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UNGERBOECK

VENUES ENTERPRISE BASE ONBOARDING

Ungerboeck’s standard approach to onboarding is a shared effort. Members of the Client’s team will be expected to configure elements of the database, perform data entry work, and test processes throughout the onboarding. This work will follow training from the Consulting Services team. For this onboarding, we would expect the customer resources to spend approximately 50 hours over the course of the project. Should the Client not be able to dedicate the time and/or resources needed at any time throughout the onboarding, budgets and project timelines will be impacted.

Ungerboeck will work with ‘the client’s’ team to complete the base onboarding, configuration, and user training. The user training portion of this project will include both virtual instructor-led courses and on-demand courses from the Ungerboeck Learning Centre (which is included in the client’s Customer Success Plan subscription). All instructor-led training will be recorded.

Onboarding and User Training

- CRM - Account and Contact Management with Relationships
- Event Opportunities
- Bookings + Calendars
- Event Details
- Function Management
- Service Orders
- Work Order Management
- Contract – Word-merge template (2)
- Ungerboeck Dashboards + Views

EXHIBITION ENTERPRISE BASE ONBOARDING

Ungerboeck’s standard approach to onboarding is a shared effort. Members of the Client’s team will be expected to configure elements of the database, perform data entry work, and test processes throughout the onboarding. This work will follow training from the Consulting Services team. For this onboarding, we would expect the customer resources to spend approximately 60 hours over the course of the project. Should the Client not be able to dedicate the time and/or resources needed at any time throughout the onboarding, budgets and project timelines will be impacted.

Ungerboeck will work with 'the client's' team to complete the base onboarding, configuration, and user training. The user training portion of this project will include both virtual instructor-led courses and on-demand courses from the Ungerboeck Learning Centre (which is included in the client's Customer Success Plan subscription). All instructor-led training will be recorded.

Onboarding and User Training

- CRM - Account and Contact Management with Relationships
- Exhibitor Sales and Opportunities
- Event Details
- Function Management
- Exhibitor Service Orders
- Exhibitor Contract – Word-merge template
- Exhibitor Invoicing
- Basic Ungerboeck Dashboards + Views

FAIRS – SHOWGROUNDS ENTERPRISE BASE ONBOARDING

Ungerboeck's standard approach to onboarding is a shared effort. Members of the Client's team will be expected to configure elements of the database, perform data entry work, and test processes throughout the onboarding. This work will follow training from the Consulting Services team. For this onboarding, we would expect the customer resources to spend approximately 50 hours over the course of the project. Should the Client not be able to dedicate the time and/or resources needed at any time throughout the onboarding, budgets and project timelines will be impacted.

Ungerboeck will work with 'the client's' team to complete the base onboarding, configuration, and user training. The user training portion of this project will include both virtual instructor-led courses and on-demand courses from the Ungerboeck Learning Centre (which is included in the client's Customer Success Plan subscription). All instructor-led training will be recorded.

Onboarding and User Training

- CRM – Account and Contact Management with Relationships
- Email Communications with Templates
- Event Opportunities
- Bookings + Calendars
- Event Details
- Function Management
- Service Orders
- Work Order Management
- Ungerboeck Revenue Accounting
 - Invoicing and Payments
 - Accounts Receivables & Collections
- Contracts (2) – Word-merge template

ROOM DIAGRAMMING - STANDARD

Ungerboeck will provide consulting services to assist with set-up of Room Diagramming including:

- Planning session
- Setup and configuration

- All relevant spaces have appropriate DWG files imported (building lines)
- Configure base level space diagrams.
- Diagram item configuration includes selection from Ungerboeck defined shapes.
- User Training
 - Diagram items (non-defined Ungerboeck shapes) creation
 - Creating new room diagrams at the event level
 - Modifying room diagrams
 - Sharing room diagrams
 - Space imports
 - Layout/Template creation - (theatre, classroom, banquet, etc.)
 - Generic room diagram export and generic report prompts.
- Online Training (10 courses) included in Success Plan

Assumption(s):

- Up to 15 base level space diagrams included. Additional ones can be configured with the training provided
- Ungerboeck defined shapes includes selective diagram items. Additional ones can be added by the client with the provided training.
- Client will manage all item and layout configuration/creation.
- Client has ALL appropriate DWG files (spaces and diagram items) ready to send to Ungerboeck.
 - The onboarding will not commence until all files have been received.
- Client is prepared with detailed inventory list that includes measurements and combinations.

ROOM DIAGRAMMING - PREMIUM

Ungerboeck will provide consulting services to assist with set-up of Room Diagramming including:

- Planning session
- Setup and configuration
 - All relevant spaces have appropriate DWG files imported (building lines)
 - Configure base level space diagrams
 - Diagram item configuration includes selection from Ungerboeck defined shapes
- User Training
 - Diagram items (non-defined Ungerboeck shapes) creation and resource mapping
 - Creating new room diagrams at the event level
 - Modifying room diagrams
 - Sharing room diagrams
 - Space imports
 - Layout/Template creation - (theatre, classroom, banquet, etc.)
 - Orders – creation, validation, order to inventory check
 - Generic room diagram export and generic report prompts

Assumption(s):

- Up to 15 base level space diagrams included. Additional ones can be configured with the training provided.
- Ungerboeck defined shapes includes selective diagram items. Additional ones can be added by the client with the provided training
- Client will manage all item and layout configuration/creation.
- Client has ALL appropriate DWG files (spaces and diagram items) ready to send to Ungerboeck.
 - The onboarding will not commence until all files have been received.
- Client is prepared with detailed inventory list that includes measurements and combinations.
- Client will be utilizing Ungerboeck Basic Inventory to track physical item counts

REPORT BUILDER + CRYSTAL LICENSE + DASHBOARD VIEWER

Ungerboeck will provide consulting services to assist with set-up of the Ungerboeck Dashboards including:

- Planning session
- Dashboard Onboarding Setup to include:
 - Edit/Manage Dashboard
 - Dashboard Layout
 - Access Type
 - Gadget Types
 - Report Building
 - Configuration Testing
 - User Training

Assumption(s):

- A single dashboard builds with up to 6 gadgets is included in the scope. Additional dashboards and gadgets can be configured and built by the client based on the training included.

ONLINE EVENT ORDERING / CAMPUS CATERING

Ungerboeck will provide consulting services to assist with set-up of Online Event Ordering including the following:

- Resources (real-time inventory, item notes, item images, display/order options, etc.)
- Packages
- Price List and Order Forms (upsells, volume pricing, etc.)
- OEO site configuration (navigation, content builder, text/instructions)
- Additional application configuration – user defined fields (UDFs), terms and conditions, payment & confirmation options

- Web theme (includes color/styling configuration and addition of client logo - no custom-built or embedded elements)
- Configuration testing
- Public-facing and back-office processes
- Basic onscreen reporting
- Site maintenance training

Assumption(s):

- Client has a high-level plan for what they want to sell online and has pricing and packages for items
- Client has appropriate pictures or photos of most items

ONLINE SPACE BOOKING – RESERVATIONS & ORDERING

Ungerboeck will provide consulting services to assist with set-up for Online Space Booking including:

- Planning session
- Licensing update and site configuration
- Add dictionaries, space types, features, and set-ups
- Add event categories, job booking status
- Resource, packages and price list configurations
- Space configurations and images
- Order processing component configuration including navigation, text/instructions
- Payment Processing – standard gateway
- Payment configuration
- Site build and site configuration
- Basic web theme (custom or enhanced web theme is not included)
- Configuration and confirmation of email templates
- Testing and one round of revisions to OSB (not back-office) configuration
- Basic reporting views
- Admin training and end user training for site and back-office OSB -related processes and views

ONLINE SPACE BOOKING – RESERVATIONS ONLY

Ungerboeck will provide consulting services to assist with set-up for Online Space Booking including:

- Planning session
- Licensing update and site configuration
- Add dictionaries, space types, features, and set-ups
- Add event categories, booking status
- Resource and package configurations
- Space configurations and images
- Site build and site configuration
- Basic web theme (custom or enhanced web theme is not included)
- Configuration and confirmation of email templates
- Testing and one round of revisions to OSB (not back-office) configuration

- Basic reporting views
- Admin training and end user training for site and back-office OSB-related processes and views

MOBILE WORK ORDER - UTILITIES OR ROOM SET UPS ONLY

Ungerboeck will provide consulting services and training to assist with set-up Mobile Work Orders including the following:

- Client planning session and planning summary document
- Work Order management (Mobile Work Order) base configuration
- Access management modifications, user updates and theme updates
- Document categories and note classes master table updates
- Configuration updates and changes resulting from, MWO addition including work order and work order item views, additional departments and related resource updates, (report updates not included).
- Configuration and business process testing
- Training on public-facing and back-office processes

Assumption(s):

- Any new data entry required - resource types, resources, departments, order forms, and price list updates will be completed by the client.

EXHIBITOR SERVICE CENTER – STANDARD

Ungerboeck will provide consulting services to assist with set-up of the standard public-facing exhibitor services centre including the following:

- Resources (real-time inventory, item placement, item notes, item images, display/order options, related resources, etc.)
- Packages
- Price Lists and Order Forms (upsells, volume pricing, etc.)
- ESC site configuration (navigation, page/form layout, text/instructions, links, references, T&Cs, custom user fields, booth placement, payment options)
- Web skin (includes colour/styling configuration and addition of client logo - no custom-built or embedded elements)
- Configuration testing
- Public-facing and back-office processes
- Basic onscreen reporting
- Site maintenance training

Assumption(s):

- Customer has a high-level plan for what they want to sell online and has pricing and packages for items
- Implementation of unlimited items with two site configurations

- Customer has appropriate pictures or photos of most items
- Client has a resource dedicated during setup that is a Ungerboeck power user that will maintain and be the power user on this extension
- Exhibitors and booths will be manually added to each event by the client, or directly by the Exhibitors through ESC.

EXHIBITOR SERVICE CENTER – PREMIUM

Ungerboeck will provide consulting services to assist with set-up of the premium public-facing exhibitor services centre including the following:

- Resources (real-time inventory, item placement, item notes, item images, display/order options, related resources, etc.)
- Packages
- Price Lists and Order Forms (upsells, volume pricing, etc.)
- ESC site configuration(s) (navigation, page/form layout, text/instructions, links, references, T&Cs, custom user fields, booth placement, payment options)
- Web skin (includes colour/styling configuration and addition of client logo - no custom-built or embedded elements)
- Configuration testing
- Public-facing and back-office processes
- Basic onscreen reporting
- Site maintenance training
- Event-level overrides

Assumption(s):

- Customer has a high-level plan for what they want to sell online and has pricing and packages for items
- Implementation of unlimited items with a minimum of two site configurations
- Customer has appropriate pictures or photos of most items
- Client has a resource dedicated during setup that is a Ungerboeck power user that will maintain and be the power user on this extension
- Exhibitors and booths will be manually added to each event by the client, or directly by the Exhibitors through ESC.

EVENT PORTAL - STANDARD

Ungerboeck will provide consulting services to assist with set-up of Event Portal including the following:

- Client planning session and planning summary
- Event Planner Portal base configuration
- Event level portal setup for documents and user configuration
- Layout & access management modifications
- Event Categories
- Event tasks & task sets

- Template documents
- Configuration updates and changes resulting from Event Portal addition (e.g. checklists, email distributions, view updates, dashboards, custom fields)
- Basic web themes (excludes custom-built or embedded elements)
- Configuration testing and process validation
- Training on public-facing and back-office process

EVENT PORTAL - PREMIUM

Ungerboeck will provide consulting services to assist with set-up of Event Portal including the following:

- Client planning session and planning summary
- Event Planner Portal base configuration
- Event level portal setup for documents and user configuration
- Layout & access management modifications
- Event Categories
- Event tasks & task sets
- Template documents
- Configuration updates and changes resulting from Event Portal addition (e.g. checklists, email distributions, view updates, dashboards, custom fields)
- Basic web themes (excludes custom-built or embedded elements)
- Configuration testing and process validation
- Training on public-facing and back-office process

SUITE MANAGEMENT

Ungerboeck will provide consulting services to assist with set-up Suite Management including:

- Planning session
- Resources (real-time inventory, item placement, item notes, custom user fields, item images, display/order options, related resources, etc.)
- Price List and Order Forms (upsells, volume pricing, etc.)
- Suite Management setup and configuration to include:
 - Suite inventory configuration (venues, levels, suites, suite ownership, event suites)
 - Suite site configuration (navigation, page/form layout, text/instructions, links, references, T&Cs, custom user fields, booth placement, payment options)
 - Task creation
 - Basic web skin with banner and/or footer images, font selection, and colour schemes (custom or enhanced web skin is not included)
 - Basic views and dashboard configuration
 - Suite management dictionary
 - Account management configuration
 - Suite function list

- Supporting master table configuration and updates (statuses, validation tables, opportunity types, note classes, etc.)
- Invitation application configuration (account management/content builder, allergies, basic web theme – customization not included)
- Configuration and testing, customization not included
- Public-facing and back-office process training
- Site maintenance training

OPERATIONS TASKS

- Planning session
- Setup and configuration
 - Event Tasks Sets
 - Operations Task Configuration
 - Operations Portal Configuration
 - Site Configuration – Dev. Ops
 - Create Personnel Accounts
 - Change Dictionary Phrases - Optional
- Basic view creation with tasks (main menu and event) – new, in-progress, completed
- Admin training
 - Sets and Configurations
 - Task Creation – event level

REGISTRATION CHECK-IN KIOSK APP (ADMIN & ATTENDEE MODES)

Ungerboeck will provide consulting services to assist with set-up of Registration Check-in, plus Function Check-in including:

- Planning session and planning summary document
- Setup and configuration
 - Administrators assigned for accurate tracking
 - Desktop mode enabled for easy searching by one or all the following:
 - Email address
 - Confirmation code (order number)
 - Company name
 - First and last name
 - Barcode scanning enabled, if applicable
 - Self-service (attendee) options enabled – allow attendee to check-in w/o having to print, view, check-in, and print badges for related attendees
 - Event selector will be added for specific events or events that meet a criteria of status range, category, class, type, or date range
 - Basic web skin with banner and/or footer images, font selection, and colour schemes (custom or enhanced web skin is not included)
 - RCI dictionary configuration
 - Function check-in enabled (if included)

- Option to allow registrants to check-in to any function
- Basic view and dashboard configuration
- Admin training

Assumption(s):

Includes a single RCI configuration. Additional configurations can be configured by client with provided training.

REGISTRATION CHECK-IN MOBILE APP

Ungerboeck will provide consulting services to assist with set-up of Registration Check-in, plus Function Check-in including:

- Planning session and planning summary document
- Setup and configuration
 - Administrators assigned for accurate tracking
 - Desktop mode enabled for easy searching by one or all the following:
 - Email address
 - Confirmation code (order number)
 - Company name
 - First and last name
 - Barcode scanning enabled, if applicable
 - Self-service (attendee) options enabled – allow attendee to check-in w/o having to print, view, check-in, and print badges for related attendees
 - Event selector will be added for specific events or events that meet a criteria of status range, category, class, type, or date range
 - Basic web skin with banner and/or footer images, font selection, and colour schemes (custom or enhanced web skin is not included)
 - RCI dictionary configuration
 - Function check-in enabled (if included)
 - Option to allow registrants to check-in to any function
- Basic view and dashboard configuration
- Admin training
- B2B app download support and training (if applicable and using the mobile app)

Assumption(s):

Includes a single RCI configuration. Additional configurations can be configured by client with provided training.

EXHIBITOR FLOOR PLAN - STANDARD

Ungerboeck will provide consulting services to assist with set-up of Exhibitor Floor Plan including:

- Planning session
- Collect DWG files for each floor plan needed (up to 3 floorplans)
 - Ungerboeck will enhance and convert it for Exhibition Floor Plan
 - Consultant to coordinate enhancements (symbols, markings, background)
- Import floor plan(s)

- Setup roles for users, configuring what users can do in the Exhibition Floor Plan
- Setup booth statuses and automated workflows for reporting
- Setup highlight schemes
- Setup pavilions and/or sections
- Training on floor plan design and selling booths

Assumption(s):

- One event implementation and three floorplans are included. Client will provide floorplans as DWG files at the beginning of the project. Additional events and floorplans can be created by Client with provided training

EXHIBITOR FLOOR PLAN - PREMIUM

Ungerboeck will provide consulting services to assist with set-up of Exhibitor Floor Plan including:

- Planning session
- Collect DWG files for each floor plan needed (up to 3 floorplans)
 - Ungerboeck will enhance and convert it for Exhibition Floor Plan
 - Consultant to coordinate enhancements (symbols, markings, background)
- Import floor plan(s)
- Setup roles for users, configuring what users can do in the Exhibition Floor Plan
- Setup real-time multi-user updates (Premium edition only)
- Setup booth statuses and automated workflows for reporting
- Setup highlight schemes
- Setup pavilions and/or sections
- Training on floor plan design and selling booths
- Setup Show Map (if included) based on all the various groups who need a floor plan or exhibitor list

Assumption(s):

- One event implementation and three floorplans are included. Client will provide floorplans as DWG files at the beginning of the project. Additional events and floorplans can be created by Client with provided training

EXHIBITOR PORTAL - STANDARD

Ungerboeck will provide consulting services to assist with set-up of Exhibitor Portal including:

- Exhibitor Portal setup and configuration to include:
 - Task creation
 - Sign-in configuration
 - Account management configuration
 - Payment Portal configuration
 - External links

- Basic web skin with banner and/or footer images, font selection, and color schemes (custom or enhanced web skin is not included)
- Exhibitor Portal dictionary
- One round of revisions to Exhibitor Portal set-up based on client feedback
- Public-facing and back-office process training

EXHIBITOR PORTAL - PREMIUM

Ungerboeck will provide consulting services to assist with set-up of Exhibitor Portal including:

- Exhibitor Portal setup and configuration to include:
 - Task creation
 - Sign-in configuration
 - Account management configuration
 - Payment Portal configuration
 - External links
 - Basic web skin with banner and/or footer images, font selection, and color schemes (custom or enhanced web skin is not included)
 - Exhibitor Portal dictionary
- Resource, Packages and Price List configuration
- Configuration testing and process validation
- One round of revisions to Exhibitor Portal set-up based on client feedback
- Training will include exhibitor floor plan management
- Public-facing and back-office process training

THE HUB

Momentum will be delivering the Hub as a client-specific portal. The standard functionality of the Hub will remain unchanged, except for minor adjustments to reflect the client's CI, such as the logo and color scheme. This customized portal will give our clients a read-only view of the data within Ungerboeck.

Features

- Sign-in with Personal Account
- Main Screen / Overview
 - Limited to Events Data
 - Upcoming Events
 - Events Calendar View
 - Event Search
- Event Details
 - Details:
 - Move-In / Our Date
 - Event Start / End Date
 - Status
 - Account Name
 - Type
 - Class
 - Category
 - Anchor Venue

- Ordered Attendance
- Lists Overview:
 - Function
 - Notes
 - Services
 - Document
 - Contacts
 - We will validate and provide an estimated cost for any requests to modify the fields or functionality.

ONLINE BOOTH STAFF REGISTRATION

Ungerboeck will provide consulting services to set up online Exhibitor Booth Staff Registration including:

Onboarding & User Training

- Rule Application Specifics
 - Booth Sizes
 - Exhibitor Registrant Type(s)
 - Quantities
 - Pricing
- Email Template with Registration URL

AUDIT-READY GENERAL LEDGER EXPORT

Ungerboeck will provide consulting services to assist with setup of Audit-Ready General Ledger Export including:

- Setup and define Journal Entries for Event Revenues and Expenses
- User-Friendly export formatting configuration
- Configure GL export on-demand
- Audit export of journal entries

BASIC INVENTORY

Ungerboeck will provide consulting services to assist with setup of Basic Inventory including:

- Configuration of inventory items
- Training on basic inventory management:
 - Ability to assign balances to inventory items
 - Ability to perform resource checks against inventory as orders are created.

DIGITAL SIGNAGE DATA FEED

Ungerboeck will provide technical services to assist with set-up of Digital Signage Feed including the following:

- Technical solution deployment in Customer's Ungerboeck Cloud environments
- Training session to cover the following data and endpoints included in the standard data feed:
- Ungerboeck to provide technical assistance as needed (up to 8 hours) on hitting endpoints, parsing data, etc.

Assumption(s):

- Any additional Ungerboeck data required by Customer to be included in feed, but not listed below, may require a change order and additional budget.

SINGLE SIGN-ON AUTHENTICATION - BACK-OFFICE

- Certificates will be installed on Ungerboeck's web servers
- Test environment will be configured to use SSO
- Chosen test users will test logging into Ungerboeck with SSO
- Test users will verify they are able to use ancillary Ungerboeck programs with their SSO logons (Outlook Add-in, Office Add-in, Web Add-in). The latest hotfix and/or new add-ins may need to be installed in order to use add-ins with SSO
- Production configuration scheduled
- Production users will be switched to SSO
- Ungerboeck Support will help with any last-minute issues

Assumption(s):

- Customer will set up two IdP configurations, one for Production and one for Test, in order to ensure a seamless transition for users between the two environments. Additional details and instructions around this will be provided once the project begins.
- Customer is using one of the following supported Identity Providers (IdP) that have been vetted with Ungerboeck Software
 - Azure AD – Gallery Application in Azure AD
 - Okta
 - OneLogin – Catalog/Directory Application in Onelogin
 - JumpCloud
 - ForgeRock
 - Shibboleth
 - F5
- IDP initiated SSO is OUT OF SCOPE

SINGLE SIGN-ON AUTHENTICATION - PUBLIC FACING

Ungerboeck will provide technical services to assist with set-up of setup of SAML 2.0 SSO with an Ungerboeck Public Facing Extension (Registration, Online Space Request, Exhibitor Service Center, Exhibitor Portal, etc.) including the following:

- Ungerboeck to send questionnaire to Customer to gather necessary IDP information
- Ungerboeck delivers custom development based on IDP information provided by Customer
- Technical working sessions between Ungerboeck and Customer to configure and test the following:
 - Ungerboeck to provide a custom URL to the SSO, which will include instructions on how to properly form the URL to redirect users to the correct Ungerboeck public facing extension.
 - When navigating to a correctly formed URL, a user will be redirected to Customer's Identity Provider (IDP). The SSO must properly be registered with the provider.
 - On successful logon to Customer's provider, the user will be returned to the location specified by the IDP configuration. This must be the correct URL for the Ungerboeck SSO.
 - The Ungerboeck SSO will process the user's information as provided by the IDP. The user will then be redirected to correct application, fully logged in.

Assumption(s):

- Includes SSO integration with one (1) Ungerboeck Public Facing Extension. Additional Ungerboeck Public Facing Extensions will require additional budget.
- Includes SSO authentication to sign in a user, it does not include the ability to sign out a user from SSO identity provider. It is recommended to add an idle timeout setting on the IdP if sign out is required.
- User sign in using SSO is required at the beginning of the public application. Ungerboeck standard logon process has the option to set at the beginning of the public application or before payment page. With SSO, only at the beginning is supported.

ELECTRONIC SIGNATURES / DOCUSIGN

Ungerboeck will provide consulting services and training to assist with set-up of the Electronic Signatures integration includes the following:

- DocuSign account settings, users, and brands
- Sandbox DocuSign configuration
- Ungerboeck access management adjustments
- Necessary updates to user themes & layouts
- Electronic Signatures configuration
- Electronic Signature profiles
- Sending and managing Word Merge Documents

Assumption(s):

- Client is actively using Crystal Reports and has a Crystal license
- Client is currently using document templates

VENUEOPS

1:1 IMPLEMENTATION

Momentum Technologies' standard approach to onboarding is a shared effort. The Client's team will be expected to configure elements of the software, perform data entry work, and test workflows throughout the onboarding. This work coincides with training from the Consulting Services team. Over the course of onboarding, the Client should expect to spend **approximately 50 hours** on the project for best results. If the Client is not able to dedicate the time needed at any point throughout the onboarding, project timelines and the scope of work will be impacted.

Momentum Technologies will work with the Client to complete base onboarding, configuration, and Client team training. The training portion of this project will include recorded videos and practice that the Client team must complete before attending live virtual Consultant-led trainings each week for 90 minutes.

Onboarding projects last 20 weeks, not including data conversions, integrations, or other technical work streams.

1:1 Onboarding and User Training:

- Discovery Call
- System Admin
- Inventory & Pricing
- Booking Events and Calendar Configuration
- Event Management (Event Scheduling and Detailing)
- Sales Workflow and Event Execution
- Post-Event Reports
- Financials I and II
- Task Management
- Intro to Insights
- Account Fine Tuning (System Maximization)
- View Only User Training + Additional User Trainings
- Account Review and Final Call

Inclusions:

- Access to all standard document templates, reports, and dashboards within our libraries
- Standard document template review session
- Standard report and dashboard review session
- Unlimited access to VenueOps Knowledge Base
- All Consultant-led training recordings will be shared for future reference and new hire training
- Hypercare via standing meetings and email support during implementation phase through final sign-off

Exclusions:

- Data conversion
- Process documentation (outside of standard offerings)
- Custom report and dashboard development

- Onsite training
- Additional product package addons
- Additional service addons

Information Required Prior to Project Start:

- Document templates that have been approved by your leadership and legal teams (Proposal, Contract, Event Orders, Invoices, etc.); document templates should be provided via Microsoft Word
- Rate sheets: inclusive of rental, venue services, equipment use, and food and beverage
- Members of Client’s project team
- Report examples
- Onboarding survey

COHORT IMPLEMENTATION

Momentum Technologies’ cohort approach to onboarding is a shared effort. The Client’s team will be expected to configure elements of the software, perform data entry work, and test workflows throughout the onboarding. This work coincides with training from the Consulting Services team. Over the course of the 10-week onboarding for a cohort, the Client should expect to spend approximately **30-40 hours for the best results**. If the Client is not able to dedicate the time needed at any point throughout the onboarding, they are expected to make up missed work within the 10-week project window.

Momentum Technologies will work with the Client to complete base onboarding, configuration, and Client team training. The training portion of this project will include two live training sessions with a Momentum trainer, and one interactive workshop with a dedicated Momentum Technologies Consultant each week. The Client is responsible for ensuring at least one venue representative is in attendance for all sessions and workshops

Cohort Training Schedule: [Professional Cohort Schedule](#)

Live Training Registration: [Training Registration Links](#)

Live training sessions are held Tuesday and Wednesday at 2PM ET. Cohort weekly workshop will be held on Fridays at 2PM ET. Days and times may be subject to change based on holiday and/or project team schedules.

Cohort Onboarding and User Training:

- VenueOps Foundations & Financial Foundations
- Inventory & Pricing
- Booking Events and Calendar Configuration
- Event Management (Event Scheduling and Detailing)
- Sales Workflow and Event Execution
- Post-Event Reports and Office Hours
- Financials I and II
- Task Management and Office Hours
- Intro to Insights
- Graduation – Final Friday Workshop Meeting and Celebration

Inclusions:

- Access to all standard document templates, reports, and dashboards within our libraries

- Standard document template review session
- Standard report and dashboard review session
- Unlimited access to VenueOps Knowledge Base
- 1:1 session to solidify workflows & template edits
- 1:1 session for document template edits
- All instructor-led training recordings will be shared for future reference and new hire training

Exclusions:

- Data conversion
- Process documentation (outside of standard offerings)
- Custom report and dashboard development
- Onsite training
- Additional product package addons
- Additional service addons

Information Required Prior to Project Start:

- Document templates that have been approved by your leadership and legal teams (Proposal, Contract, Event Orders, Invoices, etc.); document templates should be provided via Microsoft Word
- Rate sheets: inclusive of rental, venue services, equipment use, and food and beverage
- Members of Client's project team
- Report examples
- Onboarding survey

DATA CONVERSION – EB CLASSIC

Momentum Technologies will complete an import to migrate the existing EB Classic data into VenueOps. The Client team will complete advance work in EB Classic using the Event Bin to prepare the data to ensure that all events have accounts, contacts, event types, etc.

The Classic Data conversion will include the following information:

- Users
- Venues (including Rooms, Standard Rooms, Combo Rooms)
- Accounts
- Contacts
- Events
- Functions
- Resource Library
- Tasks
- Notes
- Invoices
- External Messages (will migrate as tasks)
- Documents on events

Unsupported Data includes:

- User settings and permissions
- Templates and reports

- Sales
- Custom fields
- Custom tags

The Momentus Technologies Consultant will host a 1-hour Data Conversion Discovery Call to discuss which data is currently utilized, which data will not be supported in the conversion, and what steps will be necessary post conversion to ensure unsupported data is added into VenueOps manually during onboarding. Additional conversion calls include:

- Initial Conversion to Sandbox Environment (in Week 2 or 3)
- Sandbox iterations (up to 4 additional conversions to test data, mapping, and saved state)
- Final Data Conversion to Production Environment (limit 1)

DATA CONVERSION – SPREADSHEET

Momentus Technologies will complete a spreadsheet data conversion to bring data from an existing system into VenueOps. The Client team will ensure the data is free of duplicates, has consistent formatting, spelling, and meets all conversion rules in the provided Fact Sheet. The Momentus best practice is converting five years of historical data and all future bookings/data. A 1:1 implementation is required for a Spreadsheet Data Conversion.

The spreadsheet data conversion can include the following information:

[Fact Sheet: VenueOps Spreadsheet Conversion](#)

The Momentus Technologies Consultant will host a 1-hour Data Conversion Discovery Call to discuss which data is currently utilized, which data will not be supported in the conversion, and what steps will be necessary post conversion to ensure unsupported data is added into VenueOps manually during onboarding.

The data conversion process is collaborative between Momentus Technologies and the Client team. It is recommended that a Systems Analyst who can run exports from your current system manage this process, and Client team project leads support with the verification of mapping and data that is being pulled into VenueOps. VenueOps training will begin once Client agrees that a working version of the Sandbox has been created. Additional iterations of the Sandbox may take place after training begins.

During the Data Conversion Discovery Call, a timeline of no longer than 16 weeks for the data conversion process will be agreed upon. A date and time for the final conversion will be agreed upon once training begins. The standard Spreadsheet Conversion consists of:

- Discovery call (60-minutes)
- Weekly data conversion check-in to review spreadsheet progress (30-min per week, up to 8 weeks)
- Initial conversion to Sandbox environment (in week 3 or 4)
- Sandbox iterations (up to 6 additional conversions to test spreadsheet data, mapping, and save state of work completed in system admin or inventory and pricing)
- Final data conversion to production environment (limit 1)

Inclusions:

- Conversion of any supported data according to the current fact sheet
- Weekly data conversion meeting with your Consultant
- Sandbox environment for testing and validation

Exclusions:

- Unsupported data (see fact sheet)
- Custom mapping
- Data cleansing, formatting, and deduplication

PAYMENT GATEWAY SET-UP

Enables your customers to pay VenueOps invoices online with a credit card using your existing merchant account with a supported payment gateway provider. Currently supporting Authorize.net, Stripe, and Trust Commerce.

ONLINE INQUIRY FORM

- Fully integrated with VenueOps.
- Inquiries pass from your website directly into VenueOps.
- Full Integration Details: [CLICK HERE](#)

ON-SITE TRAINING

Travel expenses not included; these will be invoiced as incurred.

DOCUSIGN INTEGRATION ONBOARDING

Ungerboeck will provide consulting services and training to assist with the DocuSign integration including:

- Activation of the connection between DocuSign and your existing VenueOps tenant.
- Guidance on how to configure and activate your DocuSign account within VenueOps.
- Training on sending documents from VenueOps to DocuSign.
- Training on best practice for Document Management in VenueOps.

Assumption(s):

- All DocuSign support and/or account updates will be managed by the client directly. Ungerboeck will NOT contact DocuSign on behalf of the client at any time throughout the onboarding.
- Updates to Document Templates are NOT included and must be sent through Client Success.

VENUEOPS ADMIN-AS-A-SERVICE

Single Venue Organization – 60 Hours

Multiple Venue Organization or Single Venue Organization – 120 Hours

Momentum Technologies will provide a Consultant to serve as the dedicated VenueOps application administrator for your organization. Managing the Client's VenueOps account will be a shared effort. A specific Client representative should be selected by the Client's organization to make and enforce system decisions. If a Power User Group for the Client does not exist, one should be established by the Client. Client will review and provide feedback on work completed by Consultant such as system adjustments, configured and customized reports, dashboards, and document templates in a timely manner.

Inclusions:

- Scheduled Check-Ins and Status Meetings
- Routine and special system administration
 - Basic system admin (re)configuration
 - User and role management, annual audit
- Feature Analysis
 - Per update, admin to review how newly released or upgraded features may be utilized by Client during scheduled check-ins
- Saved Views
 - Dedicated review of needs and establishment of unlimited saved calendar views, avails views, list views, activity log views, with specific viewer permissions
- Dashboards, Reporting, and Documents
 - Implementation of new gallery dashboards
 - Implementation of new gallery reports
 - Configuration of new documents from base library
 - Review and clean-up of any existing dashboards, reports, and documents
- Inventory & Pricing Management
 - Assistance with auditing inventory library, managing and updating price schedules, and optimizing organization
- Unlimited access to VenueOps Knowledge Base

Exclusions:

- Fully custom reports, dashboards and document templates

PRIAVA

PRIAVA IMPLEMENTATION

Suitable for up to 9 users using up to 5 modules. Using Priava guided implementation process, together we:

- Analyse - Come together to plan out the project activities, resources, timelines and needs
- Build - Configure and build the solution based on the agreed Plan
- Check - Ensure everything is working as we'd expect
- Deploy - Are ready to go, it is time to bring this project to life
- Evolve - Complete the successful implementation and continually evolve.

Deliverables:

- Data mapping sheets provided (to be populated by the client) for import.
- Creation of venue tree and user logins
- Initial consultation (population of project plan template)
- Training for up to 9 users and 5 modules
- 5 x customised reports, 1 x Invoice, 2 x Quotes, 2 x Contracts - (10 hours)

Transferable:

At the end of this Project, your core team will be fully trained in the administration of your system and empowered to support your wider team. Should there be a need for further consultation/training then additional time can be purchased as per the terms below

DATA PROTECTION OFFICER TRAINING

In-depth training sessions conducted online on your database & facilitated by a senior systems specialist:

- Overview of Priava Data Privacy Module
- Definition of terminology in Priava speak
- Explanation of Priava Data Privacy Module available rule conditions and actions
- Walkthrough setting up 2 email templates
- Walkthrough setting up 2 rules

Note: Must be system administrator. Training sessions are designed to ensure your nominated Data Protection Officer can configure your chosen settings and pass on knowledge to any future replacement. Price is for a 2hr session.