



Sage Intacct Customer Care Plans

Support. Evolve. Scale. Leverage the expertise of our team to enhance your Sage Intacct investment. Save money and time with unlimited support, training, process optimization, and more with a Customer Care Plan.

	Standard	Extended	Premium
	FREE	\$3,000	\$5,500
Access & Service Level			
Cargas Help Center	✓	✓	✓
Toll-Free Cargas Support Hotline	✓	✓	✓
Support Included per Ticket (1)	15 min.	Unlimited	Unlimited
Initial Response Time (2)	8 hr.	2 hr.	1 hr.
Sage Intacct Community	✓	✓	✓
Training Opportunities			
Monthly Newsletter	✓	✓	✓
Monthly Training Webinars		✓	✓
Quarterly Release Reviews		✓	✓
Employee Training	T&M	5 hr.	10 hr.
Scaling with New Processes, Modules & Integrations			
System Demos		✓	✓
Third-Party Partner Introductions	✓	✓	✓
Integration Support (Issue Diagnosis) (3)	✓	✓	✓
Integration Support (Troubleshooting) (4)	T&M	T&M	✓
Modification of Active Modules (5)	T&M	T&M	✓
Reports & Dashboards Consultation	T&M	5 hr.	10 hr.

Customer Partnership

Annual Support Report Card (6)		✓	✓
Forward-Thinking Planning Consultation (7)		✓	✓
Year-End Strategic Consulting Review (8)			✓
Partnership Touchpoint Frequency	Annual	Semiannual	Personalized

LIMITATIONS & EXCLUSIONS

(1) With a Standard plan, any assistance that requires 15 minutes or less is considered part of your plan and not billed to you; assistance that requires more than 15 minutes will be billed in its entirety in 15-minute increments.

With Extended and Premium plans, support is defined as assistance with answers to individual questions on everyday use of your Sage Intacct software. Examples of included services:

- Does Sage Intacct enable the creation of a reversing journal entry?
- How do I run a payables aging report so that I can begin reconciling the payables subledger to the general ledger?
- How do I add a budget column to my financial report?
- What are the possible causes of an error message?
- Does an error message mean the software is not working as designed?

Note: Support includes asking Sage Intacct for additional assistance with the answer to any included question and providing their answer to you.

Most consulting services are excluded, including these examples:

- Configuration; configuration typically requires understanding of business processes and requirements.
- Training; training typically answers many related questions about the use of software in a single session. The Premium plan includes up to 10 hours of training.
- Creating or modifying reports; report writing typically requires designing the report. The Extended plan includes up to 5 hours of report development and the Premium plan includes up to 10 hours.
- Reconciliation; reconciliation typically includes performing an accounting task to determine whether there have been errors in entering transactions.
- Advice; advice depends on having sufficient information to make an evaluation.

(2) Response time is guaranteed during business hours Monday–Friday, 7am–7pm ET, excluding holidays. Response time does not guarantee issue resolution time.

(3) Our support team will use their best effort to determine the cause of integration issues. If the issue is related to Sage Intacct, we will open a support request with Sage Intacct. If the issue is related to third-party software, we will refer the issue to the third party. If the issue is related to custom software, we will refer the issue to a Cargas Software Engineer. If the issue is related to Cargas Energy software, we will refer the issue to a Cargas Energy Software Engineer.

(4) Troubleshooting for issues related to changes in Sage Intacct configuration settings or permissions is covered under the Premium plan; all other troubleshooting will incur additional consulting charges (time-and-materials).

(5) Modifications are limited to changes to configuration settings only.

(6) A list of support tickets entered and services received will be delivered 1x annually via video call from your Account Manager at time of contract renewal.

(7) To help your organization grow, change, and adapt to new landscapes, your account manager will lead a dialog with you/your team about your organization's upcoming opportunities, any new Sage Intacct tools/features you might not know about, third-party vendors that could be of service, and other strategies and ideas for success.

(8) A technical consultant familiar with your organization will provide up to 4 hours of consulting services to analyze your current environment, meet with you to discuss your current business processes, and provide personalized suggestions to help you improve efficiency with process changes and third-party software recommendations. This will be delivered once annually via a video call from a support specialist in tandem with your Annual Report Card.