

SureStart Implementation Program TimeLinx for Sage CRM

PROGRAM DESCRIPTION

The TimeLinx SureStart Program (SureStart) provides a methodology and a fixed set of deliverables to install, configure, train and, ultimately, successfully implement TimeLinx for Sage CRM (SCRM). Services relating to other modules, add-ons, and integrations for TimeLinx for Sage CRM are not included in this program's scope unless otherwise indicated.

SureStart is performed in collaboration with the Client's Project Team and one individual who will be your TimeLinx System Administrator. During the execution of SureStart the Client's TimeLinx Administrator will work with TimeLinx Consultants to become trained in the configuration of TimeLinx (both initial and ongoing) and to understand the IT requirements/impact of TimeLinx. The Project Team will be trained in the use of TimeLinx and will work with TimeLinx Consultants to communicate the Client's requirements. Your Administrator should be very familiar with techniques and tools used to administer SCRM. For example, use of the Administration modules, installing components, modifying selection lists and configuring SCRM users. Programming knowledge is not necessary.

A Development/Test environment, which is a copy of your Production environment or an environment configured exactly to mimic it, is required for the duration of SureStart. 24/7 remote access to the backend of your Development environment is also required for the duration of SureStart. Once the Client has completed testing in their Development environment, TimeLinx will migrate the current installation and configuration of the Development environment to the Client's Production SCRM environment.

Unless agreed otherwise in writing, SureStart benefits expire after 90 days after which all further services become billable.

PROGRAM GOALS

- Deliver a comprehensive set of services to ensure a successful deployment.
- Provide a structured methodology to deploy TimeLinx correctly.
- Train your Administrator to become self-sufficient.
- Enable you to use the system's capabilities to best meet your ROI objectives.
- Control costs with a fixed set of comprehensive services.

BENEFITS TO YOU

- Learn best practices from experienced consultants to help your business perform efficiently.
- Gain efficiency by configuring TimeLinx correctly the first time. ("Measure twice, cut once").
- Save staff time by collaborating on deployment and training.
- Keep your IT team focused on your core business.

PROJECT PHASES

Included Services

- Project Management Services as identified in a TimeLinx Master Services Agreement.
- Conduct up to four 2-hour Project Meetings for ongoing review of requirements, implementation status, next actions, issue resolution.
- Access to TimeLinx help desk and Customer Portal for the duration of SureStart, regardless of annual ticket limits provided by a TimeLinx Software Assurance (“SA”) plan.
- Services to provide standard TimeLinx upgrades (not including customizations) during the duration of SureStart while current with SA plan.

Phase 1 – Initiate

- Overview demo of TimeLinx to your project team and management representatives.
- Project Kickoff meeting to ensure that Client and TimeLinx have a clear understanding of project goals, expectations and timelines.
- Creation of a project plan tailored to specific deployment requirements and manage the project through to completion.

Phase 2 – Analyze and Design

- The TimeLinx project team uses Project Meetings, client-provided materials and self-assessment surveys (to be completed by the Client) to develop detailed insight into the business needs of the Client’s organization.
- Perform a high level gap analysis.
- Identify business requirements and use case scenarios to create an initial system configuration plan with your Administrator.
- Identify security requirements and create initial TimeLinx security configuration plan with your Administrator

Phase 3 – Install and Configure

- Conduct a review of the Client’s development environment.
- Install the TimeLinx software into a development environment (to be provided by the Client) for configuration, testing and a la carte development.
- TimeLinx will identify and merge up to 10 pre-existing Client customizations to SCRM (customizations as they exist at the time of installation to the development environment) which conflict with TimeLinx. This may involve merging TimeLinx features with the Client’s customizations in SCRM (primarily in Cases, Communications and Documents).
- Train your Administrator on TimeLinx configuration settings.
- Collaborate with your Administrator on initial configuration of System Settings and up to 4 TimeLinx Users or User Templates for your Administrator to complete any others.
- Implement business and security configurations from Phase 2 for up to 4 Users or User Templates.
- Identify and code a client-defined Project and Retainer numbering routine.
- Application and activation of all licensed product keys.

Phase 4 – Train and Validate

- After Configuration is complete, provide product usage Training (up to 4 hours) to your TimeLinx Administrator. End user training is not included in SureStart.
- Ongoing Project Meetings, Project Management, Customer Support and Training provide the Client with the resources necessary to successfully test and validate the implemented solution.

Phase 5 – Deploy and Operate

- Conduct a final review of the Client's Production environment technology.
- Migration of the approved Development TimeLinx system to the Client's Production environment prior to Go-Live.
- 30 days of priority technical phone support is provided post Go-Live. Support priority is ensured regardless of SA plan level.

A LA CARTE SERVICES (may be ordered separately)

- Strategic Consulting
- Business Process Review
- Document Preparation
- Specification Development
- Workflow Mapping
- Custom Programming
- Custom Integrations
- Data Conversions/Migrations
- SCRM Services, Product Support or Development
- Report Development
- Dashboard Development
- Alert Development
- Workflow Development
- User Training
- Documentation
- Installation/Setup/Configuration of TimeLinx add-on modules or integrations. If ordered, these will be quoted separately.
- Resolution of issues in the Client's IT environment which affect the implementation or usage of TimeLinx.
- Upgrades or installation of any prerequisite technologies
- Data entry
- Services required to solve product compatibility issues
- Services provided outside of normal business hours
- Out-of-pocket costs and travel time



PREREQUISITES

For some implementations, SureStart may require a technical pre-assessment, at additional charge, of the current system, customizations, and other pertinent information before services can begin. Depending on the assessment outcome, additional services may need to be quoted for corrective actions.