



# PowerPlan NXT Managed Services Policy

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## Table of Contents

<b>Table of Contents</b> .....	<b>ii</b>
<b>Introduction to NXT Managed Services</b> .....	<b>3</b>
<b>PowerPlan NXT Managed Services</b> .....	<b>4</b>
<b>PowerPlan Managed Services Responsibilities</b> .....	<b>5</b>
Foundational Components .....	5
Proactive Components .....	6
Exclusions .....	7
Additional Notes:.....	8
<b>Appendix A</b> .....	<b>9</b>
Covered Customizations.....	9

## Introduction to NXT Managed Services

The PowerPlan NXT Managed Services Policy (“Policy”) has been developed to help you understand how PowerPlan and our Clients work together to meet business needs, optimize solution performance, and maximize the value of your NXT investment. This Policy provides a comprehensive view of NXT Application Managed Services, outlining how we partner with Clients to enhance, extend, and operate their solutions based on specific business requirements.

PowerPlan believes in providing superior value through world-class products, services, and support. We recognize that enterprise software must be both powerful and flexible, and that achieving maximum performance requires a trusted partner. Through our managed services offerings, PowerPlan is committed to helping Clients maintain stable operations, resolve issues efficiently, and continuously improve adoption of features and functionality across their NXT solutions.

This Policy provides detailed information regarding PowerPlan’s NXT Managed Services offerings capabilities. Together, these services are designed to increase solution adoption, support operational excellence, and ensure you receive the greatest possible value from PowerPlan.

PowerPlan’s mission is to deliver world-class products and services that result in satisfied customers. We strive to achieve this by:

- Delivering value
- Responding in a timely manner
- Providing high-quality resolutions
- Encouraging client feedback
- Driving continuous improvement
- Maintaining a strong commitment to training

Our Managed Services teams are customer-oriented professionals who are passionate about collaborating with Clients to resolve questions, address challenges, and support both day-to-day operations and long-term success.

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

PowerPlan may update this Policy at any time. The most current version available at <https://powerplan.com/legal> will govern your NXT Managed Services upon your next applicable renewal. PowerPlan will provide a mechanism to obtain notice of updates, and you should check regularly for the most recent version.

## PowerPlan NXT Managed Services

PowerPlan’s NXT Elite Application Managed Services (“NXT Elite AMS”), NXT Premier Application Managed Services (“NXT Premier AMS”), and NXT Signature Application Managed Services (“NXT Signature AMS”) are designed to be a partnership between PowerPlan and Clients who want to improve and optimize their current solution or need additional resources for help with integration, extension logic, reporting and operating their solution based on specific business requirements. Each component was purposefully built to provide Clients the tools to meet their needs. These managed services aim to increase the adoption of features and functionality to maximize the value you obtain from PowerPlan.

NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS are a robust suite of solutions designed to complement any organization. Clients can select a package to best meet their needs, inclusive of the below items where indicated.

	Signature Application Managed Services (NXT-SAMS)	Premier Application Managed Services (NXT-PAMS)	Elite Application Managed Services (NXT-EAMS)
Learning Portal	✓ 5 seats	✓ 10 seats	✓ 15 seats
Release Impact Analysis	✓	✓	✓
Feature Adoption Assessment, Workshops, and Activation	✓	✓	✓
Customization Support relating to release	✓	✓	✓
Break/Fix Customization Support	✓	✓	✓
Solution Manager		✓	✓
Customization Documentation		✓	✓
Strategic Planning Sessions and Continuous Solution Adoption		✓ 40 quarterly hours	✓ 80 quarterly hours
Prescriptive Components		✓	✓
New Feature Enablement		✓	✓
Targeted Training Sessions		✓	✓
Baseline Release Testing			✓
Proactive Customization Reduction			✓

PowerPlan NXT Managed Services Clients have peace of mind knowing their solution is functioning as designed, allowing them to focus on strategic initiatives.

## PowerPlan Managed Services Responsibilities

The NXT Managed Services offerings were created for Clients who want additional resources for help with NXT platform enablement, customization coverage, integration, extension logic, reporting, and operating their solution based on specific business requirements. NXT Managed Services follow the same hours of availability and response time targets as Support Services.

### Foundational Components

#### **Full Solution Support** (*NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS*)

Full Solution Support provides PowerPlan Personnel to assist and provide Error corrections or workarounds related to Client-specific integration, extension logic, and reports (“Customizations”). When Client orders NXT Managed Services, Client will provide documentation for Customizations, and we will assess against technical and functional best practices to determine supportability. Customizations approved for coverage by NXT Managed Services (“Covered Customizations”) will be documented as set forth in Appendix A. Changes to Covered Customizations may be made by mutual agreement.

#### **Covered Customization Inventory** (*NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS*)

To support effective release planning, troubleshooting, and long-term maintainability, PowerPlan will maintain a centralized inventory of Covered Customizations. The purpose of the Covered Customization inventory is to provide visibility into supported components and to enable informed decision-making related to releases, impact analysis, and support activities. The inventory also supports consistency across support engagements and reduces reliance on ad-hoc or undocumented knowledge.

#### **Release Communications & Change Awareness** (*NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS*)

Regular Platform releases are essential to delivering innovation but may introduce change for which Clients must plan. To promote awareness and preparedness, PowerPlan provides release-related communications. Release impact notifications are intended to inform Clients of upcoming NXT Platform releases and relevant changes so that Clients may evaluate timing, resources, and readiness as appropriate. PowerPlan shall provide general notifications regarding applicable NXT Platform releases and updates. Notifications are informational only and do not constitute Client-specific analysis, risk assessment, or a recommendation to take action.

#### **Release Impact Analysis** (*NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS*)

Clients may desire additional insight into how Platform changes could affect their deployment. For these Clients, PowerPlan offers release impact analysis to support informed planning and risk awareness. Release impact analysis is designed to help identify potential areas of concern related to Covered Customizations, integrations, or configurations before changes are introduced into the Client environment. PowerPlan shall perform release impact analysis limited to assessing potential impacts of Platform updates on Covered Customizations, integrations, or configurations. This analysis is advisory in nature and does not include remediation, configuration changes, or development activities unless separately contracted.

Release impact analysis includes:

- Reviewing release content for relevance to the Client's deployed solution;
- Assessing potential impacts to Covered Customizations; and
- Communicating identified risks, dependencies, or recommended actions.

#### **Break/Fix Covered Customization Issue Troubleshooting** (*NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS*)

Operational issues may arise in Covered Customizations independent of Platform releases. Break/fix Covered Customization support is intended to restore functionality to its previously supported state. PowerPlan will use commercially reasonable efforts to diagnose and resolve break/fix issues for Covered Customizations.

Break/fix services do not include net new development, functional enhancements, or re-architecture of existing Covered Customizations.

#### **Issue Troubleshooting and Repair Related to Release** (*NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS*)

Platform releases may impact Covered Customizations or configurations that were previously functioning as designed. To support continuity, PowerPlan provides limited troubleshooting and repair services focused on maintaining compatibility with released functionality. This entitlement is intended to preserve existing behavior, not to extend or enhance functionality.



PowerPlan will provide troubleshooting and repair services for Covered Customizations that are adversely impacted by NXT Platform releases.

Covered Customization support related to releases is subject to the following limits:

- NXT Signature AMS: up to 40 hours per release
- NXT Premier AMS: up to 80 hours per release
- NXT Elite AMS: up to 100 hours per release

This entitlement is limited to maintaining compatibility with released functionality and expressly excludes adoption of new features or enhancements, re-architecture, or functional expansion.

### **Learning Portal Access** *(NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS)*

Self-paced learning is a key component of sustainable adoption. PowerPlan provides Learning Portal access to support ongoing education and self-service learning.

Managed Services Clients will receive access to PowerPlan's Learning Portal, subject to seat limits shown above. Additional seats will be subject to additional fees and separate contracting.

Learning Portal access provides self-paced training materials and educational resources only and does not include instructor-led services. Assignment of Client users to seats are transferable within a 180-day window once the seat for the specific user is active.

### **Webinars and Training Resources** *(NXT Signature AMS, NXT Premier AMS, and NXT Elite AMS)*

Managed Services Clients will have access to PowerPlan provided webinars and training resources, including live and recorded sessions covering product functionality, new features, and leading practices. Clients can view these materials on the [Client Portal](#).

## **Proactive Components**

### **Named Solution Manager** *(NXT Premier AMS and NXT Elite AMS only)*

For Clients enrolled in NXT Premier AMS or NXT Elite AMS, PowerPlan will assign a Named Solution Manager. The Named Solution Manager acts as the primary strategic and operational point of coordination for managed services delivery.

The Named Solution Manager's responsibilities include:

- Facilitating strategic planning and roadmap alignment discussions;
- Coordinating cross functional PowerPlan resources as required to support Managed Services entitlements; and
- Tracking and communicating progress against Managed Services initiatives.
- Facilitates NXT Premier AMS or NXT Elite AMS kickoff meeting
- Hosts quarterly calls to review NXT Premier AMS or NXT Elite AMS engagement metrics
- Partners with Client to define yearly PowerPlan initiatives
- Hosts regular status meetings and validation points to review priority and communicate progress on mutually established initiatives
- Maintains a rolling initiative tracker of scheduled events
- Provides consulting services for increased feature and functionality adoption

Named Solution Manager services are advisory in nature and are delivered within the scope, cadence, and effort levels defined by the applicable Managed Service tier. No minimum or guaranteed outcomes are implied.

### **Continuous Solution Optimization** *(NXT Premier AMS and Elite AMS only)*

PowerPlan will provide ongoing solution adoption advisory services as part of NXT Premier AMS and NXT Elite AMS. For NXT Premier AMS, Clients can schedule up to ten (10) consulting events per quarter, and each event can be up to four (4) hours. For NXT Elite AMS, Clients can schedule up to (10) consulting events per quarter, and each event can be up to eight (8) hours. The Solution Manager works with the Client to identify the organization's top issues and areas of improvement and then develops a customized plan to address them. Elements of the plan may include:

- Business process evaluation

- Dynamic configuration assistance
- Solution Modifications
- Report writing and tuning
- Training on a specific task
- Key business event guidance
- Performance diagnostics
- Month end close assessment and tuning
- New Feature Enablement

**Prescriptive Components** *(NXT Premier AMS and NXT Elite AMS)*

In addition to the items outlined above, which are Foundational and Proactive Components, delivered annually to each Client, NXT Premier AMS and NXT Elite AMS also offers Prescriptive Components that are specifically designed to address strategic business initiatives. Client, with guidance from their Solution Manager, has the option to select two (2) Prescriptive Components to be delivered during the twelve (12) month Term of NXT Premier AMS or NXT Elite AMS to implement alongside the Foundational and Proactive Components.

The two Prescriptive Components are to be selected within the first 90 days of the NXT Premier AMS or NXT Elite AMS Term. The total time for PowerPlan to design and implement any Prescriptive Component shall not exceed forty (40) hours. In the event one selection or no selections are made at the end of the first 90 days. For the avoidance of doubt, failure by Client to make one or both selections will not entitle Client to any refund of NXT Premier AMS or NXT Elite AMS Fees. Failure to provide requirements for delivery or the deployment of the component may result in forfeiting that Prescriptive Component for the NXT Premier AMS or NXT Elite AMS Term.

Please reference the Prescriptive Component Catalog for the most current listing of Prescriptive Components available under NXT Premier AMS or NXT Elite AMS.

**Covered Customization Documentation** *(NXT Premier AMS and NXT Elite AMS)*

PowerPlan provides documentation support to promote operational continuity and reduce dependency on institutional knowledge. Covered Customization documentation is intended to support troubleshooting, release readiness, and ongoing support by capturing functional and technical context for Covered Customizations. Documentation also supports continuity as Client teams or PowerPlan resources change over time. For NXT Premier AMS and NXT Elite AMS Clients, PowerPlan shall maintain documentation for Covered Customizations on a commercially reasonable, best-effort basis and does not constitute a warranty of completeness, accuracy, or ongoing currency.

**Feature Adoption Assessment** *(NXT Premier AMS and NXT Elite AMS)*

As new functionality becomes available, Clients may benefit from understanding how effectively features are being utilized and where additional value may exist. Feature adoption assessments are intended to provide visibility into usage patterns and adoption opportunities. These assessments support informed decision-making related to training, configuration, and prioritization of future efforts.

Feature adoption assessments do not include configuration, enablement, or change execution unless expressly included elsewhere in the Client’s entitlements.

**Exclusions**

24x7 Help Desk Support	Help Desk Support is not included.
Integrated Major Application Upgrades and Changes	Modifications needed to Covered Customizations to support integrated application upgrades or changes, such as changes to general ledger, work management systems, budgeting system, etc.
New Module Installation and Implementation	Only those PowerPlan modules that are in production and functioning as designed are covered at the time of Client's enrollment in NXT Managed Services. Any subsequent SaaS subscription transaction and corresponding migration or initial implementation would be addressed in a separate agreement and will add to the annual NXT Managed Services Fees for the remainder of the committed term and beyond as agreed.

Post Go-Live Services Engagement Support	Modifications made to the PowerPlan solution via services engagements are not covered under Full Solution Support until after the Customization assessment and designation as a Covered Customization.
IT Infrastructure and System Administration	IT infrastructure, security, network, hardware, basic workstation maintenance, database management and system administration are not included.
New Client-Specific Configuration	New Client-specific configuration is not covered under NXT Managed Services until it is transitioned to support.
Client or Third-Party Modifications	Assistance with Client or third-party Modifications to the PowerPlan solution are not covered under NXT Managed Services. Please reference the PowerPlan SaaS Standard Terms for acceptable use and access rights.
Named Solution Manager Limitations	The assignment of a named Solution Manager does not constitute a dedicated or full-time resource, does not guarantee specific outcomes, and does not expand the scope of services beyond those expressly stated in this Policy and the applicable Order Form.
Covered Customization Inventory Scope	The existence of a Covered Customization in the inventory does not expand PowerPlan's support obligations beyond those expressly defined in this Policy.
Covered Customization Documentation	Covered Customization Documentation is maintained on a commercially reasonable, best effort basis and is limited to supporting operational continuity, troubleshooting, and release readiness. PowerPlan does not warrant the completeness, accuracy, or ongoing currency of documentation not originally produced by PowerPlan.
Release Impact Analysis	Release impact analysis is advisory in nature and limited to Covered Customizations and configurations and does not include remediation, development, or execution activities unless separately contracted.
Continuous Solution Optimization Hours	Continuous Solution Optimization hours may include advisory reviews, optimization recommendations, and adoption planning. Unused hours do not roll forward, do not accumulate, and have no monetary value.
Customization Break/Fix Support	Customization Break/fix services are limited to restoring existing functionality outside of a release, do not include new development or enhancements, and are provided only for customizations formally accepted into support. This does not include coverage of anything expressly listed as Outside of Scope of Support in this Policy.
Customization Break/Fix Support – Related to Release	Customization Break/fix services are limited to fully customized objects and does not include customized base coverage.
Feature Adoption Workshops	Feature adoption workshops are instructional sessions intended to demonstrate available functionality. Workshops are standardized and do not include Client specific configuration, data setup, or customization.

## Additional Notes:

- NXT Managed 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.
- NXT Managed Services are generally structured as a consultative, flexible approach based on Client's needs with respect to the PowerPlan solution. However, there can be projects defined at times that will go beyond the scope of NXT Managed Services. If the Solution Manager and Client agree that the new requirement will require additional effort, PowerPlan's Professional Services team will engage with the Client through a statement of work guided by the Solution Manager.
- NXT Managed Services are designed to maximize the value you derive from use of the PowerPlan solution by increasing the adoptions of features and functionality. In order to enable PowerPlan to provide the most value possible, you authorize PowerPlan to use information regarding your use of the PowerPlan solution in order to provide the managed services described in this Policy and to improve and refine the NXT Managed Services programs for the benefit of PowerPlan's Clients.
- Any tools, schema, reports, and queries remain the intellectual property of PowerPlan. All such components are provided "as-is" and in the event any such tools, schema, reports, or queries fail to materially comply with the descriptions herein, the sole and exclusive remedy for such non-compliance will be the election of another service offering within the same category (i.e., Foundational and Proactive Components vs. Prescriptive Components).

# Appendix A

## Covered Customizations

<b>Category</b> <i>(Interface, Extension, Report)</i>	<b>Interface/ Object Name</b>	<b>Categorization</b> <i>(Base, Modified)</i>	<b>Modified 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>			

\* Client specific logic embedded in base integration