## APPENDIX A

**PROPOSER QUESTIONNAIRE**

A complete proposal will include responses to the questions below. Proposals that contain incomplete responses may be disqualified from the selection process. Keep answers as brief as possible and related to the specific questions. Add attachments if needed and make specific reference in your answers to the attachment name and where it can be found in your proposal.

1. **PLATFORM**
2. Is your ticketing system software cloud based or would it be installed on a CBL server and network? Click or tap here to enter text.
3. Do you offer both types of software delivery? Click or tap here to enter text.
4. If both, what is your recommended type of delivery for CBL and why? Click or tap here to enter text.
5. If installed at CBL, include a system architecture diagram, all hardware requirements and pricing for all components and installation with your proposal. Click or tap here to enter text.
6. On what type of operating system does the ticketing system operate? Click or tap here to enter text.
7. **LICENSING**
8. Describe your software licensing arrangement. Click or tap here to enter text.
9. How many point of sale (POS) stations per license? Click or tap here to enter text.
10. Is a license required for remote access of the system by back office staff? Click or tap here to enter text.
11. What is the license renewal period? Click or tap here to enter text.
12. **TICKET WINDOW OPERATION & SETUP**
13. Describe the process by which sales screens are customized and whether this can be done by the local operator at no additional charge to CBL. Click or tap here to enter text.
14. Describe the extent to which the ticketing systems can be customized if CBL’s transaction process differs from the default designed by the vendor. For example, what is the process if it’s necessary to add/delete fields and information? Click or tap here to enter text.
15. Describe the system’s ability to store various sort “codes” (accounting codes) customizable by local user. Click or tap here to enter text.
16. What limitations exist on the number of ticket types or programs that can be programmed and managed at one time? Click or tap here to enter text.
17. Describe the ability of the ticketing system to sell multiple events—timed and untimed— simultaneously. Click or tap here to enter text.
18. Describe the systems’ ability to support reservation-based, limited capacity ticketing. Click or tap here to enter text.
19. Describe the system’s ability to schedule into the future. How far into the future can events be scheduled, and is there a limit to how many destinations/events can be scheduled at one time? Click or tap here to enter text.
20. What capability exists for the capture of basic demographic information from visitors? Click or tap here to enter text.
21. Can customers choose to have receipts emailed? Click or tap here to enter text.
22. Describe the ability of the ticketing system to function in standalone mode in the event of a web server failure or other network connection failure. Click or tap here to enter text.
23. **HARDWARE**
24. Is your firm able to provide and install (or subcontract) all necessary hardware for a complete turnkey system including (but not limited to): server(s) (if applicable), network hardware, POS terminal, cash draw, ticket printer, credit card scanner, barcode readers, back office workstation and any other hardware necessary for a complete installation of the system? Click or tap here to enter text.
25. Describe the hardware requirements of the ticketing system and any restrictions, system-specific equipment, or preferred vendor agreements that might be required. Click or tap here to enter text.
26. Include the hardware specifications and pricing required for a turnkey system with your proposal and reference the location in the proposal here. Click or tap here to enter text.
27. Describe the flexibility CBL has to choose hardware and processing equipment and provide a list of compatible brands. Click or tap here to enter text.
28. **FREIGHT TRANSACTIONS**
29. Describe the ability of your system to process freight transactions? Click or tap here to enter text.
30. Would customization of a freight module be needed? (See Requirements described in the Section VI.B of the RFP and Concept of Operations). Click or tap here to enter text.
31. If customization is required, explain how you will meet the requirements outlined by CBL and provide any additional pricing required. Click or tap here to enter text.
32. Would the POS interface for freight transactions be integrated with, or separate from, the ticket sales interface? Click or tap here to enter text.
33. Could any POS station access the freight module or would separate POS hardware be required? Click or tap here to enter text.
34. Can a custom bill of lading be created for CBL? Click or tap here to enter text.
35. Can the system email bills of lading to customers? Click or tap here to enter text.
36. Can freight transactions seamlessly be billed to accounts on file? Click or tap here to enter text.
37. Describe the freight modules ability to search for transactions in real-time and describe which fields can be used to find a specific transaction. Click or tap here to enter text.
38. **SELF SERVE KIOSKS & ROAMING SALES AGENTS**
39. Does your system work with self-serve kiosks? Click or tap here to enter text.
40. Are there specific self-serve kiosks models required for you system? If so list all compatible models and include pricing for the setup and installation with your proposal. Include information for both indoor and outdoor models (if available). Click or tap here to enter text.
41. What are the hardware requirements for selling tickets remotely? Can it be done with a laptop, printer, and Wi-Fi? Click or tap here to enter text.
42. What options does your system have for roaming ticket sales, i.e. with the use of a wireless tablet and mini ticket printer? Please include the specs for all required hardware and pricing/per agent-setup with your proposal. Include details for both Wi-Fi and cellular devices. Click or tap here to enter text.
43. **PAYMENT OPTIONS**
44. List all forms of payment that can be processed by ticket window staff and describe any limitations. Click or tap here to enter text.
45. Describe the integration between credit card processing and the ticketing system. Click or tap here to enter text.
46. Are there any restrictions on the use of stored value cards? Click or tap here to enter text.
47. How would the system handle payments made with vouchers? Click or tap here to enter text.
48. Does the system have the ability to issue and process gift cards/certificates? Click or tap here to enter text.
49. Can tickets be held without payment? Click or tap here to enter text.
50. Describe any hardware requirement your system has for processing payments. Click or tap here to enter text.
51. **SECURITY**
52. Describe security measures built-in to the system, such as PCI compliance to ensure all personal and financial data is safe. Click or tap here to enter text.
53. Describe system controls used to ensure data integrity. Click or tap here to enter text.
54. Describe the type of audit trails used by the system. Click or tap here to enter text.
55. Describe the system user access levels as it relates to security of the system. Click or tap here to enter text.
56. **TICKET VALIDATION TECHNOLOGY**
57. Describe the ticketing system’s ability to work with handheld or wireless ticket scanning validation solutions. Click or tap here to enter text.
58. Is bar code ability integrated with the ticketing software or an add-on component? Click or tap here to enter text.
59. Describe any mag stripe standards supported and used by the system. Is mag stripe ability integrated with the ticketing software or an add-on component? Click or tap here to enter text.
60. Describe how your system can validate tickets printed at home in ways other than with the use of handheld scanning devices. Click or tap here to enter text.
61. Explain any other technologies you have deployed and what is need to utilize that technology. Click or tap here to enter text.
62. **WEBSITE SALES**
63. Describe the entire online ticketing process and include any responsibilities CBL has in this process. Click or tap here to enter text. Describe any services available through the vendor and any charges for those services.
64. If the main ticketing system is installed on servers at CBL, does the web component exist as part of CBL’s computer infrastructure or is this hosted by the vendor? Click or tap here to enter text.
65. If hosted on CBL servers, does the web sales system require any remote processing or are all capabilities handled through the CBL servers? Click or tap here to enter text.
66. Can web transactions reside on the CBL web site (as opposed to links to an external page)? Click or tap here to enter text.
67. If not, how customizable is the external web interface? Can a web experience be provided that mimics the look and feel of CBLs web site? Describe the ability of the vendor to create and maintain this web interface. Click or tap here to enter text.
68. Which components of the ticketing system are online? Is there real-time integration between the online components and the ticketing system? Click or tap here to enter text.
69. What payment options are available to the customer? Click or tap here to enter text.
70. Who receives the payments made by customers online? How are payments remitted to the CBL? Click or tap here to enter text.
71. Are there specific charges involved with the online ticketing process? Is a third-party license required for this process? Click or tap here to enter text.
72. If other web solutions and interfaces exist that are more appealing to CBL, how easily can alternate solutions be integrated with the ticketing system? Click or tap here to enter text.
73. Does the ticketing system support print-at-home capability for tickets? Click or tap here to enter text.
74. Describe any process you have for validating tickets printed at home that does not include the use of a handheld scanner at time of check-in (boarding). Click or tap here to enter text.

1. **REPORTING CAPABILITIES**
2. Provide a general description of the reporting capabilities your ticketing system offers.
3. What reports are available through the reporting packages? Provide samples of available reports (in particular those reports identified in the Section VI.C of the RFP). Click or tap here to enter text.
4. What ability exists to schedule the generation of specific reports? Click or tap here to enter text.
5. What are the ad hoc reporting capabilities of your reporting package? Click or tap here to enter text.
6. How long is data stored and available for report generation? Click or tap here to enter text.
7. Is it possible to get the data in raw form for additional user processing? Click or tap here to enter text.
8. Does the ticketing system provide an analysis of sales, trends, markets, etc. Click or tap here to enter text.
9. If reports are available upon request over the Web, clearly define the scope of this functionality. Click or tap here to enter text.
10. Describe any fees that may be associated with reporting functionality. Click or tap here to enter text.
11. Is information stored in internal databases available to other software systems, or must the information be exported to be usable? Click or tap here to enter text.
12. If accessible to other systems, please specify which systems. Click or tap here to enter text.
13. **ACCOUNTING/FINANCE INTERFACE**
14. Describe the ability your ticketing system has to save or retrieve financial information from the Tyler Technologies Munis accounting system in real time? Click or tap here to enter text.
15. Describe the ability your ticketing system has to save or retrieve financial information from the Tyler Technologies Munis accounting system through batch processing, which may happen at multiple times throughout the day. (See EXHIBIT D for more information about the Munis system) Click or tap here to enter text.
16. **IMPLEMENTATION**
17. Provide a complete description of your implementation process, including a sample time line with milestones and description of various implementation tasks for both the vendor and the customer. Click or tap here to enter text.
18. Can your firm meet a System Acceptance deadline (including a 30 day burn-in) of May 24, 2019? Click or tap here to enter text.
19. If that deadline can’t be met, provide a detailed timeline and explanation of why more time should be provided for the implementation. Click or tap here to enter text.
20. Describe CBL’s role in the implementation process. Click or tap here to enter text.
21. List the critical success factors for a ticketing system and factors that have prevented achievement of goals. Click or tap here to enter text.
22. What are some of the common implementation obstacles you have observed? Click or tap here to enter text.
23. What ability does the vendor have to accommodate transition and data import from CBLs existing ticketing and freight systems? Click or tap here to enter text.
24. **TRAINING**
25. Describe the training programs available for potential users. Click or tap here to enter text.
26. What tiers of training are available for different types of users? Click or tap here to enter text.
27. What ongoing training or upgrade training is available? Click or tap here to enter text.
28. Describe the costs associated with the initial and ongoing training. Click or tap here to enter text.
29. **SUPPORT & WARRANTY**
30. Describe in detail the availability of ongoing support for your system once it is installed, as well as the upgrade path and policy. Click or tap here to enter text.
31. Provide a copy of the warranty agreement for the proposed ticketing system with your proposal and reference its location in the proposal here. Click or tap here to enter text.
32. Describe the cycle for replacement and upgrades of software and/or vendor provided hardware. Click or tap here to enter text.
33. How many technical support employees does your firm have? Click or tap here to enter text.
34. What are the hours of support? Click or tap here to enter text.
35. Is online support available? Provide a link to your web site. Click or tap here to enter text.
36. Describe the tiers of support available. Click or tap here to enter text.
37. How frequently are product upgrades, enhancements, and fixes distributed? Click or tap here to enter text.
38. Describe the tiers of technical and hardware support available for the ticketing system and associated hardware. Click or tap here to enter text.
39. What assumptions are made about existing IT staff and the capabilities of Casco Bay Lines? Click or tap here to enter text. Is there a user group or are there user conferences associated with this ticketing system? Click or tap here to enter text.
40. **OPTIONAL COMPONENTS**
41. Does your firm have a CRM module? Or, does the system integrate with 3rd party CRM systems? Please explain. Click or tap here to enter text.
42. Does the system have the ability to add sales via mobile phone? Please explain. Click or tap here to enter text.
43. Does your system have the ability to integrate with passenger information displays? Please explain. Click or tap here to enter text.
44. Are there any other add-ons (not mentioned above) that would benefit CBL and has the ability to integrate with your ticketing system? Click or tap here to enter text.