

Global Customer Care Customer Support Policy

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Section 1 – Introduction

Subject to an Order, this Customer Support Policy (**Support Policy**) describes how Vendor and its affiliates (**Quorum, our, we, or us**) will support with identification and resolution of Incidents related to SaaS and/or Self-Hosted Subscriptions. For Vendor’s operational standards for SaaS Subscriptions, including availability commitment and disaster recovery options, refer to the Quorum Cloud Services Standards.

Vendor may update or revise the Support Policy from time to time. Updates to the Support Policy will be made available within this document including the date of the change as well as the changes made. New versions will enter into force immediately, except for any ongoing annual Subscription term, for which the previous version will apply until the end of such ongoing term. We encourage you to review the Support Policy to stay informed about our support practices. Capitalized terms are defined either in this Support Policy, the Order, or the Agreement for the purchase of the subject Subscription(s).

Section 2 – Eligibility

Customer (**Customer, you or your**) must pay all applicable fees and have a current Subscription to qualify for the support under this Support Policy.

Section 3 – Support Plans

Three levels of Support plans are available under the Support Policy: **Choice, Premier, and Enterprise**. Included in each of these plans are the following items:

Support Plans	CHOICE	PREMIER	ENTERPRISE
Support Hours	9AM - 5PM (8X5)*	8AM - 5PM (9x5)*	6AM - 9PM (15X5)*
Email & Portal Case Submission	✓	✓	✓
Incident	5 Monthly	Unlimited	Unlimited
Service Request		3 Monthly	5 Monthly
Knowledge Base	✓	✓	✓
Desktop Sharing		✓	✓
Service Level Objectives	Basic	Basic	Extended
Executive Business Review and Goal Planning		Annual	As Requested
Support Delivery Manager (SDM)			Named
Customer Success		✓	Named
Education Webinars	✓	✓	✓
Portal Dashboard	✓	✓	✓
Executive Sponsor			✓

- Support hours: depending on your plan you will have access to our Support teams within certain Support hours:
 - *All Plans will have 24x7 coverage for Critical Cases
 - All plans will have unlimited user access management cases

- Choice will have support Hours between the hours of 9AM and 5PM daily in the applicable time zone as set forth in Section 5 for the Region selected in the Order (**Business Hours**)
- Premier will have an additional 1 hours of Business Hours of support from 8AM and 5PM daily
- Enterprise will include an additional 5 hours of Business Hours support from 6AM to 9PM daily
- Email and Portal Case submission – All Customers will have access to submit Cases through email or the Quorum Customer Support Portal
- Case limits
 - Choice Customers will be given 5 Incident Cases per month; Service Requests are not included
 - Premier and Enterprise will have unlimited Incident Cases per month; Premier will have 3 Service Requests per month and Enterprise will have 5 Service Request per month
- Knowledge Base – Customers will have access to our online Knowledge
- base as available
- Desktop Sharing – when working on Cases our Premier and Enterprise Customers will be able to use Desktop sharing during Case consultations to help work through the Case
- Portal Dashboard (Coming soon also for Energy Components) – within our Customer portal Customers will have access to see the SLO Case performance across your submitted Cases
- Education Webinars (Coming soon) – Quorum University will publish quarterly webinars designed to highlight key features and functions of various products. These webinars are designed to be supplemental learning tools for various levels of end users

Additional premium features are available depending on your selected Support package:

- Service Level Objectives (SLO) – As defined within this Support Policy we offer different service level objectives depending on your selected Support level for Enterprise Customers Critical and High Support issues will have extended response and resolution times. Same SLOs will apply to both incidents and service requests. Service requests are provided on a monthly basis and will not be deferred to subsequent periods.
- Executive Business Review and Goal Planning – Our Customer Success and Support teams will work with your leadership team to conduct either a semi-annual or quarterly review of your Support Cases and satisfaction with support delivery. In these meetings we will review performance period over period as well as current Cases that are open and define goals for each. Customer Success will work with the customer executives to schedule Executive Business Reviews (EBR). In the EBR Quorum will facilitate conversation and updates on the overall customer health to ensure a positive partnership and that each customer is achieving the stated business goals tied to Quorum software

- Support Delivery Manager (SDM) – For Enterprise Customers there will be a named Support Delivery Manager that will serve as your support concierge for any inquiries directly related to support cases submitted by the customer. This will include communication directly with your assigned SDM via direct email (assumes customer has logged an initial Case for resolution)
- Customer Success – For our Premier and Enterprise Customers we will provide access to our Customer Success team to help achieve your long-term Software goals and ensure that your overall customer experience with Quorum is positive. For our Enterprise Customers there will be a named Customer Success person to work directly with you
- Executive Sponsor – Named executive will work with the Customer Executive sponsor to ensure the success of the relationship between Quorum and the Customer

Section 4 – Definitions

Account Manager: acts as the commercial liaison between the Customer and Quorum to support the identification and acquisition of software solutions that add value to the Customer.

Administrators: are Super Users that help filter questions from your company’s authorized User base through to our Support team. Super User means Users with specific insight into the implemented Software application or Supported Software Environment and Customer business operation. They are also the people that are approved by you to approve scope estimates and fees for out-of-scope work to be done by Quorum once approved;

Business Day: means any day other than a day on which commercial banks are required or authorized to close in Houston, Texas, USA, or any of the cities identified as a Primary Support Office as set forth in Section 5 for the Region selected in the Order.

Case: is a common label for an Incident registered in the Customer Support Portal or by email by an Administrator

Customer Support Portal: Support portals for Quorum products are accessible from the Quorum Software webpage, (<https://quorumSoftware.com>) or directly at (<https://support.quorumsoftware.com/>);

Customization: means any Software code modified or amended on behalf of the Customer or Professional Services deliverables that are software or computer code, whether in source or object code. Setting of parameters or parameterization for standard product configurations is not a Customization;

Device: is any computer used to access the Software or Subscription, including without limitation a desktop, laptop, mobile phone, tablet, or other consumer electronic devices;

Documentation: means the online instructions and user guides, whether accessed in printed form, online or downloaded, for the Software as made available and Updated by Quorum from time to time;

Error: means any verifiable and reproducible bug or similar functional problem with the Software that prevents it from functioning substantially in accordance with the applicable standard Documentation;

End-of-Life: has the meaning set forth in the Quorum Product Version Support Policy

Extension: means a file containing programming that serves to extend the capabilities of or data available to the Software and that is compliant with the current extension guidelines and working together, with the Software using the standard REST API thereof;

Incident: means an Error or an unplanned interruption that disrupts the standard operation or functionality of the implemented Software, including degraded Availability of a SaaS Subscription, resulting in a deviation from its specified performance as described in the product or project Documentation and/or Quorum Cloud Services Standards, but excludes issues that arise from events designated as excluded or related to Software that is End-of-Life.

Knowledge Base:

Level 1: First level of support personnel having superficial Software and Software environment knowledge;

L2: Support by Quorum personnel having insight into the implemented Software application and in case of SaaS Subscriptions supported Production Environment(s), equipped to assess and resolve Incidents or Service Requests that cannot be handled by L1 Support, including general usage support within agreed limits;

L3: subject to separate Order, support by Quorum team which may be provided on a fixed annual fee basis or on a time and materials basis. L3 can support changes including but not limited to configurations, Customizations and Extensions, Updates or Upgrades, administrator changes, implementation of new business rules, new interface or report requirements, etc.;

L4: standard product maintenance team, leveraged to ensure that reported Errors are analyzed, approved, and prioritized by our Product / Engineering team for correction in Updates or Upgrades. This team does not provide usage, configuration, Customization and/or Extension support;

Non-Production Environment: the application, equipment and data used in any non-primary instance or other nominated instances except the Production Environment;

Production Environment: the application, equipment and data used in the primary instance and/or nominated failover instances;

Resolved: means an Incident solution that does not necessitate any changes to the Software code, including restoring degraded Availability of SaaS Subscriptions to operational status in accordance with the Agreement or acknowledgement that a code change is necessary. For more specific details, refer to Section 7 (Case Resolution Process);

Response Time: the time between the support Case creation in the Customer Support Portal or by permitted email submission and our acknowledgement of the Incident during Customer’s applicable Support Hours;

Service Level Objectives: the targeted level of service for Response Time, Status Update Time and Target Resolution Time;

Service Request: means a request for access to the Software, information, advice, or for assistance with standard product configurations (up to 8 hours of effort);

Enhancement: all requests for advice, configuration assistance, product enhancements, feature requests, or new business implementations;

Status Update Time: the interval of status updates and communications regarding the state of the work effort related to Incidents during Customer’s applicable Support Hours;

Success Manager: acts as the advocate for the Customer to bring Quorum resources to bear to maximize Software value for the Customer;

Support Hours: available times that Quorum support representatives are available to Administrators. The Support Hours are defined by the support Plan defined in this document and selected by the Customer in the applicable Order;

Target Resolution Time: the time between when the support Case was created and recognized as Resolved in the Customer Support Portal, in accordance with the Case Resolution Process below and excluding any time used by Customer to test or evaluate the resolution;

Update: a corrected version (which may include new feature(s)) of the Software;

Upgrade: a new version of the Software.

Section 5 – Support Contact Details and Support Hours

Quorum will make sure that qualified staff are available for Incident resolution during Support Hours and will use reasonable efforts to resolve Incidents and any reasonable query relating to the Software or its use or operation. However, Quorum reserves the right to require usage, configuration, Customization and/or Extension related support queries to be raised under separate Order(s).

Support Contact

Quorum support can be reached using the following contact information:

- (a) Email: [Contact and Escalation](#)
- (b) Internet: <https://quorumSoftware.com>
- (c) Support Portal: <https://Support.quorumSoftware.com>

The contact details for support are also available on the Customer Support Portal.

Cases submitted through the Customer Support Portal or by email will be logged and tracked in our Case management system, and upon submission, Customer will receive an email notification including the Case specific support number. All communication with Quorum support on an existing Case should contain the Case number. Quorum support will not be responsible for any ticketing system outside our Case management system.

Support Hours

Support is available during specified Support Hours. Quorum offers support from 8am to 5pm, Monday to Friday, in accordance with the support Plan and the applicable Region selected in the Order. Please note that Quorum acknowledges regional holidays, and depending on your Support Plan, other regional offices may be available to provide support on those particular days. The Regions are defined as follows:

Team	Region	Primary Support Office	Hours
L1	Global	Kuala Lumpur Pune	24x7
L2	Americas (i.e. North America and South America)	Houston Calgary Bogota	8am – 5pm CST 8am – 5pm MST
L2	EMEA (i.e. Europe, Middle East and Africa)	London Pune Bangalore	8am – 5pm GMT 8am – 5pm IST
L2	APAC (i.e. Australia and Asia)	Brisbane Kuala Lumpur	8am – 5pm AST 8am – 5pm MYT

Section 6 – Supported Software and Exclusions

Quorum will provide support for the eligible Software specified in the relevant Self-Hosted or SaaS Subscription Order, in accordance with the applicable End-of-Life definition and service commitments under this Support Policy.

Customizations, Extensions, non-standard product configurations and configurations implemented by the Customer itself or a third party are excluded from scope of the support, except to the extent included under a permitted Service Request or a separate Order for additional Services.

L3 Support including issues related to deployment of previously unused or new functionality, existing functionality no longer available in the deployed Software version, and/or foundation technology changes not supported by the Software version deployed in the Production Environment are also subject to a separate Order.

Furthermore, support of Self-Hosted Subscriptions is subject to Customer providing access for support personnel in a timely manner. This includes availability to both Production Environments and current Non-Production Environments.

The other exclusions from this Support Policy are:

- (a) failure to keep your Software release up to the latest supported version fixing the issue or applicable Stay Current Updates under the Cloud Services Standards or to maintain an updated server or application with latest security or third-party software patches;
- (b) factors outside of our reasonable control, including (i) any force majeure event, (ii) packet loss, network or internet problems beyond Quorum's border router supporting our public internet connectivity, (iii) hardware, software, networks, or power systems not within our possession, reasonable control or our responsibility, (iv) denial of service attacks, viruses or hacking attacks in case of Self-Hosted Subscriptions and otherwise for which there is no commercially reasonable known solution, or (v) any other events that are not within our control that could not have been avoided with commercially reasonable care, and (iv) any user actions or inactions of you or any third party;
- (c) misuse of the Software (which includes any use of the Software that is not in accordance with the Agreement including the Documentation), including use of the Software by anyone who has not been properly trained (anyone who has been trained by Quorum or a Customer Super User on the use of the Quorum Software will be treated for these purposes as having been properly trained);
- (d) use of the Software with an operating system, Device or on equipment for which it was not intended or designed; and for Self-Hosted Subscriptions, defects in any hardware, equipment or firmware;
- (e) defects in any software other than the Software to which this Support Policy relates;
- (f) building projects, entering data and interpreting results;
- (g) reconciling results to other systems and spread sheets;
- (h) building or editing reports, templates or workflows;
- (i) creating, editing or interpreting visualisations or models;
- (j) building price files and price scenarios;
- (k) configuring links to external systems;
- (l) security setup including LDAP configuration;
- (m) Customer infrastructure and environment complications;
- (n) User errors;
- (o) data errors not caused by application failure; and
- (p) training.

Customer may request assistance from Quorum to address any items listed above as excluded and such assistance may be provided subject to separate Order and unless otherwise agreed on a time and materials basis.

Enhancements and New Features

Customers may find through use of the Software that a new feature or change in behavior to an existing feature would enhance the Software. New features and Enhancements are not covered by support however all feature requests or ideas can be submitted through the Customer Support Portal. Quorum may include new features in an Upgrade or Update but is under no obligation to do so.

Section 7 – Case Submission Process

Managing Support Cases

Please find [here](#) a detailed document process on managing your support Cases.

Escalation

Customers are encouraged to seek escalation when a situation is not being resolved in a fashion that meets their reasonable requirements within the scope of the support Services they have purchased. The Customer can escalate the matter through the Customer Support Portal or their Success Manager or Account Manager.

Case Resolution Process

Cases will be considered Resolved when one or more of the following conditions are met:

- a) Both parties agree the issue is Resolved; or
- b) Quorum has proposed a resolution to the Case (however if Customer tests the resolution and can demonstrate to Quorum’s reasonable satisfaction that it does not resolve the issue within 10 working days of the date the resolution was proposed, the issue will be returned to working status); or
- c) Quorum has identified a Software Error exists and/or that a code change is necessary. In this instance, Quorum will reproduce the issue, provide any available workaround guidance to you and log the issue with our engineering or L3 Support team; or
- d) Quorum has deployed a resolution in the Production Environment and no call backs are received within 24 hours from Customer; or
- e) There are repeated attempts from Quorum to obtain additional information with notification of intent to close the Case and no call backs are received within 5 working days from Customer; or
- f) Our engineering team defers; Product determines that a request is an Enhancement, or a minor defect that is not impactful, or is not in the direction of the Software; or
- g) if a Case is in a Customer facing status (Pending Customer, Complete Pending Customer Review) the Case will close automatically without Customer input after 21 calendar

days. During this time reminder emails are sent to the Customer to ensure awareness that the Case is still pending input.

Section 8 – Service Level Objectives (SLOs)

Priority Classification

Quorum has a closely defined process for classifying support Cases. Quorum shall determine, acting reasonably, into which severity category a Case falls. Cases are identified and tracked according to priority level:

Severity Level	Definition	Example
Critical	<p>Critical Impact</p> <p>Business standstill Incident(s) that prevent Customer from proceeding with a major, mission-critical process vital to the daily business operations of the Customer's business. No work-around available.</p> <p>Customer must be available throughout the Incident until a resolution, workaround, or downgrade is achieved.</p>	<ul style="list-style-type: none"> Customer is unable to access any business resources, or all Users are unable to access a critical business application. Software application is down and not accessible by Users. Performance is significantly impacting user's ability to complete business processes.
High	<p>High Impact</p> <p>Incident(s) which causes a serious disruption but does not necessarily impede the Customer's business from running. No viable workaround or the workaround is complex or time-consuming.</p>	<ul style="list-style-type: none"> Key business operational functions cannot be performed. Major Software functions unusable. Unable to perform business functions in a timely manner.
Medium	<p>Medium Impact</p> <p>Non-business critical Incident with possible limitation to functionality or usefulness of the application; individual system functionality unusable or renders minor system functions unusable. Workaround may be complex or time-consuming.</p>	<ul style="list-style-type: none"> Intermittent or unexpected behavior is observed which suggests a possible problem.
Low	<p>Low Impact</p> <p>Non-business critical Incident with minimal impact, minor system nuisance that does not limit the functionality of system. Simple workaround or fix exists.</p>	<ul style="list-style-type: none"> Minor User impact – does not impede user's ability to complete business processes.

Response and Target Resolution Times

Quorum shall use all reasonable endeavours to respond to Incidents promptly. Response and Target Resolution times are based on priority and are stated below.

Incidents caused by Errors will be assigned to Quorum’s Product / engineering team, who may make changes to the Software to correct Error(s) and may incorporate these into the Software by making available Updates or Upgrades, but correction of all Error(s) is not guaranteed or included in Target Resolution Time.

In the event where Incident resolution needs to be verified by the Customer prior to deploying the resolution into the Production Environment, Quorum will provide Customer with the Update or Upgrade in the Software test environment for Customer to verify the resolution. Customer is required to provide verification in the test environment in a timely manner.

Response and Target Resolution Times are based on priority and are stated below:

Extended SLO			
Priority	Response Time	Status Update Time	Target Resolution Time
Critical	30 Minutes	Daily	24hrs
High	2 Hours	2 Business Days	5 Business Days

Basic SLO			
Priority	Response Time	Status Update Time	Target Resolution Time
Critical	2 Hours	2 Business Days	5 Business Days
High	6 Business Hours	10 Business Days	15 Business Days
Medium	12 Business Hours	15 Business Days	25 Business Days
Low	24 Business Hours	20 Business Days	30 Business Days

Quorum closely monitors Response Time and the time until the Incident is Resolved to ensure we meet our service levels. Times are calculated as follows:

- a) if a support Case is submitted during the Support Hours for your support Plan and Region, the Response and Target Resolution time will be counted from the time that the problem or issue is submitted with Quorum;
- b) if a Support Case is submitted outside the Support Hours for your support Plan and Region, the Response Time will be counted from when the Support Hours recommence;
- c) SLOs for Response Time and Target Resolution Time start immediately upon submission of a Critical case, regardless of the Support Hours
- d) the count of Response and Target Resolution times will be suspended outside of Support Hours and continue when the Support Hours recommence;
- e) in Case of Critical severity, Quorum will attempt to isolate and outline a resolution as soon as possible and to the extent reasonably possible provide an emergency bug fix or work around. Should a long-term fix be required, a separate Case will be opened which will be resolved based on the new Case priority SLOs;

- f) the count of Target Resolution Time will be suspended if Quorum has requested and is waiting for further information from the Customer;
- g) public holidays, determined by Customer’s Region, are excluded from the Resolution and Response Times; and
- h) in some Cases, the identification of the issue will be the resolution.

Quorum’s performance is subject to the following assumptions, constraints, and dependencies: (i) information provided by Customer as required for performance will be accurate and timely, and (ii) Quorum’s procedures and delivery of Services may be affected by changes in relevant Customer internal policies or in applicable laws or regulations. The remedies set forth in this Support Policy shall be Customer’s sole and exclusive remedy for Quorum’s failure to meet any Response Time or Target Resolution Time.

Section 9 Change Log

Date of Change	Details of changes
February 22, 2023	Initial Release
October 25, 2023	General wording clarifications, inclusion of Service Request in Support Plans, clarification of regions and Primary Support Office hours, updates and clarifications to Definitions
July 15, 2024	Updated SLOs to cover Service Request, Updated Support Policy Coverage in Support Plans, Updated Email Contacts, Clarified SLO support times and targets, Refreshed all links,