Custom Requests

To streamline project planning and ensure we capture key details upfront, we require a **Project Brief Form** for new projects, integrations, and any requests involving custom development.

When to Complete a Project Brief:
If you're requesting a new integration, custom API, or reporting enhancement, completing a Project Brief helps us assess your needs and plan accordingly. Examples include:

- **Integrations** – Connecting data sources like POS, PMS, eCommerce, surveys, spa, golf, etc.
- **APIs & Data Transfers** – Flat files, webhooks, inbound & outbound data exchanges.
- **New CDP Fields** – Adding new data points to your customer data platform.
- **Reporting Enhancements** – PowerBI reports, SSRS, or data migration reports.
- **Custom Development** – Unique API needs tailored to your business.

By providing this information upfront, we can ensure a smoother process and a well-defined project scope before engaging our Development Team. Your Client Success Manager (CSM) will use the details in your Project Brief to compile detailed requirements, likely requesting your approval before submitting for an official "level of effort" estimate from the development team.

✏️ Complete the project brief form HERE.

Need help? Let us know—we're happy to guide you through the process!