Wiise Cloud ERP Software Support Capability Statement

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.
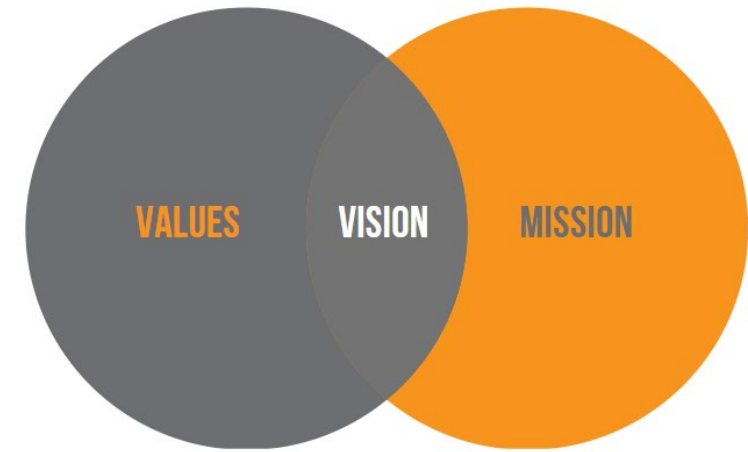
Values:

- 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.

About Momentum Software Solutions

✓ Wiise Elite Partner

✓ 2023 Wiise Customer Success Partner of the Year

✓ Team of 30+ people and growing

✓ Experienced team of accredited ERP & Payroll consultants

✓ Based in Brisbane and The Sunshine Coast

✓ Provide implementation, training, customisation, integration and support services

✓ Strong Project Management

250+
CLIENTS

**15+**
YEARS IMPLEMENTING
ERP SOFTWARE

Our 'Wiise' Expertise

- Wiise Elite Partner

- Certified in all Wiise / Microsoft Business Central Editions

- Wiise Customer Success Partner of the Year for 2023

- Certified team of Wiise Consultants

- Customer Service Manager with dedicated Wiise Support Team

- In-house Certified Wiise Developers

- Full Time Project Managers

- Service Delivery Manager

- Customer Success Manager
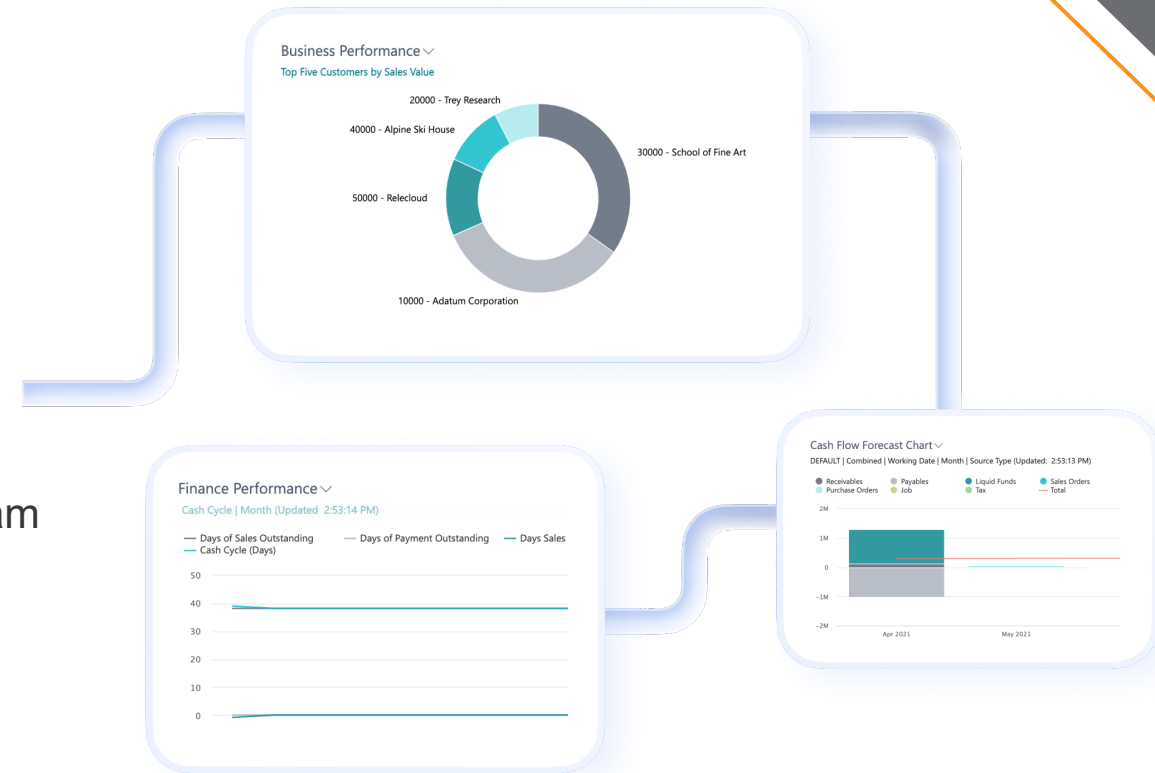
Some of our Cloud ERP clients

Menu of Services

- Implementation of Wiise / Microsoft Business Central – all modules

- Upgrades and implement new features

- User Training (on-site and online

- Support (phone, email, portal)

- Report Design / Dashboards

- Integration and custom Development

- Business Process Review

- Business Consulting and Planning

- Project Management

Momentum's Methodology

1 Project Kick Off

2 Scoping and Requirements Analysis

3 Business Modeling and Design

8 Implementation Review and Handover

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PROJECT METHODOLOGY

4 System Tailoring

7 Go Live

6 Preparation and Sign Off

5 Testing and Training in Pilot

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Take your business to the *next level*

Momentum's Methodology

MYOB Advanced Implementation Plan — momentum SOFTWARE SOLUTIONS

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																		■	■	■

Post Go-Live Services

Business as Usual

Go-Live → Settling In → Ongoing Support

Continuous Improvement

Evaluate Needs → Set Goals → Initiate Projects → Execute Projects → (Evaluate Needs)

- System Refinements
- Process Improvements
- New Modules & Add-ons
- User Training

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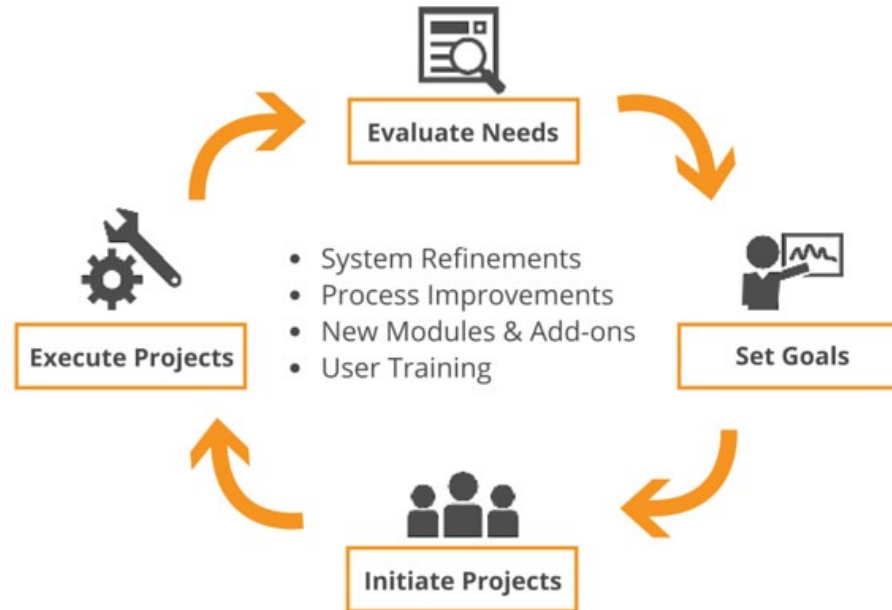
Post 'Go-Live' Services

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 Wiise 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

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

Momentum's Prepaid Services Plan

MOMENTUM PREPAID SERVICES PLAN

| Approx Consultant Hrs | | Hourly Rate | | | | Tick |
	Support	Consultant	Developer	Total	One
20		220	230	240	4,400	
40		210	220	230	8,400	
60		190	200	210	11,400	
80		180	190	200	14,400	
100	+	170	180	190	17,000	

+   *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.

Average Prepaid Hours for General Wiise Support in First 12 Months

wiise

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A bit about Wiise

Wiise is a software business 100% owned by KPMG Australia in partnership with Microsoft.

Wiise is **clever business software** that allows SMBs to reach their full potential by connecting banking to finance and operation to **get a clearer picture** of what's happening at every level of their business. Wiise connects SMBs with the information they need to succeed.

Wiise's software distribution channel through rhipe.

Clever accounting and ERP solution made for Aussie businesses

Aussie made
Customised to suit the Aussie market made by locals who know how you work.

Secure
Wiise is housed in Australian Microsoft Azure data centres and protected by rigorous security protocols.

Reliable
Over 100,000 businesses using the underlying Microsoft platform globally.

Connect with Microsoft
Wiise can easily integrate into Microsoft tools and platforms – saving you time and money.

Suits a range of industries
Wiise clients come from a broad range of industries — so we can meet your unique needs.

Supported by industry experts
Created by KPMG, built on Microsoft and supported by CommBank - bringing together industry experience, top-tier tech and banking know-how.

Flexible
Add or remove users, easily change your subscription package, or connect other apps into Wiise with open APIs – the choice is yours.

Affordable setup options
Network of experienced Partners that help support and implement Wiise. And with our fixed setup packages, you can see estimated time, cost and inclusions upfront.

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Market Overview

Small Business Accounting Software

CLOUD BUSINESS MANAGEMENT SOFTWARE

Enterprise Systems

GROWING BUSINESS COMPLEXITY & NEEDS

Small businesses or sole traders

TURNOVER < $5M
EMPLOYEES <20

BUSINESS WHO ONLY REQUIRE A BASIC ACCOUNTING PACKAGE

Large, established businesses

TURNOVER >$5M +
EMPLOYEES >20

OUTGROWN SMALL ACCOUNTING PACKAGE.

USING MULTIPLE DISCONNECTED SOLUTIONS

Enterprises

TURNOVER >$1B

EMPLOYEES 2,500+

Take your business to the next level

Wiise Features

In-built machine learning and integrated industry benchmarking

Native Microsoft Office and Dynamics 365 connection

wiise

- ✓ Projects, job costing & timesheets
- ✓ Warehousing and landed cost
- ✓ Manufacturing
- ✓ Fixed assets
- ✓ Reporting and analytics
- ✓ Inventory and purchasing
- ✓ Sales and service management
- ✓ Multi-company, intercompany and consolidations
- ✓ Advanced finance and accounting

Integrated banking, Australian bank feeds and reconciliation

Integrated Single Touch Payroll

Power BI

Power Automate

PowerApps

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Find out more

Looking for more information?

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

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

https://momentumsoftwaresolutions.com.au/solution/wiise/

https://wiise.com/

Contact us

- Momentum Software Solutions
- 07 5479 1877 | enquiries@momentumss.com.au
- www.momentumsoftwaresolutions.com.au