

Pendo Engineering Services

Service Options

Pendo's Professional Engineering Services consist of many options with a separate service description for each. Click the links below to access the relevant service description(s).

Category	Service
Resource Center Knowledge Base Integrations	<ul style="list-style-type: none"> • Custom Salesforce Knowledge Base Integration Service • Custom HelpJuice Knowledge Base Integration Service • Custom Zoho Knowledge Base Integration Service • Custom Freshdesk Knowledge Base Integration Service • Custom ServiceNow Knowledge Base Integration Service • Custom Hubspot Knowledge Base & Live Chat Integration Service • Custom Coveo Knowledge Base Integration Service • Custom KnowledgeOwl Knowledge Base Integration Service • Custom Mindtouch Knowledge Base Integration Service
Resource Center Live Chat Integrations	<ul style="list-style-type: none"> • Custom Salesforce Live Chat Integration Service • Custom Freshdesk Live Chat Integration Service • Custom Zoho Live Chat Integration Service • Custom Hubspot Knowledge Base & Live Chat Integration Service • Custom ForethoughtAI Live Chat Integration Service
Resource Center Support Ticket Integrations	<ul style="list-style-type: none"> • Custom Salesforce Support Ticket Integration Service • Custom JIRA Support Ticket Integration Service • Custom Zendesk Support Ticket Integration Service
Data-Out Workshop Services	<ul style="list-style-type: none"> • Data-Out Workshop Service (small, medium, and large options)
Configuration Migration Services	<ul style="list-style-type: none"> • Configuration Migration Service (small, medium, and large options)
Data Deletion Services	<ul style="list-style-type: none"> • VisitorID / AccountID Deletion Service
VisitorID / AccountID Remapping Services	<ul style="list-style-type: none"> • VisitorID / AccountID Merge & Remapping Service
Assumptions	<ul style="list-style-type: none"> • Standard Assumptions Across All Pendo Engineering Service Packages

Custom Salesforce Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with the Customer's team to implement a Custom Salesforce Knowledge Base Integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Salesforce Knowledge Base Integration Service will require a 12-16 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Develop the Integration's frontend experience, including the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations, including branding, context-awareness, article preview text, etc.• Retrieve and render image assets hosted within Customer's Salesforce Knowledge Base within the Resource Center integration experience• Provide up to 20 hours of consultation around the creation of the necessary authentication middleware• Implement analytics tracking about which articles were clicked via Pendo Track Events• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Create and host a lightweight middleware server, within Customer's organization's infrastructure, to surface a Salesforce bearer token to be used for requests against the Salesforce API. This is required to retrieve Salesforce article content. This cannot be hosted by Pendo.• Implement SSO such that users can link directly to the Salesforce Knowledge Base portal itself from articles displayed within the integration. For external public instances of Salesforce Knowledge Bases, this setup is not applicable. For private Salesforce Knowledge Bases, in absence of this SSO, Pendo will exclude the portal link out functionality from the integration.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Engineer	Creates the authentication middleware service to provide a Salesforce bearer token to Pendo utilizing our provided technical documentation. Determines the necessary infrastructure within Customer product's infrastructure to host said service, and works collaboratively with Pendo to ensure functionality. If applicable, confirms and configures SSO setup to facilitate direct-to-portal	20% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Salesforce Knowledge Base Integration Service

- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be retrieved from the relevant Salesforce APIs and middleware.
- Customer must host the relevant middleware service within their software ecosystem. This cannot be hosted by Pendo.

Custom HelpJuice Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom HelpJuice Knowledge Base Integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom HelpJuice Knowledge Base Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Develop the Integration's frontend experience, including the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations, including branding, context-awareness, article preview text, etc.• Retrieve and render image assets hosted within Customer's HelpJuice Knowledge Base within the Resource Center integration experience• Implement analytics tracking about which articles were clicked via Pendo Track Events• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Provide the necessary basic authentication API key information to Pendo to allow for retrieval of knowledge article content from HelpJuice• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be retrieved from the relevant HelpJuice APIs.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom HelpJuice Knowledge Base Integration Service

- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be retrieved from the relevant HelpJuice APIs.
- Customer must consent to using the Basic Authentication framework supported by HelpJuice, so that knowledge articles can be retrieved into the Pendo Resource Center.

Custom Zoho Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Zoho Knowledge Base integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Zoho Knowledge Base Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Develop the Integration's frontend experience, including the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations, including branding, context-awareness, article preview text, etc.• Retrieve and render image assets hosted within Customer's Zoho Knowledge Base within the Resource Center integration experience• Implement analytics tracking about which articles were clicked via Pendo Track Events• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Register Customer's application, using the Zoho Developer Console, to support OAuth token generation per the Zoho API Documentation• Provide the relevant OAuth information to Pendo so that the authentication flow can be codified within the Pendo Resource Center• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be retrieved from the relevant Zoho APIs.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Zoho Knowledge Base Integration Service

- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be retrieved from the relevant Zoho APIs.
- Customer must consent to using the [OAuth framework](#) supported by Zoho, so that knowledge articles can be retrieved into the Pendo Resource Center.

Custom Freshdesk Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Freshdesk Knowledge Base integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Freshdesk Knowledge Base Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Develop the Integration's frontend experience, including the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations, including branding, context-awareness, article preview text, etc.• Retrieve and render image assets hosted within Customer's Freshdesk Knowledge Base within the Resource Center integration experience• Implement analytics tracking about which articles were clicked via Pendo Track Events• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Provide the necessary basic access authentication API key information to Pendo to allow for retrieval of knowledge article content from Freshdesk• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be retrieved from the relevant Freshdesk APIs.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Freshdesk Knowledge Base Integration Service

- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be retrieved from the relevant Freshdesk APIs.
- Customer must consent to using the Basic Authentication framework supported by Freshdesk, so that knowledge articles can be retrieved into the Pendo Resource Center.

Custom ServiceNow Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom ServiceNow Knowledge Base integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom ServiceNow Knowledge Base Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Develop the Integration's frontend experience, including the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations, including branding, context-awareness, article preview text, etc.• Retrieve and render image assets hosted within Customer's ServiceNow Knowledge Base within the Resource Center integration experience.• Implement analytics tracking about which articles were clicked via Pendo Track Events.• Provide quality assurance and UAT testing for delivered code.• Provide documentation of the implemented service for ongoing maintenance.	<ul style="list-style-type: none">• Provide the necessary basic authentication API key information to Pendo to allow for retrieval of knowledge article content from ServiceNow.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be retrieved from the relevant ServiceNow APIs.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom ServiceNow Knowledge Base Integration Service

- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be retrieved from the relevant ServiceNow APIs.
- Customer must consent to using the Basic Authentication framework supported by ServiceNow, so that knowledge articles can be retrieved into the Pendo Resource Center.

Custom Hubspot Knowledge Base & Live Chat Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Hubspot Knowledge Base & Live Chat integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Hubspot Knowledge Base & Live Chat Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Invoke the Integration's frontend experience, leveraging the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations within the customization limitations defined by the Hubspot widget.• Retrieve and render image assets hosted within Customer's Hubspot content within the Resource Center integration experience• Implement analytics tracking about when the Hubspot widget has been invoked via standard Pendo Tagging.• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Install the required code within Customer's application / product to allow the Hubspot widget to be invoked• Make necessary configurations and purchase necessary add-ons (the Knowledge Base & Live Chat functionality, respectively) such that it can be shown within the Hubspot widget.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Hubspot Knowledge Base & Live Chat Integration Service

- Customer will install the required code within Customer's application / product to allow the Hubspot widget to be invoked
- Customer will make necessary configurations and purchase necessary add-ons (the Knowledge Base & Live Chat functionality, respectively) such that it can be shown within the Hubspot widget.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Custom Coveo Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to seamlessly launch a Custom Coveo In-Product Experience (IPX) interface from a Pendo Resource Center module. Pendo will also set up Customer's Coveo instance so that Pendo guides will appear as search results alongside Customer's other sources and can be initiated from the IPX.

Implementation Activities

Implementation of the Custom Coveo Knowledge Base Integration Service will require a 12-16 week timeline, assuming Coveo-related dependencies are installed.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Setup a Pendo Resource Center Code Sandbox Module that will invoke the Coveo IPX frontend experience using JavaScript• Facilitate and implement visual or functional customizations to the IPX within limitations defined by the Coveo product• Integrate with Coveo Query Pipelines to surface relevant, active Pendo Guides• Implement analytics tracking about when the Coveo widget has been invoked. Further analytics can be found within the Coveo platform.• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Install the required code within Customer's application / product to allow the Coveo IPX widget to be invoked• Either provide Pendo with direct access to Customer's Coveo environment, or make necessary Coveo query pipeline configurations and IPX frontend modifications on Pendo's behalf.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Coveo Knowledge Base Integration Service

- Customer will install the required code within their application / product to allow the Coveo IPX widget to be invoked
- Customer will either provide Pendo with direct access to their Coveo environment, or make necessary Coveo query pipeline configurations and IPX frontend modifications on Pendo's behalf.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be rendered within the Resource Center
- Integration Key access to Pendo is required. If this is not turned on, Pendo will turn it on for Customer exclusively for this integration.

Custom KnowledgeOwl Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom KnowledgeOwl Knowledge Base integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom KnowledgeOwl Knowledge Base Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Develop the Integration's frontend experience, including the requisite HTML, CSS, and JavaScript• Facilitate and implement visual or functional customizations, including branding, context-awareness, article preview text, etc.• Retrieve and render image assets hosted within Customer's KnowledgeOwl Knowledge Base within the Resource Center integration experience• Implement analytics tracking about which articles were clicked via Pendo Track Events• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Provide the necessary basic authentication API key information to Pendo to allow for retrieval of knowledge article content from KnowledgeOwl• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be retrieved from the relevant KnowledgeOwl APIs.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom KnowledgeOwl Knowledge Base Integration Service

- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be retrieved from the relevant KnowledgeOwl APIs.
- Customer must consent to using the Basic Authentication framework supported by KnowledgeOwl, so that knowledge articles can be retrieved into the Pendo Resource Center.

Custom Mindtouch Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Mindtouch Knowledge Base integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Mindtouch Knowledge Base Integration Service will require a 12-16 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Develop the Integration's frontend experience, including the requisite HTML, CSS, and JavaScript• Facilitate and implement visual or functional customizations, including branding, context-awareness, article preview text, etc.• Retrieve and render image assets hosted within Customer's Mindtouch Knowledge Base within the Resource Center integration experience• Provide up to 20 hours of consultation around the creation of the necessary authentication middleware• Implement analytics tracking about which articles were clicked via Pendo Track Events• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Create and host a lightweight middleware server, within Customer's organization's infrastructure, to surface a Mindtouch OAuth token to be used for requests against the Mindtouch API. This is required to retrieve Mindtouch article content. This cannot be hosted by Pendo.• (Optional) Implement SSO such that users can link directly to the Mindtouch Knowledge Base portal itself from articles displayed within the integration. For externally public instances of Mindtouch Knowledge Bases, this setup is not applicable. For private Mindtouch Knowledge Bases, in absence of this SSO, Pendo will exclude the portal link out functionality from the integration.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Engineer	Creates the authentication middleware service to provide a Mindtouch OAuth token to Pendo utilizing our provided technical documentation. Determines the necessary infrastructure within Customer's product's infrastructure to host said service, and works collaboratively with Pendo to ensure functionality. If applicable, confirms and configures SSO setup to facilitate direct-to-portal.	20% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Mindtouch Knowledge Base Integration Service

- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow content to be retrieved from the relevant Mindtouch APIs and middleware.
- Customer must host the relevant middleware service within their software ecosystem. This cannot be hosted by Pendo.

Custom Salesforce Live Chat Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Salesforce Live Chat integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Salesforce Live Chat Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">● Invoke the Integration's frontend experience, leveraging the requisite HTML, CSS, and JavaScript.● Facilitate and implement visual or functional customizations within the customization limitations defined by the Salesforce Live Chat widget.● Retrieve and render image assets hosted within Customer's Salesforce content within the Resource Center integration experience● Implement analytics tracking about when the Salesforce widget has been invoked via standard Pendo Tagging.● Provide quality assurance and UAT testing for delivered code● Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">● Install the required code within Customer's application / product to allow the Salesforce widget to be invoked● Make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the Salesforce Chat widget.● Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Salesforce Live Chat Integration Service

- Customer will Install the required code within Customer's application / product to allow the Salesforce widget to be invoked
- Customer will make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the Salesforce widget.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Custom Freshdesk Live Chat Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Freshdesk Live Chat integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Freshdesk Live Chat Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Invoke the Integration's frontend experience, leveraging the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations within the customization limitations defined by the Freshdesk Live Chat widget.• Retrieve and render image assets hosted within Customer's Freshdesk content within the Resource Center integration experience• Implement analytics tracking about when the Freshdesk widget has been invoked via standard Pendo Tagging.• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Install the required code within Customer's application / product to allow the Freshdesk widget to be invoked• Make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the Freshdesk Chat widget.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization’s overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Freshdesk Live Chat Integration Service

- Customer will Install the required code within Customer’s application / product to allow the Freshdesk widget to be invoked
- Customer will make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the Freshdesk widget.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer’s application to allow content to be rendered within the Resource Center

Custom Zoho Live Chat Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Zoho Live Chat integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Zoho Live Chat Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Invoke the Integration's frontend experience, leveraging the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations within the customization limitations defined by the Zoho Live Chat widget.• Retrieve and render image assets hosted within Customer's Zoho content within the Resource Center integration experience• Implement analytics tracking about when the Zoho widget has been invoked via standard Pendo Tagging.• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Install the required code within Customer's application / product to allow the Zoho widget to be invoked• Make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the Zoho Chat widget.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Zoho Live Chat Integration Service

- Customer will Install the required code within Customer's application / product to allow the Zoho widget to be invoked
- Customer will make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the Zoho widget.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Custom ForethoughtAI Live Chat Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom ForethoughtAI Live Chat integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom ForethoughtAI Live Chat Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Invoke the Integration's frontend experience, leveraging the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations within the customization limitations defined by the ForethoughtAI Live Chat widget.• Retrieve and render image assets hosted within Customer's ForethoughtAI content within the Resource Center integration experience• Implement tracking about when the ForethoughtAI widget has been invoked via standard Pendo Tagging.• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Install the required code within Customer's application / product to allow the ForethoughtAI widget to be invoked• Make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the ForethoughtAI Chat widget.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom ForethoughtAI Live Chat Integration Service

- Customer will install the required code within Customer's application / product to allow the ForethoughtAI widget to be invoked
- Customer will make necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) such that it can be shown within the ForethoughtAI widget.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Custom Salesforce Support Ticket Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Salesforce Support Ticket integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Salesforce Support Ticket Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Direct link from the Pendo Resource Center Home View into a Salesforce Ticketing Portal, leveraging the requisite HTML, CSS, and JavaScript• Facilitate and implement visual or functional customizations within the Pendo Custom Code Module, specifically as it relates to the links to open a new ticket, and see all tickets• Implement analytics tracking via standard Pendo tagging about impressions and clicks on the Salesforce Support Ticket integration• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Implement SSO such that users can link directly to the Salesforce Ticketing portal itself from within the Pendo Resource Center. For externally public instances of the Salesforce ticketing portal, this setup is not applicable.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Engineer	If applicable, implement SSO such that users can link directly to the Salesforce Ticketing portal itself from within the Pendo Resource Center.	20% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Salesforce Support Ticket Integration Service

- Customer will implement SSO such that users can link directly to the Salesforce Ticketing portal itself from within the Pendo Resource Center. For externally public instances of the Salesforce ticketing portal, this setup is not applicable.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Custom JIRA Support Ticket Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom JIRA Support Ticket integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom JIRA Support Ticket Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Invoke the Integration's frontend experience, leveraging the requisite HTML, CSS, and JavaScript.• Facilitate and implement visual or functional customizations within the customization limitations defined by the JIRA Support Ticket widget.• Implement Pendo standard tracking about when the JIRA Support Ticket widget has been invoked via standard Pendo Tagging.• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Install the required code within Customer's application / product to allow the JIRA Support Ticket widget to be invoked• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom JIRA Support Ticket Integration Service

- Customer will Install the required code within Customer's application / product to allow the JIRA Support Ticket widget to be invoked
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Custom Zendesk Support Ticket Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to implement a Custom Zendesk Support Ticket integration, housed within the Pendo Resource Center.

Implementation Activities

Implementation of the Custom Zendesk Support Ticket Integration Service will require a 8-12 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Direct link from the Pendo Resource Center Home View into a Zendesk Ticketing Portal, leveraging the requisite HTML, CSS, and JavaScript• Facilitate and implement visual or functional customizations within the Pendo Custom Code Module, specifically as it relates to the links to open a new ticket, and see all tickets• Implement analytics tracking via standard Pendo tagging about impressions and clicks on the Zendesk Support Ticket integration• Provide quality assurance and UAT testing for delivered code• Provide documentation of the implemented service for ongoing maintenance	<ul style="list-style-type: none">• Implement SSO such that users can link directly to the Zendesk Ticketing portal itself from within the Pendo Resource Center. For external public instances of the Zendesk ticketing portal, this setup is not applicable.• Make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Engineer	If applicable, implement SSO such that users can link directly to the Zendesk Ticketing portal itself from within the Pendo Resource Center.	20% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Custom Zendesk Support Ticket Integration Service

- Customer will implement SSO such that users can link directly to the Zendesk Ticketing portal itself from within the Pendo Resource Center. For externally public instances of the Zendesk ticketing portal, this setup is not applicable.
- Customer will make any Content Security Policy and Cross-Origin Resource Sharing changes necessary within Customer's application to allow content to be rendered within the Resource Center

Data-Out Workshop Service

Overview

Pendo's Professional Engineering Services team will work directly with Customer's team to provide technical consulting around the extraction of data from Pendo into an external system or dataset.

This service specifically covers advising on and creating custom [Aggregations Query Language](#) requests to Pendo's v1 API, Engineering-led data-out trainings & workshops, as well as consulting and advisory services around ETL solutions that will work best for specific products.

Package options

The table below outlines the package levels available.

Activities	Small	Medium	Large
Project kickoff	✓	✓	✓
Access to specialized developer tools	✓	✓	✓
Expert-led aggregations trainings	✓	✓	✓
Extract-Transform-Load (ETL) consultation workshops		✓	✓
Customer aggregation support hours	8 hours	20 hours	40 hours
Project review	✓	✓	✓
Duration	2 weeks	4 weeks	8 weeks

Implementation Activities

What Pendo will do	What Customer will do
<ul style="list-style-type: none"> • Provide trainings, workshops, and technical consulting expertise around topics relating to data extraction out of Pendo • Provide specialized tooling (Chrome Extension) to easily retrieve Aggregations from the Pendo UI • Provide a sample repository of aggregations for Customer reference • Provide consultation around ETL solutions best suited for particular product implementations and technical ecosystems 	<ul style="list-style-type: none"> • Implement any desired ETL solutions within their own ecosystem and codebase. This cannot be hosted by Pendo. • Implement any Pendo-created custom aggregations within their ecosystem to programmatically retrieve data

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Creates the environment to support Pendo. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Engineer	Implements any desired ETL solutions within Customer's technical ecosystem, as well as any custom aggregations queries created by Pendo. Participates in engineering-led training sessions and reviews Pendo's provided resources and tools.	50% FTE
Executive Sponsor	Provides clear direction for the project and how it links with the organization's overall strategy. Secures project resources.	5% FTE

Assumptions for Data-Out Workshop Service

- Customer will implement any desired ETL solutions within their own ecosystem and codebase: Pendo can provide consultation around which ETL products may be best in specific circumstances, but as the code will need to reside outside of the Pendo ecosystem, it cannot be directly installed or implemented by Pendo engineers.
- Customer will implement any Pendo-created custom aggregations within their ecosystem or ETL infrastructure to programmatically retrieve data: Pendo engineers can write these custom aggregations, but they cannot install them within a customer's codebase.

Configuration Migration Service

Overview

Pendo's Professional Engineering Services team will execute a migration of a defined set of Pendo configurations from one Pendo subscription/application to one or more other subscriptions and applications.

This service specifically covers the potential migration of page tags, feature tags, guides created in Visual Design Studio, guide layouts, guide themes, product areas, staging & exclusion lists, and reports created in Pendo. Any other configurations (guides built within the classic designer, segments, the Pendo Resource Center, etc) are not supported by this service.

Package options

The table below outlines the package levels available.

Activities	Small	Medium	Large
Number of applications supported	1	2-3	4-6
Page tags	✓	✓	✓
Feature tags	✓	✓	✓
Product areas	✓	✓	✓
Visual Design Studio Guides (not classic)	50 guides	100 guides	200 guides
Themes	✓	✓	✓
Visual Design Studio Layouts (not guide templates)	✓	✓	✓
Staging and Exclusion Lists		✓	✓
Reports			✓
Duration	2 weeks	4 weeks	6 weeks

Implementation Activities

Implementation of the Configuration Migration Service will require a 2-4 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">Migrate all specified, in-scope configurations to another Pendo subscription or application	<ul style="list-style-type: none">Specify to the designated Pendo Consultant the full set of configurations that are to be migrated

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Serves as the main point of contact for designated Pendo Consultant.	10% FTE

Assumptions for Configuration Migration Service

- Customer to provide directions and specifications to Pendo Consultant as to exactly what configurations are to be migrated, and to which subscriptions / applications.

VisitorID / AccountID Deletion Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to execute a deletion of up to 100,000 visitorIDs or accountIDs that have been sent to a Pendo subscription.

This job is intended for bulk deletions of visitors or accounts, and will delete the **full historical set of data** for a visitor or account. Partial or selective deletions are not supported. For account deletions, the account and its associations will be deleted, but the visitors within the account will not be affected unless explicitly deleted as well.

Implementation Activities

Implementation of the VisitorID / AccountID Deletion Service will require a 2-4 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Validate the provided CSV file of visitor and/or account IDs to ensure that are no invalid entries and that the file matches the required specifications• Coordinate and execute to delete all events received by Pendo associated with the visitor and/or account IDs in the file• Provide quality assurance and UAT that the events have been deleted as expected	<ul style="list-style-type: none">• Provide a data extract mapping, in single-column CSV format, specifying all visitor and/or accountIDs to be deleted

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Engineer or Data Analyst	Extracts the single-column CSV data file necessary for Pendo to execute a visitor or account deletion job.	10% FTE

Assumptions for VisitorID / AccountID Deletion Service

- Customer to provide a data extract mapping, in single-column CSV format, specifying all visitors or accounts to be deleted.
- Visitor and account bulk deletions are processed on a weekly basis by Pendo, so individual batches of visitor or account deletions may take 1-3 weeks to be processed.

VisitorID / AccountID Merge & Remapping Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with Customer's team to execute a merge or remapping of up to 100,000 visitorIDs or accountIDs that have been sent to a Pendo subscription.

This job will perform two primary functions:

1. Remap or merge the specified visitor and/or account IDs for all **historically received** events by Pendo.
2. Create future-focused mappings between the old and new identifiers. So, if Pendo receives an event at any point in the future with an original, but now remapped, visitor or accountID, Pendo will rewrite the identifier to its new, corresponding value on-the-fly as the data is being processed.

Implementation Activities

Implementation of the VisitorID / AccountID Merge & Remapping Service will require a 2-4 week timeline.

What Pendo will do	What Customer will do
<ul style="list-style-type: none">• Validate the provided CSV file of visitor and/or account IDs to ensure that are no invalid duplicates and that the file matches the required specifications• Coordinate and execute a job that will rewrite the events received by Pendo, to modify the visitor and/or account ID on those received events to a new, specified value• Provide quality assurance and UAT that the events have been rewritten or merged as expected	<ul style="list-style-type: none">• Provide a data extract mapping, in two-column CSV format, mapping each original visitor and/or accountID to its new, corresponding visitor or accountID• Coordinate modifications to the Pendo snippet required to send updated identifiers.• Coordinate any temporary disabling of guides or the Pendo initialization as deemed necessary by Customer.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Manages the project and ensures on-time delivery. Serves as the main point of contact and assists with the procurement of engineering resources.	10% FTE
Engineer or Data Analyst	Extracts the two-column CSV data file necessary for Pendo to execute a remapping and merge job.	10% FTE

Assumptions for VisitorID / AccountID Remapping Service

- Provide a data extract mapping, in two-column CSV format, mapping each original visitor and/or accountID to its new, corresponding visitor or accountID
- Coordinate any temporary disabling of guides or the Pendo initialization as deemed necessary by Customer: The remapping job has an approximate machine time of anywhere from 6 hours - 7 days, depending on the volume of events being processed. As such, it is advised that Customer and Pendo coordinate the execution of the remapping job with the Customer's modification of their Pendo snippet. Additionally, temporary disabling of Pendo Guides is advised to avoid reshowing existing guides during the job's execution period.

Standard Assumptions Across All Pendo Engineering Service Packages

- Customer will install Pendo code on the applicable Customer or third-party application(s) and provide access to Customer's Pendo subscription and such application(s) as needed.
- Pendo will not modify Customer application code. For clarity, Customer is responsible for deploying the Pendo Launcher extension to user endpoints to enable the Pendo solution functionality.
- All Professional Services must be consumed within 6 months after contract execution.
- Each session can have up to 10 attendees. If additional attendees are required, Pendo will work with the Customer to determine whether additional sessions are needed.
- A Pendo Professional Services Engineer resource will be assigned based on mutually agreed upon session timing and availability. A resource is typically assigned 2-4 weeks after contract date.
- Customer must have an active, paid subscription for any Application Key in scope for the Professional Services.
- The Professional Services will be performed on a remote basis.

The engineering services performed by Pendo in accordance with this Services Description are referred to as "Professional Services." This Services Description is incorporated into the Pendo Order Form or other ordering document between Pendo and a customer covering the purchase of applicable Professional Services.

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