juunie

PARADIGM HUB · STATEMENT OF WORK

Site Touchpoint Logging

I'll design, build, migrate and deploy touchpoint logging in the PARADIGM Hub Salesforce® org, and take the data cleaning and import off your team's plate. You go live in early February with clean, reconciled history and nothing left to load.

AUD $26,000
Fixed price

Mon 4th Jan
Work starts

Tue 2nd Feb
Go-live

Thu 4th Mar
30-day warranty ends

What you'll be able to do

- Log a touchpoint against a Site quickly, on desktop or mobile
- Schedule touchpoints that appear in the calendar and stay in sync when rescheduled or cancelled
- See at a glance when each Site was last contacted and which follow-ups are due
- Carry existing touchpoint history across, cleaned and reconciled

Who's involved

Prepared for: Anteris
Contact: [Anteris contact name and role]
Prepared by: Chace Grierson
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How it works

WHEN THIS HAPPENS	SALESFORCE DOES THIS
An FCS **schedules** a touchpoint	Creates a calendar Event for the FCS
The date, time, specialist or activity changes	Updates the Event to match
The touchpoint is **cancelled**	Deletes the Event

WHEN THIS HAPPENS	SALESFORCE DOES THIS
The touchpoint is **completed**	Keeps the Event, updated to the final date
An FCS **logs** a past touchpoint	Records it, with no Event
The **SIV date** is set or changed on a Site	Creates or updates a Planned SIV touchpoint, and its Event
Someone edits the Event directly	Leaves the touchpoint unchanged; warn or block per decision D9

The Touchpoint is the single source of truth. Reports, history, “last touchpoint date” on the Site and follow-ups all run from it; the calendar simply shows what’s planned.

02 Scope

The fixed price covers discovery and REQ-01 to REQ-17 based on Anteris's *PARADIGM Hub Site Touchpoint Logging: Scope of Requirements v2* (November 2026). The final detail of each requirement is confirmed in the approved requirements summary after discovery. REQ-16, the SIV integration, is included using Option B1 with automatic scheduling from the SIV date. Anything not listed here is out of scope.

REF	DELIVERABLE
DISCOVERY	
Discovery	Production metadata checks, picklist values, and confirmation of decisions D1–D9
DATA MODEL AND LOGGING	
REQ-01	Touchpoint object, Site lookup filtered to trial sites, related list on the Site
REQ-02	Status lifecycle and allowed status transitions
REQ-03	"Log a touchpoint" screen flow, including field order and mobile layout
REQ-04	"Schedule a touchpoint" path
REQ-05	Complete and Cancel actions
REQ-06	Status-dependent validation rules, with a bypass for migration
REQ-07	Calendar Event automation: create, update and delete Events as touchpoints are scheduled, rescheduled or cancelled
REQ-08	Category formula and Unclassified list view
REQ-09	Follow-up due date and completed flag
ACCESS AND ADMINISTRATION	
REQ-10	Delegated administration, locked picklist values, admin guide section
REQ-11	Three permission sets, Event access, testing by persona
VISIBILITY	
REQ-12	Last touchpoint date and Days since last touchpoint on the Site

REF	DELIVERABLE
REQ-13	Six list views, listed below
REQ-14	Six reports (R1–R6, listed below) and a “Touchpoints with Site” custom report type, in a shared folder
DATA AND GO-LIVE	
REQ-15	Data cleaning and migration: 427 tracker rows merged into 399 touchpoint records using cleaning rules M1–M10, up to two UAT loads, production load, and a reconciliation report from source rows to merged meetings to loaded records
REQ-16	SIV integration (Option B1, automated): the Account SIV fields stay the source of truth. When the SIV date is set or changed, a Planned SIV touchpoint is created or updated for the primary FCS, with its calendar Event via REQ-07. When “SIV occurred” is ticked, the specialist completes it, and a list view shows occurred SIVs still Planned. Duplicates for the same site and date are prevented
REQ-17	Deployment, release notes, admin guide, cutover plan with a parallel run while the Microsoft Form stays open

Reports (REQ-14)

Standard Salesforce reports, each exportable to Excel or CSV, filterable by Status (default Completed) and by Category.

REF	REPORT	GROUPED BY
R1	Touchpoints by site and month	Site, calendar month
R2	Touchpoints by specialist	Specialist
R3	Touchpoints by activity, role engaged and channel	Activity, Role, Channel
R4	Days since last touchpoint, by site	Site, using the REQ-12 fields
R5	Open follow-ups and due dates	Outcome “Follow-up required”, not yet completed
R6	Touchpoints by category	Category, Activity, month

List views (REQ-13)

LIST VIEW	SHOWS
My touchpoints	The current user's touchpoints
All touchpoints	Every touchpoint the user can see
My planned	The user's upcoming Planned touchpoints
Planned with a past date	Planned touchpoints whose date has passed but are not yet completed
Open follow-ups	Touchpoints with a follow-up still to close
Unclassified category	Touchpoints with no category mapping, for admins

Not included

- Salesforce licences, sandboxes or other platform costs
- End-user training beyond the admin guide
- Data cleaning beyond rules M1–M10, or loads beyond those listed in REQ-15
- Integrations with other systems, including the KOL instance and Power BI/Azure
- Dashboards, deadline alerts for mandatory touchpoints, and automatic creation of follow-up touchpoints
- Two-way sync from Event edits back to the Touchpoint
- Writing UAT test scripts; Anteris prepares and runs these
- Changes to the screening workflow, the site status path or system access
- The priced options in the Scope of Requirements: SIV Option A (section 10.2), multi-select Role engaged (decision D4, section 14), cadence reporting OPT-1 and the first-45-days checklist OPT-2 (section 8), and the site contacts load OPT-3 (section 9). Each can be quoted separately
- Support or enhancements after the warranty period

03 Decisions and rules

These come from section 14 and section 9.1 of Anteris's Scope of Requirements v2. Anteris confirms each decision in discovery, within 3 business days of being asked. A choice that adds work beyond this scope, such as SIV Option A (D1) or multi-select Role engaged (D4), is quoted as a change request.

Open decisions

REF	DECISION	DECIDED BY	AFFECTS
D1	SIV integration: Option A, B0 or B1	Clinical Operations lead, with the system-access product owner	REQ-16. This SOW includes B1 (automated)
D2	Production date of the site status path	Hub product owner	When SIV B1 or A can go live
D3	Category mapping (Appendix B)	Clinical Field lead	Category formula values and reports
D4	Role engaged: single-select or multi-select	Clinical Field lead	13 merged historical meetings involve more than one role
D5	Merge the 4 meetings logged by two specialists into one record each?	Clinical Field lead	Migration count (399 or 395) and ownership
D6	How a follow-up is closed	Clinical Field lead	REQ-09
D7	Is "DurAVR Product & Procedure Deck" the same item as "Product & Procedure Deck", and is the "Complete - No F/U" wording final?	Clinical Field lead	Migration mapping and list values
D8	Trial-site criterion for the Site lookup	Salesforce admin	REQ-01
D9	Should FCS be warned or blocked when they edit an Event directly?	Clinical Field lead	REQ-07

Data cleaning rules

REF	RULE	VOLUME
M1	Merge rows into meetings: same date, site, specialist and activity	427 rows → 399 meetings
M2	Resolve conflicting fields within a merged meeting: Content combined, Attendees and Notes joined, Role per D4, Channel = first non-blank	49 field conflicts
M3	Map tracker values to the agreed picklist values (Appendix A)	134 values, 106 rows
M4	Fold the tracker's Contact and Attendees (#) columns into Attendees text; Number of attendees stays blank	215 / 248 rows
M5	Keep blanks: empty required fields load as blank under the migration bypass	Per field
M6	Follow-up interval and due date load as blank, as no history row has an interval	54 rows
M7	Map specialists to Users; where there is no user, keep the legacy name and assign a Clinical Field lead as owner	14 names
M8	Match sites on site number, not name	5 rows
M9	Trim leading and trailing spaces	111 cells
M10	Meetings logged by two specialists: merged or kept separate per D5	4 meetings

04 Assumptions and risks

The price and timeline are based on the assumptions below. If one turns out differently and adds work, it's handled as a change request.

Assumptions

- 427 tracker rows, loading as 399 touchpoint records (395 if the 4 joint meetings are merged under decision D5)
- Cleaning follows rules M1–M10 as agreed in discovery; Anteris resolves records the rules can't clean
- Up to two UAT loads and one production load. Reconciliation shows source rows to merged meetings to loaded records, with any differences explained
- Everyone who logs or schedules touchpoints is a licensed Salesforce user with access to the Site records they work with
- The Primary FCS and Secondary FCS fields on the Site are user lookups, and every FCS is a full Salesforce user
- Built with Salesforce configuration and Flow, plus small custom Lightning components where they make the process smoother. Where a third-party tool or package is the better option, I'll recommend it and only install it with Anteris's approval; any licence costs are Anteris's
- The Account SIV fields (SIV date and SIV occurred) exist in production before go-live and stay unchanged; the SIV date, a date-time field, is converted to the touchpoint date without shifting the day

Risks and dependencies

These items depend on other work or are confirmed in discovery.

RISK OR DEPENDENCY	EFFECT	HOW IT'S HANDLED
SIV fields not yet in production (section 11.3)	The SIV automation (REQ-16) can't be switched on at go-live	Built and tested in UAT, then deployed once the fields are live. A separate deployment after the warranty period is quoted as a small change
SIV date is a date-time field	Converting it to a touchpoint date could shift it by a day, depending on time zone	The time zone used for the conversion is agreed in discovery, and tested with sites in different time zones

RISK OR DEPENDENCY	EFFECT	HOW IT'S HANDLED
FCS Event and calendar access in production	Event automation could fail for some users	Checked in discovery; the FCS permission set grants Event access
Business admins maintaining dropdown lists (REQ-10)	Delegated administration gives access to the whole Touchpoint object, not just its lists, so locked values could be changed	In discovery I'll agree a setup with Anteris that lets the business admin manage the five lists without touching anything else, such as list values held as records they can edit, with locked values protected
Account record page and layout (section 11.4)	The DEV page can't be promoted	Related list and actions added directly in production, and mirrored in DEV
Trial-site criterion (D8)	The Site lookup filter	Decided in discovery
Matching 13 specialists to active Users (M7)	Ownership of migrated records	Matched in discovery; fallback per M7
Late decisions or data	Go-live moves	Per Client delays in Scope control

05 Approach

How the solution comes together. It's a medium-sized build with several connected parts and a careful data migration, all designed so the Touchpoint stays the single source of truth and is straightforward to maintain after handover.

Data model

- A custom Touchpoint object, as recommended in the requirements. It keeps history independent of the calendar, supports its own managed lists and reports cleanly
- Every touchpoint is linked to a Site, and the site picker shows trial sites only (using the rule confirmed under D8)
- Status values Planned, Completed and Cancelled, with allowed transitions enforced by validation rules

Forms

- Two screen flows launched from the Site record, on desktop and mobile: "Log a touchpoint" (full field set, in the order in Appendix A) and "Schedule a touchpoint" (date, site, activity and specialist only)
- A Complete action on a planned touchpoint opens with the planned details already filled in, so FCS only add what happened. A Cancel action asks for an optional reason
- Where it makes the process smoother, small custom Lightning components may be added, for example a quick touchpoint summary on the Site page. These are included in the fixed price

Calendar Event automation

- A record-triggered flow on Touchpoint creates exactly one Event per Planned touchpoint, stores its Id on the record, and updates or deletes it as the touchpoint changes
- The Event carries no data of its own; the Touchpoint stays the master
- For D9 I recommend blocking date and time edits on linked Events, with a message to change the touchpoint instead

Locked and managed lists

- Restricted picklists; formulas, validation and automation reference the values' API names, so a label change can't break them
- A business administrator can add or deactivate values in the five editable lists without system admin access. The exact setup is agreed in discovery so the locked values (the SIV activity, "Follow-up required" and the follow-up intervals) stay protected, and it's documented in the admin guide

Site summary and SIV

- A Touchpoint flow keeps Last touchpoint date on the Site current; Days since is a formula. The update touches only that field
- An Account flow watches the SIV date and SIV occurred fields, creates or updates the Planned SIV touchpoint assigned to the site's Primary FCS, and blocks duplicates for the same site and date

Access, categories and follow-ups

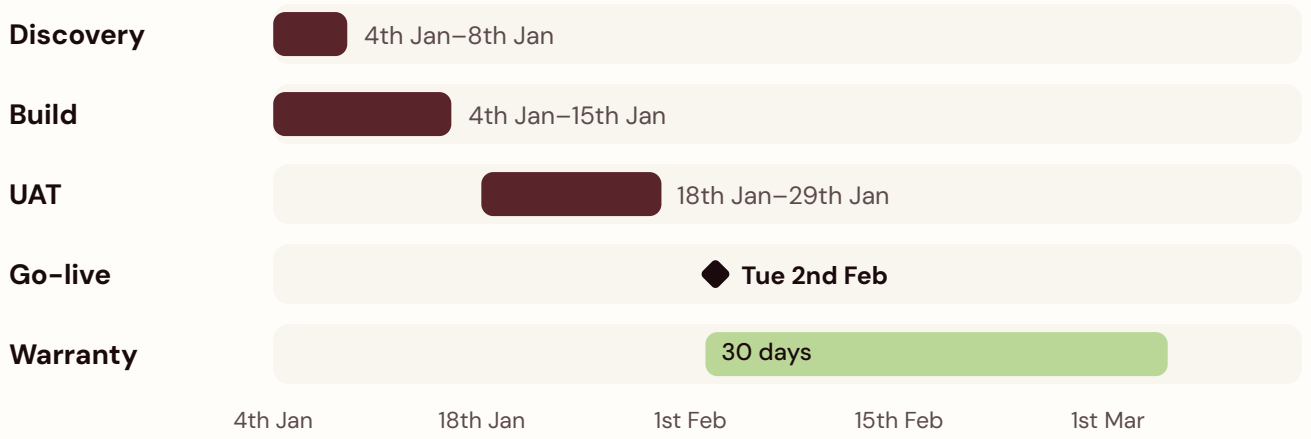
- Three permission sets, one per persona in section 7, each tested with its own user so people can do only what their role allows
- Each touchpoint's category is worked out automatically from its activity, using the mapping confirmed under D3
- The follow-up due date is calculated from the touchpoint date plus the chosen interval, and closes as agreed under D6
- The six reports are standard Salesforce reports on a "Touchpoints with Site" report type, in a shared folder

Migration and deployment

- Cleaning rules M1–M10 run as a repeatable transformation, so every load produces the same result and differences can be traced
- Records load with a migration bypass and the Migrated flag set, then the reconciliation report is produced
- Deployment follows Anteris's change process from DEV/UAT to production. The Account page changes are made directly in production, as section 11.4 requires, not promoted from DEV

06 Timeline

Work starts on Monday 4th January 2027, and no later than Monday 11th January 2027. Go-live is within 4 weeks of the start date, and the 30-day warranty then runs to Thursday 4th March 2027. If go-live moves later for any reason, the warranty still ends by Friday 12th March 2027.



Monday 4th January
Kickoff and discovery

Tuesday 2nd February
Production go-live

Thursday 4th March
Warranty ends

PHASE	TIMING	INCLUDES
Discovery	Week 1	Metadata checks, decisions D1–D9, data extract received, requirements summary approved
Build	Weeks 1–2	REQ-01 to REQ-14, cleaning rules and first UAT data load
UAT	Weeks 3–4	Client testing, fixes and retest, second UAT data load if needed, sign-off
Go-live	Start of week 5	Production deployment, production data load, reconciliation, release notes
Warranty	30 days from go-live	Defect fixes only

07 Investment

All prices are in Australian dollars. The fixed price is paid in three milestones.

MILESTONE	INVOICED	SHARE	AMOUNT
Deposit	On signing	30%	AUD $7,800
UAT ready	When UAT starts	40%	AUD $10,400
Go-live	On production deployment	30%	AUD $7,800
Total		**100%**	**AUD $26,000**

Payment terms

- The deposit secures the project start date and is non-refundable once work has started
- All invoices are due within 14 days, by bank transfer to the account shown on the invoice
- If an invoice is more than 14 days overdue, work may pause until it's paid
- Overdue amounts may attract interest at 10% per annum
- Prices exclude GST. Chace Grierson is not currently registered for GST. If he becomes registered, GST will be added to invoices issued after the registration date.

08 Working together

The price and dates rely on these items arriving on time. Client-side delays may move go-live, and extra effort is quoted as a change request.

Anteris provides

- System Administrator access to production and a full or partial copy sandbox by the start date
- A named decision-maker who confirms decisions D1–D9 within 3 business days of each request
- The source data extract in one agreed format (CSV or Excel) by Tuesday 12th January 2027, 3 business days before the first UAT load
- UAT testers during the UAT window, with feedback and sign-off within 5 business days
- Approval for production deployment at an agreed time

Working hours

- Monday to Friday, 8:30am to 5:00pm AEST (Brisbane time), excluding Queensland public holidays
- Early-morning sessions are available by arrangement to suit US time zones. For example, 7:00am in Brisbane is 3:00pm the previous day in Minnesota (US Central) during the project
- Emails and messages answered within 1 business day
- Production deployment within working hours unless agreed otherwise in writing

Meetings included

- A kickoff
- Up to 2 discovery workshops of 2 hours each
- A weekly 30-minute check-in
- A UAT walkthrough and a go-live session
- Additional meetings or training at AUD $180 per hour

09 Scope control

The fixed price covers the deliverables in the Scope section, as confirmed in the approved requirements summary. Everything else is a change request.

Requirements baseline

- After discovery, I provide a requirements summary: fields, picklist values, flow screens, list views, reports, mapping rules and decisions D1–D9
- Anteris approves the summary within 3 business days (by email is fine)
- The approved summary is the baseline for build, testing and warranty

What UAT includes

- One round of client testing, up to 5 business days
- One round of fixes, then one retest of up to 2 business days
- Feedback after the window closes becomes a change request or goes on a phase 2 list

Defect or change?

Defect: fixed at no cost

- Doesn't work as the approved summary describes
- Errors, failed automation or incorrect permissions
- Data loaded incorrectly against the agreed mapping rules

Change request: quoted separately

- New fields, picklist values, screens, list views or reports
- Changes to labels, layouts or field order after sign-off
- New or changed mapping rules, extra data sources or extra loads

Where it's unclear which applies, we agree in writing before work starts.

Change requests

- Quoted in writing, at AUD $180 per hour or as a fixed price, before work starts
- No change work starts without your written approval (email is fine)
- Approved changes may move go-live, but the warranty still ends by 12 March 2027 at the latest
- Up to 2 hours of minor adjustments included at no charge, at my discretion

Client delays

- If access, decisions, data, testing or sign-off arrive late, go-live moves by the same number of business days
- If the project is paused more than 10 business days by client delays, I may invoice for work completed to date

10 Warranty and acceptance

30-day warranty

Defects in the delivered scope are fixed at no charge for 30 days from go-live, to Thursday 4th March 2027 on the current plan. If go-live moves later, the warranty still ends by 12 March 2027. A defect is behaviour that doesn't match the agreed requirements; new requests are not defects.

Milestone acceptance

Anteris reviews each milestone within 5 business days. If no written feedback arrives in that time, the milestone is treated as accepted.

This proposal is valid for 30 days from 22 November 2026.

11 Terms

These terms apply to this Statement of Work between Anteris and Chace Grierson (ABN 22 737 816 579), referred to as "I" or "me". If Anteris requires its own supplier terms, we'll agree in writing which terms apply where they differ.

1 Ownership

Once paid in full, Anteris owns the configuration, flows, code and documentation built for this project. I keep my general know-how, tools and templates, and Anteris may use any of them included in the deliverables.

2 Confidentiality and data

Each party keeps the other's confidential information confidential. Anteris data is used only for this project, stored securely, and returned or deleted within 30 days of completion. Personal information is handled in line with the Australian Privacy Principles.

3 Liability

My total liability under this SOW is limited to the fees paid under it. Neither party is liable for indirect or consequential loss, such as lost profits. Nothing here limits rights that can't be excluded under Australian Consumer Law.

4 Ending the engagement

Either party may end this SOW with 10 business days' written notice. Either party may also end it immediately by written notice if the other commits a material breach and doesn't fix it within 10 business days of being notified, or becomes insolvent or bankrupt. Anteris pays for work completed up to the end date (the deposit is non-refundable once work has started) and receives everything delivered to that point. Rights that existed before the end date are not affected.

5 Independent contractor

I work as an independent contractor, not an employee, and am responsible for my own tax, superannuation and insurance.

6 Disputes

If a dispute arises, the parties first try to resolve it through good-faith discussion. If it isn't resolved within 20 business days, it goes to mediation under the Australian Disputes Centre (ADC) Guidelines for Commercial Mediation. Neither party starts court proceedings, except for urgent interim relief, until this process has been followed.

7 Governing law

This SOW is governed by the laws of Queensland, Australia, and the parties submit to the non-exclusive jurisdiction of its courts.

8 Entire agreement and variations

This SOW is the whole agreement for this project and replaces earlier discussions and proposals. Changes must be agreed in writing by both parties; email is fine, and change requests follow the Scope control section.

9 General

Neither party may transfer its rights or obligations without the other's written consent. If any part of this SOW is found unenforceable, the rest still applies. The SOW may be signed in separate copies, including electronically, which together form one agreement. A delay in using a right doesn't mean giving it up.

12 Accept this proposal

Happy to go ahead? Download the PDF to sign, or copy the summary below and reply to admin@juunie.com to confirm. I'll lock in your start date and send the deposit invoice straight away.

Anteris accepts the Statement of Work from Chace Grierson for PARADIGM Hub Site Touchpoint Logging (22 November 2026).

Scope: discovery and REQ-01 to REQ-17, including automated SIV touchpoints
Fixed price (no GST): AUD $26,000
Deposit (invoiced on signing, due in 14 days): AUD $7,800

Start: Monday 4th January 2027 · Go-live: Tuesday 2nd February 2027 · Warranty ends: Thursday 4th March 2027

Signatures

Anteris	**Chace Grierson**
_____	_____
Name	Chace Grierson
_____	_____
Signature	Signature
_____	_____
Date	Date