



# PowerPlan Application Managed Services Policy

Version 2.8

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## Introduction to PowerPlan Application Managed Services

PowerPlan believes in providing superior value to customers through our products, services, and support. We recognize enterprise software must be flexible and powerful, and we know that in order to achieve maximum performance, you need a partner who can meet those demands. Our success is evident in our unparalleled customer retention rate.

PowerPlan Application Managed Services (“PowerPlan AMS”) are designed to be a partnership between PowerPlan and customers who want to improve and optimize their current solution. Each component was purposefully built to provide customers the tools to meet their particular needs.

PowerPlan AMS is a comprehensive suite of solutions designed to complement any organization and includes:

- Advanced diagnostics, troubleshooting and rapid issue resolution
- Solution support and source control management providing added control for both base code and customizations
- Ongoing education with monthly webinars from PowerPlan University

PowerPlan AMS customers have peace of mind knowing their solution is functioning as designed, allowing them to better focus on strategic initiatives.

If you have questions not answered by this Policy, please contact us directly by emailing [confidence@powerplan.com](mailto:confidence@powerplan.com).

PowerPlan may update this Policy at any time, and the version available at <https://info.powerplan.com/AMSPolicy> will govern your PowerPlan AMS. You should check regularly for updates.

## PowerPlan AMS Responsibilities

PowerPlan Application Managed Services were created for customers who want additional resources for help with integration, extension logic, reporting, and operating their solution based on specific business requirements. PowerPlan Application Managed Services follow the guidelines of the PowerPlan Standard Support & Maintenance Policy as it applies to hours of availability and response time guidelines.

When a customer signs up for PowerPlan Application Managed Services, we perform an assessment to gather existing documentation for all custom integration, extension logic and reports, which allows us to provide timely and high quality responses.

The following tasks are provided under the PowerPlan Application Managed Services plan:

- **Solution Support** – Solution Support provides PowerPlan resources to assist and help resolve support issues related to customer specific integration, extension logic, and reports not working as currently designed and installed at the time of customer’s enrollment in PowerPlan AMS. A functional specialist from the support team will be assigned for each issue resolution and will be responsible for updating associated documentation to reflect the solution.

Appendix A will be created at the kickoff of the PowerPlan Application Managed Services to document all PowerPlan customer specific integration, extensions, and reports as of the Effective Date of your Order Form for PowerPlan AMS. Changes to Appendix A may be made by mutual agreement.

- **Solution Source Control** – PowerPlan will provide delivery and PowerBuilder compilation of the PowerPlan software suite and integration executables. PowerPlan manages and maintains version control to facilitate the client’s release management schedule and provides documentation for reference. After completing a build, PowerPlan provides customers with the executable as well as the associated source code for the customer’s unique environment. Initiation of the release management process includes:
  - Configure source control software on customer’s defined PowerPlan build terminal
  - PowerPlan source code will be backed up on PowerPlan databases
  - Establish a defined PowerPlan build schedule with customer to facilitate best practice testing and migration cycles
- **Training Webinars** – Customers can participate in live training webinars, which cover various areas of the PowerPlan system and best-practices. They can also access a library of recorded training material on demand through PowerPlan’s online user community.
  - Webinars are hosted once a month
  - Presenter hosts Q&A at end of webinar
  - Topics cover various areas of the PowerPlan application
  - Duration is between 30 minutes and 1 hour and 30 minutes
  - Webinars are posted to PowerPlan’s online user community within one week of scheduled webinar
  - Accessible by all employees of licensed organization



Services will be provided remotely unless otherwise mutually agreed to in writing by the parties. Travel and expenses are not included and will be invoiced separately.

## Exclusions

- 24x7 Help Desk Support
- PowerPlan Major Application Version Upgrades – Upgrading the PowerPlan Suite of Modules to the latest Version is a separate Professional Services engagement and not included in PowerPlan AMS.
- Integrated Major Application Upgrades and Changes - Modifications needed to customer specific integration, extensions, or reports to support integrated application upgrades or changes, such as changes to GL, WMS systems, Budgeting System, etc.
- New Module Installation & Implementation – Only those PowerPlan modules that are in production and that are functioning as designed are covered at the time of customer's enrollment in PowerPlan AMS. Any additional License purchase and implementation would be addressed in a separate agreement, and will add to the annual support fees, for the remainder of the committed term and beyond as agreed.
- IT infrastructure, network, hardware, basic workstation maintenance, database management and system administration

## Appendix A

<b>Category</b> <i>(Interface, Extension, Report)</i>	<b>Interface/ Object Name</b>	<b>Categorization</b> <i>(Base, Custom)</i>	<b>Custom Extension*</b> <i>(Yes, No)</i>
<b>Standalone Interfaces Count</b>			
<b>PowerPlan Extensions Count</b>			
<b>PowerPlan Report Count</b>			
<b>Grand Count</b>			

*\*Customer specific logic embedded in base integration*