

# UNIT4

## Unit4 Cloud Customization Policy & Procedure for SQL Database Objects

Cloud Operations

VERSION 1.1

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# 1. Introduction

## 1.1. Purpose and Scope

Custom SQL database objects (**DB Objects**) can be a security risk and may inadvertently lead to data leaks. This document sets out the Unit4 policy in relation to DB Objects.

Unit4 strongly recommends all Customers replace DB Objects with supported customization forms as part of their project to migrate from their on-premise solution to Unit4 SaaS. On request and subject to payment of appropriate Charges (to be agreed between the Parties), Unit4 can assist Customers with replacement of DB Objects with supported customization forms.

However, Unit4 appreciates that it may not be possible to eliminate all DB Objects in advance and this policy sets out which DB Objects may be retained, the associated risks which must be accepted by the Customer, the steps that must be taken by the Customer and Unit4's rights.

## 1.2. Scope

These guidelines apply to the following Unit4 SaaS Services:

- Unit4 ERP CR
- Unit4 ERP 7
- U4 Financials by Coda

# 2. Self Certification of Custom SQL Database Objects

During a project to migrate a Customer from their on-premise environment to Unit4 SaaS, and before user acceptance testing (**UAT**) has commenced, Customers must declare to Unit4 any DB Objects that they use by submitting a self-service request in ServiceNow.

This submission process follows a self-certification approach, requiring Customers to provide the following information in the ServiceNow request:

1. Definition of the DB Object; and
2. Explanation of the DB Objects function and purpose.

Any DB Objects not submitted to Unit4 before UAT will be automatically deleted, denied for use in Unit4 SaaS and cannot be restored.

### 3. Permitted DB Objects

Subject to compliance with sections 4 and 7 below, the following DB Objects are allowed in Unit4 SaaS for a limited period of time:

- **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.

### 4. Technical Standards for Permitted DB Objects

The DB Objects identified in section 3 above must comply with the following technical standards to be eligible for use in Unit4 SaaS:

- **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.

## 5. Restricted DB Objects

Any DB Objects not listed in section 3 of this policy are not permitted in Unit4 SaaS.

Examples of DB Objects which **cannot** be used in Unit4 SaaS are as follows (please note that this list is not exhaustive):

- **Partition Functions and Schemes** – File group-based partitioning is not supported.
- **Plan Guides** – Cannot influence query optimizer behavior.
- **Synonyms** – Aliases for DB Objects are not permitted.
- **Constraints** – Primary keys, foreign keys, unique constraints and check constraints are restricted.
- **Encrypted Database Objects** – Stored procedures and functions cannot be encrypted.
- **Schemas** – Custom schemas for database 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 DB 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.

## 6. Conditions of Use

By submitting DB Objects for review by Unit4 in accordance with section 2 of this policy, Customers acknowledge and agree to the following conditions:

1. **Compliance with Guidelines** – All DB Objects must meet the technical standards outlined in section 4 of this policy. However, please note that following the technical standards in this policy does not guarantee secure and performing DB Objects.
2. **No Modifications Post-Migration** – Once DB Objects are migrated to Unit4 SaaS, they cannot be updated or modified.
3. **Customer Responsibility for Data Integrity** – Customers are responsible for ensuring their DB Objects do not introduce security vulnerabilities or performance issues.
4. **Performance and Security Risk** – DB 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 DB 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 DB Objects in Unit4 SaaS.

## 7. Enforcement and Review

Although section 3 of this policy lists DB Objects that are initially permitted in Unit4 SaaS, all DB Objects must be replaced with a supported customization form 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**). The Customer acknowledges responsibility for initiating the removal or replacement of the DB Objects.

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

In addition, Unit4 reserves the right at all times to:

- **Reject DB Objects** that do not comply with this policy.
- **Remove non-compliant DB Objects** from Unit4 SaaS without prior notice.

- **Audit DB Objects** periodically to ensure adherence to security and performance standards.

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