

Statement of Work (SOW) - Momentum Enterprise Pro for Convention Centers One-Time Services

Project Summary

Provider will work with Customer to onboarding the following as a part of this project:

- Leads
- Web Lead Form
- Accounts & Contacts
- Event Opportunities
- Campaigns
- Proposals & Contracts
- Calendars
- Functions
- Service Orders
- Work Order Management
- Mobile Work Orders
- Non-Event Orders
- Accounts Receivable
- Online Payment Portal
- Basic Inventory
- Sales Goals
- General Ledger
- Audit Ready GL Export
- Budgeting
- Standard Reports
- Dashboards
- Single Sign On (Back Office)

Assumptions

Enterprise Onboarding Approach

The standard approach to onboarding is a 'Configured Delivery' model, meaning that the Customer is responsible for providing all required master data for configuration on time as well as timely testing feedback. In order to ensure Customer's enablement and long-term success, Provider assumes Customer will contribute to configuring spaces, resources, inventory, packages, pricelists, etc. Once the Implementation Summary is signed off by the Customer, any further requirements are out of scope.

Enterprise Training Approach

Training will include both remote instructor-led courses and on-demand courses from Provider's Learning Center. Customer has dedicated named user(s) who will receive Application Administration training to support and maintain the system. A portion of the Administrator Training will be conducted during the Build phase of the project to support the Customer in the configuration tasks they will be assisting with. One (1) round of remote Application Administrator and Key User Training is included. All instructor-led training will be recorded. Process documentation will be managed by the Customer with specific software processes outlined throughout the onboarding.

Payment Portal

Scope does not include configuration or deployment of a payment gateway. Customer will use payment portal with default currency setup.

Single Sign On (Back Office)

Provider will provide technical services to assist with the setup of SAML 2.0 SSO integration. Customer will set up two (2) IdP configurations (1 for Production environment and 1 for Test environment).

Customer is using a supported IdP (Azure, Okta, OneLogin, JumpCloud, ForgeRock, Shibboleth, F5).

Limitations

The Services will be configured with the features and capabilities of the current release of the Services.

Scope of Services

Kick Off

Provider responsibility:

- Internal handover and preparation.
- Up to one (1) 60-minute remote kick off meeting with preparation.

Customer responsibility:

- Ensure key project resources and stakeholders can attend kick off meeting.
- Ensure project scope is accurate and fully aligns to all business requirements.
- Raise any risks, blackout periods for software release, resourcing plan.

Discovery

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Provider responsibility:

- Up to 15 90-minute remote requirements gathering meetings with preparation and write up.
- Document business requirements, expected functions, and accepted criteria via Implementation Summary.
- One (1) 60-minute remote session reviewing Implementation Summary with Customer.

Customer responsibility:

- Ensure key resources attend all discovery sessions.
- Provide an understanding of business processes, data and requirements.
- Ensure key project resources attend Implementation Summary review.

Build

Momentum Enterprise Pro for Convention Centers – Plan to Market

Provider responsibility:

- Configure master tables.
- Configure Spaces and related tables for up to 50 spaces.
- Configure of up to three (3) Space Rates per Space for up to 50 spaces.
- Configure Resources and Inventory Items with related tables for up to 250 resources.
- Configure GL Accounts – Configuration of up to 50 GL accounts – posting accounts only, no summaries.
- Configure GL Schemes or Dimensions to support advanced GL distribution.
- Configure up to five (5) packages (one level package, substitution possible).
- Configure up to one (1) Price List with up to 250 Items. Up to one (1) price class is included.

Customer responsibility:

- Provide resources, inventory, menus, packages and relevant master data in specified formats as requested.
- Configure remaining items as guided by Provider following included training.

Momentum Enterprise Pro for Convention Centers – Lead To Opportunity

Provider responsibility:

- Manage Leads - Configure CRM Leads with up to three (3) master tables.
- Web Lead Form - Configure up to one (1) Web Lead Form utilizing a standard basic web theme.
- Manage Organizational & Individual Accounts - Configure account, contact and relationship windows with up to five (5) master tables on each.
- Create the Event Opportunity - Configure Event Opportunity windows and process.
- Configure up to one (1) Activity Checklist on the account level.
- Create Campaigns - Configure statuses, groups and a sample campaign.

Customer responsibility:

- Provide master data and documents in specified formats as requested.
- Configure remaining items as guided by Provider following included training.

Momentum Enterprise Pro for Convention Centers – Event to Order

Provider responsibility:

- Create the Event - Configure the Event window with event statuses and up to four (4) master tables, five (5) user fields and appropriate field set rules.
- Configure up to one (1) Activity Checklist on the event level.
- Create the Function Schedule - Configure Function window with function statuses, usages and appropriate field set rules. Define the relevant function usage process.
- Manage Booking Orders - Configure booking statuses, standard views with up to three (3) calendars, and load notices with up to two (2) note classes for two (2) years.
- Manage Service Orders - Configure order statuses, order window, and up to five (5) user fields.
- Manage Contracts - Configure up to one (1) template document using standard product functionality. Scope does not include custom development such as EZWriter.

Customer responsibility:

- Provide proposal and contract documents, and other master data and documents in specified formats as requested.
- Configure remaining items as guided by Provider following included training.

Momentum Enterprise Pro for Convention Centers – Operations To Delivery

Provider responsibility:

- Enrich Function Schedule - Configure up to three (3) different views of the function schedule and adapt it for various departments.
- Create Internal Service Orders - Configure up to 20 internal resources and items to accommodate non-chargeable services.
- Review Resources/Inventory Requirements - Configure resource requirement review windows and associated process.
- Review & Issue Work Orders - Configure Work Order and Work Order Items windows for up to five (5) departments.
- Complete Work Orders - Configure and review work order closing process.
- Review Actuals - Configure and review the work order actuals update process.
- Close Service Orders - Configure the service order close statuses and associated processes.
- Mobile Work Orders - Configure the base application and associated processes.

Customer responsibility:

- Create additional views and configurations as guided by the Provider following included training.

Momentum Enterprise Pro for Convention Centers – Invoice To Cash

Provider responsibility:

- Invoice Events OR Invoice Payment Plans - Configure up to three (3) payment plans and the credit note process.
- Manage Deposits & Transactions - Configure Accounts Receivables transactions.
- Payment Portal - Configure up to one (1) online Payment Portal with a basic web theme.

Customer responsibility:

- Provide master data and documents in specified formats as requested.
- Configure remaining items as guided by Provider following included training.

Momentum Enterprise Pro for Convention Centers – Inventory To Event

Provider responsibility:

- Manage Stock & Non-Stock Items - Configure inventory items window.
- Receive Inventory - Configure the stock receive process for inventory items.

Customer responsibility:

- Provide master data and documents in specified formats as requested.

Momentum Enterprise Pro for Convention Centers – Record To Report

Provider responsibility:

- Sales Goals - Configure goal types to support Customer creation of KPIs.
- Configure a GL Export to suit import in to the Customer's existing 3rd party financial system.
- Budgeting - Configure budget codes and up to one (1) entity or event budget.
- Budget Import - Configure the budget import format.
- On-Screen Reporting - Configure main windows views based on the customer reporting requirements: up to 18 views.
- Dashboard Reporting – Configure up to five (5) standard dashboards, with up to six (6) gadgets each.

Customer responsibility:

- Provide master data and documents in specified formats as requested.
- Configure remaining items as guided by Provider following included training.

Momentum Enterprise Pro for Convention Centers – Single Sign On (Back Office)

Provider responsibility:

- Install certificates on Provider web servers.
- Configure Test environment for SSO use.

Customer responsibility:

- Complete SSO Questionnaire.
- Customer must nominate Test users.
- Customer must ensure latest versions of the Provider Enterprise Outlook, Office & Web Add-In are installed on end users Customer machines.

Training

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Provider responsibility:

- Develop training plan.
- Up to 10 hours of remote Application Administrator Training; sessions will be recorded. A portion of the Administrator Training will be conducted during the Build phase of the project to support the Customer in the configuration tasks they will be assisting with.
- Up to nine (9) hours of remote Key User Training; sessions will be recorded.
- Training is scheduled to be completed in no more than three (3) weeks.

Customer responsibility:

- Ensure appropriate users are selected and attend all training sessions.
- All users will be expected to complete the designed curriculum in the Provider's Learning Center.

Testing

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Provider responsibility:

- Up to one (1) 60-minute remote meeting to introduce an example test plan and the process to raise issues.
- Up to four (4) 30-minute remote meetings to review and resolve any issues, with follow up.
- Provider will maintain an issue log to track status and progress of issues raised.

Customer responsibility:

- Customer is responsible for preparing for and executing user testing, including creation of test plans, test cases, and test scripts.
- Ensure key resources attend all testing meetings.
- Raise any issues found (that are within scope) via the issue log.
- The testing phase will be no more than three (3) weeks in duration.

Launch & Post Launch

Provider responsibility:

- Up to two (2) 30-minute remote post launch support review meetings.
- Internal handover.
- Project closure.
- Post Launch activities will be completed in no more than two (2) weeks.

Customer responsibility:

- Ensure key resources attend all post launch support review meetings.
- Raise any issues found (that are within scope) via the issue log.
- Complete customer satisfaction survey.

Project Management

Provider responsibility:

- Weekly 30-minute project review meeting with follow up to commence after kick off meeting and for duration of the project.
- Creation and maintenance of project plan.
- Weekly project status report to be sent out detailing progress, budget review, issues, risks, and next steps.
- Coordination of resources, activities, meetings in alignment with timelines and milestones.
- Ownership of issues log and delegation of tasks.

Customer responsibility:

- Nominated project lead.
- Ensure key resources attend all weekly project review meetings to provide updates.
- Coordination of activity and resources on customer side to align to project plan and schedule.

Exclusions

- Payment gateway or credit card processing
- Momentum Payments Platform – In-House Processing
- Momentum Payments Platform – Third Party Gateway
- Multi-currency
- Data Import
- Data Migration
- Custom development, including crystal reports, EZWriter, and custom APIs
- Integration services, including amending existing custom integrations (CRM, POS, Finance, etc.)
- IdP initiated SSO
- SSO to other Provider software, or extensions to facilitate public login

Project Schedule

The estimated timeline for this project is 18 weeks. However, Provider and Customer will create and agree to a joint project plan. The plan is an estimate and may change.