



CUSTOMER SUCCESS ONLINE TERMS

Customer Success is at the core of everything we do at Aforza. To ensure we make this happen every day for our customers, we offer Success Plans that not only include support but also expert guidance and best practice to maximise the success of every Aforza user ensuring our customers get the most value from the Services or products purchased.

Aforza's Success Plans incorporate different levels of support and include Aforza's Standard Support service, Aforza's Premier Support service and Aforza's Managed Service. These are collectively defined as the "Success Plans" or individually as a "Success Plan".

Customers who have purchased Aforza Professional Edition or Aforza Enterprise Edition will receive Aforza's Standard Support service as part of the Service Subscription they have purchased. Aforza Essentials Edition provides Customers with access to the Aforza Self-Service Support Portal but does not include Aforza Standard Support Service.

In addition to the Aforza Standard Support, Customers may elect to purchase Aforza's Premier Support or Aforza's Managed Service.

Aforza Customer Success Plans : Terms and Conditions

The terms and conditions of each Success Plan are detailed below. Capitalised terms used but not defined below shall have the meaning subscribed to them in the Aforza Online Subscription Agreement which can be reviewed and downloaded at <https://info.aforza.com/standard-terms>.

Aforza's Success Plans do not include implementation of the Services. Aforza Success Plans are for ongoing support and administration of the Services after the Services have been implemented and shall not result in a transfer or assignment of intellectual property rights between the parties.

Designated Contacts. Designated Contacts are Users identified by Customer as primary liaisons between Customer and Aforza for coordination and management of a Success Plan. Customer shall identify and maintain at least one (1) Designated Contact.

Customers' Designated Contacts shall be responsible for:

1. Overseeing Customer's Success Plan support case activity



2. Developing and deploying troubleshooting processes within Customer's organization
3. Resolving password reset, username and lock out issues for Customer, and
4. Requesting Success Plan cases.
5. Configuring and maintaining a minimum of 1 Admin User Subscription to Customer's Organisation as instructed by Aforza for the exclusive use by Aforza's Managed Service Team. (Managed Service Customer's only)

Customer shall ensure that Designated Contacts:

1. Have completed, at a minimum, the basic SFDC Services administration trail on Trailhead (trailhead.salesforce.com) currently titled "Admin Beginner" which is available at no additional charge.
2. Are knowledgeable about the Services in order to help resolve, and to assist Aforza in analysing and resolving, technical issues, and
3. Have a basic understanding of any problem or requirement that is the subject of a case, and if necessary, the ability to reproduce the problem in order to assist Aforza in diagnosing and triaging it.

Aforza Standard Support Service : Terms & Conditions

General Terms. Aforza's Standard Support Service will be provided at no additional charge to Aforza Customers who have an active subscription of Aforza's Professional Edition or Enterprise Edition Service Subscriptions. Support is available on weekdays, excluding holidays, during UK business hours. Designated Contacts must submit requests via email to support@aforza.com. Upon email submission, Designated Contacts will be asked to provide their company name, contact information and the reason for their query. Each request will be assigned a unique case number. An Aforza Customer Success Support Representative will use commercially reasonable efforts to call or e-mail the Designated Contact within two (2) business days and will use commercially reasonable efforts to promptly resolve each case. Actual resolution time will depend on the nature of the case and the resolution. A resolution may consist of a fix, workaround or other solution in Aforza's reasonable determination.

Submitting a Case. Designated Contacts may submit a request in English in any of the following ways:

1. By logging into the Aforza Success Community portal at <https://success.aforza.com> and raising a case.
2. By sending an email to support@aforza.com



Note:

1. For assistance with Salesforce password resets, Users must use the "Forgot your password?" link on the login page or contact their system administrator.
2. For assistance with usernames and account lockouts, Designated Contacts should contact their system administrator.

Cooperation & Reproducing Errors. Aforza must be able to reproduce errors in order to resolve them. Customer agrees to cooperate and work closely with Aforza to reproduce errors, including conducting diagnostic or troubleshooting activities as reasonably requested and appropriate. Also, subject to Customer's approval on a case-by-case basis, Designated Contacts or Users may be asked to provide remote access to their salesforce.com account, mobile device and/or desktop system for troubleshooting purposes.

Escalation & Severity Levels. Reproducible errors that cannot promptly be resolved will be escalated to higher support tiers for further investigation and analysis. Issues will be categorized and handled according to an assigned severity level. The case severity level will be categorized to an assigned severity level and handled as follows:

Severity Level	Description and Examples
Level 1 – Critical	Critical production issue affecting all users, including system unavailability and data integrity issues with no workaround available.
Level 2 – Urgent	Major functionality is impacted or significant performance degradation is experienced. Issue is persistent and affects many users and/or major functionality. No reasonable work around is available. Also includes time-sensitive requests such as requests for feature activation or a data export.
Level 3 – High	System performance issue or bug affecting some but not all users. Short-term workaround is available, but not scalable.
Level 4 – Medium	Inquiry regarding a routine technical issue; information requested on application capabilities, navigation, installation or configuration; bug affecting a small number of users. Reasonable workaround



	available. Resolution required as soon as reasonably practicable.
--	---

Excluded Items. Aforza's Standard Support service does not include any of the following:

- Assistance with Salesforce password resets. Users should click the "Forgot your password?" link on the login page or contact their system administrator;
- Assistance with Salesforce username. Users should contact their system administrator;
- Assistance in developing or configuring User-specific customizations;
- Assistance with Salesforce lockouts due to incorrect login attempts. Users should contact their system administrator to unlock the account, or wait for the lockout period to expire;
- Assistance with non-Aforza products, services or technologies, including implementation, administration or use of third-party enabling technologies such as databases, computer networks or communications systems;
- Assistance with SFDC AppExchange applications, whether authored by SFDC, Customer or a third party; or
- Assistance with installation or configuration of hardware, including mobile devices, computers, hard drives, networks or printers.
- Creation or testing of custom code, including SOQL queries.

Changes to Aforza's Standard Support Service. Aforza may change its Standard Success Plan from time to time in its sole discretion.

Aforza Premier Support Service : Terms & Conditions

Aforza Premier Support Service is purchased as a subscription starting on the Order Start Date and ending on the Order End Date set forth in the Agreement.

Aforza Premier Support Service is for the ongoing support and administration of the Services after the Services have been implemented and shall not result in a transfer or assignment of intellectual property rights between the parties. Aforza Premier Support Service does not include the implementation of the Services.

Aforza Premier Support Service subscriptions are non-cancellable and fees paid are non-refundable. If Customer does not use the Aforza Premier Support Service purchased during the Order Term, fees paid by Customer may not be refunded, extended, or rolled over to another subscription. The Aforza Premier Support Service is only available in English.



Aforza's Premier Support service may not be purchased for a subset of Customer's Service Subscriptions. When purchased, Aforza's Premier Support service must be purchased for all such subscriptions in any given Customer Org where Aforza's Service Subscriptions are provided. Therefore, Customer may incur additional Premier Support Service charges as new subscriptions are added to an Org.

General Terms. If purchased, Aforza's Premier Support Service will be provided to Customer's Designated Contacts in accordance with this description. Designated Contacts can submit cases over the Web or by telephone. Aforza will use commercially reasonable efforts to promptly respond to and resolve each case. Actual resolution time will depend on the nature of the case and the resolution. A resolution may consist of a fix, workaround or other solution in Aforza's reasonable determination.

Telephone Support. Telephone support in English is available from 8:00 a.m. to 6:00 p.m. GMT, seven days a week. Calls will normally be answered by a triage agent, who will document the case and route it to the appropriate support team for response to Customer. Aforza's Customer Support telephone number is +44 1442 780 183.

Submitting a Case. Designated Contacts may submit a request in English in any of the following ways:

1. By logging into the Aforza Success Community portal at <https://success.aforza.com> and raising a case.
2. By sending an email to support@aforza.com
3. By telephone call to Aforza Customer Support as described above. For Severity Level 1 issues, Designated Contacts must call Aforza's Customer Support on +44 1442 780 183.

Designated Contacts will be asked to provide their company name and contact information, and each case will be assigned a unique case number.

Note:

1. For assistance with Salesforce password resets, Users must use the "Forgot your password?" link on the login page or contact their system administrator.
2. For assistance with usernames and account lockouts, Designated Contacts should contact their system administrator.



Target Initial Response Time. Aforza will use commercially reasonable efforts to respond to each case within the applicable response time described in the table below, depending on the severity level set on the case.

Target Initial Response Time by Severity	
Severity Level	Target Initial Response Time
1	1 hour
2	2 hours
3	3 hours
4	4 hours

Note:

1. Severity Level 1 and 2 target initial response times are measured including weekends and holidays. Severity Level 1 cases must be submitted via telephone as described above. Severity Level 1 and 2 target initial response times do not apply to cases submitted via email.
2. Severity Level 3 and 4 target initial response times include GMT business hours only and exclude weekends and holidays, and do not apply to cases submitted via e-mail. Reproducible errors that cannot promptly be resolved will be escalated to higher support tiers for further investigation and analysis.

Escalation Matrix. The table below outlines the escalation contacts available to Customer, as necessary.

Escalation Matrix	
Level	Title
1	Customer Support Duty Manager
2	Assigned Support Escalation Manager
3	Manager, Engineering
4	VP Customer Success

Customer Success Guidance. Aforza's Customer Success Portal includes access to a variety of resources with specialized product and market expertise to assist with Aforza Service adoption and utilization, including sharing advice and guidance related to optimizing Customer's ongoing use of Aforza. Customer is responsible for evaluating any advice or guidance received from Aforza and for implementing any such advice and guidance.

Excluded Items. The Aforza Premier Success Support service does not include any of the following:



- Assistance with Salesforce password resets. Users should click the “Forgot your password?” link on the login page or contact their system administrator;
- Assistance with Salesforce username. Users should contact their system administrator;
- Assistance in developing or configuring User-specific customizations;
- Assistance with Salesforce lockouts due to incorrect login attempts. Users should contact their system administrator to unlock the account, or wait for the lockout period to expire;
- Assistance with non-Aforza products, services or technologies, including implementation, administration or use of third-party enabling technologies such as databases, computer networks or communications systems;
- Assistance with SFDC AppExchange applications, whether authored by SFDC, Customer or a third party; or
- Assistance with installation or configuration of hardware, including mobile devices, computers, hard drives, networks or printers.
- Creation or testing of custom code, including SOQL queries.

Changes to the Aforza Premier Support Service. Aforza may modify the Premier Support Service from time to time, provided the level of service under this service plan will not materially decrease during a subscription term.

Aforza Managed Service : Terms & Conditions

Aforza Managed Service is purchased as a subscription starting on the Order Start Date and ending on the Order End Date set forth in the Agreement.

Aforza Managed Service, which includes Aforza Premier Support Service, is for the ongoing support and administration of the Services after the Services have been implemented and shall not result in a transfer or assignment of intellectual property rights between the parties. Aforza Managed Service does not include the implementation of the Services.

Aforza Managed Service subscriptions are non-cancellable and fees paid are non-refundable. If Customer does not use the Aforza Managed Service purchased during the Order Term, fees paid by Customer may not be refunded, extended, or rolled over to another subscription. The Aforza Managed Service is only available in English.

Aforza’s Managed Service may not be purchased for a subset of Customer’s Service Subscriptions. When purchased, Aforza’s Managed Service must be



purchased for all such subscriptions in any given Customer Org where Aforza's Service Subscriptions are provided. Therefore, Customer may incur additional Managed Service charges as new subscriptions are added to an Org.

Aforza Managed Service is delivered remotely by Aforza's Managed Services Team and provides Customer with access to: Aforza's advisory resources, content, skilled consultants and domain expertise to deliver administration, advisory and related services associated with Aforza's Service Subscriptions.

Specific areas of capabilities available with Aforza Managed Service are:

- Configuration changes, including
- Product library and hierarchy updates
- Pricebook and Discount Rules
- Desktop and Mobile layout configuration
- Visit and activity configuration
- Promotion configuration (if applicable)
- Custom Dashboard & Report creation
- Updates to custom logic built on the Aforza & Salesforce platform to support Aforza functionality
- Updates to existing data transfer logic built on the Aforza & Salesforce platform to support Aforza functionality
- Aforza Data Management Assistance (limited to your Salesforce Org where the Services have been installed)
- Salesforce Environment Management (limited to your Salesforce Org where the Services have been installed)
- Education with periodic User Clinics
- Assistance with new feature implementations
- Periodic End-user training in line with Aforza Releases
- Aforza System Administration
- Aforza Premier Support Service (as defined above)

General Terms. If purchased, the Aforza Managed Service will be provided to Customer's Designated Contacts in accordance with this description. Designated Contacts can submit cases over the Web or by telephone. Aforza will use commercially reasonable efforts to promptly respond to each case and will use commercially reasonable efforts to promptly resolve each case. Actual resolution time will depend on the nature of the case and the resolution. A resolution may consist of a fix, workaround or other solution in Aforza's reasonable determination.



Aforza Managed Service Monthly Allowance. The Aforza Managed Service is subject to a monthly Managed Service allowance which is calculated exclusively from the Aforza Managed Service Subscriptions Daily Unit Price and Number of Days per Month as detailed on an Aforza Service Subscription Agreement Order Form. A “use it or lose it” approach applies to the first 80% of each month’s Managed Service allowance. However, Customer may transfer up to a maximum of 20% of a month’s unused fixed monthly Managed Service allowance to the immediately following month only. The 20% unused monthly allowance transfer does not apply in the last month of each annual 12 month period. Also, at the end of an Order Term, any unused Managed Service time cannot be transferred to a new or extended Order Term. There is a maximum 8 hours of Managed Service time available in any one day. The minimum unit of measure is 1 hour.

Configuration Services. Aforza will work in alignment with the Customer’s Designated Contacts to execute configuration requests based on Customer’s design specifications. Customer is responsible for gathering business and functional requirements, design specifications, change management approvals, and documentation of configuration. Customer’s Designated Contacts will act as Customer’s sole contacts for submitting cases on behalf of Customer. Cases are worked during Aforza’s local business hours only. Case or request delivery times are dependent on mutual scheduling between Aforza and Customer and Aforza’s delivery capacity or other relevant factors.

Customer Success Guidance. The Aforza Managed Service includes access to a variety of resources with specialized product and market expertise to assist with Aforza Service adoption and utilization, including sharing advice and guidance related to optimizing Customer’s ongoing use of Aforza. Customer is responsible for evaluating any advice or guidance received from Aforza and for implementing any such advice and guidance.

Excluded Items. The Aforza Managed Service does not include:

- The initial implementation of the Aforza application, data migrations, data management or manipulation (de-duping, merging, cleansing), transferring data from one org or object to another, flows, AppExchange installs/uninstalls/customization and custom code. Any initial implementation must be undertaken by certified experts from one of Aforza’s Professional Services Partners or by Aforza Professional Services team under a dedicated Statement of Work or equivalent agreement.
- On-boarding of additional Customers User groups such as Users in additional countries, divisions or teams where Customer processes and application requirements are different to those already in use.



- General Administration Assistance with password resets. For password resets, Users should click the “Forgot your password?” link on the login page or contact their system administrator; Assistance with usernames. For assistance with usernames, Users should contact their system administrator; Assistance with Salesforce lockouts due to incorrect login attempts. For assistance with Salesforce lockouts due to incorrect login attempts, Users should contact their system administrator to unlock the account, or wait for the lockout period to expire; Assistance with non-Aforza products, services or technologies, including implementation, administration or use of third-party enabling technologies such as databases, computer networks or communications systems; Assistance with AppExchange applications, whether authored by Salesforce or a third party; Assistance with installation or configuration of hardware, including computers, smartphones, tablets printers, hard drives or networks; or creation or testing of custom code, including SOQL queries, except as provided in a separate agreement.

Changes to Aforza Managed Services. Aforza may modify the Aforza Success Plans and Managed Service from time to time, provided the level of service will not materially decrease during a subscription term.