Beam Software User Policies

Table of Contents

1   Overview

At Beam Software, our goal is to be a continuous part of the success of your implementation and ongoing use of BEAM. We are ready to respond to any of the questions or issues you may have. Beam Software offers customers a variety of support services and aims to provide easy access to knowledgeable support staff who can answer your questions.

2   Technical Support

What does technical support include?

- Your organization's own Dedicated Support Rep
- Support requests made via telephone, email or your company's BEAM Web Portal
- Remote shadow support using desktop sharing software
- Hours of support from 8:00am – 5:00pm Eastern Standard Time Monday through Friday with the exception of observed corporate holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, the day after Thanksgiving Day, Christmas Eve, Christmas Day, and New Year's Eve
- Efforts to remedy a defect, error, failure, or malfunction (unless the Subscriber has made a change that has caused the error)
- Simple answers to basic questions about how a BEAM feature works (excludes training)
- Repairs to any BEAM feature not performing its designed functions in accordance with BEAM documentation or as interpreted by Beam Software.

What isn't covered under technical support?

- After-hours and weekend support requests. Non-critical requests made outside normal hours will be followed up on during the next business day.
- Customer database repair, manipulation or analysis resulting from customers' erroneous or incorrect data entry.
- Support requests, database repair or manipulation on test or sandbox databases.
- Any customization, vendor integration, enhancement, or modification to BEAM or the SQL Server database or the creation of a report, query, database trigger, script or stored procedure not originally created and supported by Beam Software (request for enhancement).
- Ongoing training (request for training).

And most importantly:

- Troubleshooting and correcting customer LAN/WAN configuration, on-site hardware or networking equipment or individual workstation configurations

Maintaining your local environment is the responsibility of your network administrator; someone that is either already in your office or that can be available onsite.

2.1   What Do I Do When I Have a Question or Encounter a Problem?

2.1.1 Telephone Submissions

Simply **dial 1-800-212-2326** and **press 3** for the Support Team.

To most effectively take advantage of support services and to help us serve you better please follow these simple steps when requesting support:

1. DESIGNATE A PRIMARY CONTACT. To request technical support, your organization must designate a key user as the primary point of contact for BEAM issues. Beam Software will not accept submissions from anyone other than the key user at your organization. You can add a key user by entering his/her contact information directly into Org Contacts under the Security menu from within your BEAM Web Portal
2. DO NOT CALL YOUR SALES REP. Your sales rep is not a dedicated support resource.

2.1.2 Critical Issues and Down Systems

A critical issue means that:

- BEAM is unusable at your organization.
- BEAM produces consistent, frequent errors and fails to respond.
- The issue is completely disruptive to operations.

When you experience any of the above **dial 1-800-212-2326** and **press 3** for Support.

1. Press 1 for "unable to log into BEAM" (critical issue)
2. Please do not call individual team members directly

Incoming telephone calls identified as critical ring simultaneously for all team members. If all team members are assisting other customers you will be prompted to leave a message with a description of the problem and your contact information. The system will automatically submit a support case into our case tracking system with an .mp3 recording of your message. It will also SMS text message and email all members of the technical team with your case number and immediately inform them you are experiencing a critical issue.

Note: the inability to log into BEAM *may be a result of your Internet connection, your network hardware or individual workstation performance. Troubleshooting customer networking issues or workstation configurations is not covered under technical support services and can be a billable expense.   You can verify your network is functioning optimally by running a speed test at www.speedtest.org.*

Your Dedicated Support Rep (or another member of our technical support services team) will quickly respond by calling your company's primary contact. When a critical issue is reported, Beam Software's objective is to find a satisfactory solution as soon as possible. This may include identifying a workaround that meets your immediate business requirements.   A workaround provides a temporary solution to complete a task that would not otherwise be possible due to your problem or limitation.

2.1.2.1 Abuse

Falsely claiming that your organization is experiencing a critical issue (as defined above) in an attempt to receive a higher priority of support is considered abuse of the support system.

2.1.3 Email Submissions

If it's more convenient for you to request technical support via email, simply send your inquiry to **support@beamsoftware.com**. Please do not email individual team members directly.

2.1.4 What Information Do I Need to Provide?

Providing the area of BEAM you were working in, what steps led up to encountering the error and a screen shot of the error itself are most helpful.

Be as specific as possible when indicating the details of your request in your email subject line. You should also include:

- The area of software you were in
- A description of your issue or inquiry
- The steps we can take to reproduce the error

You will be notified by email that your submission has been received along with a corresponding case number for your request.

Fri 8/28/2015 3:28 PM

BEAM Technical Support Team <support@beamsoftware.com>

BEAM Technical Support: (Case 43565) - Authorization Error

To   Tom Simon

This message is to confirm that we have received your request for technical support. You can check the status of your support case at the following URL:

https://beam4d.fogbugz.com/default.asp?55518_kpn9svus76k8q3dl

You should save this case number for reference purposes: 55518_kpn9svus76k8q3dl. Simply refer to the support case number when communicating with the Technical Support Team.

You may reply to this email to add additional information to your support case, including screen shots and attachments.

When emailing support about a case you have sent in, please reference the case number in the subject line so our case tracking system can append to the existing case and not open a new one.

For example, add the phrase (Case #####) where ##### is your case number.

Thank you!

BEAM Technical Support Team
support@BeamSoftware.com

IMPORTANT: It is imperative that you do not attempt to circumvent this process. Only support issues that have been assigned a case number can be logged, researched and tracked for responsiveness, quality of service and resolution. Do not try and directly contact Beam Software personnel in an effort to speed up the resolution to your issue. Please do not have anyone other than your company's primary contact request technical support unless Beam Software has given you permission to do so. This can only result in longer response and resolution times. You can easily track the status of your request through your BEAM Web Portal by choosing the My Tickets option under the Support heading from the navigation pane.

Please do not email the same request over and over. We understand that getting a resolution to your issue is vitally important but repetitive requests for the same support result in inefficiency and redundancy.

The Beam Software data center employs a monitoring service that identifies the health of your BEAM application server. If an issue arises from a failed service or piece of hardware, our real-time notification system immediately alerts Beam Software personnel to the issue. The data center equipment also has advanced technology to auto-restart and correct itself.

Beam Software prioritizes support cases based on the order they are received as well as the nature and severity of the problem.

2.1.5 BEAM Web Portal Submissions

Requests for technical support services may be submitted through your BEAM Web Portal by logging into your organization's portal at **https://www.beamorgs.net**. By choosing the My Tickets option under the Support heading, you can click on the Create New Ticket button to add a support case. Once the web form has been filled out with all the requisite information, you will be redirected to the My Tickets section with the details of your submission. You will be able to override the Correspondent, Email Address and Phone Number fields and will need to specify whether your request is a Bug, Feature Request, Training Request or simply an Inquiry. If you are submitting a bug, you should specify a title, description and in what area of BEAM you encountered the bug. You will also have the opportunity to submit a file as part of your request.

2.1.6 Automatic Submissions

Oftentimes when BEAM encounters an internal error, it will prompt you to send the error message to technical support along with the details of what you were doing.

Clicking on the **Send to Beam** button will send the highly-detailed error message directly to our case tracking system and automatically create a corresponding support case on your behalf.
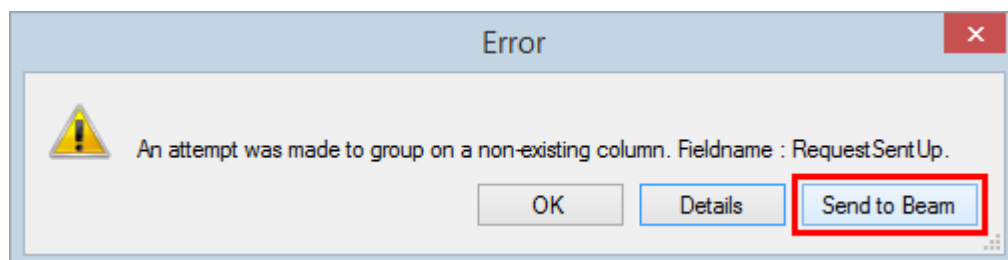
If you have received an error message and have already clicked the **Send To Beam** button, it is not necessary to submit the same error multiple times. Only the Key Contact at your organization should be sending the details to Beam.

When multiple people encounter the same error and submit the details to the Beam Support Team it generates mutliple support cases for the same issue. That causes a longer than normal time to resolution.

3 Request for Enhancement

A request for enhancement (RFE) is a customer's desire to include additional functionality, a new feature, a new report, vendor integration or a modification to existing functionality in BEAM. We evaluate each feature request as it is made.

Feature requests that bring value to BEAM and our user community can be added to the software at no charge to your organization provided the request can wait until it coincides with our development timeline. Beam Software will use its discretion to determine if a RFE will be added to BEAM. RFEs that your organization wants implemented right away will be identified as custom programming initiatives. They will require custom development at the current custom programming rate published in your BEAM Web Portal.

3.1 How Do I Submit a RFE?

All requests for enhancement must be submitted through your BEAM Web Portal or through a single email to support@beamsoftware.com. Only your organization's primary contact can submit a request for enhancement.

Following receipt of a custom programming request, Beam Software will provide you with a very brief project plan. The Project Plan will contain a cost-estimate-range for the entire project, and a Fee for proceeding to the second step - the Project Specification. The Project Specification is the result of detailed analysis and identifies precisely what the project entails and what Beam Software will deliver.

Once the Project Plan has been approved, your organization has issued a Purchase Order and/or the initial fee has been paid, the Project Specification will be prepared. The Project Specification will contain a second estimate, which will be the Deposit required to proceed to the final step – the Project Implementation. Once the Project Specification has been approved and the Deposit has been paid, Project Implementation can be scheduled. Fee and Deposit estimates are for approximation purposes only. Customers will be notified at the completion of Project Implementation of any final cost adjustments, based on actual time and materials used.

4 Time and Materials Charges

Requests that are not covered under your organization's subscription agreement will be charged at the current *hourly* time and materials rates and are billable in 30-minute increments:

Custom Programming:	$200	Rush Rate Programming:	$300
Database Touch-ups:	$200	BEAM Training:	$125

SQL Database Training:	$235	Onsite Training:	$1,280/day
Microsoft Excel Training:	$185	Onsite Senior Engineer:	$2,000/day
Reactivation Fee:	$200	Database backup copy:	$132
Emergency/Off-Hours:	$310	Add'l server storage:	$25/10GB
Emergency Surcharge:	$250	Azure Premium storage:	$50/256GB

5 Request for Training

Customers can request additional training (RFT) on the use of BEAM. Simple use questions and answers are included as a part of technical support. But detailed, lengthy explanations, training sessions or demonstrations more than 15 minutes in length are not. RFTs must be scheduled and will be charged at the current training rate, billable in 30-minute increments.

5.1 How Do I Submit a RFT?

Requests for training can be made via telephone, email, or your BEAM Web Portal.

Please include the area in BEAM and specific topic your organization needs training on.

6 How Do I Add or Subtract User Licenses from My Subscription?

Sending a single email to support@beamsoftware.com is the most effective way to add user licenses. Your request will automatically be given a date and time stamp and can be completed relatively quickly. Please note that your organization may not go below the minimum user license threshold identified in its Subscription Agreement. Requested reductions to your total user license count are not permitted after the close of business on the last day of the month. Requesting additions and subtractions to your license count to simply reduce your total subscription price each month is forbidden.

6.1 Increasing User Licenses

If your request to add BEAM licenses to your subscription is received on or before noon on the 24th of the month, the invoice will reflect the change and your ACH will be for the same amount as the invoice. If your increase request is received after noon on the 24th but before the close of business on the last day of the month, Beam's Accounting Department will issue an additional invoice and ACH your account for the amount of the original invoice plus the addition(s). License additions after the close of business on the last day of the month will be invoiced on the day of receipt and Beam Accounting will ACH your account the next business day.

6.2 Decreasing User Licenses

If your request to reduce BEAM licenses is received before noon on the 24th day of the month, your invoice will reflect the change and Beam Accounting will ACH your account for that amount. If your request is received after noon on the 24th but before the close of business on the last day of the month, Beam Accounting will issue a return, apply the credit against the invoice and ACH your account for the invoice amount less the return.

7   When Can I Receive Support?

Customer support services are available from 8:00 a.m. to 5:00 p.m., Eastern Standard Time, Monday through Friday, with the exception of the following holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Eve, Christmas Day and New Year's Eve.

Technical Support Services are only available to customers who are current with all payments and fees.

8   Revision History

Date	Section	Changes
1/2/2018	2.1.1 – Telephone Submissions	Added instructions on how to add a key contact from your Web Portal
12/29/2017	4 – Time & Materials Charges	Custom Programming now $200 per hour Database Touchups now $200 per hour Rush Rate Programming now $300 per hour BEAM Training now $125 per hour SQL Database Training now $235 per hour Microsoft Excel Training now $185 per hour Emergency/Off-Hours now $310 per hour Onsite Training now $1,280 per day Onsite Sr. Engineer: $2,000 per day Database backup now $132
12/20/2016	4 – Time & Materials Charges	Custom Programming now $180 per hour Database Touchups now $180 per hour BEAM Training now $120 per hour Onsite Training now $1,200 per day Database backup now $129
12/20/2016	6 - Adding & Subtracting User Licenses	More clearly identified timeframe and terms for decreasing User Licenses
12/20/2016	8 - Revision History	Added section to easily identify changes