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 Integrations	• Custom Knowledge Base Integration Service • Custom Live Chat Integration Service • Custom Support Ticket Integration Service
Data-Out Consultation	• Getting Started with Data Sync
Pendo Data Modification	• Pendo Data Modification Service
Pendo Data Migration	• Configuration Migration Service • Cross-Environment Historical Data Migration Service

Please see our glossary for an index of Pendo-specific or industry technical terms and abbreviations.

Resource Center Integrations

Custom Knowledge Base Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with the Customer's team to implement a Custom Knowledge Base Integration, housed within the Pendo Resource Center. This service will integrate with a compatible knowledge base vendor solution (**Vendor**) that has been approved in advance by Pendo Professional Services.

Implementation Activities

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

What Pendo will do	What Customer will do
• 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 Vendor's Knowledge Base product, into 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	• Provide the necessary authentication* information to Pendo to allow for retrieval of knowledge article content hosted by Vendor. • 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 Vendor APIs. • Configure any SSO that deep links a user from the Customer's product application into Vendor's web portal.

** This service supports basic, token, or any form of client-side authentication. If server-side / OAuth authentication is required, the creation and ongoing hosting of an authentication middleware service is outside the scope of this service. Pendo does offer middleware hosting services, sold separately.*

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 fields any user experience questions around the integration experience.	10% FTE
Engineer (Optional)	If applicable, implement SSO such that users can link directly to the Vendor Knowledge Base portal itself from within the Pendo Resource Center.	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 Knowledge Base Integration Service

- Customer will provide the Pendo team access to their Pendo subscription.
- Customer will provide the Pendo team access to their application on which the integration will be installed. A non-production or test environment is acceptable to meet this requirement.
- Customer will provide the necessary authentication information to Pendo to allow for retrieval of knowledge article content hosted by Vendor.
- 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 Vendor APIs and middleware, if applicable.
- Customer will configure any optional SSO, if included in the desired experience, that deep links a user from the Customer's product application into Vendor's web portal.
- Scope of delivery covers implementation of the integration on one (1) Pendo application key, for one (1) language. Additional fees may apply for any localization and implementation on additional application keys.

Custom Live Chat Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with the Customer's team to implement a Custom Live Chat Integration, housed within the Pendo Resource Center. This service will integrate with a compatible live chat vendor solution (**Vendor**) that has been approved in advance by Pendo Professional Services.

Implementation Activities

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

What Pendo will do	What Customer will do
• 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 Vendor's Live Chat widget. • Implement analytics tracking about when the Live Chat 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	• Install the required code within Customer's application / product to allow the Vendor's widget to be invoked • Make any necessary configurations and purchase necessary add-ons (the Live Chat functionality, respectively) within the Vendor's web portal such that a chat widget can 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 fields any user experience questions around the integration experience.	10% FTE

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
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 Live Chat Integration Service

- Customer will provide the Pendo team access to their Pendo subscription.
- Customer will provide the Pendo team access to their application on which the integration will be installed. A non-production or test environment is acceptable to meet this requirement.
- Customer will provide any necessary authentication information to Pendo to allow for rendering of live chat content hosted by Vendor.
- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow for the Live Chat widget to be shown.
- Scope of delivery covers implementation of the integration on one (1) Pendo application key, for one (1) language. Additional fees may apply for any localization and implementation on additional application keys.

Custom Support Ticket Integration Service

Overview

Pendo's Professional Engineering Services team will work in collaboration with the Customer's team to implement a Custom Support Ticket Integration, housed within the Pendo Resource Center. This service will integrate with a compatible support ticket vendor solution (**Vendor**) that has been approved in advance by Pendo Professional Services.

Implementation Activities

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

What Pendo will do	What Customer will do
• 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 Vendor Support Ticket widget. • Implement Pendo standard tracking about when the Vendor 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	• Install the required code within Customer's application / product to allow the Vendor 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 • Configure any SSO that deep links a user from the Customer's product application into Vendor's web portal.

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 fields any user	10% FTE

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
	experience questions around the integration experience.	
Engineer (Optional)	If applicable, implement SSO such that users can link directly to the Vendor Ticketing portal itself from within the Pendo Resource Center.	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 Support Ticket Integration Service

- Customer will provide the Pendo team access to their Pendo subscription.
- Customer will provide the Pendo team access to their application on which the integration will be installed. A non-production or test environment is acceptable to meet this requirement.
- Customer will provide the necessary authentication information to Pendo to allow for retrieval of knowledge article content hosted by Vendor.
- Customer will make all Content Security Policy and Cross-Origin Resource Sharing changes necessary within their application to allow for the Live Chat widget to be shown.
- Customer will configure any optional SSO, if included in the desired experience, that deep links an end-user from the Customer's product application into Vendor's web portal.
- Scope of delivery covers implementation of the integration on one (1) Pendo application key, for one (1) language. Additional fees may apply for any localization and implementation on additional application keys.

Getting Started with Data Sync

Overview

Pendo's Getting Started with Data Sync Service provides targeted, technical consulting to help customers export and operationalize product usage data through their own analytics workflows. This offering is ideal for customers who want to model Pendo data in their own data warehouse, power business intelligence dashboards, or join Pendo with other systems (CRM, support, billing, etc.).

We guide the Customer team through the structured setup and validation of Pendo's Data Sync solution, whether exporting to cloud storage (S3, GCS, Azure) or directly into a Snowflake warehouse, and partner with Customer technical teams to ensure readiness across ETL ownership, schema alignment, and reporting goals.

Implementation Activities

The Getting Started with Data Sync Service has a duration of 45 days.

What Pendo will do	What Customer will do
• Assign a dedicated Professional Services Engineer (PSE) to guide your team throughout the engagement • Facilitate discovery sessions to align on business goals, success metrics, and reporting use cases • Review your tagging structure, metadata plan, and data modeling needs to ensure readiness for export • Provide tailored guidance on schema interpretation, event filtering, and joining Pendo data with other systems (e.g. CRM, backend systems) • Recommend strategies for working with: matchedEvents vs allEvents, exportmanifest.json and counter tracking, finalized exports and straggler handling • Share documentation templates including: Baseline Discovery & Data Discovery, Common joins and event mapping examples	• Identify a primary data engineering contact responsible for ingesting, transforming, and modeling Pendo Data Sync exports • Provision a supported cloud destination (AWS S3, GCS, Azure Blob, or Snowflake) for Pendo to deliver data • Own and maintain the internal ETL/ELT process used to load and transform Avro files into usable reporting structures • Participate in an intent discovery session to define business outcomes and key KPIs • Provide visibility into: Systems Pendo data will join with (e.g., Salesforce, product DBs), Internal BI tools (e.g., Power BI, Looker, Tableau) • Team members responsible for insights and activation

• Provide ongoing check-ins during the 45-day window to help unblock technical issues and track progress	• Review discovery documents and contribute to tracking project outcomes and internal success criteria • Attend regular check-ins and provide feedback on implementation blockers or changes in priorities • Confirm whether backfill/historical data is needed and align internal resources to support pipeline readiness within the 45-day timeline

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 data engineering resources.	10% FTE
Data Engineer	The primary person responsible for maintaining the integrated Pendo Data once the consultation concludes. Has access to and can manage data within the Data Warehouse to which Pendo's data will be sent. Also responsible for any ETL solutions present within the customer's ecosystem that consume Pendo data.	30% 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 Consultation Service

- Customer will provide the Pendo team access to their Pendo subscription.
- 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.

Pendo Data Modification Service

Overview

Pendo Professional Services will work in collaboration with Customer's team to complete any **one** of the following tasks:

- Bulk deletion of up visitorIDs or accountIDs that have been sent to a Pendo subscription (up to 500,000 IDs).
- Bulk deletion of Pendo Track Events (up to 50,000 event types)
- Bulk deletion of Pendo Metadata (up to 100 metadata key names)
- Execution of a merge or remapping of visitorIDs or accountIDs that have been sent to a Pendo subscription (up to 1,000,000 IDs).

Implementation Options

All services listed here will require a 2-4 week timeline:

Data Modification Type	Definition & Details
Bulk Visitor or Account Deletion	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. Once removed, this data cannot be recovered.
Track Event Deletion	This job will delete all ingested events, as well as event property data, associated with one or more track event types that have been sent to Pendo. Once removed, this data cannot be recovered.
Metadata Deletion	This job will delete all metadata values, as well as metadata associations with Pendo events, for one or more metadata key names that have been sent to Pendo. Once removed, this data cannot be recovered.
Visitor or Account Remapping or Merge	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 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 Deletion Service will require a 2-4 week timeline.

What Pendo will do	What Customer will do
• Validate any provided CSV files of visitorIDs, accountIDs, track types, or metadata to ensure that there are no invalid entries and that the file matches the required specifications • Coordinate and execute to modify any and all events received by Pendo associated with the values in the file • Provide quality assurance and UAT that the events have been deleted as expected	• Provide a data extract mapping, in CSV format matching specifications provided by Pendo, enumerating all entities in scope for deletion, remapping, or merge. • For remappings, 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 CSV data file necessary for Pendo to execute the relevant data modification.	10% FTE

Assumptions for VisitorID / AccountID Deletion Service

- Customer to provide a data extract mapping, in CSV format matching specifications provided by Pendo, enumerating all entities in scope for deletion, remapping, or merge.
- Deletions, remappings, and merges are processed on a weekly basis by Pendo, so individual batches of entities may take an additional 1-3 weeks to be processed from the date at which the deletion, remapping, or merge has been executed.

Pendo Data Migration Services

Configuration Migration Service

Overview

Pendo Professional Services will execute a migration of a defined set of Pendo configurations from a Pendo subscription/application to another subscription or application. This scope of this service supports up to five (5) applications for migration, and the specified assets therein.

This service specifically covers the migration of any number of following within the scoped application(s):

- Pendo Page Tags
- Pendo Feature Tags
- Pendo Guides created in Visual Design Studio
- Pendo Guide Layouts
- Pendo Guide Themes
- Pendo Product Areas
- Pendo Staging & Exclusion Lists

Any other configurations (guides built within the classic designer, segments, reports, Pendo Resource Center configurations, integrations, etc) are not supported by this service.

Implementation Activities

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

What Pendo will do	What Customer will do
Migrate all specified, in-scope configurations to another Pendo subscription or application	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 access to the relevant destination and origin Pendo subscriptions for the migration activities.
- Customer to provide directions and specifications to Pendo Consultant as to exactly what configurations are to be migrated, and to which subscriptions / applications.

Cross-Environment Historical Data Migration Service

Overview

Pendo's Professional Engineering Services team will execute a migration of **one** Pendo subscription, including all web and mobile applications, and data contained within, into a different Pendo data center. This will include all historical data within the application(s), as well as pages, features, guides, segments, and analytics. This migration supports migration to and from Pendo's US, EU, US1, and Japan data centers.

Neither cherry-picking of historical data (including based on specific date ranges, specific visitors or accounts, etc), nor merges with other Pendo subscriptions are supported by this service. The subscription chosen for the migration will be moved in its entirety, including name, API key, and any other configurations and characteristics.

Implementation Activities

Implementation of the Cross-Environment Historical Data Migration Service will require a 4-8 week timeline from the point of scheduling. Scheduling will be performed on a quarterly basis.

What Pendo will do	What Customer will do
• Migrate all applications, historical event data, and configurations to a Pendo subscription within a different Pendo data center. • Communicate expectations around which Pendo features and functionality will be in scope for the migration. • Communicate updates around migration phases, as well as windows in which guides and analytics will be unavailable.	• Coordinate with Pendo Professional Services to schedule migration and associated downtime. • Provide Pendo with temporary access to the subscriptions relevant for migration • Re-configure any integration keys, CNAME, and SAML SSO on the new specified subscription.

Customer Roles and Responsibilities

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Champion	Communicates and agrees to project timelines. Serves as the main point of contact for designated Pendo Consultant.	10% FTE

Role	Responsibilities	Estimated % Full-Time Equivalent (FTE) during project
Engineer	Re-configures any Pendo features ineligible for migration, such as integration keys, CNAME, and SSO.	5% FTE

Assumptions for Configuration Migration Service

- Customer to provide access to the relevant destination and origin Pendo subscriptions for the migration activities.
- A Pendo data and guide display outage of up to 8 hours will occur as part of this migration process. No Pendo event data will be collected during this time, nor will any Pendo Guides be displayed on the relevant application.
- Pendo analytics may be unavailable or inaccurate for up to one week following the completion of the migration while data is processing.
- Data will remain in the original Pendo subscription for 90 days
- Some Pendo features are ineligible for migration. These include, but are not limited to, Pendo Feedback, Roadmaps, Session Replay, Hubspot Integration, and Data Sync.
- All Pendo Guide history will be limited to the most recent version that exists at the time that the migration is executed. Restoration of prior guide versions are not supported once the migration is complete.
- Some Pendo product features may not be available in certain Pendo data centers.

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.
- If no expiration date is defined on the order form, all Professional Services must be consumed within 6 months after execution of the Order Form or other ordering document between Pendo and the Customer.
- 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.
- A courtesy maintenance window of 60 days after the close of the Professional Services engagement will be provided, in which any implementation issues may be submitted to Pendo and assessed for remediation. After the maintenance period ends, any further requests for updates or support will need to be contracted as a new Professional Services engagement.
- Pendo Professional Services will be performed on a remote basis during the working hours of 9am-5pm in the Consultant's local timezone, during working days (Monday-Friday).

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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