

UNIT4



Service Terms
Success4U - Advanced



Success4U Advanced - Overview

Success4U Advanced brings the following services together to help you achieve your goals from Unit4 software products:

- Tailored success planning with customer success manager guidance;
- Access to preferential pricing within the Success Catalogue, using Success Points;
- Customer Support access;
- Premium education and product guidance; and
- Community4U access.

The following sections cover the scope of each of the above services:

Customer Success Management

Unit4 will allocate a Customer Success Manager (CSM), who's primary aim is to make sure you not only use our product effectively but also get the most value out of it. Your CSM will check in with you to understand your business goals and challenges. They will help you to identify how to leverage your Unit4 software and services to enable the outcomes your business requires and agree with you how and when to execute each activity. This will be captured in your tailored Success Plan.

A "**Success Plan**" outlines the steps and milestones necessary for you to achieve your desired business outcomes with the Unit4 solutions. It is a collaborative, evolving document which aims to track the outcomes you plan to realise with Unit4 solutions.

A Success Plan agreed with your CSM may include:

- *Goals and Objectives*: Clearly defined objectives that we aim to enable using Unit4 products and Success Catalogue services.
- *Timeline*: A timeline or schedule outlining when specific milestones or goals should be accomplished.
- *Key Performance Indicators (KPIs)*: Metrics and indicators that measure the success and effectiveness of the plan.
- *Action Items*: Specific tasks or actions that both Customer and the Unit4 team need to undertake to reach the defined goals.
- *Responsibilities*: Clear delineation of responsibilities between the customer and the Unit4 team, ensuring accountability on both sides.
- *Resources Needed*: Identification of any resources, tools, or support required to execute the Success Plan successfully.

If you ever have questions, run into issues, or want to explore how to get even more out of our product, your CSM is your go-to person.

Success Catalogue and Success Points

As a Success4U Advanced customer, you can purchase Success Points – these provide you with budgeting certainty and simplify procurement and invoicing processes, as well as giving you access to our preferential pricing for services within the Success Catalogue.

You could use your Success Points to educate new team members, add new capabilities or configure your existing solution to accommodate evolving legislative requirements. You may also use your Success Points to test changes and upgrades, enhance your support levels or outsource your system administration to free your team up for other tasks. There are services to assist you at every stage of your Unit4 journey.

The Success Catalogue provides you with access to the portfolio of Unit4 and partner Services and is continually updated with new services and outcomes with the goal of helping you achieve your business objectives.

Your CSM will help you to identify the outcomes that will enable your business objectives and will work with your “Success Points Owner” to purchase and schedule services.

Success Points are not mandatory for the purchase of Services from the Success Catalogue, your CSM or Account Manager can assist you if you wish to purchase without using Success Points

Success Catalogue

Each service within the Success Catalogue ([here](#)) has a detailed Service Description which is provided to you in advance of purchasing the Service, so you can find more details about the Service you will receive. You will be deemed to have accepted the terms of the Service at the point Unit4 commences delivery.

- Services in the Success Catalogue are designed to use Unit4 solutions in the optimal manner to enable the described outcome to be achieved. Consequently, these Services are pre-defined and cannot be adjusted. Services outside of the deliverables / defined scope set out in the detailed description of the Service are not included and Unit4 is not obliged to deliver anything other than what is described. In the event (i) Customer requires additional services beyond the defined scope, or (ii) services are required as a result of Customer’s failure to fulfil its obligations, or (iii) the assumptions are incorrect or pre-requisites not fulfilled, Unit4 reserves the right to charge for any additional Services rendered.
- All Success Catalogue Services assume remote delivery. On-site delivery may be possible, however costs for travel and expenses will be chargeable. Please speak with your CSM if you require more information.

Success Points Redemption

Success Points are a pre-paid credit.

- Each organisation must allocate an individual within their business whose role it is to manage the Success Points – the ‘Success Points Owner’. Your Success Points Owner will be visible within your Success Plan.
- The designated ‘Success Points Owner’ works with the CSM to purchase and schedule services. Only individuals registered as the ‘Success Points Owner’ can book services. Should others in your business require a service, the ‘Success Points Owner’ will need to request this on their behalf.
- If you need to change your ‘Success Points Owner’, your CSM can arrange this. Please provide the request in writing (email is sufficient) so that we have a record of the request.
- Your Success Points balance is available from your CSM on request.

Success Points Terms & Conditions

- Redemption of Success Points for products and services from the Unit4 Success Catalogue is available only to customers with a current Success4U Professional or Success4U Advanced subscription. Specific Success Point redemptions also apply to Managed Application Services and are covered in the MAS Service Description.

- Your Success4U Advanced subscription enables you to purchase Success Points. You can increase the number of Success Points available to you at any point during your subscription through the purchase of “Additional Success Points” packages.
- Packages of “Additional Success Points” purchased shall renew annually (on your renewal date) for an annual fee, at an annual fee, incremental to your other Success Points, for the remainder of your Success4U Advanced subscription.
- Any unredeemed Success Points shall expire on each annual anniversary of the Success4U Advanced subscription. This includes “Additional Success Points” purchased during the subscription year. Success Points cannot be carried over into future years.
- Any services related to redeemed Success Points must be scheduled and consumed within 3 months of the date of redemption.
- Up to 30% of a Customer’s Success Points may be brought forward during the each of the first two (2) years of a three (3) year contract, thereby allowing you to adjust your usage. To bring forward any Success Points, you must discuss this with your CSM. Any points brought forward shall expire on the next annual anniversary of the Success4U Advanced contract and may not be restored.
- Success Points cannot be sold, transferred, or used in any other way than as outlined in the Success Catalogue.
- Success Points have no monetary value and may not be redeemed for cash or credit.
- You will be responsible for consuming your points and will appoint a “Success Points Owner” who will plan, request, and authorise the use of Success Points.
- Success Points are redeemed only against Services from the Unit4 Success Catalogue or for activities within the scope of a current Managed Application Services (MAS) agreement.
- The number of Success points required for Services in the Success Catalogue will be the current catalogue price at the point of redemption.
- Where Success Points services are cancelled or rescheduled by you, less than 2 weeks prior to the scheduled delivery date, a charge will be incurred.

Additional Information and FAQ’s for Success Points are available on www.unit4.com.

Education

In addition to Unit4’s standard education content included in Success4U Essentials, as a Success4U Advanced subscriber, you will have access to additional education content, geared towards your system administrators, included in your subscription.

Success4U Professional education content will be provided for two (2) named users and Success4U Essentials education content for twenty-five (25) named users.

This content will be assigned to you on commencement of your subscription and will be updated periodically during this time. You will need to provide the names of your identified education users during your onboarding.

Your CSM will cover how to access this content during your onboarding.

You can update your named users once per year if required, by contacting your CSM.

Additional education content is available for purchase through the Success Catalogue to enable you to expand the scope and depth of enablement across your team.

Customer Support

Success4U Advanced includes access to our standard support offering detailed [here](#).

Community4U

You have access to a rich source of documentation, knowledge and peer to peer support via our Community4U portal. In many situations, customers can address their questions or issues directly without the need to raise a case with the Support Desk.

Community4U also houses our Customer Success Hub with best practices and details for fast-track onboarding. Customers can learn how to raise a case and read knowledge articles to aid self-service with your Unit4 products.