entity Extraction		
Advanced Insights		
Similar Case Identification		
Queryable Dashboards		
Integration & Customisations (T&M with example costs provided)		
Additional Request Channels		Set-up
Additional Custom Request Channel	£	10,000
3rd Party Case Manager - Update	£	20,000
3rd Party Case Manager - Synchronisation	£	40,000
Processing System Integration (Query)	£	20,000
Processing System Integration (Action)	£	40,000
Task-based workflow set-up	£	1,000
Custom BPMB workflow setup	£	10,000
Gym Model Training		
License Fee per User	£	2,500

	£	250
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per annum
per quarter





Recurring

£	100
£	150
£	150
£	200

£	50
£	100
£	50
£	100

£	100
£	1,000

% on annual fee
% on annual fee

% on annual fee
% on annual fee
20%

20%
20%

1/3 on annual fee
1/3 on annual fee
1/3 on annual fee

£ 250
£ 150

£ 250

£ 250
£ 500



<u>Recurring</u>	
	20%
	20%
	20%
	20%
	20%
	-
	20%



per annum

per month



Paid in advance, minimum of 5 users, 3 months notice of termination, 30 day pay
Paid in advance, minimum of 5 users, 3 months notice of termination, 30 day pay
[For occasional users, we calculate an FTE equivalent fee based on usage](#)

One channel is included - Microsoft O365 or Exchange, Google Gmail, Teams, S
Unlimited number of mailboxes or message channels / rooms
[Others channels can be built on request and may require an upfront T&M fee](#)
[Running costs are driven by mail volume and the number of concurrent users - th](#)

Secure high availability multi-tenant instance with logical partition between clients
Username & password integrated with a client's SSO solution if available with Jai
Unlimited number of isolated organisational partitions
Any existing standard AWS region is available in Europe or North America
Instances are distributed across multiple zones for high availability with DR to a s
[New regions or those with unusually high compute attract additional fee until 5 cli](#)

Consolidated case, communications and task management with inbox and tabula
Includes optional multiple-intent model training
Shared comments attached to cases
Any attributes can be set up and populated by a human or model
User defined assignable delegation and approval tasks with communication flow
User configurable alerts to highlight breaches of defined deadlines
Summary, team and user level case status and flow metrics
All case data can be extracted using a REST API to feed external reporting soluti
Straightforward storage of client and counterparty data or retrieval via an API is ir

Typically, we custom train a primary request type classification for case routing



Translate inbound messages into English

Translate inbound messages into English

Translates outbound message into specified language

Translates outbound message into specified language

Category A languages: PT, ES, FR, DE, IT, ...

Category B languages: ZH, FI, RU, JA, AR, ...

Fair use applies. Assumes < 10% cases require translation.

Additional models can be trained to determine for example, priority or other requirements

Additional models can be trained to extract key case attributes from messages

For very complex requirements e.g. where large models are required, additional training may be required

Slack or Teams with internal communications must be initiated from the case management channel

Communications can be initiated in the message channel with a rule or model recommendation

When additional to the primary channel, no cross-channel correlation is included

A rule or model will be deployed to correlate requests about the same case - may require additional training

Does not include cross channel message correlation (requires additional correlation training)

AI determined tasks based on classification and rules

Assumes that the system required for the action has been integrated or there is an integration point

Secure high availability single-tenant instance with physical partition between client instances

AI deployed in the client's cloud - this creates additional support and deployment requirements

When it is necessary to deploy higher compute large language models to discern intent

When it is necessary to deploy zero shot / prompt engineering due to limited or correlated data

Includes 1000 documents recurring 20% fee covers maintaining and re-embedding

Enables users to query the case attributes and associated communications using
Provides a summary to quickly determine requests intent without having to read through
Provides insight into the case activity to highlight issues or anomalies

One-click "Generate reply" using case context for agent review.
Automatic selection of template with auto-filled entity fields.

Identifies entities and key information in attachments and appends them to the case
[Fair use applies. Assumes < 10% cases require document processing.](#)

Shows historically similar cases.
Transform NLQs into data queries and automatically generates interactive dashboards

Client's proprietary internal channels or an unsupported and uncommon 3rd party |
Uni-directional update of external CMS such as Salesforce to provide centralised information
Full bi-directional synchronisation with 3rd party CMS such as Salesforce
Delivered and includes batches of 5 associated automation agents
Delivered and includes batches of 5 associated automation agents
T&M to assist in the initial setup of task-based workflow
T&M to assist in the initial setup and maintenance of complex custom BPMN workflows

Paid in advance, minimum of 5 users, 3 months notice of termination

Paid in advance, minimum of 10 users, 1 month notice of termination



User/Org

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lack, Web Portal API

us the number of users is basis of fees

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raining effort and compute fees may apply

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provider
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