

Unit4 Cloud Customization Policy & Procedure for SQL Database Objects

Cloud Operations

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1. Introduction

Customers may need to retain custom SQL database objects (**Objects**) when migrating from an on-premises environment to Unit4 SaaS. These Objects may introduce security, performance, compatibility and data-integrity risks.

This document defines which Objects may be accepted, how they must be submitted and the conditions under which they may remain in Unit4 SaaS.

This policy and procedure applies to:

- **Unit4 ERP CR**, and
- **U4 Financials by Coda**.

Database views used with U4 Financials by Coda are excluded and must follow the standard customization review process.

2. Acceptance Requirements

Only Objects already operating in the Customer's on-premises environment may be submitted.

Objects must be migrated in the same form in which they operated on-premises. They must not be redesigned, corrected, enhanced or otherwise modified during the migration project.

Each Object must be fully contained within the Customer database. It must not depend on external infrastructure, servers, services, endpoints, file shares, linked servers, SQL Agent jobs, SSIS, SSRS or other components outside the database.

Where an Object must be modified to operate in Unit4 SaaS, it is not eligible for this process. A supported customization, alternative solution or revised business process must be used instead.

3. Self-Certification During Migration

Objects must be submitted before UAT through the [Database Object Self-Certification Request](#).

All Objects may be submitted together using the required Cloud Migration Assessment format.

The self-certification process must not be used to:

- introduce new functionality;
- submit newly developed Objects;
- modify existing Objects; or
- submit Objects requiring ongoing adjustment or maintenance.

Objects not declared before UAT may be deleted, denied for use and may not be recoverable.

The Customer remains responsible for the Object's stability, security, performance, compatibility and effect on data integrity. Objects may impact system performance and security. The Customer acknowledges and assumes full responsibility for any such risks. Customer further acknowledges and agrees that Unit4 shall not be liable, directly or indirectly, for any damage or loss caused by or connected to the Customer using Objects in Unit4 SaaS. For the avoidance of doubt, Unit4 shall not be liable for any loss, damage, or corruption to Customer Data caused as a result of the performance or existence of Objects in Unit4 SaaS.

Submission does not constitute review, validation or approval by Unit4.

4. Permitted Objects

The following Objects are allowed in Unit4 Cloud:

- **Customer-Defined Views** – Views created for easier reporting and data retrieval.
- **Customer-Defined Tables** – Tables used in a Customization that do not belong to the core Service.
- **Stored Procedures** – Precompiled SQL code that performs operations on the database (excluding standard stored procedures).
- **Triggers** – Automated execution logic responding to insert, update, or delete operations (excluding standard triggers).
- **Functions** – Scalar and table-valued reusable SQL code.
- **User-Defined Data Types (UDDTs)** – Custom data types based on built-in SQL server data types.

User and roles will be stripped from the database. SSIS, SSRS, SQL Agents, Linked Servers and similar Customization/integration mechanisms are not allowed.

5. Technical Standards

All Objects must follow these best practices to be eligible for migration:

- **Validate Input Parameters** – Ensure all input parameters conform to expected formats, lengths, and ranges.
- **Use Parameterized Queries** – Avoid dynamic SQL; use parameterized queries to prevent SQL injection.
- **Error Handling** – Implement robust error handling using TRY...CATCH blocks and log errors appropriately.
- **Use Schema Qualifiers** – Always use schema-qualified Object names (dbo.TableName) to prevent SQL injection.
- **Avoid Using sp_ Prefix** – The sp_ prefix is reserved for system stored procedures and should not be used.
- **Limit Output** – Avoid SELECT *; only return necessary data columns.

- **Review Execution Plans** – Optimize stored procedures and queries to prevent performance bottlenecks.
- **Limit Use of Triggers** – Triggers should be simple and efficient; use AFTER triggers instead of INSTEAD OF triggers where possible.
- **Handle Multiple Rows in Triggers** – Always design triggers to handle batch operations.
- **Avoid Nested Triggers** – Nested triggers should be disabled unless absolutely necessary.

6. Restricted Objects

The following Objects **cannot** be used in Unit4 SaaS:

- **Partition Functions and Schemes** – File group-based partitioning is not supported.
- **Plan Guides** – Cannot influence query optimizer behavior.
- **Synonyms** – Aliases for Objects are not permitted.
- **Constraints** – Primary keys, foreign keys, unique constraints, and check constraints are restricted.
- **Encrypted Objects** – Stored procedures and functions cannot be encrypted.
- **Schemas** – Custom schemas for Objects are not allowed.
- **Full-Text Indexes** – Full-text search indexes are not supported.
- **Sequences** – Sequence generators for numeric values are restricted.
- **Extended Properties** – Metadata attributes for Objects are not permitted.
- **Linked Servers** – External database connections are not allowed.
- **CLR Code (Common Language Runtime Integration)** – .NET-based code execution within SQL server is restricted.
- **Roles and Permissions** – Custom roles and permission sets are not permitted.
- **Change Data Capture (CDC)** – Change tracking mechanisms in SQL server are not supported.
- **Views** – Views not defined inside the ERP CR user interface will be taken as-is and cannot be modified.

7. Management After Go-Live

All self-certified Objects should be removed or replaced with supported customizations, alternative solutions or revised business processes within one year of: (a) the date on which Customer first enters live transactions in Unit4 SaaS or (b) 12 months from the Subscription Start Date, whichever is earlier (the Go Live Date).

If any Objects remain in Unit4 SaaS on the anniversary of the Go-Live Date, Unit4 reserves the right to invoice the Customer for an additional Charge relating to the ongoing risks and management costs to Unit4 associated with retaining DB Objects.

Objects may be reviewed and removal requested through the [SQL Database Objects dashboard](#).

Notifications may be issued as reminders only. They do not change the deadline or create an additional approval step.

8. Temporary Modification After Go-Live

An existing Object may be modified only where:

- the Customer is already live;
- the Object has failed, no longer fulfils its business purpose, or causes a security, performance or stability issue; and
- immediate removal would leave an unresolved business requirement.

This exception must not be used during migration, to introduce new functionality, or to make an otherwise ineligible Object suitable for Unit4 SaaS.

The complete modified Object must be submitted through [Install or Update an Existing Customization](#), using **Update to Existing Database Object**.

Unit4 will not design, develop or determine the required modification. Professional Services may be engaged separately for an additional Charge where assistance is required.

A modified Object may remain for a maximum of 180 days from deployment. It will then be removed, and the exception cannot be extended.

By submitting the request, the Customer agrees in advance to that removal. Further approval or permission will not be requested, and the exact removal date or time does not need to be separately confirmed.

Payment of a fee for other self-certified Objects does not permit a modified Object to remain beyond 180 days.

9. Unit4 Rights

Unit4 may:

- reject any non-compliant Object;
- remove undeclared or prohibited Objects;
- disable or remove Objects creating security, performance, stability or data-integrity risks;
- review or audit Objects;
- apply the applicable Charge referred to under section 7 above; and

- remove a modified Object at or before the end of the 180-day period.

Any action taken by Unit4 does not constitute development, validation, maintenance or support of the Customer's Object.

This version keeps the architect's technical lists intact but cuts most of the repeated explanation around them.

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