

# Unit4 WebInfo

## Unit4 Cloud Service Description

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## CONTENT

1. Introduction .....	2
2. Data centres & data residency .....	3
3. Service model .....	5
4. Environments .....	7
5. Reporting and monitoring .....	8
6. Updates .....	9
7. Planned and unplanned maintenance .....	9
8. Customer permissions and responsibilities .....	10
9. Customisations, integrations, custom reports and fields .....	15
10 Technical operations .....	21
11 Data considerations .....	23
12 Non-Production Environment with production specifications .....	26
SCHEDULE A Unit4 WebInfo standardized configurations per country .....	26
SCHEDULE B Glossary and Technical Acronyms .....	27
Notable Changes from V. 2026 Q1 .....	28

# 1. Introduction

Unit4 WebInfo is a fully featured, web based, LCDP tool (Low Code Development Platform). An extensive library of object-based functionality makes it easy for Unit4 personnel, and partners, to create web applications to meet business requirements within relevant verticals.

A WebInfo application contains of the WebInfo Engine and a WebInfo solution configuration. The solution can be standard, meaning it adopts automatically to the Customer setup, or Customer specific, requiring manual changes to be made, using the WebInfo edit mode, post installation. A standard solution can be global or a localization for a specific region. A customer specific solution is always treated as a Customisation. Templates are often used as basis for customer specific solution. Available standard solutions are listed in Schedule A..

The purpose of this document is to describe the cloud service composition provided to the Customer.

Unit4 provides a complete technically managed solution for Unit4 WebInfo deployed in the public cloud. This end-to-end service includes infrastructure, hardware, system software, monitoring, management and maintenance of the entire solution (including backups), disaster recovery and service updates.

Unit4 offers cloud enterprise solutions as Software as a Service: Unit4 SaaS - a software as a service delivery model deployed on Microsoft Azure or on Nordic data centre (Conapto AB) data centres. This model leverages of Microsoft Azure's scale and experience of running highly secure and compliant cloud services around the globe. Microsoft Azure's infrastructure is second to none in terms of physical and electronic security, and it adheres to industry standards such as ISO 27001, SOC 1 & 2, PCI DSS and many more.

Unit4 WebInfo is available as a shared option (default), where computing resources are shared between customers without any interference and a dedicated option where compute resources such as Web server, SQL server and Business server, are dedicated to a single customer.

In summary, Unit4 provides the following:

- Full deployment of Unit4 Products, including web client and Unit4 WebInfo APIs.
- All User access to Unit4 WebInfo is over secure internet connections (HTTPS). A variety of browsers and mobile platforms are supported. There is an Azure ExpressRoute option to provide a private communications channel.
- Comprehensive integration options available, including the use of Unit4 WebInfo APIs.

- Infrastructure is fully scalable, in a high availability environment with redundancy in critical aspects such as power, hardware, network communications.
- Firewalls, anti-virus and access controls.
- Continuous monitoring is in place, covering servers, services and applications, feeding alerts and continuous improvement.
- Application of all updates, patches, Hot Fixes to Unit4 and other supporting software.
- Production Environment and Non-Production Environments with a separate database for your data.
- Forgiveness restores (where applicable), plus disaster recovery in a physically separate secondary site.
- Service Credits based on Service Availability.
- Unit4 Community4U to engage with Unit4 directly, giving insight in the service performance indicators and see the status of services.

Various Azure regions leveraged to enable Unit4 to meet your data residency needs; your data always resides within a specified a geopolitical zone (except where explicitly stated otherwise).

## 2. Data centres & data residency

Unit4 uses the Microsoft Azure infrastructure and Platform Services and Nordic data centre (Conapto AB) to deliver the Unit4 ERP SaaS. These services are delivered from within different geopolitical zones, using a primary and a secondary location in every zone to meet service level commitments and disaster recovery needs. The location within each geopolitical zone is at the discretion of Unit4 and can change from time to time. The table below contains details of the geopolitical zones, along with the data centre locations. For more information, see Azure region details: [azure.microsoft.com/regions](https://azure.microsoft.com/regions) and Nordic data centre (Conapto AB) details on [www.conapto.se](http://www.conapto.se).

Geopolitical zone	Provider	Data Location (Countries/City's/Regions)	Time Zone
Azure EU	Microsoft Azure	Dublin, Ireland and Amsterdam, The Netherlands (DR)	CET/CEST
Azure USA	Microsoft Azure	Texas and Illinois (DR)	CST/CDT

Geopolitical zone	Provider	Data Location (Countries/City's/Regions)	Time Zone
Azure Canada	Microsoft Azure	Quebec City and Toronto (DR)	EST/EDT
Azure United Kingdom	Microsoft Azure	London and Cardiff (DR)	GMT/BST
Azure Asia	Microsoft Azure	Singapore and Hong Kong (DR)	SGT
Azure Australia	Microsoft Azure	Victoria and New South Wales (DR)	AEDT/AEST
Azure Norway	Microsoft Azure	Oslo and Stavanger (DR)	CET/CEST
Azure Sweden <sup>1</sup>	Nordic data centre (Conapto AB)	Sätra and Sollentuna (DR)	CET/CEST
	Microsoft Azure <sup>1</sup>	Gävle and Staffanstorp (DR)	CET/CEST

Unless agreed otherwise in a Sales Order, the chosen deployment of the Customer will be as follows:

Customer residence	Geopolitical zone used
APAC	Asia
Australia/New Zealand	Australia
Canada	Canada – Azure
EU	EU – Azure

<sup>1</sup> It is on Unit4 discretion which location is used.

Customer residence	Geopolitical zone used
Sweden <sup>2</sup>	Nordic data centre (Conapto AB) or Sweden – Azure
Norway/ Denmark	Norway – Azure
UK	UK – Azure
US	US – Azure
Primary	Secondary
Geopolitical zone EU	Geopolitical zone EU
Geopolitical zone UK	Geopolitical zone UK
Geopolitical zone USA	Geopolitical zone USA
Geopolitical zone Canada	Geopolitical zone Canada
Geopolitical zone Asia	Geopolitical zone Asia
Geopolitical zone Australia	Geopolitical zone Australia

### 3. Service model

Unit4 WebInfo is available in 2 main models:

1. in a shared deployment model
2. in a dedicated deployment model.

Unit4 WebInfo dedicated model provides the same service offering as the shared model with the distinction that computing resources such as Web server and SQL server, are not shared with other Unit4 Customers, and are dedicated to a single Customer.

Please note that not all models are available for all solutions and or data centres. In summary form the characteristics of each of these models is as per the table below:

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<sup>2</sup> Platform Services will be delivered from Azure Norway data centre.

Category	Component	Comments
SOLUTION	All patching, updates of the standard solution (technical)	Included and automatic
	Environments included	1 Production + 2 Non-Production (Preview and Acceptance)
INFRASTRUCTURE	Data Files storage	250GB <sup>3</sup>
	Document Archive storage	250GB <sup>4</sup>
	Transactional data storage	150GB <sup>5</sup>
	Availability guarantee	Yes
	Data centres	Microsoft Azure and/or Nordic data centre (Conapto AB) Microsoft Azure
	Updates will commence	Automatically
	On-going technical operations, performance management, maintenance of all infrastructure components, monitoring alert response and issue resolution	Yes
	Backup & Service Restore	Yes
	Disaster recovery	Yes

<sup>3</sup> Additional Data Files Storage is provisioned when needed and is subject to an extra charge. Operationally the system will not be halted when overage occurs.

<sup>4</sup> Additional Document Archive Storage is provisioned when needed and is subject to an extra charge. Operationally the system will not be halted when overage occurs.

<sup>5</sup> Additional Transactional Data Storage is provisioned when needed and is subject to an extra charge. Operationally the system will not be halted when overage occurs.

Category	Component	Comments
	Monitoring program of infrastructure and application	Yes
COMPLIANCE	Compliance certificates and assurance documents – Microsoft Azure and Nordic data centre (Conapto AB)	SOC1 Type II (ISAE 3402), SOC2 type II (ISAE 3000), ISO27001, ISO27017 <sup>6</sup>

## 4. Environments

Three (3) environments are provided<sup>7</sup>, including:

- One Production Environment (PE) called alternatively “live” environment, being the environment that the Customer uses to run the day to day (live) operation; and
- Two Non-Production Environments (NPEs) :
  - Preview – a Customer's Preview environment always contains the latest updates for the Unit4 Product in use by the Customer.
  - Acceptance – which can be used according to Customer needs as “Test” / “Quality” / “Development” / “Pre-Production”.

Additional environments can be provided at an extra charge.

### 4.1 Production Environments

Only the Production Environment (PE) is a subject to the Service Level Agreement.

### 4.2 Non-Production Environments characteristics

Although a Non-Production Environment (NPE) is not a subject to the SLA, NPEs have some characteristics as described below.

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<sup>6</sup> It is Customers responsibility to ensure their own compliance with all applicable standards and compliance obligations. For more details around Information Security please see the Unit4 Information Security Policy, which is available at [www.unit4.com/terms](http://www.unit4.com/terms).

<sup>7</sup> Three (3) environments set up is a new standard applicable to Customers that got their Agreements signed with effect from May 2020.

## Customer responsibilities

Customer needs to manage non-production WIP such as non-production report templates (e.g. in progress changes to purchase order report template) as refresh will replace WIP with copies from production.

## Update of an NPE to a new Update

The Preview (NPE) environment is updated as soon as an Update is available following an announcement of Unit4. Once an NPE has been updated to the latest Update, it is not possible to move back to the previous Update.

## Backups

Backups of NPE are made daily in the time zone of the geo-political zone in use. Backups of NPE are kept for fourteen (14) calendar days.

## Suspension

An NPE that is not actively used will be suspended. A suspended NPE may be reactivated at any point in time. To reactivate a suspended NPE, Customer needs to initiate re-activation, by accessing the NPE through the web interface or activating it in Citrix workspace, which may take up to 15 minutes.

# 5. Reporting and monitoring

## 5.1 Reporting on Service Performance

Unit4 provides operational information regarding the Unit4 SaaS on the Unit4 Community4U. That information includes:

- Service Availability
- Scheduled maintenance (times, dates per region)
- Release update information and deployment schedules
- Site recovery status (in the event of the disaster plan initiation)

## 5.2 Monitoring program

A continuous 24x7 monitoring and resolution program is in place to detect and resolve incidents to meet the Service Availability targets on Production Environment.

## 6. Updates

Periodically, Unit4 introduces new features in the Unit4 WebInfo Service including enhanced features and functionality across applications. Features and functionality will be made available as part of an Update. As part of regular maintenance Unit4 will apply Updates as deemed necessary by Unit4 in order to maintain the existing features of the Unit4 Global Cloud Service and to maintain service level commitments and security.

Updates will be provided free of charge as part of the Service. However, it should be noted:

- Any Updates may result in additional Service Configuration and/or functional adjustments that are required to be made by either: (i) the Customer; (ii) Unit4; or (iii) approved service partner consultants, which are not included in Unit4 SaaS and would be chargeable.
- Where any Update replaces or updates any Customisation or non-standard functionality utilised by Customer, the Customer will be required to adopt the standard functionality. Unit4 reserves the right to charge a reasonable charge to provide assistance if Customer wishes to maintain the previous Customisation or non-standard functionality.

### 6.1 Update deployment

Updates may take place approximately twice per year. The frequency of Updates may be increased or decreased at Unit4's discretion. Updates may take up to twelve (12) hours to deploy, resulting in the Service being unavailable for some or all of that time (such unavailability shall not be counted as service downtime for the calculation of Service Availability).

A schedule of planned deployment to the Production Environment will be published on the Unit4 Community4U. A Customer's Preview environment always contains the latest updates for the Unit4 SaaS solution in use by the Customer. Unit4 will use reasonable endeavours to ensure that Updates will be carried out during the Planned Maintenance window.

## 7. Planned and unplanned maintenance

### 7.1 Planned Maintenance

Currently, the Planned Maintenance window is from Saturday 18:00 to Sunday 06:00 CET/CEST on the 4<sup>th</sup> week of every month. For the Nordic data centre, the Planned

Maintenance window is Monday from 20:00 to Tuesday 03:00 CET/CEST every week. Next to that a Planned Maintenance Window might be planned twice (2x) in a 12 month period to deploy a software Release from Saturday 18:00 to Sunday 06:00 CET/CEST. The Production Environment may be periodically unavailable at this time. Planned Maintenance windows are subject to change upon reasonable notice.

The exact dates of Planned Maintenance windows are communicated in the Unit4Community4U.

If actual downtime for scheduled or planned maintenance exceeds the time allotted for Planned Maintenance, it is considered part of the calculation for Service Outage. If actual downtime for scheduled or planned maintenance is less than time allotted for Planned Maintenance, that time is not applied as a credit to offset any Service Outage time for the month.

Planned Maintenance can also be carried out by Unit4 provided that the Customer has received at least 8 hours' notice. This will occur in unforeseen or exceptional circumstances only (similar to emergency / Unplanned Preventative Maintenance) to deal with a vital or critical issue and Unit4 will use its reasonable endeavours to do this outside Business Hours to cause minimal disruption to the Customer. In this case, because Unit4 provides Customer 8 hours' notice, this maintenance does not count as Service Outage. This is so that Unit4 is not encouraged to wait until the next Planned Maintenance window to deal with an urgent issue and avoid a Service Credit penalty.

## 7.2 Unplanned Preventative Maintenance

Unit4 may carry out Unplanned Preventative Maintenance if there is an urgent requirement to secure the stability of, or the security of the Unit4 Global Cloud Service. This action may be taken at the discretion of Unit4 for unforeseen and exceptional circumstances, which require immediate resolution that cannot wait until the next Planned Maintenance window. Unplanned Preventative Maintenance is counted as a Service Outage.

# 8. Customer permissions and responsibilities

## 8.1 Customer permissions

The Customer has the right to:

## **1. Monitoring**

Track the availability of the Production Environment and monitor service responsiveness using an external monitoring tool. Such monitoring will consume Unit4 SaaS resources within the limits of current and future Usage constraints. Both Unit4 and the Customer must agree in advance on the details of the monitoring setup, to ensure it does not interfere with Unit4 SaaS operations or trigger security protections.

Monitoring activities must not require the installation of software, agents or components within Unit4 infrastructure and must operate within applicable service limits and usage constraints.

## **2. Security Testing**

Perform external vulnerability scanning and penetration testing of their environments once per year. The Customer must submit a Service Request with full details of the planned activity at least 30 days in advance. Unit4 reserves the right to adjust the scope of such testing to protect the stability and integrity of shared infrastructure. Even if the activity is approved, Unit4 may suspend or terminate it without notice if it causes or risks causing disruption to the Customer or the stability or integrity of shared infrastructure. The Customer is solely responsible and liable for any resulting impact on the Service or recovery effort (which includes all efforts taken by Unit4 to restore the Service to a stable, secure, and operational state).

## **3. Performance Testing**

Carry out performance testing in the Production Environment, provided that the simulated load reflects typical Production Environment Usage patterns and is executed at the corresponding time of day (e.g. night jobs during nighttime hours). The Customer is not permitted to conduct testing designed to evaluate system behaviour under overload.

## **4. Other Potentially Disruptive Activities**

Notify Unit4 in advance of any activity that may impact the behaviour, performance, or stability of Unit4 SaaS services. Unit4 may suspend or isolate affected systems—without prior notice—if an activity, whether authorized or not, is deemed to pose a risk to operational continuity or infrastructure health. Any investigation, mitigation, or remediation effort undertaken by Unit4 may be charged to the Customer.

Any effort by Unit4 to prepare for, coordinate, or manage the above activities is subject to additional charges, which can be immediately invoiced by Unit4 to the Customer.

## 8.2 Customer Responsibilities

### Service Updates

The following list summarizes typical Update tasks and indicates services included as part of the Unit4 SaaS and tasks that are the responsibility of the Customer (or by Unit4 Success Services at an extra charge):

Task	Included	Customer Responsibility
<b>Project Planning</b>		
<ul style="list-style-type: none"> <li>Publishing general availability schedule of Updates on the Community4U</li> </ul>	✓	
<ul style="list-style-type: none"> <li>Managing timelines, outline goals, roles and responsibilities</li> </ul>		✓
<ul style="list-style-type: none"> <li>Business analysis and discovery</li> </ul>		✓
<ul style="list-style-type: none"> <li>Creating test plans</li> </ul>		✓
<b>Update deployment in a Preview environment</b>		
<ul style="list-style-type: none"> <li>Preview environment with Update</li> </ul>	✓	
<ul style="list-style-type: none"> <li>User training on changes</li> </ul>		✓
<ul style="list-style-type: none"> <li>Test: conducting basic Update testing</li> </ul>		✓
<ul style="list-style-type: none"> <li>Training support to assist with testing</li> </ul>		✓
<ul style="list-style-type: none"> <li>Functional and user acceptance testing as desired</li> </ul>		✓
<ul style="list-style-type: none"> <li>Training, implementation and Service Configuration for new features</li> </ul>		✓
<ul style="list-style-type: none"> <li>Uplift and testing of all Customisations</li> </ul>		✓
<ul style="list-style-type: none"> <li>Reviewing test scripts and testing outcomes for issues resolution</li> </ul>		✓

Task	Included	Customer Responsibility
<b>Update deployment in Production</b>		
<ul style="list-style-type: none"> <li>Update existing application Service Configuration, being all activities undertaken to set up applications provided by the Service which involve the use of standard menus and functionality. There may be rare cases where it is not technically possible to determine the correct business Service Configuration; in these rare cases, any tasks that must be completed manually are the responsibility of the Customer.</li> </ul>	✓	✓
<ul style="list-style-type: none"> <li>Update Production Environment with Update</li> </ul>	✓	✓

### Customisation update responsibilities

Unless otherwise agreed, Customer responsibilities include Customisation code lift and testing for compatibility, functional testing and any application (re)configuration.

Unless otherwise agreed, any Customisations that are not updated to run on the current Update in time for the Production deployment may be disabled in the Production Environment prior to Update deployment.

### Technical & functional responsibilities

The Customer's technical environment responsibilities include:

- Supply, administration and maintenance of Customer-side devices and local printers.
- Customer-side networking infrastructure, including connectivity to the internet.
- Security of Customer-side network, devices and internet connectivity.
- Ensuring sufficient bandwidth, including internet bandwidth.
- All Customer-initiated activities around penetration testing, security checks and Customer-owned monitoring are the sole responsibility of the Customer.

The Customer's functional environment responsibilities include:

- Customer is fully responsible for the configuration and administration of the functional aspects of the Service, including User and role administration.

## 8.3 Customer Obligations

### Activities Impacting System Operations

Customers are required to notify Unit4 in advance of any testing or activities that may impact system behaviour. If such activity poses a risk to infrastructure stability or service continuity, Unit4 reserves the right to immediately suspend the affected Service—without prior notice to the Customer—to limit risk and identify the root cause of the suspicious activity. Where such action is required, remediation efforts and associated costs will be charged to the Customer.

### Account set-up

The Customer is responsible for designating its Users and for ensuring that all Users are adequately trained and understand Customer's remote access and use obligations and requirements. Where applicable, each User must establish an Account. The Customer is responsible for managing its Accounts and disabling a User's Account when Unit4 SaaS access is no longer required, including immediately upon termination of such User's affiliation with the Customer. The Customer is responsible for its Users' acts and omissions and all activities occurring under its Users' Accounts.

### Account Administrator

The Customer will designate one or more Account Administrator(s). The Account Administrator(s) responsibilities include, but are not limited to, coordinating with Unit4 regarding the Unit4 SaaS and managing Customer's Accounts. Customer warrants that its Account Administrator(s) will maintain authority to act on Customer's behalf concerning the Unit4 SaaS and that Unit4 can rely on the Account Administrator(s) actions and instructions in connection therewith.

### Account security

Each User is responsible for keeping their Account credentials confidential. Users may not share Account credentials, and the Customer may not reuse or recycle credentials when activating or disabling Accounts. The Customer will notify Unit4 without undue delay upon becoming aware of any known or suspected unauthorized access, misuse, or security breach affecting the Unit4 SaaS or any User Account and will provide all relevant information and take all reasonable steps requested by Unit4 to investigate and remediate the issue.

All Accounts used to access Unit4 Services and related applications must be secured in accordance with industry-standard security practices. Minimum password requirements are defined in the Unit4 Cloud Technical Guidelines and Limits document, available at <https://www.unit4.com/service-descriptions> under Technical Documents.

The Customer is responsible for enforcing appropriate password management practices, including timely access removal and credential changes where required.

## 8.4 General functional and technical requirements and specifications

Customer must comply with the functional and technical requirements and specifications, shared by Unit4 and available on <https://www.unit4.com/service-descriptions> and Community4U, which may be updated in accordance with the Unit4 General Terms of Business.

## 9. Customisations, integrations, custom reports and fields

A WebInfo Customisation is any non-standard WebInfo Service Configuration including its data queries and solution specific database objects such as tables, views etc.

Customisations, custom reports and integrations are permitted and can be written by Unit4 or Unit4 partners. Maintenance, support, implementation and update considerations for these custom components are not included in the Charges. Customisations are not supported by Unit4 under Standard Support. The Customer has sole responsibility for the Customisations, custom reports and integrations, as well as their maintenance and Unit4 has no responsibility to maintain compatibility or fix any problems resulting from the use of non-standard software. This includes any custom development or Customisation (including Unit4 delivered Customisation as part of a project implementation, bespoke code written by Unit4). If any assistance is required in regard to Customisations and/or bespoke work, Unit4 may be able to assist with resolving issues or with upgrades of the Customisation, but this will be subject to review and extra charge. Customer will be required to purchase Success Services at Unit4's Prevailing Rates.

## 9.1 Unit4 Created Customisations

Maintenance of Unit4 authored or created Customisations, including custom entities, fields, relationships, screens, reports, imports, exports, workflows, interaction plans, lookup data, localisation files, C# / Java /etc. code, web styles and scripts, are outside the scope of Unit4 SaaS model offerings. Maintenance, support, implementation and update considerations for these components are not included in the Charges.

## 9.2 Restrictions on Customisations

In general, there are restrictions regarding allowing Customisations in Unit4 WebInfo SaaS including but not limited to:

- No third-party applications/DLL installed.
- Unit4 provides the capability to bring custom SQL database objects from on-premises environments into the Unit4 SaaS for continued operation of Customer-specific Customisations. However, custom SQL database objects must comply with strict security, performance, and operational guidelines to be accepted.
- Custom SQL database objects can be a security risk and may inadvertently lead to data leaks. Therefore, Customers must accept the risk of running their custom SQL database objects in the Unit4 SaaS. Custom SQL database objects that do not meet security and performance requirements will not be permitted. Please review the *Unit4 Cloud Customization Policy & Procedure for SQL Database Objects* (available to partners, Customers and prospects via the Cloud Documentation in Community4U or at [www.unit4.com/service-descriptions](http://www.unit4.com/service-descriptions)).
- All Customers must self-certify custom SQL database objects (i.e., assessing the custom SQL database objects that they use and confirming to Unit4 that they are complying with the requirements set out in this section 10 and the *Unit4 Cloud Customization Policy & Procedure for SQL Database Objects*). Unit4 reserves the right to impose an additional charge on the Customer for the ongoing risks and management costs to Unit4 associated with retaining custom SQL database objects in the Unit4 SaaS.
- No direct access to local resources such as file system, network, etc., access must be indirect via approved methods that provide abstraction from specific infrastructure.
- All Customisations must be delivered fully documented.
- Any code needs to be transparent, readable and delivered to Unit4; and

- All Customisations must include installation routines that require no manual interaction and allow for end Users to validate installation has been completed and that the Customisations are ready for configuration or use via standard application capabilities.
- should follow the WebInfo development guidelines

### **9.3 ACT Customisation – review, rejection, removal**

Unit4 requires a full review of all ACT Customisations submitted on Customers' behalf to ensure the security, stability and performance of its services. The Service Request must follow the guidelines and include the source code of the Customisation to evaluate any potential risks to the service's stability, security and/or performance.

For the adoption of new Customisations or updates to existing ones, Customers must submit a Service Request to Unit4. Customisation will only be installed after positive review.

### **9.4 Data Modification via Customisations**

Customisations allow Customers to execute direct database modifications (e.g., directly changing, removing or updating data in their database). Direct changes to the database are not normally permitted and Customisations can bypass standard built-in data controls in the application layer which protect both the confidentiality and integrity of Customer's information, as well as impact system performance. By introducing Customisations, Customer accepts all the risks that are related to data consistency and integrity.

### **9.5 Data modification via SQL queries**

Customers may request an execution of custom one-time SQL scripts in their databases. Such scripts may be subject to additional review by Unit4 and may be rejected due to a lack of compliance with Unit4 policies. Customers accept all the risks that are related to data consistency and integrity by requesting a custom SQL script execution. With this, Unit4 assumes no responsibility for the manual alteration of the database records. Scripts to create objects in the Customer's database, such as views and tables, are treated as Customisations and should follow the standard Customisation review process.

### **9.6 Unit4 APIs backward compatibility**

Unit4 recommends using the most recent version of the Unit4 WebInfo APIs in order to receive optimum performance and stability. Unit4 WebInfo APIs always follow the current version. All breaking changes in the Unit4 WebInfo APIs will be noted in the Unit4 WebInfo Release Notes.

## 9.7 Permitted tools

The following Customisation and custom report tools are permitted. These may be created by Unit4, Unit4 partners or by the Customer themselves using Unit4 ERP CR tools. Please note that the prerequisite is that all Customisations must be reviewed by Unit4 according to the Customisation review process (paragraph 10.3):

- ACT DLLs and other solutions created with the ACT tools considering the following constraints:
  - a. Use of standard ACT methods and Unit4 ERP CR APIs/web services where applicable.
  - b. No direct access to the file system except via standard Unit4 ERP CR environment variables for import and export locations.
  - c. No access to infrastructure or operating system level capabilities e.g. StartProcess or other process mechanisms.
  - d. No dependence on registry.
  - e. No code-based dependence on static server host name, IP address etc.
  - f. Must operate within a dynamic infrastructure-based environment (e.g. no sticky sessions).
  - g. No 3rd party DLL or EXEs included with Customisation, only Unit4 ERP CR and standard .NET Framework permitted.
  - h. IntellAgent events running executable files are prohibited.
- DataLoad
- IntellAgent (with read-only SQL)
- Xtra Reports
- ARC reports (Deprecated and should be replaced by Xtra reports)
- Excelerator - Installed on the Customer's local desktop
- Worderator - Installed on the Customer's local desktop
- Report Engine to view data
- Report writer (ARW, with read-only SQL) to view data
- Browse table to view data
- Additional Database View (created via Unit4 ERP CR Desktop Standard View definition screen) on the Data Model (for reporting purposes)
- Workflow (with additional Database view created via Unit4 ERP CR Desktop standard view definition screen)
- SQL reader

Console administration

## 9.8 Robotic Process Automation (RPA)

Robotic Process Automation (RPA) is permitted in Unit4 SaaS under the following conditions:

1. No software can be installed on the Web, Business or Citrix server. The RPA must function entirely as a User, although it may optionally use APIs.
2. The RPA must operate like a human (i.e. similar pace and login frequency). Rapid, robotic keystrokes or excessive system interactions may cause timeouts or other issues, which could disrupt both the RPA's operation and the system itself.

## 9.9 Usage of report queues

The Unit4 Additional Report Queue service provides Customers with extra report queues beyond the standard allocation included with their U4 Products. By default, Customers are provided with up to four (4) report queues, which include:

- Two (2) DEFAULT queues per environment (one for x86 and one for x64 architecture).
- Up to two (2) additional queues on x64 architecture per environment based on specific needs.

Customers may also qualify for one (1) additional queue in x64 architecture at no extra charge for every 1,000 full-time equivalents or 300 named Users, with the ability to request up to four (4) extra queues.<sup>8</sup>

For any additional queues beyond these conditions, Unit4 offers an option to increase the number for an additional charge, with a maximum of 7 queues on the x64 architecture (and 1 DEFAULT queue on the x32 architecture).

## 9.10 Maintenance of Customisations, Custom reports and Integrations

Maintenance, support, implementation and update considerations for these components are not included in the Charges.

Custom reports, integrations and Customisations authored by a Customer or a Unit4 partner, are the full responsibility of the Customer for all aspects of deployment and maintenance. Customer responsibilities include code lift for Update compatibility, functional testing and configuration and error resolution.

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<sup>8</sup> The Customer is entitled to request a maximum of four (4) additional queues in accordance with the 1,000 FTEs rule. Therefore, even if the Customer has 5,000 FTEs, the maximum number of additional queues that may be requested under this provision remains limited to four (4).

Custom reports, integrations and Customisations authored by Unit4, are outside the scope of Unit4 ERP CR SaaS. Maintenance of Customisations, custom reports and integrations must be formally set up and included on an executed Sales Order to ensure that Unit4 takes responsibility. If Unit4 maintenance of Customisations, custom reports and integrations has not been included on an executed Sales Order, responsibility for all aspects of deployment and maintenance will reside with the Customer.

## 9.11 Custom report Authoring

Custom reports created by Unit4, Unit4 partners or by the Customer themselves are permitted. Authoring / creation of reports has the following considerations:

Custom reports authored by the Customer	Authored via Internet Browser?
(Information) Browser reports	Yes <sup>9</sup>
Standalone Excelerator reports	No <sup>10</sup>
Standalone Xtra reports (ARC is deprecated and should be migrated to Xtra reports asap)	No <sup>9</sup>

### 9.11.1 Integrations

Integrations are permitted according to the supported integration methods described below. Integration methods not explicitly stated below are not permitted.

Standard Unit4 product integration options:

Integration Type	Available?
Unit4 FP&A integrates with Unit4 ERP CR through its ETL process, extracting financial data, intercompany data, cash data	Yes

<sup>9</sup> Browser reports are authored and deployed using the standard Web (Information Browser reports) and or Desktop Client (classic Browser Templates Reports).

<sup>10</sup> Excelerator, ARC and Xtra reports are created via Unit4 reporting tools (e.g., Unit4 ERP CR Report Engine) that must be installed and run on a Customer's own local PC. MacOS Users need to use a virtualization solution to access a Windows desktop to Unit4 reporting tools.

Integration Type	Available?
and metadata. Please also review the Unit4 FP&A Cloud Service Description.	

Other integration options:

Integration Type	Permitted?
Integration using Unit4 ERP CR APIs and web services	✓
Integration using standard export files over SFTP generated by / import files imported by Unit4 ERP CR standard server processes <sup>11</sup>	✓
Integration with Unit4 WebInfo application Rest APIs / web services.	Yes

## 10 Technical operations

### 10.1 Printing

All printing is carried out on the Customer side.

### 10.2 Read-only Database access

Direct database access can be provided to a replicated read-only database, as described in the Database Replica Service for ERP CR service description. This additional service is not available for the Nordic data

### 10.3 Connectivity

Unit4 uses static public IP addresses (both outgoing and incoming) for its services, providing reliable connectivity. However, please note that while Unit4 strives for consistency, these IP addresses are subject to change in the future and cannot be guaranteed as permanent.

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<sup>11</sup> Via folder access that is restricted to nominated administrative Users (Data Export, Data Import, Report Results and Server Logging folders).

## Internet bandwidth suggestions<sup>12</sup>

Since the configuration and use of Unit4 ERP CR are highly variable, Unit4 can provide only high-level bandwidth suggestions; Unit4 ERP CR (Web Client) – an assumed concurrency factor of 5 results in an average bandwidth requirement of 20–50 Kbps per User, with a maximum latency of 100 ms. For Unit4 ERP CR Desktop, the estimated bandwidth requirement is 100 Kbps per User, also with a maximum latency of 100 ms.

### 10.3 Solution access

The Unit4 WebInfo solution is accessed in the following manner:

- Unit4 WebInfo (web-client), accessed via a supported web browser.
- Programmatic access to Unit4 WebInfo API / web services

### 10.4 Authentication

Available Unit4 WebInfo authentication options

- Unit4 ERP 7 solutions:
  - Secure link from ERP 7 web client
  - Unit4 IDS
- Unit4 IDS
- Unit4 Property Management solutions:
  - Secure link from UPM Web

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<sup>12</sup> Rough guidance only based on simulation testing submitting timesheets. Response times will be dependent upon a variety of factors such as the number of Users, type of web processing initiated, Customer side internet line capacity and infrastructure setup such as the use of proxies. Note: Unit4 ERP CR Document Archive Usage is not covered by this estimate; uploading or downloading large documents from the Document Archive will consume bandwidth and time as normally experienced with an internet-based document upload or download.

## 10.5 Technical overview

Topic	Description
<b>Authentication</b>	
Protocols supported	WS-Federation, SAML-P and OpenID Connect support (see Unit4 IDS Service Description) and application specific credentials
<b>Internet communication</b>	
Protocols supported	HTTPS secured with TLS with RSA SHA256withRSA encryption and/or EC SHA256 with ECDSA

# 11 Data considerations

## 11.1 Transfers of Customer Data to the Unit4 WebInfo

Unit4 deploys a standard architecture and therefore, where Customer is an existing Unit4 customer, it is responsible for ensuring data consistency (i.e. that Customer Data to be inserted follows such standard architecture) and that any inconsistencies in Customer Data are appropriately cleansed before such data is inputted into the Unit4 Global Cloud Service.

When Customer requests to copy a database snapshot from outside of Unit4 SaaS environment then it should be free of any Customisation objects. These objects should be sent in a separate Service request and will follow standard Customisation review process.

## 11.2 Backup and Restore Services

Customers are given the option of a “forgiveness” restore, where a recent Production Environment back-up can be restored to the PE in case of a disastrous user mistake (e.g. running month end processing in “live” environment instead of Preview as intended).

Backups are performed to allow for forgiveness restores to be completed with a restoration point as shown below and no later than thirty (30) days prior to current time, to a resolution as shown below. Forgiveness restores should be initiated as a P1 incident and time to complete depends on data volume.

There is no “forgiveness” restore option for Unit4 People Platform Services.

### Request restore point permitted

between 1 hour prior to the time the request is made and no later than 30 days prior to the time of request to a resolution of 5 minutes

Customer may request a Service Restore report no more frequently than once per month via the Unit4 Community4U using a Service Request. Example:

Current time	Restore Range	
15-03-2017 00:15	13-02-2017 00:15	14-03-2017 23:15
25-07-2017 14:25	25-06-2017 14:25	25-07-2017 13:25
22-09-2017 08:00	23-08-2017 08:00	22-09-2017 07:00

## 11.3 Data Security

### Data in transit

Customer Data in transit is protected with latest TLS encryption levels.

### Customer Data at rest

Except for Unit4 SaaS Dedicated and cloud delivery in the Nordic data centre (Conapto AB), data at rest is protected using transparent, whole database encryption (e.g. transparent data encryption, and/or whole disk data encryption). When selecting Unit4 SaaS Dedicated an extra charge will be applied to have whole database encryption. Please see the Unit4 Information Security Policy, which is available at [www.unit4.com/terms](http://www.unit4.com/terms).

### Whitelisting

IP Whitelisting is offered as an option that will come at an additional cost in the Unit4 Global Cloud Service, as a means to gain an extended level of control on who has access to the Customers environment. An IP whitelist is a list of IP addresses that are granted access to a certain Service. When an IP whitelist is used, all IP addresses are denied access, except those included in the IP whitelist.

IP Whitelisting is available for the following product – data centre – cloud type combinations.

Whitelisting	Data centre	Cloud Type	Available?
Web endpoints	Azure,	All	Yes

Whitelisting	Data centre	Cloud Type	Available?
Web endpoints	Nordic	All	Yes

Customer needs to provide VPN access to their own network for Partners or Unit4 consultants working off network (to allow remote working).

The People Platform Services like Unit4 Identity Services, Unit4 Wanda and Unit4 Extension Kit use dynamic IP addresses, therefore IP Whitelisting is not supported for any combination of Global products with any People Platform Services.

## 11.4 Limits and regulators on usage

Unit4 runs in a Multi-Tenant environment and, as such, Unit4 observes fair use limits so that runaway processes do not monopolize shared resources. When a limit is exceeded, corrective measures will be taken.

For actual Usage limits please see fair usage policy in the Service Terms – SaaS, available at [www.unit4.com/terms](http://www.unit4.com/terms).

## 11.5 Access to my data

The Customer's Data is owned and controlled by the Customer and in accordance with Applicable Law, Customer shall be the data controller. Unit4 is the data processor.

To ensure the Customer has access to their Customer Data, the following options are available:

- Application functionality (e.g. Web client, Desktop client, Mobile Apps).
- Application reporting tools.
- Application functionality to export to file.
- APIs/web services.
- When the Agreement terminates, and at the Customer's written request, Unit4 can provide the Customer with a file containing the last back-up of Customer Data (see Service Terms - SaaS at [www.unit4.com/terms](http://www.unit4.com/terms) for further details).

# 12 Non-Production Environment with production specifications

As an additional Service against additional costs, it is possible to opt for a Non-Production Environments (NPE), that holds the characteristics of an NPE as described in paragraph 4.2 with Production alike specifications.

## SCHEDULE A

### Unit4 WebInfo standardized configurations per country

The solutions listed below are validated and proven solutions to support certain business processes for a specific vertical and/or for a specific region.

Country/region	Product name	Main product
Global	Financial Information Centre	ERPCR
Global	Unit4 Analyzer	ERPCR
Global	Unit4 Analyzer	Unit4 Financials by Coda
Nordic	Property Information Centre	Unit4 Property Management
Nordic	Document Merger	ERPCR

# SCHEDULE B

## Glossary and Technical Acronyms

Unless defined in the tables below, capitalised words and phrases have the meaning given to them in Unit4's General Terms of Business or Service Terms (found on [www.unit4.com/terms](http://www.unit4.com/terms)).

### Glossary

<b>Account Administrator</b>	an appropriate and qualified Business User who will have administrative level control for creation, maintenance and deletion of Accounts providing access to the Unit4 Product.
<b>Archive Service</b>	a Unit4 SaaS additional service that provides the Customer with the ability to retrieve its historical data.
<b>Customisation Object</b>	A WebInfo customisation is any non-standard WebInfo solution configuration including its data queries and solution specific database objects such as tables, views, AG16 etc.
<b>Localisation</b>	a Unit4 Product developed for strategic territories and verticals that secures legal, statutory and market standard requirements in that territory or vertical.
<b>Multi-Tenant</b>	a single instance of Unit4 SaaS including its supporting infrastructure which serves multiple Customers.
<b>Record</b>	a data record stored within a Customer's database (for example a line in a timesheet).
<b>Service Restore</b>	the time it takes Unit4 to perform the restoration of a recent Production Environment back-up (at the request of the Customer).
<b>Transaction</b>	the creation or modification of a Record.

## Technical Acronyms

<b>ACT</b>	Advanced Customisation Tools (Unit4 ERP only)
<b>ADFS</b>	Active Directory Federation Services
<b>AES</b>	Advanced Encryption Standard
<b>API</b>	Application Program Interface (e.g. Web Services)
<b>ARC</b>	Agresso Reporting Tool (Unit4 ERP only)
<b>ERP</b>	Enterprise Resource Planning
<b>FTP</b>	File Transfer Protocol
<b>HTML</b>	Hyper Text Markup Language
<b>HTTPS</b>	Hypertext Transfer Protocol Secure
<b>Kbps</b>	Kilobits Per Second
<b>NPE</b>	Non-Production Environment
<b>PCI DSS</b>	Payment Card Industry – Data Security Standard
<b>PE</b>	Production Environment
<b>SFTP</b>	Secure File Transfer Protocol
<b>SHA-2 RSA</b>	Secure Hash Algorithm (number 2) and RSA encryption Algorithm
<b>SLA</b>	Service Level Agreement
<b>SOC</b>	Service Organization Controls
<b>SQL</b>	Structured Query Language
<b>TLS</b>	Transport Layer Security Encryption
<b>URL</b>	Uniform Resource Locator (a web address)
<b>VPN</b>	Virtual Private Network
<b>WIP</b>	Work In Progress
<b>XML</b>	Extensible Markup Language

## Notable Changes from V. 2026 Q1

No updates from the previous version have been incorporated into the current 26.2 release.