

Customer Payment Portal	
Description	Provider will deliver professional services assistance through use of our Payment Portal feature.
Assumptions	Customer has implemented Enterprise account receivables module. Invoicing and back-officing payments are already managed by Customer will use payment portal with default currency setup. Customer has payment gateway already deployed in a Provider environment.
Kick Off	Provider responsibility: Internal handover and preparation Customer responsibility: Ensure key project resources and stakeholders 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	Provider responsibility: A 1 hour remote review session with Customer to check ordering, invoicing and payment existing procedures Customer responsibility: Ensure key resources attend discovery session Provide business case of payment portal use
Design	Not applicable
Build	Provider responsibility: Payment portal site allowing order, invoice / payment plan step invoice online payment (x1) Online actions setup Access management One back office online payment view / dashboard gadget Standard Account and Contact Import provided in the Account/Contact Import Template done in the Test environment
Training	Provider responsibility: A 1 hour of remote training session with application administrator and key users; session will be recorded Customer responsibility: Ensure appropriate users are selected and attend all training sessions All users will be expected to complete the appropriate curriculum in the Provider's Learning Center
Testing	Provider responsibility: Provider will perform unit configuration testing. Up to 1 hour of remote testing support with key users / light adjustments and fine tuning 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 The testing phase will be no more than 3 days in duration
Launch & Post Launch	Not applicable
Project Management	Provider responsibility: Project closure
Exclusions	Custom reporting is excluded Amendments to existing custom integrations (CRM, POS, Finance, Existing payment gateways, etc.) are not included Multi-currency management excluded
Estimated length of project: 2 weeks	
Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.	