



## **Paid Consulting v2.0**

While codeREADr is a self-service platform, paid consulting is offered if you don't have time to create your own service workflows, or you simply wish to jumpstart their deployment.

With paid consulting, a codeREADr specialist creates your service workflows for you and trains you on their use.

This document outlines the process for issuing a quote after a consultation and the creation of workflows during the consulting period.

## **Free Quote**

The first step in the process would be to request a free consultation by email, phone, or the codeREADr website's Chat Now utility. If a consultation is arranged, it is usually a 10-15 minute conference call with a codeREADr support specialist.

During this call, the codeREADr specialist should be able to:

- A. Determine if your goals are achievable using the codeREADr platform; and,
- B. Verify what we can do to help you achieve those goals.

It's possible that not all goals can be achieved with codeREADr alone. Also, sometimes you will need to handle certain tasks on your own, such as creating your database(s) for importing. For those certain tasks, we will offer guidance to make the process as seamless as possible.

After the call, you may be asked to provide a written overview of your goals. The codeREADr specialist will review your overview and issue a quote in 1 to 2 business days after receiving it.

Notes:

- If needed, you are responsible for configuring third-party services, such as Dropbox, Zapier, QuickBase, etc.

- If integrating codeREADr directly to your servers (or third-party servers), you need to write your own code. For example, if you want to use Postback URL, Direct Scan to URL (DSU), API calls, or FTP/SFTP uploads, you will need to work with your IT department and/or developers for those options.

### **Quote Sent**

You will receive a quote that will define what the codeREADr specialist will configure for the consulting service. The quote will include an estimated delivery. You may request changes to any aspect of the quote, which then may alter the price and delivery based upon the complexity of the task. We will not begin until you accept the quote.

### **Start Consulting**

Service configurations typically take 2 to 5 business days. When the configuration is complete, the codeREADr specialist will set up a **1-hour phone call** with you to go over the configuration and instruct you on their usage and maintenance.

Generally, this is the only high level, focused support you will need. After the call, you can email us or reach out on our website's Chat Now utility for real-time support. However, if you require a high level of support after your 1-hour phone call, each additional hour of specialist support will cost \$125.00. You will not be charged without pre-approval or discussing alternatives.