

SILVER



DISCOVERY & PROJECT MANAGEMENT

- Kickoff and discovery calls to confirm your needs
- CSM/Implementation Lead to guide onboarding project
- Weekly status update calls through onboarding

PLATFORM CONFIGURATION

- Bulk activation of up to 500 initial customers
- Setup of up to 15 users and role management
- Activation of up to 5 initial instant on integrations
- Activation of 1 initial SmartConnector
- Creation of 1 channel and up to 3 calculations
- Creation of 1 initial Dashboard/Report Studio

PROPOSAL/ORDER FORM + WORKFLOW

- Up to 6 predefined workflows
- Up to 6 predefined product forms
- 1 configured business unit and order form
- Editing required / non-required fields
- Activating/deactivating any predefined fields
- Editing required/non-required fields
- Editing help text
- Minor form update requests

TRAINING

- Two 1-hour training sessions covering how to aggregate, visualize, and distribute your data for core implementation team
- Additional Q&A training calls, if needed
- Remote 'Train the Trainer' sessions (up to 3 webinar-based trainings)
- 1 hour training on order processing

MAX HOURS INCLUDED: The entirety of this package includes up to 30 hrs. of the above included professional services. Additionally, there is a 2 hr max. of configuration and/or data transformation per Smart Connector.

GOLD



DISCOVERY & PROJECT MANAGEMENT

- Kickoff and discovery calls to confirm needs
- CSM/Implementation Lead to guide onboarding project
- Weekly status update calls through onboarding

PLATFORM CONFIGURATION

- Bulk activation of up to 2,000 initial customers
- Setup of up to 100 users and role management
- Activation of up to 20 instant-on integrations
- Activation of up to 3 SmartConnectors
- Creation of up to 5 channels, 10 calculations
- Creation of up to 3 initial dashboards and 1 Report Studio Template

PROPOSAL/ORDER FORM + WORKFLOW

- Configuration and documentation of up to 4 custom products with forms and workflows
- 2 Add'l products with Push Activations (GAM and AdWords)
- 1 configured Business Unit and Order Form

TRAINING

- Three, 1-hour training sessions covering how to aggregate, visualize, and distribute your data for core implementation team
- Additional Q&A training calls
- Remote 'Train the Trainer' sessions (up to 3 webinar-based trainings)
- 1 hour training on order processing

MAX HOURS INCLUDED: The entirety of this package includes up to 100 hrs. of the above included professional services. Additionally, there is a 2 hr maximum of configuration and/or data transformation per Smart Connector.

PLATINUM: Custom Onboarding Package



The **Platinum Tier** is a fully customized set of services designed to address the specific needs of our most complicated enterprise clients.

Combine our standard onboarding services with TapClicks' industry-leading data solutions, marketing connectors, workflow design or

enterprise platform integrations along with customized dashboards, report designs and personalized training services.

We'll work together to understand your desired ROI and develop a custom scope of services document to help reach your goals as quickly as possible.