The Qi Cover Charter

Our Promise to You

Sage 50 and Manufacturing (Perpetual License)
Qi Sage Accounts 50c Subscription Plan
Hardware & Networks (and Hardware & Networks Plus to include annual security review)
Office 365 (+Enhanced SharePoint library support)
Qi Dynamics NAV and Dynamics 365 Business Central On Premise
Qi Dynamics 365 Business Central SaaS (which includes the Qi Extension Pack developed by Qi for user optimisation)
Qi Bespoke Applications

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Web   www.qil.co.uk

Qi Cover – Overview

Qi Cover – provides:

Telephone and remote support for third party applications, including standard package software licensed by Sage, Microsoft and other software companies. In some circumstances, and after a detailed review, it is possible for Qi to provide a telephone support service for bespoke software developed by organisations other than Qi.

Telephone and remote support for hardware & networks, Office 365, SharePoint, Back-Up, Routers and System Security – regardless of who supplied them to you. We will deliver an on-site audit of your infrastructure at the beginning of your cover with us at no extra charge.

Telephone and remote support for QiBespoke software with guaranteed continuity.

Qi's Support Team

> **We are here to help you.**
> **Our support team is an extension of your internal team.**
> **We are your partner.**
> **If you need us – please get in touch (there is no cap to your call numbers)**

Contacting the Qi Support Team

Our office contact details are:

Tel   01525 243490

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Fax   01525 243499
Email   support@qil.co.uk (please avoid personal addresses as the support email address is monitored real time during office hours, regardless of individual's diary commitments)

Our normal office hours are Monday to Friday, 9am to 5pm.

Our team is experienced and are approachable, knowledgeable, largely office based, individuals.

When you contact us, we will:

- ✓ Try to provide an immediate solution on the telephone or via remote access.
- ✓ If we cannot provide an immediate solution we will not keep you holding. Once we have the information we need from you and have identified that we can provide a sensible approach - we will start investigating how to provide the solution you need and let you know the progress
- ✓ If we are unable to provide an immediate solution and have identified, we are in a position to recommend a sensible approach* we will commence the deeper investigation.

In every case we will try to advise you of the approximate time that we expect our investigations to take.
(*error is not caused by something beyond our knowledge such as 3rd party bespoke or hardware network we do not support)

Qi's Internal Support Call Portal (QiFL)

Qi Limited has a call logging system in to which we enter **all support calls and the resolutions.** When a call comes into the office we will pass it straight to a relevant consultant or take a detailed message and pass the call on as soon as possible.

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We ask our customers to assist us in this by having one member of their team as the main contact. This means that duplicate issues are not reported, and that one person will be aware of all outstanding issues.

A single line of communication promotes accountability and efficiency.

Please ensure full details of the problem are given so the call can be prioritised and dealt with as efficiently as possible. Ideally this will include,

- A description of the problem
- A note of the version number of the program that you are using
- Screen prints showing what you were doing
- Any error messages

We will give you an estimated timescale as to when a consultant can review your call which depend on call numbers. (There are occasions when call volumes spike such as HMRC tax year end or a new release of an application that is displaying common issues for our customers).

Our system allows the Qi team to priorities calls. If a system is completely down and you are unable to process – you will be treated as a priority.

If an issue needs to be investigated, we will keep you up to date with our findings and estimate a timescale. Our investigations frequently involve remotely logging on to your system.

Qi Cover Monthly Reports
The Benefit of QiFL

Each month you will receive an email report that details the support calls you have logged and the resolutions to the calls. The report gives you an additional reference point for the future. You have a view of any persistent issue, staff members who are struggling to use your solutions effectively and any recommendations we have made that if implemented would benefit your solution performance. We just need you to confirm the email address you would like the report to go to at the point you take Qi Cover.

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Qi Cover Annual Review Meetings

As part of our support service we offer annual reviews. These discussions are an opportunity to review the service you have had and to look forward to plan for your future business needs. These are usually one to one meetings with you and are free of charge. Meetings can be face to face, conference calls or Teams meetings. You choose!

Priority Response

Customers with annual Qi Cover agreements will also be given priority for on-site visits in busy times.

On-Site Consultancy Rates

As a Qi Cover customer, you will always enjoy a preferential hourly on-site rate to non-covered customers.

QiMultiple Cover – Economies of Scale

The more contracts you have with us – the better economies of scale we can reflect. We can add further cover areas to existing contracts on a pro-rata basis to provide one renewal date or if preferred individual renewal dates for each Qi Cover contract can be offered. In both instances – economies of scale can be reflected depending on the number of current Qi Cover contracts you hold.

Out of Hours (by arrangement)

Not all businesses are the same, thus if you need out of hours support – either for specific days of the year or as a standard provision – please discuss this with us. We will always try to meet your needs and be honest if this is not possible.

Qi Cover *(and what is not included)*

Qi Cover is never a substitute for adequate staff training, reliable hardware, on-site consultancy or technical visits or regular housekeeping. Where recommended solutions are not acted upon or when we consider that an on-site consultancy or training visit would be more appropriate we will advise you and discuss the best way to address issues that do not fall under the Qi Cover Charter. Repeatedly revisiting the same issues with your

staff is merely a 'band aid'. We strive to partner with our customers to ensure they are getting the best return possible from any area of their business we support.

Qi Cover Maintains the Status Quo
Any changes or new introductions to your system will be chargeable for example installing a new printer or installing software onto a new PC. The good news is that as a Qi Cover customer – you will always access the keenest rate available.

Sage Installations on new PC's or Servers
For our Qi Covered customers we are pleased to offer a reduced rate per PC or Server for remote installations. This provides another benefit of having Qi Cover support and also means your installation will be structured and correctly configured. Non-supported customers will continue to be charged at our normal hourly rate.

Some customers prefer to install the software themselves, we therefore have created a document detailing the suggested steps and our advice for installing Sage software. This will ensure the software is set up in a structured manner and will hopefully avoid any chargeable calls relating to the installation. Our resource library is only available to Qi Cover customers.

Backups
Customers with perpetual licences are required to take regular backups of their data and ensure housekeeping checks are also done in a timely manner. All problems must be reported to Qi Limited at the earliest convenience. If these measures are not taken, then problems **may not** be covered under the Qi Cover contract and we reserve the right to invoice for services.

If you have questions or wish to discuss your requirements as an existing or new Qi Cover customer – please contact us.

Qi Cover Contract Information

The Detail and Things You Need To Know

Contracted Period

The term of the Qi Cover contract will be 1 year. Your contract will automatically renew upon the renewal date.

Your Right To Cancel

You may provide notice to cancel the automatic renewal at any point during your contract but no later than 3 months before the renewal date.

Payment Terms

- All contracts are invoiced in advance and on an annual basis
- Sage 50, Qi Sage 50 Subscription Plan, Hardware & Networks and Dynamics 365 Business Central can be paid for in staged payments. Please contact us for details.
- Sage Manufacturing contracts must be paid annually in advance *
- Microsoft Dynamics NAV contracts must be paid annually in advance.
- All payments are due on invoice date.
- Qi Limited reserve the right to suspend support if the clients account is not paid in accordance with our credit terms.

*Exceptions apply please contact us for details

Support Priorities

1st Line Support provided by Telephone.
Unlimited Telephone Support is included in the contract.

2nd Line support provided by Remote Access/Remote Control.
Unlimited Remote Support is included in the contract.

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Response

Standard response time is 1 Business Day with a 4-Hour response time in the event of a full programme failure.

Changes

The client must inform Qi of any changes, for example an upgrade or additional companies or users.   Any change in your company name, bank details, key contact or address must be forwarded immediately.

2nd Line support provided by Remote Access/Remote Control.
Unlimited Remote Support is included in the contract.

Response

Standard response time is 1 Business Day with a 4-Hour response time in the event of a full programme failure.

Changes

The client must inform Qi of any changes, for example an upgrade or additional companies or users.

Qi Cover Sage 50 Accounts & Manufacturing

Whether you are a Sage 50 Accounts user or both Accounts and Manufacturing, the Check data and Backup routines are extremely important. You must ensure the check data is performed and investigated to ensure your data is clean and free from issues. This data must then be backed up daily.

Sage 50 Accounts Check Data

The Check Data routine in Sage Accounts should be run daily before a backup is taken. The routine checks the validity of your Sage data files and produces a report detailing any problems that have occurred.

The report is divided into three sections – Comments, Warnings and Errors.

Comments

Comments are the least serious of data problems and do not necessarily require data corrections. Nevertheless, they do indicate minor inconsistencies in the data, which you should consider investigating.

Warnings

Warnings, like comments, do not necessarily require use of the fix option. However, potentially they do indicate problems, so it is useful to scan through them.

Errors

These must be reported to Qi as soon as possible and investigated. A print of the report can be taken and faxed over if the Check Data is run out of office hours.

On the Errors section of the report there is a Fix button, please DO NOT press this without contacting Qi. In the vast majority of cases there are other routines or processes to do before pressing Fix and in some cases, you do not need to press Fix at all.

Please be aware that Qi reserves the right to charge for data repairs where daily clean data backups have not been taken or where Qi has not been informed of errors on the data when they first occur.

In general, the Check Data in Manufacturing does not have to be run on a regular basis, Qi may advise you to run some of the processes if there are discrepancies in the data.

Backups

A backup of your data should be taken daily, at least. In the event of loss of a computer or network or in the rare occasion where the data may have errors that are not fixable, you may need to restore a backup. If that backup was a week old, then you may end up re-entering a weeks' worth of transactions.

Sage recommends the system should be backed up every time you enter new data. Therefore, if you use the system every day then you should backup every day. In some cases, if you have a large number of users or a large number of transactions have been entered then backing up part way through the day is also encouraged.

Please remember to run the Check Data routine in the Accounts data before backing up, in the event you need to restore then you will want clean, error free data.

A system backup is not always sufficient, and we would not suggest relying upon it. System backups will take a copy of files and folders that it is instructed to; however not all systems can backup files that are still being accessed, for example the Manufacturing data is stored in an SQL server as the SQL server is always running the files are constantly shown as being accessed. Therefore, the backup is unable to be copy the files. However, having the Sage backup file included in your system backup is a good idea.

Sage 50 Accounts Backups

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Within the File menu, there is the Backup option and you are prompted to run a Check Data beforehand. On the second tab there are Advanced Options where you can indicate what to backup.

To make the backup process quicker you could do a Reports and Layouts only backup and a separate Company Archive backup (both without data being ticked). As no data is included, these backups can be restored whenever needed and will not affect the existing data files. The Company Archive backup doesn't need to be rerun as there won't be any changes, if at any time Reports or Layouts are amended then just take another backup of these without ticking data. You could then run the daily backup without the Report, Layouts or Archives ticked and it will be much quicker.

Sage 50 Manufacturing Backups

Backups should be run from within the Manufacturing Software; this will back up your Accounts and Manufacturing data at the same time. Should the need ever arise to restore data; both Accounts and Manufacturing data must be restored to the same point in time. Never attempt to restore one set of data without the other as this would have serious, irreversible consequences. Backing up in Accounts does not backup the Manufacturing data.

For Sage Accounts Version 2015 and onwards separate Accounts and Manufacturing backups must be taken ensuring no work is undertaken in-between these backups being run to ensure consistency.

There is a routine that can automate the backup and set it run overnight. There are some considerations to using the automated backups such as you will need to check that the backups have completed successfully. Qi have step by step instructions for this if required.

Qi Cover Hardware and Network Customers *

- Regular review of Server Performance Reports and Alerts
- Monthly Qi Server report and system maintenance tasks for servers, including anti-virus updates, disk usage, backups & server service packs
- Office 365
- SharePoint
- Servers
- Clients
- Firewall
- Phones

There may be occasions where we cannot resolve the problem directly and the solution requires assistance from a third party. Qi Cover will assist you with the necessary arrangements to ensure that the issues are resolved as quickly and efficiently as possible.

Initial Audit

When you first take Qi Cover – Hardware and Networks to ensure that we provide the best level of support, one of our staff will visit you prior to the commencement of the Qi Cover service. During this initial visit, we will carry out an audit of your hardware and software to enable us to identify and agree on all of the equipment and software that you require us to support.

*If you wish to construct a Qi Cover support package that includes some but not all for infrastructure (e.g. – Server only) – please contact us to discuss your needs.

Third Party Hardware & Software Support

If you have a problem with hardware or software that is covered by a third-party support contract, then your first contact should normally be with that supplier. It is possible that the purchase of additional hardware and/or software may be necessary as part of the solution to your problem in which case we will provide the appropriate advice and guidance.

Network Support Packs

Customers with Qi Cover – Hardware and Network agreements may purchase Network Support Packs (NSP), buying consultancy hours in advance at a rate discounted from standard hourly rates. These hours can be used for regular site visits, for housekeeping and non-urgent issues and for on-site support if it is not possible to resolve the problem over the telephone or by remote access connection.

Qi will provide a regular statement of your account containing information about hours used and renewal dates. Network Support Packs (NSP), not used within twelve months of the date of issue will not be able to be used. No minimum charge for site visits will be made to customers with annual Qi Cover – Hardware and Network agreements.

Hardware & Networks PLUS (contract enhancement)

We offer our QiCover customers a service which will result in a custom built security policy.
How does this work?
- Hardware + Networks PLUS increases a hardware & network contract price by £200 a year and will include an annual security review that we will proactively book in with you.
- This remote consultation will provide a forum for detailed discussion based around some but not all the topics covered in this message.
- This approach will enable us to develop an IT Security Policy (ITSP) specific to your business and if included as part of your contract ensures that your ITSP evolves in line with security threats & developments.
- Qi will deploy the custom built IT Security Policy as part of the cost, that will protect your business in the most effective manner based on your network and your business needs.

Why do we offer this enhancement?

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Increasingly complex methods to hack networks are deployed every day and to some extent are 'morphing' every day. As one avenue to cyber attackers is blocked another one is found. Scanners, printers and mobile telephones are now also prey to attacks that can result in a serious breach of system security. The net of the cybercriminal widens every day.

The industry is constantly 'fighting' back and thankfully the armoury of defence tools continues to be developed and made available to end users. There must always be a consideration however over which of these tools and their method of deployment is the most effective for a network.

The makeup and purpose of every network is always slightly different to another.
Consider that even a business in the same industry with similar processes as another will still be slightly different from each other.
Scatter gunning security can be counterproductive.
Applying a broad stroke 'one hat fits all' approach can seriously limit the productivity of a business on a day to day basis. You can lock a system down and make it like Fort Knox but this is not practical or desirable.
In short – a system's use and purpose will define the most appropriate approach to security.

Qi Cover Office 365 (Included in Hardware and Networks but available separately)

By transferring your registration for your Office 365 to Qi at no cost to you and by taking Qi Cover 365 your benefits will include these services:

- Setting up of additional users
- Assistance with connectivity issues
- Guidance through the improved 2-Factor authentication protocol (which incidentally contributes to your GDPR compliance strategy).
- The Setup of additional domains
- The Setup of Shared mailboxes and distribution lists
- Enhanced Qi Cover 365 includes **SharePoint Document Management** – ensuring that as you use this great application already included in your Office 365 subscription you have a port of call to ensure you maintain your SharePoint Library correctly.

Office 365 currently offers its licensees over 20 apps – and this is growing. With Qi Cover365 we will advise you on the merits of apps as they launch and provide signposting on how these will benefit your business and help you get the best return from your monthly subscription fee.

Protecting your Office 365 and protecting yourselves as a business

From time to time we will make recommendations which may incur an additional fee. These recommendations will be based on any industry changes to best practice regarding Office 365 security and protocols. Any aspect of guiding your staff to understand any changes we are commissioned to make will be included in the cost of your support cover. Services commissioned to effect any changes we recommend will be chargeable as this a change to the 'status quo' and hence not covered by your support contract.

As with other protocols such as server backup and recommended housekeeping - if repeatedly recommended measures are not taken which subsequently require substantial remedial services from the Qi support team, then these problems **may not** be covered under the Qi Cover contract and we reserve the right to invoice for services.

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Qi Cover – **Qi Software (Bespoke)**

You have invested your money and time in a QiBespoke development.

Our Promise To You – Staying Futureproofed!
Our succession planning in the workplace ensures that the support of your bespoke programme is never dependent on a single Qi individual. We will always be able to meet the contractual remit of Qi Cover for your bespoke piece(s).

Qi Cover - Qi Software provides telephone support for all bespoke applications developed by Qi for a specific customer. Qi will also update your bespoke application to work with new standard Microsoft operating systems, and new compatible versions of Microsoft Access. Qi will also develop new versions to link to new releases of compatible Sage software where appropriate.

The service provides telephone support which includes bug fix corrections to the software, where practical and required corrections to the data, but excludes changes to the system functionality and site visits, for example to issue updated software or correct data.

Qi Cover – Qi Software is calculated as a percentage of the original development cost. Any additional development work will mean an increase in Qi Cover. Increases will apply from the installation of the additional development work. Quotes for additional work will have the increased Qi Cover cost detailed.

This service excludes changes to the system functionality, and site visits, for example to install updated software or correct data.

Qi Limited will provide ongoing telephone support for any additional developments, at an annual charge of 20% of the development costs (excluding data conversion etc but including system design and programming) payable in advance each year.

The first payment will fall due at installation of the additional development and will be pro rata until your Qi Cover Bespoke contract renewal date. There will be an annual charge thereafter. Quotes for additional Bespoke development will have the annual increased Qi Cover cost included.

Requests for system changes must be completed via a Change Request Form – this ensures complete clarity and visibility throughout the development resulting in a delivered development that meets your specified criteria.

Qi Cover Microsoft Dynamics NAV

Dynamics-NAV, *Qi Cover* includes the Microsoft Enhancement Licence.

This service excludes changes to the system functionality, and site visits, for example to install updated software or correct data.

Additional NAV Development
Qi Limited will provide ongoing telephone support for any additional developments, at an annual charge of 20% of the development costs (excluding data conversion etc but including system design and programming) payable in advance each year.

The first payment will fall due at installation of the additional development and will be pro rata until your Navision renewal date. There will be an annual charge thereafter. Quotes for additional NAV development will have the annual increased Qi Cover cost included.

Requests for system changes must be completed via a Change Request Form – this ensures complete clarity and visibility throughout the development resulting in a delivered development that meets your specified criteria

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Qi Cover Microsoft Dynamics 365 Business Central SaaS, Sage Accounts 50C Subscription

Telephone and remote support are included in your monthly licence payment plan. All subscriptions are due monthly in advance and late payment may affect your access to the software and the support Qi can provide you.

This service excludes changes to the system functionality (see change request form)

Qi Limited

Change Request Form (for bespoke, Dynamics 365 Business Central and NAV)

Project Change Process

Change Need Identified – The person requesting the change completes section 2, 3, 4 and 5 of this form with the description of the change and reasons for change. Also documenting what the impact will be if the change is not made.

Investigation - Qi will then investigate the impact the requested change would have on time and budget, offer alternative solutions where applicable. Qi will complete sections as indicated.

Decision - The document will then be presented to the Customer's Project Manager who will decide within 7 consecutive business days of receipt and indicate acceptance or rejection of the proposed change by signing the Change Request. Qi and the Customer will sign to confirm the decision.

Qi Limited shall have no obligation to commence work in connection with any change until the estimated fee and schedule impact of the change is agreed upon in a written Change Request Form signed by the designated Project Managers from both parties. If the change is rejected, Qi shall proceed only with the original services. In the absence of acceptance or rejection, Qi will not perform the proposed change.

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Your Details (Customer)

Please complete you details

Name	
Job Role	
Date of Request	

Please complete sections below Once completed please forward to Qi.

Description and Reason for Change (Customer)

Please describe the change and the reasons for it.

Impact of Not Making the Change (Customer)

Please describe how not making the change will impact.

Supporting Information (Customer)

Please provide any additional information or supporting documents.

Log Change Request (Qi)

Enter on the Change Request List

Change Request ID	
Date Request Received	

Functional and Technical(Qi)

Detail scope of the change, impact on other processes or operations within the Bespoke System, any alternatives

- *Detail the scope of the change*
- *Highlight any requirements or consequences of the change*
- *Impact on other areas of the system, any amendments needed*
- *Cover what is not included (within the area of the system the change is in)*
- *Are there any alternatives? Maybe worth describing the standard system and any work arounds we can think of*

The programming change will require support by our consultants and we have detailed the annual Qi Cover cost accordingly.

Review of Project Impact (Qi)

Requirement	Time (hours)	Rate	Estimated Cost
Producing the Solution Design Document			
Qi Cover for Bespoke Change – price per annum			
Expense Description *(Delete if not required)*			
TOTAL ESTIMATED COST:			
Comments:			

Additional Information (Qi)

Qi's comments and recommendations regarding the change.

Decision

Please indicate one option and sign below

Approve/Reject

Change Request:	☐ Approved	I agree to incorporate the changes summarised herein into the existing project definitions.
	☐ Rejected	The changes summarised herein will not be incorporated into the existing project.

For Customer:

_____   _____
Project Manager   Date

For Qi:

_____   _____
Project Manager   Date

Internal (Qi)

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Change Request ID	
Change Request Short Description	
Change Log updated?	