



Take your business to the *next level*

Momentum Software Solutions

Capability Statement



Diamond
Partner



Partnership

Our Values, Vision and Mission are all centered around our customers.

To earn customers' loyalty, we listen to them, anticipate their needs and act to create value in their eyes.

Values:

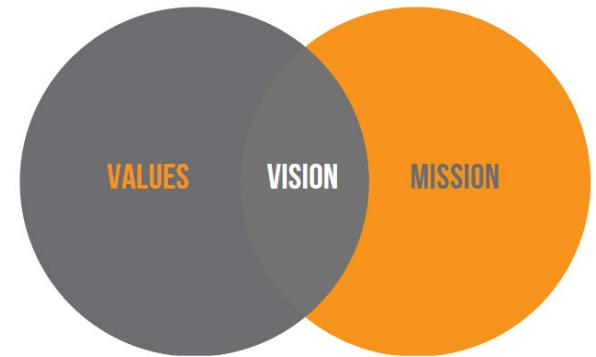
- Customers for Life
- Working Together
- Learning and Embracing Change
- Balance in Life

Vision:

Empowering People in Business

Mission:

We work with our customers to take their business to the next level, by delivering tailored software solutions through partnerships, cooperation and trust.



Your Business



About Momentum Software Solutions

- ✓ MYOB Enterprise Diamond Partner
- ✓ MYOB Channel Partner of the Year 2022
- ✓ Experienced team of accredited MYOB consultants
- ✓ Based in the Sunshine Coast & Brisbane
- ✓ Provide implementation, training, customisation, integration and support services

250+

CLIENTS

15+

YEARS IMPLEMENTING
ERP SOFTWARE



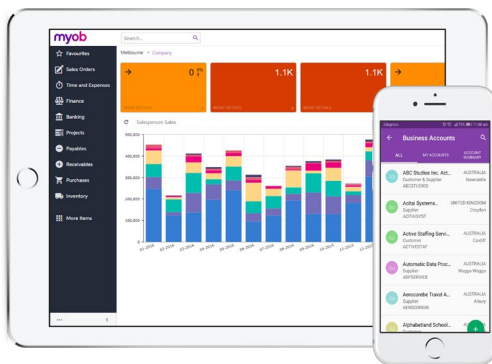
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Our 'Advanced' Expertise

- Momentum named MYOB Channel Partner of the Year 2022 and Construction Partner of the Year 2022.
- 100+ Active MYOB Advanced Sites across multiple sectors, using all functional areas including payroll.
- 17 Certified Advanced Consultants and Advanced Support Team
- 3 Certified MYOB Advanced Developers
- 2 x Full Time Project Managers
- Service Delivery Manager
- Customer Success Manager
- Certified in MYOB Advanced Manufacturing and Construction Editions
- Completed various integrations incl Salesforce, 3PL, Smartfreight, Mandalay, WMS



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Some of our clients



Menu of Services

- Implementation of MYOB Advanced – all modules
- Upgrades and implement new features
- User Training (on-site and online) + Advanced Bootcamp Training Courses
- Support (phone, email, portal)
- Report Design / Dashboards / Excel Odata Reports / Velixo Reports
- Integration and custom Development
- Business Process Review
- Business Consulting and Planning
- Project Management



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Our Methodology



Our Methodology

MYOB Advanced Implementation Plan



Key Milestones and Dates for ABC Company

Phase #	ERP Project Phases	Responsibility	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20
1.0	Project Initiation & Pre-Scoping Data Review	Momentum & Client	█																			
2.0	Data Cleansing	Client		█	█	█	█															
3.0	Scoping & Process Review	Client		█	█																	
4.0	Software Configuration	Momentum				█	█															
5.0	Trial Data Conversion	Momentum						█														
6.0	Solution Walk-Through - Super User/s	Momentum & Client							█													
7.0	Forms Development	Momentum							█													
8.0	Reports Development	Momentum								█												
9.0	Customisations/ Integrations	Momentum								█	█											
10.0	Preparation for User Training	Momentum & Client										█										
11.0	End User Training Sessions	Momentum & Client											█									
12.0	End User Testing and Acceptance Sign Off	Client												█	█							
13.0	Go-live Readiness Meeting	Momentum & Client														█						
14.0	Go-live Preparation	Momentum															█					
15.0	Final Data Conversion	Momentum & Client																█				
16.0	Go-live - Live Transaction Processing - 1st Month	Client																	█			
17.0	Post Implementation Phase	Momentum & Client																			█	█



Diamond Partner

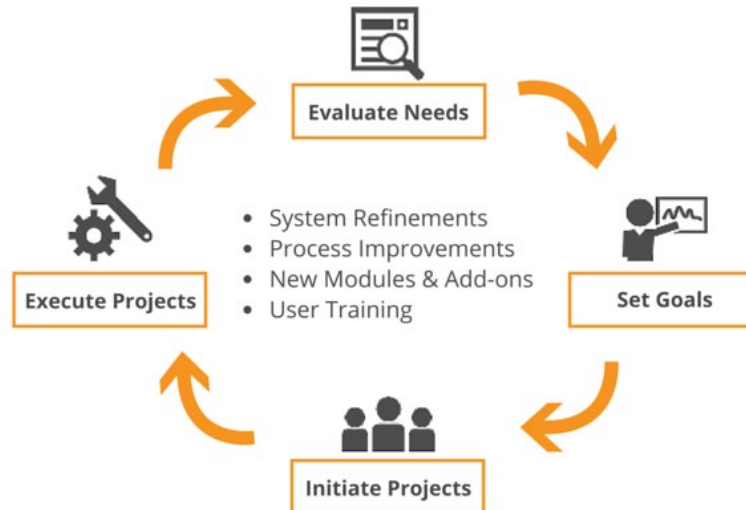


Post Go-Live Services

Business as Usual



Continuous Improvement



Post 'Go-Live' Services

What is included in the Service Plan?

1. Telephone and email assistance with "how to" questions in relation to using the software
2. Access to our On-Line Support Logging system
3. Access to our State-of-the-art Remote Support Software
4. Access to the online Knowledgebase
5. Working on faults and errors that occur in relation to a software fault
6. Working on faults and errors in standard MYOB Advanced reports and forms
7. Fixes to data that was created due to user error or lack of knowledge
8. Provision of upgrades to the software, both product and delivery of software
9. Monthly newsletter via email outlining hints and tips, new releases and up and coming events
10. Regular and on-request reports detailing the status of issues logged by Momentum
11. Invitation to our Customer Forums run 2x a year



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Post 'Go-Live' Services

Additional Services Available from Momentum (Projects)

1. On-Site Consulting
2. Solution Review and Health Checks
3. Training services
4. New reports or forms, or modifications to reports or forms
5. Installation of software on new servers or workstations or troubleshooting server, network or pc issues that affect the software (e.g. security, permissions, virus protection).
6. Changing the configuration of the software to meet new or changed business requirements.

We treat these requests as 'Projects' and proposals can be provided on request. Customers can elect to allocate these Projects against Pre-Paid Services.

Note: Momentum does not provide Accounting, Bookkeeping or reconciliation services



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ERP Upgrades

Extract from Momentum Sales Proposal

9. MYOB Advanced Upgrades

MYOB Advanced is improving rapidly and there is a minor release every 1-2 months. These minor upgrades are managed by MYOB after hours and are designed to be non-disruptive whilst providing improvements and fixes.

Major Releases usually occur once per year and these major upgrades may contain entire new modules and significant new functionality and design changes. Depending on the likely impact to the client a Sandbox (test System) is made available at no charge for the client and Momentum to review and test the new version. Clients with highly customised or integrated solutions would need to test in the Sandbox. Simpler configurations may not require Sandbox testing and this is managed via consultation between the client and Momentum.

Upgrades are scheduled over a period of weeks known as the 'upgrade window' with communications before, during and after the upgrade window.



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ERP Upgrades

MYOB Advanced Major Upgrades Explained

ERP Major Upgrades require input and action from the software vendor (MYOB), Business Partner (Momentum) and the Client.

Upgrades are scheduled once validation and testing is done.

Not possible for MYOB to test every possible scenario / combination of configuration / customization / data

Latest Major Upgrade (2021.2) included over 70+ new features, as well as various fixes. This is great for clients – learn more:

<https://momentumsoftwaresolutions.com.au/myob-advanced-2021-2-major-release/>



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ERP Upgrades

MYOB Advanced Major Upgrades Explained

MYOB have taken customer and partner feedback onboard and designed a new deployment strategy that will provide customers and partners with:

- Predictability of the deployment schedule through the year
- Time to prepare for the upgrade
- Choice of deployment windows

What does this look like?

- Each customer is assigned to 1 of 5 cohorts. Each cohort is to be upgraded twice a year on a month-based schedule. This will provide predictability as schedules can be pre-published for 6+ months in advance.
- 2 months out you will receive notification from MYOB of the upgrade schedule along with a “What to expect” document
- 1.5 months out you will receive “What’s new” in the product along with links to relevant release notes.
- 1 month out you will have access to a sandbox for testing along with a checklist of what you should be doing prior to the upgrade.
- Regular progress messages will be sent.
- On the day of the upgrade, you will again get the “What to expect” document
- 7 days after you will receive a survey.



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Post 'Go-Live' Services

MOMENTUM PREPAID SERVICES PLAN

Approx Consultant Hrs	Support	Hourly Rate		Total	Tick One
		Consultant	Developer		
20	220	230	240	4,400	<input type="checkbox"/>
40	210	220	230	8,400	<input type="checkbox"/>
60	190	200	210	11,400	<input type="checkbox"/>
80	180	190	200	14,400	<input type="checkbox"/>
100 +	170	180	190	17,000	<input type="checkbox"/>

Average Prepaid Hours
for General MYOB
Advanced Support
in First 12 Months

+ customers can choose to purchase > 100 Hrs, there is no cap

Prepaid services purchased is based on the Consultant Rate. Services consumed against the prepayment are at the applicable rate depending on the Consultant and Nature of Work.

Travel to and from the customer's location greater than 30 mins is charged at 50% of the Consultant's Rate.

For customers in South East Qld the origin of travel is Momentum's nearest office (Brendale, Maroochydore).

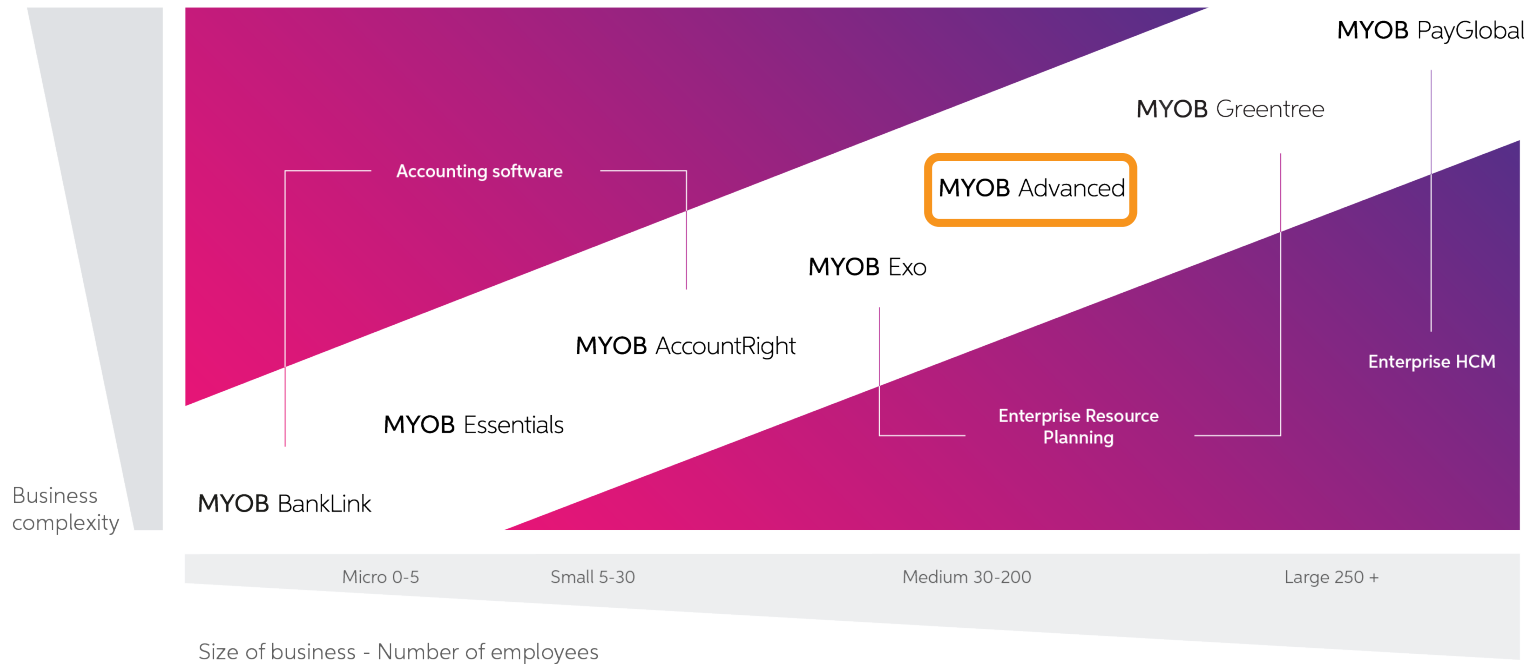
Usage Reports are provided showing work completed and the remaining value of prepaid services.



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MYOB Software Overview



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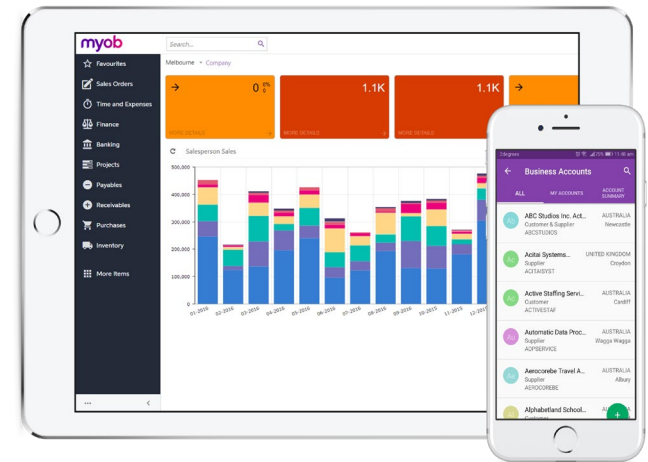


MYOB Advanced

Modern cloud ERP delivering powerful, cohesive and end-to-end business management

- ✓ Fully customisable platform
- ✓ Convenient monthly pricing
- ✓ Flexibility and freedom to work the way you want
- ✓ Supports the growth and evolution of your business

Based on the class leading Acumatica platform



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MYOB Advanced



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Future State

The Connected Business – with MYOB Advanced

- ✓ Simplify financial management with industry leading multi-entity workflows
- ✓ Unify business systems and data with a cloud ERP that integrates systems, so you have a single source of truth and single system to manage
- ✓ Anytime, anywhere access with cloud ERP
- ✓ Enterprise grade security and data backup
- ✓ Reduce costs and complexity of IT management with SaaS solution
- ✓ Industry leading API technology to simplify connecting to 3rd party solutions and add-ons



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The Advanced Ecosystem

Productivity Tools

- + Budgeting
- + EDI
- + Inventory Optimisation
- + Foreign Exchange
- + Electronic Signature
- + Marketing Automation
- + Document Automation



Module Extensions

- + Asset Management
- + Expense Management
- + Receivables Management
- + Shipping & Freight
- + Human Resources
- + Workforce Management
- + Rostering

Industry Solutions

- + Wholesale Distribution
- + Manufacturing
- + Retail
- + eCommerce
- + Food & Beverage
- + Hospitality
- + Construction

Business Intelligence

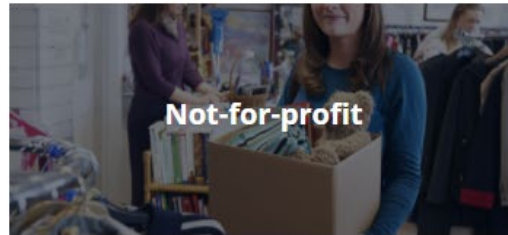
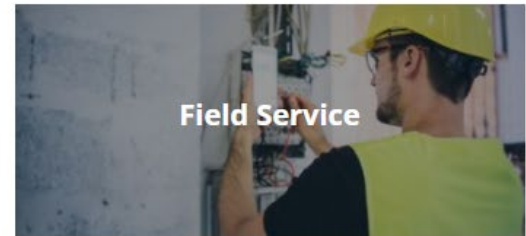
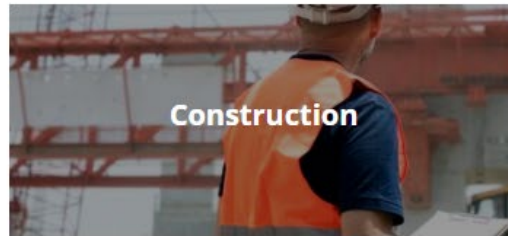
- + BI Reporting
- + Forecasting
- + Analytics

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Solutions for every industry



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Find out more

Looking for more information?

Visit the below websites for more information about MYOB's ERP Software, and how it can help take your business to the next level.

<http://www.momentumsoftwaresolutions.com.au/>

<https://www.myob.com/au/enterprise>

<http://help.myob.com.au/advanced/videos/index.htm>

<https://www.youtube.com/channel/UCPkI1ruXfO9Kq9-kB88tDQ>



Contact us

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