

A woman with curly hair, wearing a blue button-down shirt and large hoop earrings, is sitting at a wooden desk in a warehouse. She is looking down at a laptop, with her hands on the keyboard. In the background, there are metal shelving units filled with cardboard boxes. The scene is lit with warm, indoor lighting.

ATTIVO *ERP*

TotalCare Plan

Always on. Always aligned.

Ensuring Your ERP is
Optimized & Future-Proof.

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Attivo Academy:

Empowering Your Team with Comprehensive Training

Included in Your Attivo TotalCare Plan

Unlock the full potential of your team with Attivo Academy, an exclusive training platform designed to meet the needs of growing businesses, that delivers flexible, role-based training that reduces costs and elevates employee performance—no matter your industry or company size.



Key Features and Benefits

- **Cost-Effective Training and Support:** Minimize your training and support expenses by providing employees with targeted, on-demand resources.
- **Immediate and Continuous Learning:** New employees can access essential training, while current staff can refresh their skills or cross-train for multiple roles at any time.
- **Extensive Lesson Library:** Choose from hundreds of lessons covering fundamental business processes and advanced topics.
- **Anytime, Anywhere Access:** Learn on your desktop, smartphone, or tablet—24/7 training that fits your schedule.
- **Role-Based, Functional Curriculum:** Courses are organized by business function, and lessons are specifically assigned to match each employee's job responsibilities.
- **Personalized Learning Pathways:** Employees can request additional training in other areas.
- **Comprehensive Training Materials:** Lessons include step-by-step guides and easy-to-follow instructions, as well as engaging training videos for visual learners.

A Smarter Way to Train and Support Your Business

With Attivo Academy, you ensure your workforce is always up to speed—reducing errors, increasing productivity, and fostering a culture of continuous improvement. Whether you're onboarding new hires or upskilling existing team members, Attivo Academy as part of your TotalCare plan makes high-quality training accessible, efficient, and effective.

Discover how Attivo Academy can help your organization thrive as part of the comprehensive Attivo TotalCare solution.



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ATTIVO ERP

New Employee Onboarding Training

Comprehensive ERP Application Training for New Hires

Overview

Attivo is pleased to offer a specialized Employee Onboarding Training Service designed to streamline and accelerate the integration of new team members into your organization. Our service focuses on providing hands-on training for the ERP applications we support, ensuring new hires are equipped with the knowledge and resources to be productive from day one.

Key Features

- **Personalized Onboarding Support:** Attivo will guide new employees through the initial stages of familiarization with company ERP processes.
- **Attivo Academy Access:** We assist new hires in gaining immediate access to the Attivo Academy.
- **Lesson Assignment & Tracking:** Our team assigns appropriate lessons within the Attivo Academy based on the employee's role and required ERP competencies, and monitors progress to ensure completion.
- **Live Online Training Sessions:** Attivo provides interactive online training sessions with ERP experts, allowing employees to ask questions and resolve uncertainties in real time.
- **Continuous Support:** After initial onboarding, ongoing support is available to help employees deepen their understanding of ERP applications and adapt to new updates or workflows.



Benefits

- **Accelerated Productivity:** Rapidly onboard employees with the knowledge they need to use ERP applications efficiently.
- **Reduced Training Burden:** Free up internal resources by leveraging Attivo's expertise and training infrastructure.
- **Customized Training Paths:** Ensure each employee receives training relevant to their specific responsibilities.
- **Improved User Confidence:** Empower new hires with the skills to navigate ERP systems independently and confidently.
- **Consistent Standards:** Maintain standardized onboarding across teams and locations for all supported ERP applications.

Service Delivery Process

1. Collaborate with your HR or IT teams to identify new hires needing ERP training.
2. Provision Attivo Academy accounts and assign relevant training modules.
3. Schedule live online training sessions tailored to employee roles and application needs.
4. Monitor progress and provide additional resources or Q&A sessions as needed.
5. Offer continuing support and refresher courses as employees advance in their roles.

Empower your new hires with the skills and confidence they need to succeed!



The HOUR OF POWER:

Your Direct Line to ERP Expertise

As part of the comprehensive Attivo TotalCare Plan, we are excited to offer the Hour of Power—a regularly scheduled, interactive online session designed specifically for our ERP user community. This session is your opportunity to engage directly with Attivo experts and fellow users, ensuring you get the most from your ERP system and connected applications.



What is The Hour of Power?

The Hour of Power is a regularly scheduled monthly online event included in your TotalCare plan. Each session begins with a focused discussion on key and timely topics related to your ERP system—ranging from new features and best practices to practical tips for maximizing productivity. After the brief presentation, the majority of the hour is dedicated to an open Q&A forum.

The Hour of Power is specific to your ERP solution, allowing for a broad sharing of insights from other users of your ERP system.

How Does It Work?

- **Expert-Led Discussion:** Each session starts with insights from an Attivo ERP specialist, covering topics tailored to your needs and latest system updates.
- **Open Q&A:** The hour is set aside for you to ask any question about your ERP system or related applications. Get answers directly from our experts or from the experiences of other participants.
- **Collaborative Learning:** The webinar format encourages active participation, knowledge sharing, and networking with peers facing similar challenges.

How to Join

Registration details and session schedules will be via ongoing communications, as well as announcing date and time of the next Hour of Power each month. We will strive to schedule the session at a similar time each month.

Why Attend the Hour of Power?

- **Immediate Answers:** Receive real-time solutions and advice from Attivo specialists and your user community.
- **Stay Informed:** Keep up with the latest ERP system enhancements, tips, and industry best practices.
- **Boost Productivity:** Learn practical techniques to streamline your daily tasks and resolve issues faster.
- **Personalized Support:** Bring your unique questions and scenarios for expert input tailored to your organization's needs.

Part of the Total Care Advantage

Participation is included at no additional cost—just sign up and bring your questions! The Hour of Power is just one of the many ways Attivo TotalCare goes beyond standard support to deliver ongoing value, insight, and partnership.

Business Process Assessments

An Essential Component of the Attivo TotalCare Plan



MAXIMIZE THE VALUE OF YOUR APPLICATION SOFTWARE

As part of the comprehensive TotalCare plan, the Attivo Business Process Assessment (BPA) is designed to help your organization extract maximum value from your business systems. The BPA is a structured, consultative service that evaluates your current business processes, identifies areas for improvement, and aligns technology solutions to your strategic goals.



KEY FEATURES

- **In-Depth Process Evaluation:** Our experienced consultants conduct a thorough review of your business workflows, uncovering inefficiencies and opportunities for automation.
- **Best Practice Recommendations:** We benchmark your processes against industry standards, providing actionable insights and recommendations tailored to your organization.
- **Collaborative Workshops:** Interactive sessions with your stakeholders ensure that all perspectives are considered and that proposed changes align with your business objectives.
- **Strategic Roadmap Development:** The assessment results in a clear, prioritized roadmap for process enhancements and system optimizations, helping you plan for sustainable growth.
- **Seamless Integration with Attivo TotalCare:** Findings from the BPA feed directly into your ongoing support and improvement initiatives, ensuring continuous alignment with your evolving needs.



BUSINESS BENEFITS

- **Increased Return on Investment:** By streamlining processes and leveraging Attivo's expertise, your organization can realize faster and more substantial ROI from your technology investments.
- **Reduced Operational Risk:** Identify and address process bottlenecks and compliance gaps before they impact your business.
- **Enhanced Productivity:** Empower your teams with optimized workflows and the right tools to boost efficiency and employee satisfaction.
- **Strategic Decision-Making:** Gain data-driven insights that support informed business decisions.



HOW THE ATTIVO BUSINESS PROCESS ASSESSMENT WORKS

The BPA is designed as a structured, collaborative journey that maximizes value while minimizing disruption. Here's how the process unfolds:

▶ Multi-Session Engagement for Sustainable Progress

Rather than concentrating all assessment activities into a single, intensive period, the Attivo BPA is delivered through multiple sessions scheduled throughout the year. This phased approach allows teams to spread out the effort, reflect on findings, and implement improvements incrementally. Each session builds on the previous one, ensuring continuous alignment with evolving business needs and priorities.

▶ Comprehensive Questionnaire: Documenting "As Is" and "To Be" Processes

At the heart of the BPA is a robust questionnaire, developed to capture both the current state ("as is") and the desired future state ("to be") of your business processes. This tool is used in interviews and workshops, enabling stakeholders to provide detailed input on workflows, pain points, and improvement opportunities. The questionnaire covers process steps, roles, systems, bottlenecks, and compliance requirements, forming the foundation for targeted process recommendations.

▶ Collaborative Workshops and Interviews

Interactive sessions—both group workshops and individual interviews—are held to review questionnaire responses, clarify issues, and explore improvement ideas. These sessions ensure that all perspectives are considered and foster buy-in across departments. Consultants work closely with your team to confirm "as is" processes, identify gaps, and co-create "to be" process maps that reflect best practices and achievement of your strategic goals.



▶ Training Plans for Effective Adoption

As new processes and technologies are recommended, the BPA includes the development of tailored training plans.

These plans address skill gaps, support change adoption, and empower employees to operate efficiently in the new environment.

Training is delivered in stages, aligned with the multi-session rollout, to ensure that learning is timely and relevant.

Change Management Considerations

Successful process improvement requires thoughtful change management. The BPA incorporates proven change management strategies, including stakeholder analysis, readiness assessments, and communication plans. Leadership sponsorship and active engagement are emphasized to drive momentum and overcome resistance. The process is designed to minimize disruption, maintain transparency, and support a positive transition for all involved.

Quantifying the Business Case for Prioritization

To help management make informed decisions, the BPA provides a structured process for quantifying the business case for each improvement initiative. This includes:

- Documenting current costs and inefficiencies
- Estimating potential savings, revenue gains, and risk reduction
- Scoring and ranking opportunities based on strategic impact, urgency, and ROI
- Presenting findings in a clear, actionable roadmap for prioritization

This data-driven approach enables leadership to allocate resources effectively and focus on initiatives that deliver the greatest value.

Customer Business Review Calls

Enhancing Your Attivo TotalCare Experience

Customer Business Review Calls are part of the Attivo TotalCare plan —regularly scheduled conversations designed to ensure your organization receives maximum value from our partnership. These periodic calls provide a dedicated forum to:

- Review recent support activities and address any outstanding issues or follow-ups.
- Discuss ongoing or upcoming business process assessment initiatives to align our services with your evolving needs.
- Share information regarding changes to personnel, business strategies, or shifts in the business climate that may impact your business.
- Identify and anticipate opportunities for process or service improvements tailored to your organization.
- Offer feedback to Attivo on how we can further enhance your support experience.
- Simply “catch up” and maintain open, collaborative communication as your business grows and changes.



Why are these calls important? By staying connected through these business review calls, Attivo is better positioned to proactively address your needs, adapt to your changing environment, and deliver the highest level of service. Your input and insights are invaluable in guiding our continuous improvement efforts and ensuring our support remains aligned with your business objectives.

We encourage you to use these sessions as an opportunity to share your feedback, discuss future plans, and let us know how we can best support you. Together, we can ensure your Attivo Total Care experience delivers both immediate support and long-term strategic value.

Software Updates:

A Key Part of Attivo TotalCare

Keeping Your Systems Reliable, Secure, and Supported

INTRODUCTION TO SOFTWARE UPDATES

At Attivo, we understand that your business relies on the consistent performance and security of your systems. As part of the Attivo TotalCare plan, software updates play a vital role in maintaining the reliability and protection of your technology investments. Regular updates ensure your solutions remain current, resilient, and equipped with the latest security improvements, bug fixes, new features and enhancements.

Attivo includes updating your ERP system and related systems once per year, assuming the software developer has provided an update to their code during that period. There may be other “patches” released during the year designed to address a particular issue or bug, which will also be applied at no charge if your system needs that patch to function properly.

UPDATE PROCESS OVERVIEW

Our team works closely with your software developers who periodically release updates to your systems that are designed to improve functionality, address vulnerabilities, and enhance system performance. With each update cycle, Attivo provides a detailed patch list that clearly outlines the fixes and improvements included.

This transparency allows you, as our valued client, to make fully informed decisions. Together, Attivo and your organization will review the patch list and jointly determine which updates are most relevant and necessary for your specific environment.



THE PRACTICAL UPDATE REQUIREMENT: ESCALATION OF SUPPORT TICKETS

While Attivo can handle most routine technical support requests, many issues arise because of code-based errors that can only be diagnosed and repaired by the developer themselves. In the software industry, the rule for supporting end users on older versions of software is “Current Minus Two”, meaning a developer will only support their latest release and the two prior releases. After that, they will tell you “Update your software” so we can support you.

What that means for your system is that Attivo must strive to keep your systems at the “most current release...or no more than two releases back”. Otherwise, we cannot escalate support tickets to the software developers, when necessary, as they will tell us to “Update your client so we can support you.”

So...your job is to keep your software maintenance billing current, and our job is to inform you of and complete updates that need to be installed to keep your system current and always supportable.

SCHEDULING AND SYSTEM ACCESS

To ensure updates are installed safely and efficiently, our team works closely with you to schedule the update process at a time that minimizes disruption to your business. Quite often, especially for complex deployments or for those that require validation for compliance reasons, this requires installation of the software update in a test environment and performing a user acceptance test with you prior to installing the updated software in your production environment.

During the agreed update window, we require exclusive access to the affected systems. This means that personnel access is temporarily restricted, allowing our experts to complete the update swiftly and securely.



YOUR TRUSTED PARTNER IN SYSTEM CARE

At every stage, Attivo is committed to a collaborative, transparent approach.

Our goal is to provide you with peace of mind, knowing that your systems are not only up-to-date but also fully supported by a team that understands your unique business needs.

With Attivo TotalCare, you benefit from proactive communication, expert guidance, and a partnership focused on your long-term success.

Attivo TotalCare Application Support

An effective support program is the backbone of your company's information system and is essential to your success. The Attivo TotalCare plan ensures that your system continues to sustain and facilitate your growth and performs at full potential.

Application support is designed to help you get system errors corrected quickly so that you can get your work done. We also recognize that there are many system functions that are used infrequently, and you may need a "refresher" on how to use the system tools that you depend upon to do your job. We are here to help you solve those system issues and keep you working!

Application Support

- Unlimited portal, telephone, and email support.
- Personalized Client Portal access:
 - Log support tickets, modify requests, check on ticket status and progress
 - Access to User Training Guides
 - System documentation and other helpful system resources



Hours of Operation: Attivo will provide technical support for all products listed in this agreement. Phone support is available from 5:00 AM Pacific to 5:00 PM Pacific Monday through Friday. To ensure that technical support will be available for hours or days outside these times, please inform us in advance so we can plan for someone to be available for you, which may have additional costs associated. Otherwise, these calls will be handled on the next business day.

Call Logging & Ticketing

Customer Portal: Attivo provides for centralized logging of technical support calls for you through our Customer Portal and Service Ticketing system.



The very best way to log a support ticket with us is to use the customer portal so that the ticket can be immediately visible to the correct support resources. Using our customer portal allows you to not only enter or modify tickets, but you can also track the status and progress of open support incidents and view support history. It also provides access to training guides, system documentation and other helpful system resources.

Phone or Email: You may also call our office at [\(877\) 428-8486](tel:8774288486) during working hours from 5:00 AM to 5:00 PM Pacific Time Monday-Friday. If you need to leave a voicemail, please identify your call as a technical support call, so that it be handled properly. Voice mails or emails left for a specific Attivo consultant or resource do not guarantee that your call will be recognized as a technical support request and handled promptly, as that resource may be busy with another client or out of the office.

If sending an email, using the Support@AttivoERP.com email address will ensure that it is automatically entered into our ticketing system. It will then be visible on the customer portal so that you may track progress on the resolution.

Annual Software License or Maintenance Fees

In most cases, the developers of your software solutions charge an “Annual License Fee” or “Software Maintenance Fee” to keep your software current. These fees are typically handled in one of two ways:

- Included in your quarterly/annual license subscription fees
- Billed annually by either Attivo or the software developer directly.

Annual License Fees or Software Maintenance fees are not included in the fees for this Technical Support Agreement. You will be billed separately for these fees by either by Attivo or the software developer directly.

Limitations and Exclusions

- **Training or Consulting on New Applications** – New applications that you choose to implement yourself are specifically excluded from coverage under this agreement. Let us assist with such implementations with a separate statement of work including the proper training to ensure its success.
- **Report Writing** – This support agreement covers the proper functioning of report writing tools such as Crystal Reports or other report writing tools, and proper connection to the database to allow the report writing tools to work properly, but other than guidance or database fields to use, it does not include assistance in creating reports. We will be glad to assist you in getting your reporting needs met; this can be done on a separate statement of work. We will inform you of the billing in advance of working with you on these efforts so that you may approve such billing.
- **Correction of Database Errors** – Correction of database errors or problems with data accuracy, however created, is not covered under this support agreement. Where applicable, we will perform Database Health Checks to point out data irregularities that should be corrected. Attivo can make these corrections on a time and materials basis after reviewing them with you.



Attivo Database Check

Proactive Performance and Security Assurance

As part of the comprehensive Attivo TotalCare plan, our Database Health Check service delivers critical value by ensuring your system database environments remain secure, optimized, and resilient. This proactive assessment is designed to identify potential issues before they impact your business, helping you maintain peak performance and safeguard sensitive information.

- **Comprehensive Health Review:** Using diagnostic tools and scripts, our experts conduct an in-depth analysis of your database, examining configuration, performance metrics, and security settings to uncover error conditions, unnecessary data and inefficiencies or vulnerabilities.
- **Early Issue Detection:** Periodic database checks allow us to spot potential risks, misconfigurations or emerging performance bottlenecks, enabling fast remediation and minimizing downtime.
- **Security and Compliance:** We review access controls, audit logs, and compliance parameters to help you stay aligned with industry regulations and best practices, reducing the risk of breaches or data loss.
- **Actionable Recommendations:** After each check, you receive a detailed report outlining findings and prioritized recommendations, empowering your team to act decisively and enhance your database environment. Attivo can provide solutions using SQL queries or tools at a small additional cost if your staff is not equipped to use those tools.
- **Ongoing Peace of Mind:** With regular Database Health Checks included in your Attivo TotalCare plan, you benefit from continuous oversight and support, allowing you to focus on strategic initiatives while we handle the technical details.



By integrating the Attivo Database Health Check into your support plan, you gain a powerful tool for maximizing uptime, strengthening security, and ensuring your database systems are always running at their best. Experience the difference proactive care makes with Attivo TotalCare.