

## ACUMATICA APEX SERVICES SUPPLEMENTAL TERMS

### General

Acumatica APEX implementation and professional services (the “**APEX Services**”) are governed by the Acumatica Master Services Agreement, which can be found at <https://www.acumatica.com/agreements/> and is incorporated herein by reference and by this Acumatica APEX Services Supplemental Terms. All capitalized terms shall have the meaning defined in the Acumatica Master Services Agreement.

Acumatica will provide APEX Services in a professional and workmanlike manner in accordance with industry standards for Acumatica ERP implementation.

Acumatica's APEX Services utilizes templates and configuration checklists based on best practices, minimizing the need for extensive requirements gathering, process definition, and customization. This strategy enables the deployment of core business functions within 180 days or less. Data migration tools facilitate the transfer of data to Acumatica. Packaged business content, such as online learning resources, accelerates training and implementation, enhancing user adoption.

### Engagement Assumptions

All parties will work collaboratively towards delivering a successful project outcome for the implementation of Acumatica ERP.

- All parties will work actively towards the on-time implementation of Acumatica ERP. This will be accomplished by maximizing the project's efficiency, simplifying the solution's functionality, and restricting scope changes and customization requests. Stringent criteria to manage scope changes will be established.
- APEX Services are based on go-live date no later than 180 calendar days from the date Client signed the Acumatica Order Form. If go-live date extends beyond 180 calendar days, and additional assistance from Acumatica is required, a separate Statement of Work at an additional fee may be required.
- All professional services will be provided remotely via conference calls and web conferences as determined by Acumatica.
- All project documentation, presentations and project communication will be in English.
  - Any targeted timelines or completion dates discussed are estimated dates and are intended for planning purposes only.

### Acumatica's Responsibilities

- Provide project management oversight and coordination of a team of consulting resources.
- Provide a team of consulting resources and services as outlined in this proposal.
- Acumatica will provide import templates, including field descriptions, guidance, and deliver training on the use of templates.
- Acumatica will review Client-created user test scripts and all issues reported.

Acumatica will work with Client to resolve reported issues.

## Client Responsibilities

- Provide project management to coordinate and ensure Client participation in this project.
- The Client will be exclusively responsible for the deployment and is requesting and using APEX Services. While providing APEX Services, Acumatica acts in an advisory role of “deployment assistance”.
- Provide full and open access to all material so Acumatica can accurately estimate and schedule the project activities in collaboration with Client.
- Extracting, cleansing, and translating all Client data in the format specified by Acumatica prior to Client loading into Acumatica ERP, including all data imports and migration.
- Notify Acumatica within five (5) business days about any inaccuracies or incomplete information in project documentation provided by Acumatica to Client.
- Develop any necessary end-user documentation, including, but not limited to, documenting specific business practices, data examples and organization/end-user specific policies and procedures.
- Plan, execute, and manage all aspects of the system review, including preparing and executing test cases and plans and reviewing test results.
- Modify Client processes as necessary to comply with the standard functionality in the instance.
- Interaction and interfacing with all Client existing systems including production and consumption of file-based (or other) interfaces with non-Aumatica systems.
- Ensure that Client team members are dedicated to completing their obligations related to these Services and their assigned tasks under the project work plan.

## Data Migration

To support business continuity as Client moves to Acumatica, data migration is a crucial component of implementing any new system, encompassing activities such as data cleansing, data mapping, and conversion development. Acumatica will supply import templates, offer training on their usage, and provide instruction on reconciliation and validation techniques, along with general support. Client will be responsible for leading the data migration effort, which includes populating the templates in the prescribed format. It is Client's duty to prepare all data (cleanse, map, and verify accuracy) for migration using the tools and templates provided by Acumatica. Only active Master records and open transactional data will be imported, except for the General Ledger Balance, as specified in the Transactional Data Import section. Historical data will not be imported.

## Training

Acumatica has an extensive online education system allowing Client to learn at their convenience. After Client have completed the online courses, Acumatica will offer supplementary Acumatica ERP functional training specifically tailored to the modules Client have purchased. These sessions will be recorded and made available to Client.

## User Acceptance Testing (UAT)

The success of an implementation relies on the assignment, attention, and cooperation of a committed Client's team. It is essential for users to be involved to fully understand the business rationale behind any process changes. User Acceptance Test (UAT): Entails testing business processes after the completion of the build cycle. UAT serves as the final stage of testing prior to Go-Live and is conducted by Client. Client is responsible for creating test scripts to ensure that its business processes can be effectively executed.

## Customizations

Client is responsible of any screen modifications. Client can request additional services from Acumatica with a separate Statement of Work at an additional fee. Acumatica will work with Client to design requirements for customizations that may be identified.

## Custom: Reports, Generic Inquiries, dashboards, etc.

Acumatica ERP is an extremely flexible solution to extend functionality through out-of-the-box tools like; Analytical Reports, Operational Reports, Generic Inquiries, Pivot Tables and Dashboards. Client is responsible of modifying or creating all forms, reports, generic inquiries, pivot tables and dashboards. Client is responsible for modifying existing capabilities or creating new content with general guidance from the Acumatica Services team. Client can request additional services from Acumatica with a separate Statement of Work. Acumatica will work with Client to design requirements for a fixed fee Statement of Work to complete the agreed work.

## Post Live Assistance

Once you're live on Acumatica, Advanced Customer Care is activated, you unlock a direct line to Acumatica experts— turning assistance into a strategic advantage. Our consultants' partner with your team to deliver tailored guidance, rapid-response assistance, and continual system optimization, so your technology becomes a true growth engine, not just a back-office tool.

With Advanced Customer Care, you don't just maintain your Acumatica environment, you elevate it. We help you maximize ROI, increase user confidence, and continuously refine your system so it keeps pace with your evolving business needs.

The Assisted (ACC-1) program is designed for organizations that want premium assistance with minimal friction. It includes:

- **24x7 Premier Support** for always-on coverage when you need it most
- **Annual system health assessments** to identify opportunities, reduce risk, and keep performance high
- **Guided upgrades** to ensure smooth transitions with minimal disruption
- **One (1) concurrent service initiative** and up to **two (2) service initiatives per month** to drive ongoing improvements and keep your Acumatica instance running at peak efficiency

**Service initiatives** go beyond standard support, helping your business implement new features, streamline processes, and adapt to ongoing Acumatica innovation. With the Assisted plan, you get focused support for service initiatives such as:

- Case Management • Business Event Set Up • Feature-based Training • Email Notification Set Up • Dashboard Creation and Design • Import/Export Scenarios • Feature Enablement • Performance Troubleshooting • Feature Documentation • New Module Evaluation Drive progress with focus and flexibility.

With the Assisted tier, you gain a trusted partner focused on keeping your system optimized, your team empowered, and your business moving forward.

## APEX Services scope for specific editions, modules, or features

### Included in APEX Core

#### Financials

Guidance, recommendations concerning the suggested best practices for implementation, and setup review:

- **General Ledger** - General Ledger Preferences, Accounts, Subaccounts, Fiscal Year, Ledgers, Account Classes
- **Payables** - Accounts Payable Preferences, Vendor Class, Vendors, Terms, Vendor Relations
- **Receivables** - Accounts Receivables Preferences, Customer Class, Customers, Terms
- **Cash Management** (Banking) - Cash Management Preferences, Payment Methods, Entry Types
- **Taxes** - Tax Preferences, Taxes, Tax Zones, Report Settings and Report Groups

#### AP Document Recognition

Guidance Only - Client will use Acumatica Help ([help.acumatica.com](http://help.acumatica.com)) to configure

#### Acumatica Payments

Guidance Only - Client will use Acumatica Help ([help.acumatica.com](http://help.acumatica.com)) and Training Materials to configure.

#### Monitoring and Automation, Multi-Factor Authentication

Guidance Only - Client will use Acumatica Help ([help.acumatica.com](http://help.acumatica.com)) to configure

### Additional Modules Available with APEX Core

#### Bank Feeds

Guidance Only - Client will use Acumatica Help ([help.acumatica.com](http://help.acumatica.com)) to configure.

#### Fixed Assets

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Fixed Assets Preferences, Assets Type, Books, Depreciation Methods.

#### Outlook and Gmail plugins

Guidance Only - Client will use Acumatica Help ([help.acumatica.com](http://help.acumatica.com)) to configure

#### CRM (SFA, MA):

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Customer Management Preferences, Opportunities Classes, Activity Types.

## Included in APEX Construction

### APEX CORE

#### **Construction Foundation (Project Accounting)**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Project Preferences, Account Group, Project Groups, Billing Rules, Projects, Tasks, Cost Codes, Project Templates.

#### **Timecards**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Time Preferences, Employees, Earning Types, Approvals.

#### **Order Management (Inventory Control required for Stock Items)**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Sales Order and Purchase Order Preferences, Order Types, Carriers.

## Additional Modules Available with APEX Construction

### **Advanced Expense Management**

Guidance Only - Client will use Acumatica Help ([help.acumatica.com](http://help.acumatica.com)) to configure.

### **Construction Project Management**

Guidance Only - Client will use Acumatica Help ([help.acumatica.com](http://help.acumatica.com)) to configure.

### **Payroll**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Payroll Preferences, Earning Types Codes, Deduction and Benefit Codes, Employees, Overtime Rules, Pay Groups.

### **Resource Management powered by ProjectManager**

The Quick Start implementation is a set of services to 1) ensure a quick and correct installation of the integration to Client's environment, and 2) onboarding, training and enablement of Client's team onto the PM solution.

### **Inventory Control (requires Order Management):**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Inventory Preferences, Inventory SKU's, Posting Classes, Item Classes, Lot/Serial, Unit of Measures (UOM), Warehouses (1), Warehouse Locations, Basic Physical Count

### **Included in APEX Distribution**

APEX CORE

#### **Order Management:**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Sales Order Preferences, Order Types, Blanket Sales Order, Sales Order Margin Anomaly detection, Pick /Pack/Ship (manual), Shipping Carrier Integration (1; PaceJet, EasyPost, Fedex, UPS, Stamps.com or Ship Engine)

### **Inventory Control (requires Order Management):**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Inventory Preferences, Inventory SKU's, Posting Classes, Item Classes, Lot/Serial, Unit of Measures (UOM), Warehouses (1), Warehouse Locations, Basic Physical Count

#### **Purchases Order:**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Purchase Order Preferences, Purchase Order, Blanket Purchase Order, Drop Ship, Receipts, PO Approval Map (Single Level Approval)

### **Included in APEX Manufacturing**

APEX CORE

APEX DISTRIBUTION

#### **Bill Of Materials:**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- BOM Preferences, Work Centers, Labor Code (Direct and Indirect), Shifts (1), Work Calendars (1), Operations (3 max per BOM), BOM Levels (2)

**Production Management:**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Production Preferences, Order Types (Regular and Planning), Labor Reporting (Indirect Back Flush), Material Reporting (Back Flush), Costing (Standard or Actual), Disassembly

**Material Requirements Planning “MRP”:**

Guidance, recommendations concerning suggested best practices for implementation, and setup review:

- Inventory Planning Preferences, Purchase Calendar (1), Item Replenishment Settings, Source (2: Purchase and Manufacturing)