IMPLEMENTATION CHECKLIST

New Client Implementation Checklist

Please print the applicable pages and use them to track your implementation progress. Consider noting in the top right corner of each section the date and time of contact for each aspect of your implementation.

NOTE: Not everything in this document may apply to you. Please refer to Exhibit A of your executed contract for the services and products that your organization purchased. Additional services may be added at any time; please contact your Agile Sales Representative for quotes.

APRIL 1, 2015

AGILE TICKETING SOLUTIONS
4124 Central Pike | Hermitage, TN 37076

Welcome – *(Page 2, Welcome Packet)*	**Date Complete**
1 to 3 Business days from receipt of contract	
Welcome Familiarize yourself with the overall Implementation process	☐______________________
Initial contact with Product Expert and Client Support Rep. First meeting with your PE and CSR to go over the welcome packet, checklists and set tentative dates for different phases.	☐______________________

Hardware Checklist – *(Page 7, Welcome Packet)*	**Date Complete**
1 to 15 business days	
Assessment meeting with Client Services Representative and Hardware Specialist Meeting with your CSR and HS to go over System Requirements, discuss existing hardware, purchase of new equipment and answer any hardware questions.	☐______________________
Send existing Hardware list sent to CSR for compatibility Client to send inventory list of existing Box Office equipment.	☐______________________
New Hardware Catalog received from Hardware Specialist Your HS will send you a list of all the latest equipment that Agile sells.	☐______________________
New Hardware Order Processed Once you have sent in the request for new hardware to be purchased, the HS send you a Sale Order.	☐______________________
New Hardware Configured New equipment will be imaged and configured with the Agile Software, print drivers for our ticket printers, credit card configuration, etc.	☐______________________
New Hardware Shipped The HS will confirm when your new equipment will be shipped and send you tracking information via email.	☐______________________
All Equipment Installed The HS will work with your IT department if on site or virtually through conference calls to help get equipment installed.	☐______________________

Signature_____________________________________ Date____/____/____

Payment Processing Checklist – *(Page 4, Welcome Packet)*	**Date Complete**
1 to 20 business days depending on provider	
Collect Revenue Accounts Your CSR will ask for your GL or Accounting Codes to associate with the different revenue accounts.	☐____________________
Identify your Merchant Provider You CSR will contact you about your Merchant Services provider. A list of preferred vendors are on pages 12 -14 of the welcome packet.	☐____________________
Verify Compatibility Your CSR will work with your Merchant Services Rep to insure that your merchant services processor is compatible with Agile.	☐____________________
Receive new TID/VAR Information Once you have been approved for a Merchant Account, your Merchant Services Rep will send you a VAR sheet. Please forward to your CSR as soon as possible	☐____________________
Install and Test Merchant Your CSR will install and test the merchant account.	☐____________________

Web Site Integration Checklist – *(Page 5, Welcome Packet)*	**Date Complete**
1 to 20 business days depending on the complexity of the style	
Identify Needs with Client Support Representative We will discuss the different style options available for your ticket pages on your website.	☐____________________
Initial Style Development Send styling information and definitions to our web stylist to start creating the skin in Agile.	☐____________________
Proof Web Styling Once the initial skin has been set up in Agile, your CSR will set up a time to walk through the pages to identify any edits that need to be made to the skin.	☐____________________
Web Structure review When the skin has been finalized, your CSR will walk you through the process of setting up your URL's and Menu structure.	☐____________________
Final Style Updates Completed	☐____________________
Web Integration Complete	☐____________________

Signature_______________________________________ Date____/____/____

Membership Program Checklist – *(Page 6-7, Welcome Packet)*	**Date Complete**
1 to 15 business days	
Collect Revenue Accounts, Price Matrix and Benefit Matrix Your CSR will ask you for the revenue account that the membership program will be associated with, the levels, prices and benefits for each membership type.	☐______________________
Build Base Membership Program Your CSR will start building the membership program in Agile once they have your Member Matrix	☐______________________
Import Current Member Information Your CSR will talk to you about extracting information from your current membership database to import into Agile.	
Card Art Definition Finalizing the art work for the membership cards.	☐______________________
Place Card Order Artwork finalized and sent to vendor to be printed.	☐______________________
Welcome Letter Definition Draft, format and finalize letter that will be sent with the membership cards	☐______________________
Renewal Reminders Draft, format and finalize automated email renewal reminders when a member is about to expire	☐______________________
Current Membership Transition Schedule official day to roll over to Agile and create communication piece to announce the new system.	☐______________________

Signature_____________________________________ Date____/____/____

Donor Perfect Integration Checklist – *(Page 8, Welcome Packet)*	**Date Complete**
1 to 5 business days	
Data Conversion Contact Your CSR will contact you to discuss the steps to for setting up the integration between Donor Perfect and Agile	☐______________________
Donor Perfect API Key and Agile User set up Client will need to send API Key to Agile and set up a username and password for Agile.	☐______________________
Data Import Your CSR will schedule a time to import information from Donor Perfect.	
Conversion Review Confirm data imported to Agile is correct and review set up.	☐______________________

Events/Show Implementation Checklist – *(Page 8, Welcome Packet)*	**Date Complete**
1 to 15 business days	
Collect Revenue Accounts and Price Matrix Your CSR will ask you for the revenue account that the events will be associated with, prices to create each template	☐______________________
Venue Templates Identify and capture Venue information to create templates for each venue/screen with capacity.	☐______________________
Template Development Start building the venue templates and/or seating charts if a reserved seat house	
Template Review Once the CSR has completed building the templates, they will schedule a meeting to review.	☐______________________
Event/Show Build Training Your CSR will contact you with a set of dates to schedule for training	☐______________________
Test and Review Events/Shows Process Test Sales, Proof Events Online and in Box Office to confirm that events information and pricing are correct.	☐______________________

Signature_____________________________________ Date____/____/____

Catalog – Concessions/Merchandise Checklist – *(Page 8, Welcome Packet)*	**Date Complete**
1 to 15 business days	
Collect Revenue Accounts and Price Matrix Your CSR will ask you for the revenue accounts that your concessions or merchandise items need to be directed to.	☐______________________
Concessions/Merchandise Items Identify the list of items that you wish to sell along with descriptions and images.	☐______________________
Concessions/Merchandise Inventory and Pricing Set up inventory and build pricing for items	
Concessions/Merchandise Review Proof and edit items	☐______________________

Gift Card Program Checklist – *(Page 9, Welcome Packet)*	**Date Complete**
1 to 20 business days	
Collect Revenue Accounts and Price Matrix Your CSR will ask you for the revenue account that the gift card program will be associated with. Confirm price levels (pre-set prices)	☐______________________
Build Base Gift Card Program Once your CSR has your Gift Card Matrix, one of our Client Support Reps will start building the program in Agile	☐______________________
Card Art Definition Finalizing the art work for the gift cards.	☐______________________
Place Card Order Artwork finalized and sent to vendor to be printed.	☐______________________
Confirm Fulfillment Procedures. Your CSR will work with you on how to fulfill your gift cards	☐______________________

Signature_____________________________________ Date____/____/____

Training Sessions Checklist- *(Page 9 – 11, Welcome Packet)*	**Date Complete**
1 to 20 business days	
Discovery of Training Needs Your CSR will discuss training sessions, both via the web as well as on site (if applicable). Scheduling will be made with the Product and Client Learning Expert.	☐______________________
TRAINING SESSIONS Below are just a few samples of some of our training sessions. You will work closely with your Implementation Analyst to customize your training schedule for your staff.	
How to Build a Show Learn all there is to creating and putting an event on sale. Everything from images and description for the event to inventory and pricing. This is everything you will need to put a show on sale.	☐______________________
General Management of a Show Your event is on sale. What now? Learn how to transform inventory to a hold status, add inventory, make pricing changes, add a promotional price using promotion codes and so much more	☐______________________
How to Create Ticket Formats Ticket Formats allow you to have the flexibility to have different information print on your tickets for different type of events.	☐______________________
How to build Catalog Items Learn how to create menu items for your merchandise and concessions items. Create online shopping page for items you want to sell online.	☐______________________
How to Sell In AMS Events are built, concessions items are ready to sell. Learn how to create a customer account, look up existing members to sell or renew, sell concessions items or tickets to a show. You will also learn how to edit an existing order and much more.	☐______________________
Gate Control Create Gate Control Batches and scan tickets.	☐______________________
Reporting Accessing reporting in Agile is very easy through our reporting portal. In this session we will go over some of the most often used reports for accounting, night of show settlements, membership user reports, etc.	☐______________________
How to use CRM's to stay in touch with your customers CRM's allow you to generate emails directly out of Agile. Learn how to format and send emails using our CRM program.	☐______________________

Signature_______________________________________ Date____/____/____

Post- Implementation Support	
On going	

Once you have gone live with all of your events and items and are using Agile Ticketing to run your box office, your CSR will schedule a wrap up meeting to go over any questions or outstanding items that need to be finalized.

At this point, the CSR will introduce you to the Client Support team who will be your main point of contact for any tasks, questions, or issues that might be addressed on a day to day basis.

The Client Support Department is available during regular business hours for non-critical issues. Our business hours are Monday through Friday, 9AM to 5PM Central Time.

Agile has an Afterhours Client Support Representative 7 days a week for critical issues only. If you have a critical issue after hours, call the phone number listed below and press option 8. PLEASE NOTE: When calling the afterhours extension, you will be asked to give your name and organization name prior to being routed to the on call person. It is important that you announce your name and organization so the person on call can log in to your domain while your call is routed to them.

Agile Support Contact Information **support@agiletix.com** **(615) 360-6700**

Signature_____________________________________ Date____/____/____