

CUSTOMIZATION MAINTENANCE



Overview

These days it is critical for businesses to stay current on ERP software to leverage the latest functionality to ensure competitiveness, compliance, and retain support. We know that a significant challenge our customers face during an upgrade is ensuring any customizations to the software are tested against the new release and corrected swiftly. You can now enroll your custom business objects in the Encompass Customization Maintenance program, and for a planned, flat annual fee, our team will work with you to test, upgrade, and deploy your customizations along with the updated ERP software. This will ensure you can continue to upgrade easily without having to deal with unplanned expenses, or overlooked test scenarios.

Any new custom solutions we deploy will be enrolled automatically, unless you choose to opt out. Existing custom solutions may be enrolled with a one time fee to document the functionality contained in the customizations and the associated tests needed to validate them during upgrades, and to bring the solution into our system.

In addition to the upgrade benefits above, custom solutions enrolled in our Customization Maintenance program will also be covered for any defects that surface outside the standard 90 day from delivery warranty we offer.

All upgrades are covered, as long as the technical tooling used to build the customization exists in the future platform. For any custom solution that contains a component that require a one-time rewrite due to an ERP tech stack change (moving from ABL Progress to C#/LINQ, Crystal Reports to SSRS, UI Customizations to Application Studio), we would uplift on a time and materials basis at a discounted rate if the solution itself is under Customization Maintenance.

For further guidance on customizations or to ask other questions you may have, please reach out to us at:

<https://www.encompass-inc.com/contact-us/>

FAQ's

How much notice do we need to give before upgrading?

- We are aware of Epicor's upgrade cadence, and will work with you accordingly. If you are on premise, we request 60 days notice for minor upgrades or patches, and 120 days notice for major upgrades.

Does this apply for both on-premise and cloud installations?

- Yes. We must have remote access to a Pilot environment at the target version for upgrade and validation, and to the Production environment to release when the upgrade takes place.

We have customizations written by another company, or that were written before this program became available. Can these be included in this program?

- Yes. There will be a one off fee to enroll the customizations under our maintenance program, that covers the effort to document the customizations, and the tests needed to validate them. From there we can quote for enrollment and they will be treated the same as any other enrolled customizations.

Can we, or another partner, make changes to code enrolled in the program?

- No. When you report an upgrade or a defect, our engineers will work from the documented solution on our side, and any changes will be lost. Making changes to solutions under Customization Maintenance may invalidate your enrollment, and anything paid to date would not be refunded. We would have to treat the solution as a re enrollment with a one time fee to get compliant.

What are the SLAs for addressing defects in the customizations under this program?

- You will get a response within three business days - we expect you to send us a fully documented replication path, and based on that, we will set a timeline to resolution with you as soon as we have validated from the replication path that there is a software issue. If the issue is determined to be related to data setup issues, or a training issue, time would be billed at time and materials for discovery. Customization upgrades will be released to your system during business hours. Release during weekends or after hours may incur a weekend/afterhours fee.

What if I need help sooner?

- Use the escalation information found on the support page of our website to let our team know that your issue requires more immediate attention. Please include the ticket number as well as details around the business impact when escalating an issue.