

TRUNORTH SUCCESS PLAN TRIAL

RISK-FREE OPPORTUNITY TO EXPERIENCE SUPPORT SERVICES

Overview

The Success Plan Trial is designed to give new clients a risk-free opportunity to experience TruNorth Dynamics' support services. This offering provides confidence and flexibility while ensuring valuable time and effort are protected for both parties. The trial period begins on the start date of the Success Plan agreement and lasts for 30 calendar days. Clients may cancel the agreement at any time during this 30-day period.

Risk-Free Hours

If the agreement is canceled within 30 days and total usage is five (5) hours or fewer, charges will be refunded.

If total usage exceeds five (5) hours and the client chooses to cancel, any hours beyond the initial five will be invoiced at the standard project rate of \$260 per hour, time and materials.

Billing Requirements	Time Consumption Details
<p>To begin the Success Plans, clients must provide valid payment information (credit card or ACH bank details) to be kept on file for automated monthly payments.</p> <p>All payments, including any applicable charges incurred during or after the trial period, will be processed automatically using the payment method provided.</p>	<p>All time spent during the trial counts toward the five-hour threshold. This includes:</p> <ul style="list-style-type: none">• Support Onboarding Activities<ul style="list-style-type: none">◦ System access setup◦ Environment review◦ Documentation of third-party tools and customizations◦ Initial discovery and background gathering• Live Support<ul style="list-style-type: none">◦ Remote sessions and screen share meetings◦ Advisory and troubleshooting discussions• Asynchronous Support<ul style="list-style-type: none">◦ Ticket handling◦ Internal research◦ Documentation review and follow-up correspondence

Post-Trial Options

At the end of the trial period or upon reaching the five-hour threshold, clients may:

- Continue the Success Plan. No action is needed. Your engagement will continue seamlessly, and next month's billing will be processed automatically. We look forward to building a strong, ongoing partnership.
- Cancel the agreement with no obligation if usage remains within the five-hour limit
- Cancel the agreement and pay only for support hours more than the five-hour allowance, if applicable

TRUNORTH SUCCESS PLAN LITE

SIMPLE, PREDICTABLE SUPPORT FOR MINIMAL-USE ENVIRONMENTS

Overview

Success Plans Lite is designed for customers who need limited annual support or who pair TruNorth's fixed-fee service offerings with occasional advisory or troubleshooting needs. This plan provides predictable, low-commitment access to TruNorth's expert team without the broader features included in higher-tier Success Plans. At an affordable monthly rate, Success Plan Lite ensures clients receive the essential help they need when they need it.

For Clients Who Only Need the Basics

Success Plan Lite focuses purely on essential support. There are no added services, no discounts, and no strategic components—making it a limited but functional option for teams that simply need an occasional touchpoint. Clients who require regular guidance, training, or system improvements will benefit more from a full Success Plan tier.

What's Included	What's Not Included
<p>Success Plan Lite provides 10 support hours per year that can be used for:</p> <ul style="list-style-type: none">◦ Break/Fix Requests◦ Troubleshooting◦ Advisory Support◦ Small Environmental Tweaks/Adjustments◦ Training or Refresher Guidance <p>All TruNorth support offerings are delivered through the same trusted channels including remote sessions, screen share meetings, and asynchronous ticket-based support.</p>	<p>To keep this plan lightweight and cost-effective, Success Plan Lite does not include:</p> <ul style="list-style-type: none">◦ Discounts on other bundled products (for example: BC Upgrade Management is discounted in Tier One and above)◦ System reviews, optimization reports, or training workshops◦ Priority support response times◦ Strategic planning or quarterly advisory sessions

Pricing and Usage Information

- \$199/month
- \$2,388 annually
- Additional Block Time: \$260/hour

When annual hours are fully consumed, clients can continue receiving support through Block Time at the standard rate of \$260/hour.

- No rollover of unused hours
- No discounts applied to other TruNorth products or services (including BC Upgrade Management)

TRUNORTH SUCCESS PLAN - TIER 1

ESSENTIAL SUPPORT FOR GROWING & ACTIVE ENVIRONMENTS

Overview

Success Plan Tier One is designed for customers who need dependable, ongoing support combined with light strategic guidance and annual system touchpoints. This plan builds on core break/fix support by adding a dedicated Customer Success Manager, annual reviews, and training - ensuring your system stays stable, understood, and continuously improving. Tier One delivers predictable support with added value for organizations that rely on their system day-to-day.

For Clients Who Need More Than the Basics

Success Plan Tier One is ideal for customers who want a consistent relationship with TruNorth, proactive check-ins, and structured annual reviews without moving into a fully strategic or advisory engagement. Clients benefit from essential support hours plus included annual services that enhance system utilization and long-term reliability.

What's Included	What's Not Included
<p>Tier One provides 24 support hours per year that can be used for:</p> <ul style="list-style-type: none">○ Break/Fix Requests○ Troubleshooting○ Advisory Support○ Small Environmental Tweaks/Adjustments○ Training or Refresher Guidance <p>In addition, at no additional cost without impacting support hours, it also includes:</p> <ul style="list-style-type: none">○ Dedicated Account Executive○ Onboarding meeting with the TruNorth team○ Annual Utilization Report○ Annual System & Process Review with a Solution Architect○ Annual (Re)Training & New Feature Workshop <p>Service Levels</p> <ul style="list-style-type: none">○ Standard SLA response: 24 hours○ Standard Resolution: Up to 5 business days	<p>To keep Tier One focused on essential support, this plan does not include:</p> <ul style="list-style-type: none">○ Priority or expedited SLA response times○ Quarterly strategic planning sessions○ Unlimited or on-demand advisory services <h3>Pricing and Usage Information</h3> <ul style="list-style-type: none">• \$600/month <p>Business Central Upgrade Management may be added at a discounted rate of \$250/month.</p> <p>Support hours do not roll over year to year. Once annual hours are fully consumed, additional support may require an upgraded Success Plan tier or separate service engagement.</p> <h3>The TruNorth Way</h3> <p>All TruNorth support offerings are delivered through trusted channels including remote sessions, screen share meetings, and asynchronous ticket-based support.</p>

TRUNORTH SUCCESS PLAN - TIER 2

ADVANCED SUPPORT FOR OPTIMIZED & EVOLVING ENVIRONMENTS

Overview

Success Plan Tier Two is designed for customers who require deeper system oversight, more frequent optimization, and ongoing advisory support. Building on the foundation of Tier One, this plan introduces quarterly reviews, system optimization reporting, expanded training, and project-level support - ensuring your environment evolves alongside your business. Tier Two delivers proactive, structured engagement for organizations that depend heavily on their system and want to continuously improve performance and adoption.

For Clients Who Need Proactive Guidance & Optimization

Success Plan Tier Two is ideal for customers with complex or growing environments who want regular touchpoints, increased advisory access, and hands-on support for improvements and small projects. This plan provides a balance of predictable support hours and included strategic services - without moving into a fully custom engagement.

What's Included	What's Not Included
<p>Tier Two includes everything in Tier One plus 75 support hours per year that can be used for:</p> <ul style="list-style-type: none">○ Break/Fix Requests○ Troubleshooting○ Advisory Support○ Small Environmental Tweaks/Adjustments○ Training or Refresher Guidance <p>In addition, at no additional cost without impacting support hours, it also includes:</p> <ul style="list-style-type: none">○ System Optimization Report○ Semi-Annual Utilization Report○ Quarterly System & Process Reviews with a Solutions Architect○ Quarterly (Re)Training & New Feature Workshops○ Increased advisory and consultative support○ Free Bootcamp training for one user per quarter○ Included Business Central Upgrade Management○ Access to a Project Manager (subject to usage limits) <p>Service Levels</p> <ul style="list-style-type: none">○ Standard SLA response: 24 hours○ Standard Resolution: Up to 5 business days	<p>To maintain clarity and predictability, Tier Two does not include:</p> <ul style="list-style-type: none">○ Unlimited project delivery or large-scale implementations○ Fully custom or embedded resources○ Proactive system monitoring (available as an add-on) <hr/> <h3>Pricing and Usage Information</h3> <ul style="list-style-type: none">• \$2,000/month <p>Support hours do not roll over year to year. Once annual hours are fully consumed, additional support may require an upgraded Success Plan tier or separate service engagement.</p> <hr/> <h3>The TruNorth Way</h3> <p>All TruNorth support offerings are delivered through trusted channels including remote sessions, screen share meetings, and asynchronous ticket-based support.</p>