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Cloud9 Membership Support Contract

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Microsoft
Dynamics 365

Microsoft Partner
Gold Customer Relationship Management
Silver Midmarket Solution Provider
Silver Cloud Productivity
Silver Small and Midmarket Cloud Solutions

2015
PRESIDENT'S CLUB
for Microsoft Dynamics

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1. Service Overview

Cloud9 Insight offer clients a Membership Support Contract to ensure the success and adoption of the use of their Microsoft Online and related services. Our support will give you access to an experienced team to provide ad-hoc consulting and training. Support may include Level 1 support for mutually agreed named add-ons purchased through Cloud9 such as Click Dimensions, DCP, Office 365 and DocuSign etc. Most clients typically purchase Membership Support at time of purchasing their first licence at the start of thier project development. Having access to Membership Support enables clients early access to our team to support you through the project delivery and training cycle which is a time when clients most benefit from this hand holding for example during UAT.

Pricing for Membership Support depends on the number of total CRM users licenced. Please note that all organisations will have 2 Authorised Users who are authorised to request configuration, admin and security changes. All other users will not be authorised to request these system changes but will benefit from access to break-fix support as well as ad hoc training.

Membership Support options:

Total number of CRM users
1-10 users inclusive
11-40 users inclusive
41-100 users inclusive
101-200 users inclusive
201+ users inclusive

Please note that in addition to these monthly costs, clients have the option to add additional add-ons as well as a higher level of Managed Support which gives access to a dedicated account manager as well as additional support time giving access to consulting expertitse for areas not covered by Membership support (see following sections):

- Support named authorised all users directly to investigate and resolve their support issues, where possible on behalf of users.
- Two Authorised users are included as standard. All other users will be able to raise break-fix support request as well as request ad-hoc training or assistance in personalisng CRM limited to own views. Admin requests such as changes or tweaks, or administration regarding users (eg change of security levels) will not be undertaken for non authorised users.
- Post project minor tweaks (for fair-use only changes, that are less than an hour that can be

undertaken while user point of contact is on phone will be included, requirements taking longer than an hour, will be charged on a time and materials basis as a separate project.)

- Quarterly newsletter with useful links, advice and articles.
- Post Upgrade Review & Planning to leverage new features (2 upgrades expected a year).
- Administration of users, roles, security and licences as directed by client. (optional)
- Ad-hoc training, to deal with 'How to' questions.
- General knowledge transfer including Admin related features (Eg: how to set up automation, add fields).
- Supporting users with knowledge to be able to set up their own dashboards views and other reporting features.
- Advice on how to align CRM to fit your business processes as they evolve beyond the project.
- Free attendance of webinar training.
- Access to Help Videos.
- Proactive advice on use of Add-ons to support greater ROI and user adoption.
- Annual Strategic Optimisation Review & Planning to increase ROI of project investments and provide advice on future Vision for best practice use of CRM with recommendations for future investments to align CRM to further support your business success. Additional benefits of this review include knowledge transfer of features of benefits to use. Further development if required would be subject to separate project charged on time and materials basis. Typically this review is a 2 hour remote web-based session but could be upgraded at a reduced cost to a one day workshop.
- Workflow and automation and related support
- Creation of new entities (record types)
- Advice for data import related queries

2.Optional Add-ons

The following options (others may be available on request) are available to include within your Membership Support a small additional cost of £150 per month per named add-one:

- **DCP**
- **Click Dimensions**
- **Office 365**
- **DocuSign**
- **Portal**
- **Redware**

3.Optional Managed Account Manager

Clients with larger user numbers or more complex implementations will benefit from upgrading their support to a Managed Support Tier. This level entities clients to a dedicated Account Manager as well as a discounted half or full day of additional consulting services a month. This time can cover on-site effort (when a full day is required) as well as provide access to use more senior consultants to address more complex requests, outside scope of standard membership

support. Clients with plugins, integration and Power BI are strongly suggested to take out this additional level of support as these areas are not covered by our standard Membership Support.

Level 1 Managed Account. Additional cost of £850 a month (standard cost of day usually £1250)

Dedicated Account Manager as well as a discounted additional day of support (7 hours) will be added to your support contract a month. This can be carried over up to to a rolling 6 months. Unused time will not be refunded.

Level 2 Managed Account. Additional cost of £450 a month.

Dedicated Account Manager as well as a discounted additional day of support (3 hours) will be added to your support contract a month. This can be carried over up to to a rolling 6 months. Unused time will not be refunded.

	Hours a month	Cost per month	Dedicated Account Manager
Level 1	7	£850	yes
Level 2	3	£450	yes

4. Terms of Engagement

- Clients on support taken out before end of December 2018 will be entitled to use Apps for free that have been developed by Cloud9 Insight. Additional development to align to client needs will be charged on a time and materials basis.
- All work is undertaken remotely and uses web-based desk sharing where required.
- Support is unlimited within terms above, but is not intended to cover additional Phase 2 project effort which is always recommended to budget for. Should you require changes other than minor tweaks and changes up to an hour per request then this support contract is not intended to cover these.
- Changes that may affect the design and architecture of the solution or require advice about your processes should be planned seperately with a consultant and are not covered by support.
- Urgent support requests can be raised by calling 01273 921448 or raised in the Portal.
- New support requests can be made by raising a ticket within our dedicated support portal which nominated users will be given access. This portal can be used to track updates and status of any requests.
- Emails should only be sent to Support@cloud9insight.com not support team directly to ensure good response times.

- Where Support requests are not of a business critical priority, they may be scheduled to be undertaken at a mutually convenient time.
- Cloud9 reserve the right to terminate the support contract at any time.
- For ease of reference Cloud9 Insight Privacy Policy is [here](#)
- SSRS in CRM and Power BI Reports are excluded from support. These typically take 2+ days to develop and require specialist consulting skills which are charged on a time and materials.
- It is a pre-requisite that Cloud9 Insight is designated as 'Designated Partner of Record' within Microsoft Online Services supported at time contract is taken out and for the duration of the period that the support contract covers.
- Cloud9 will support clients where other partners have previously deployed CRM for the client. A full list of known support issues should be provided on commencement of the contract. Cloud9 can assist with this if required. If these issues will take more than 2 hours in duration to resolve, Cloud9 recommend addressing these as a mini project which will be charged on a time and materials basis. At Cloud9's discretion we may permit some of these issues to be covered by Support free.
- Clients using a Dynamics 365 trial licence are eligible to sign-up for this support service.
- Any requirements expected to take longer than an hour will need to be quoted for and paid for separately but with the first hour free. Cloud9 expect a fair use by clients but understand that during a period of Go-Live the level of support requests may increase slightly.
- Hardware and Platform issues are excluded from this contract (including unsupported browser issues).
- Custom code and Plug-Ins must be tested prior to upgrades. This testing and subsequent modifications or required re-builds are not included in this support contract. This is charged for on a time and materials basis. integrations and custom code will be supported only on a time and materials basis.
- This contract is only valid for customers purchasing their licenses via CSP from Cloud9. For non-CSP customers please contact Cloud9 for a quote.
- Cloud9 reserve the right to change the terms of this contract with 1 week's notice.
- Support is defined at the discretion of Cloud9 Insight.
- Cloud9 reserve the right to charge for time spent fixing issues which are a result of changes the client has made which have caused the issues (eg changes to workflows). Charges will be made on a discounted time and materials basis of £145 an hour. Please ensure any configuration changes follow best practice advice as provided by Cloud9. Request a copy of this for useful reference.

5. Service Level Agreement

Response Times

Each case is reviewed within 2 hours of receipt on the support portal. Priority levels are assessed and if required reassigned. Cases are prioritised and maximum expected SLA's are as follows:

Priority Level	Impact	Response Time
1A	All users affected. Critical to the operation of the business, no workaround exists	2 hours
1B	One or limited number of users affected. Critical to the operation of the business, no workaround exists	4 hours
2	Non-critical or acceptable work-around exists	8 hours
3	Cosmetic or low-priority	24 hours
4	Request for change	7 days

The hours of service are 9.00am to 5.00pm on UK business days. Please note Cloud9 Insight are closed between 24th December and 2nd January inclusive.

6. Termination of Support

Our goal is to ensure you receive continuous value from your support agreement. Whilst it is unlikely you will want to terminate your support, based on the exceptionally low volume of clients that do so, you are completely free to give at least a full months notice for your support to be terminated. Please do this in writing by sending an email to support@cloud9insight.com. No refunds will be made for part months paid for. The direct debit to be deducted following receipt of termination the final payment will be due in full. No further payments will be deducted.

7. Escalation

- Cloud9 have a secure Support Portal as well as a dedicated telephone line and email address for support requests which are handled by our level 1 support team. Following this request, a member of the Cloud9 team will contact you at a mutually convenient time.
- Escalation of any support requests will be to a Emily@cloud9insight.com and Carlene@cloud9insight.com
- Emails to Support should be emailed to support@cloud9insight.com and will be handled by the Cloud9 Insight Service Desk.
- The Cloud9 Insight support team monitors the Cloud9 Support Portal. On receipt of new cases raised, they are assigned an ID, verified for support eligibility and the priority level is agreed between Cloud9 Insight and the client.
- Requests are allocated to a member of our team who will contact the client at the agreed time. When required, a support request will be raised with third party vendors.
- The client will confirm that the case is closed.

- A report is available on request for support requests raised.

8. Order Form for Support Contract

Please update and return the last two pages if you would like to take out a support contract.

Start Date for Support (*typically support is assumed to start on date first invoice is paid*)

Planned total number of CRM Users

Please note support contract must state up to 2 primary authorised users. All other users only entitled to raise break-fix support issues and training requests only. Please state email and name of authorised users.

Specify support level required

Up to 10 users

11- 40 users

41-100 users

101-200 users

201+ users

Optional enhanced add-on for more complex or larger user groups.

Level 1 Managed Account 1 day £850 per month

Level 2 Managed Account 3 hour £450 per month

Specify Add-ons to be supported £150 per add-on per month (level 1 support only)

Eg DCP, Click Dimensions, Office 365, DocuSign, Portals, Redware etc.

Total monthly cost UK£




9. Payment Terms and Conditions

- Payment can only be made by Direct Debit.
- All pricing is shown in GBP.
- Costs exclude VAT.
- Costs exclude license costs.
- Costs exclude travel expenses which will be charged if on-site work is required.
- The support contract starts as soon as payment has been received.
- Payment method is by Direct debit, your support contract becomes active once your DD mandate has been completed and submitted. You will be sent a link for your Mandate via the first invoice for acceptance.
- If a support contract is started after the 25th of a month no charge for that month will be incurred. A support contract started before this date will incur a full month on commencement of contract and then from the 1st the following month.
- Cloud9 reserve the right to automatically amend Direct Debit to reflect increased number of users if threshold of 10 or 40 users is passed. Payment for support is due in advance for the upcoming month (from 1st to end of month)
- Direct Debits are collected on the nearest working day to the 24nd or nearest working day of every month.
- Payment by the Client is made via Direct Debit. Cloud9 insight uses a Direct Debit facility offered by www.gocardless.com. Should the Client default on payment of invoices, Cloud9 Insight is allowed to terminate your services immediately. At this point the Client would be liable for all payments up to that date and over the remainder of the contracted period (it would be assumed 30 days notice from point of cancelation if this notification has not been received).

10. Declaration

On behalf of both parties it is confirmed that the terms and services as described herein are acceptable to us:

<p>Cloud9 Insight</p> <p>Authorised by: Carlene Jackson</p> <p>Signature: </p> <p>Date:</p>	<p>Authorised by and behalf of Client:</p> <p>Authorised:</p> <p>Signature:</p> <p>Date:</p>
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