INSIGHTSOFTWARE PROFESSIONAL SERVICES OFFERINGS:

Spreadsheet Server

PROFESSIONAL SERVICES OFFERING[1]	DESCRIPTION

Professional Services with no Statement of Work – Time and Materials under 25 hours	**Offering Name: Professional Services with no Statement of Work – Time and Materials under 25 hours:**
	
	Description of Services
	• These services are remote professional services hours provided by insightsoftware consultants. By way of example, these hours can be used for:
	  • Consulting on the preparation of consolidated financial statements
	  • Report design, report creation
	  • Software upgrades, if new versions are available and the necessary technical adjustments
	  • System testing, data plausibility checks
	  • Help with new product functions
	  • Documentation
	  • Support with changes to the product configuration
	  • Project management (20% of the contracted time)
	
	• The definition of the scope of the services and the timing of the consulting services must be agreed in advance between the customer and insightsoftware.
	• These services cannot be used as an extension of existing projects or as part of an initial introduction or installation.
	• The consulting services included in this order expire 12 months from the date of the written order.

SS Existing Customer Upgrade	**Installation:** (2) sessions up to one hour each to complete the following: • Upgrade of Spreadsheet Server for one user* • Knowledge transfer for how to complete upgrade of Spreadsheet Server for additional users o Customer to complete upgrade for other users
	o *If assistance is required to complete additional user upgrades, it may be purchased separately by selecting SS Additional User Installation/Upgrade and entering the number of additional users. A key factor to a successful software upgrade is Customer readiness. insightsoftware reserves the scheduled dates and times for your personal use thereby preventing us from scheduling those times for other customers on those date(s). Additional charges (at the then current hourly Professional Services rate) may result if delays are due to Customer readiness. • Necessary Customer resources must attend the upgrade session. This includes: • IT (including person responsible to install additional users) • Finance (to validate data) • Resource familiar with retrieving data from the ERP • The user to be installed must be present with necessary credentials. • Any rescheduling must take place within five business days of scheduled installation session.

SS Additional User Installation/Upgrade	• (1) session up to one hour to complete the install or upgrade of Spreadsheet Server for one user* • The initial configuration, installation (or upgrade), and validation of the desired version of Spreadsheet server must have been successfully completed. A key factor to a successful software install/upgrade is Customer readiness. insightsoftware reserves the scheduled dates and times for your personal use thereby preventing us from scheduling those times for other customers on those date(s). Additional charges (at the then current hourly Professional Services rate) may result if delays are due to Customer readiness. • Necessary Customer resources must attend the upgrade session. This includes: • IT (including person responsible to install additional users) • Finance (to validate data) o Resource familiar with retrieving data from the ERP • The user to be installed must be present with necessary credentials. • Any rescheduling must take place within five business days of scheduled installation session.
New Customer Spreadsheet Server GL & QD Foundational Bundle – Installation, GL, and Query Designer Training & Workshop	• Installation - (2) sessions up to one hour each to complete the following: o Installation, setup, configuration, and validation of Spreadsheet Server for one user* o Knowledge transfer for how to install Spreadsheet Server for additional users ▯ Customer to complete install other users ▯ If assistance is required to complete additional user installations, it may be purchased separately by selecting SS Additional User Installation/Upgrade and entering the number of additional users. • Training – Spreadsheet Server for GL & Query Designer and Workshop o 1 private class o 3 days duration o Up to 10 students A key factor to a successful software installation is Customer readiness. insightsoftware reserves the scheduled dates and times for your personal use thereby preventing us from scheduling those times for other customers on those date(s). Additional installation charges (at the then current hourly Professional Services rate) and training rescheduling fees may result if delays are due to Customer readiness. • Customer must successfully complete the Spreadsheet Server Installation Readiness Checklist which will be reviewed during the project Kick Off. • Necessary Customer resources must attend the installation session. This includes: • IT (including person responsible to install additional users) • Finance (to validate data) • Resource familiar with retrieving data from the ERP • The user to be installed must be present with necessary credentials. • Any rescheduling must take place within five business days of scheduled installation session.

New Customer SS QD Foundational Bundle - Installation and Query Designer Training & Workshop	• Installation - (2) sessions up to one hour each to complete the following: o Installation, setup, configuration, and validation of Spreadsheet Server for one user* o Knowledge transfer for how to install Spreadsheet Server for additional users Customer to complete install other users *If assistance is required to complete additional user installations, it may be purchased separately by selecting SS Additional User Installation/Upgrade and entering the number of additional users. • Training –Spreadsheet Server Query Designer Training & Workshop o 1 private class o 2 days duration o Up to 10 students A key factor to a successful software installation is Customer readiness. insightsoftware reserves the scheduled dates and times for your personal use thereby preventing us from scheduling those times for other customers on those date(s). Additional installation charges (at the then current hourly Professional Services rate) and training rescheduling fees may result if delays are due to Customer readiness. • Customer must successfully complete the Spreadsheet Server Installation Readiness Checklist which will be reviewed during the project Kick Off. • Necessary Customer resources must attend the installation session. This includes: • IT (including person responsible to install additional users) • Finance (to validate data) o Resource familiar with retrieving data from the ERP • The user to be installed must be present with necessary credentials.
	Any rescheduling must take place within five business days of scheduled installation session.
New Customer SS GL Foundational Bundle - Installation and Remote GL Training	• (2) sessions up to one hour each to complete the following: o Installation, setup, configuration, and validation of Spreadsheet Server for one user* o Knowledge transfer for how to install Spreadsheet Server for additional users Customer to complete install other users *If assistance is required to complete additional user installations, it may be purchased separately by selecting SS Additional User Installation/Upgrade and entering the number of additional users. • Training – Spreadsheet Server for GL Training and Workshop o 1 private class delivered remotely o 1 day duration o Up to 10 students A key factor to a successful software installation is Customer readiness. insightsoftware reserves the scheduled dates and times for your personal use thereby preventing us from scheduling those times for other customers on those date(s). Additional installation charges (at the then current hourly Professional Services rate) and training rescheduling fees may result if delays are due to Customer readiness. • Customer must successfully complete the Spreadsheet Server Installation Readiness Checklist which will be reviewed during the project Kick Off. • Necessary Customer resources must attend the installation session. This includes: • IT (including person responsible to install additional users) • Finance (to validate data) • Resource familiar with retrieving data from the ERP • The user to be installed must be present with necessary credentials. • Any rescheduling must take place within five business days of scheduled installation session.

SS New Customer Installation for 1 User	Installation - (2) sessions up to one hour each to complete the following: • Installation, setup, configuration, and validation of Spreadsheet Server for one user* • Knowledge transfer for how to install Spreadsheet Server for additional users o Customer to complete install other users o *If assistance is required to complete additional user installations, it may be purchased separately by selecting SS Additional User Installation/Upgrade and entering the number of additional users. A key factor to a successful software installation is Customer readiness. insightsoftware reserves the scheduled dates and times for your personal use thereby preventing us from scheduling those times for other customers on those date(s). Additional charges (at the then current hourly Professional Services rate) may result if delays are due to Customer readiness. • Customer must successfully complete the Spreadsheet Server Installation Readiness Checklist which will be reviewed during the project Kick Off. • Necessary Customer resources must attend the installation session. This includes: • IT (including person responsible to install additional users) • Finance (to validate data) • Resource familiar with retrieving data from the ERP • The user to be installed must be present with necessary credentials. • Any rescheduling must take place within five business days of scheduled installation session.