

Support & Services

Document Process Automation (DPA) Product Support Lifecycle Policy

North American & Australian Operations

Version 1.0 | Effective July 1, 2010

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1. Product Support Lifecycle Overview

Bottomline’s Product Lifecycle Support Policy is designed to provide customers with consistent and predictable guidelines for support beginning with a product’s general availability, and continuing through the complete lifecycle to retirement and end of life. By understanding the support options available at each stage of the product lifecycle, customers are better able to manage and maximize the value of their IT investments, while planning for Bottomline support policy changes and future upgrades.

1.1 Lifecycle Terminology

To understand the Bottomline Product Support Lifecycle Policy, it is important to know how Bottomline uses the following terminology in the context of the policy:

Term	Definition
General Availability (GA) Release	A GA release refers to the introduction of a wholly new product, or a new software update for existing products.
Patch Release	A patch release addresses updates to an existing product and usually contains a small set of changes that are to be applied to a specific product version.
Hot Fix Release	A hot fix is focused on a critical bug remedy and is intended to address an immediate production or other mission-critical issue.
Legacy Products	A legacy product is a software product or a specific product version and platform (i.e. Windows, Unix, and AS400) that have been replaced with a newer GA product.
Customer Technical Assistance Center (CTAC)	CTAC is the North American and Asia-Pacific product support center for all Bottomline products.
Technology Refresh	A software or other update process that may be issued periodically in response to business or other technology needs. The refresh process provides flexibility to upgrade and/or migrate systems and prevent technology obsolescence.

1.2 Product Lifecycle Categories

This Product Support Lifecycle Policy provides clear guidance on future support plans for all Bottomline DPA products. Bottomline has defined three Product Lifecycle categories; all DPA products have been placed into one of these three categories.

The categories are:

Term	Definition
Core Portfolio	Core products are available to both new and existing customers and are actively marketed and sold by Bottomline.
Maintaining	Maintaining products are still being developed but are no longer available for sale to new customers and are not actively marketed. Existing customers of products in this category may continue to add new software licenses or new application modules as needed.
Legacy	Legacy products are not being developed, are not available for sale to new customers and are no longer being marketed.

2. Core Portfolio Product Support Policy

2.1 Category Summary

Core Portfolio Products consist of all new and recent generally available (GA) product releases from Bottomline. Once a new version of a core product is released, the preceding version is automatically r and removed from general sale to new customers. Existing users can purchase additional license options for their current product version. A core product version will be totally removed from sale once it is within 12 months of its extended support date or sooner by market announcement at Bottomline’s discretion.

2.2 Product Lifecycle

Bottomline will offer a minimum of eight (8) years of Standard and Extended support for Core Portfolio products. Standard Support will be provided for five (5) years beginning when the product becomes generally available. Extended Support will be provided for three (3) years following the end of Standard Support. At its discretion, Bottomline may also elect to provide Continual Support after the expiration of Extended Support on a product-by-product basis.

1	2	3	4	5	6	7	8
Standard Support					Extended Support		

2.3 Core Portfolio Product Support Phases

During the Core product lifecycle, Bottomline will offer two phases of support. These phases include:

- Standard Support
- Extended Support

Support Phase	Standard Support	Extended Support
CTAC Phone Support	√	√
Escalation Support	√	Limited
Product Upgrades/Hotfixes	√	√
Product Patches	√	Limited
Online Customer Care Portal	√	√

2.2.1 Standard Support Phase

Standard Support is the first phase of the product support lifecycle. This phase includes:

- Five (5) years of support
- Phone support through Bottomline’s CTAC
- Call escalation and resolution

- Product software upgrades offered at no charge (not including optional professional services)
- Product software patches and hotfixes
- Access to Bottomline’s online Customer Care Portal

2.3.2 Extended Support Phase

Extended Support follows the Standard Support phase of the product support lifecycle. Maintenance fees for Extended Support will be increased by 30 percent over and above the existing maintenance fees provided under Standard Support. This increase will continue for the life of the extended support period or until the customer migrates to a core portfolio product/version.

This phase includes:

- Three years of support
- Support through Bottomline’s CTAC Limited call escalation and resolution
- Limited product software patches and hot fixes
- Access to Bottomline’s online Customer Care Portal

Bottomline may elect to provide additional support beyond the Extended Support phase on an exception or product-by-product basis. This option is known as the Continual Support Option. Additional information on this option is located under the **Continual Support Option** section in Appendix A.

3. Maintaining Product Support Policy

3.1 Category Summary

Maintaining products include those products that are in a preserved development state. Products in this category will continue to receive technology refreshes to support new releases of operating systems, ERPs, databases or other supporting technologies that are critical to ongoing performance. Maintaining products will move to the Legacy product category as new Core portfolio products are generally available to replace and/or provide a migration path.

3.2 Product Lifecycle

Bottomline will offer Standard Support for all products in the Maintaining product category. Products in the Maintaining category will not be moved into the Legacy category until a replacement product or migration path to a Core portfolio product is available.

Bottomline reserves the right to move a product from the Maintaining to Legacy category via market announcement and will provide at least three (3) months notice of this change.

3.3 Maintaining Product Support Phase

Bottomline will offer Standard Support for products in the Maintaining product category. This support phase includes:

- Phone support through CTAC
- Limited call escalation and resolution
- Product software upgrades offered at no charge (not including optional professional services)
- Limited product software patches and hot fixes
- Access to Bottomline's online Customer Care Portal

4. Legacy Product Support Policy

4.1 Category Summary

Legacy products are those which are in a mature development state. Products in this category are aligned with external market dependencies such as operating systems, ERP systems, and third party software platforms that are no longer supported or approaching extended support retirement dates. Products in this category will move into the End of Sale (EOS)/End of Life (EOL) phase of the Legacy Product Support Lifecycle as they mature and/or as other integrated technologies are no longer supported by their vendor.

Products in the Legacy category are not available for sale to the general market but existing users may purchase additional license options for their current product. A legacy product version will be completely removed from sale within 12 months of its extended support date or earlier by market announcement at Bottomline's discretion.

4.2 Product Lifecycle

Bottomline will offer a minimum of three (3) years of Standard and Extended support for Legacy Products. Standard Support will be provided for two (2) years from the effective date of this policy. Extended Support will be provided for one (1) year following the end of Standard Support.

1	2	3
Standard Support		Extended Support

4.3 Legacy Product Support Phases

During the Legacy product lifecycle, Bottomline will offer two phases of support. These phases include:

- Standard Support
- Extended Support

Support Phase	Standard Support	Extended Support
CTAC Phone Support	√	√
Escalation Support	Limited	Limited
Product Upgrades	√	√ ¹
Product Patches/Hotfixes	Limited	Limited
Online Customer Care Portal	√	√

¹ Additional services may be required to upgrade a Legacy product to a Core Portfolio product.

4.3.1 Standard Support Phase

Standard Support is the first phase of the product support lifecycle. This phase includes:

- Two (2) years of support
- Phone support through Bottomline's CTAC
- Limited call escalation and resolution
- Product software upgrades offered at no charge (does not include optional professional services)
- Limited product software patches and hot fixes
- Access to Bottomline's online Customer Care Portal

4.3.2 Extended Support Phase

Extended Support follows the Standard Support phase of the product support lifecycle. The maintenance fee for Extended Support will be increased by 30 percent beyond the existing maintenance fee charged under Standard Support. This increase will remain in effect for the life of the extended support period or until the customer migrates to a Core portfolio product.

This phase includes:

- One (1) year of support
- Phone support through Bottomline's CTAC
- Limited call escalation and resolution
- Limited product software patches and hot fixes
- Access to Bottomline's online Customer Care Portal

5. End of Life (EOL) Policy

5.1 Summary

At some point, all products will reach the end of their Product Lifecycle. This can result from several factors, including changes in technology, changing market demands or the fact that Bottomline has replaced the product with functionally richer technology.

While this is a standard and well-established part of the overall software lifecycle, Bottomline recognizes that end of life milestones often prompt organizations to review the ways in which such end-of-sale and end-of-life decisions impact critical products in their environment.

5.2 Guidelines

All products defined as Legacy have been identified for end of life in the near future. To help our customers manage the end of life transition and to better understand how Bottomline can assist in the migration to alternative solutions, we have defined the following EOL Policy guidelines. Bottomline agrees to:

- Provide a product migration path or a replacement product prior to EOL policy notification.
- Provide customers a minimum of 1 year advance notification of changes in Product Support Lifecycle status.
- Implement a staged approach to EOL product status.

5.3 Milestones

Once a product has been identified for EOL, the policy identifies three stages. These stages are:

1. **End of Sale** – the date when the product is no longer available for purchase by new or existing customers. This date is the first phase of the EOL Policy process. This is typically a one-year period prior to the end of standard support, but Bottomline reserves the right to end of sale a specific product earlier or later.
2. **End of Standard Support** – this is the date when the product moves from the Standard Support phase into the Extended Support phase.
3. **End of Extended Support** – the date when the product moves from Extended Support phase to Continual Support. This is typically a one-year period after the end of standard support but Bottomline reserves the right to adjust this period.

Appendix A

A. Additional Support Options (North America Only)

A – 1 Premium Support

Bottomline’s Premium Support provides enhanced support over the Standard Support phase. Differentiators are priority handling of all phone support inquiries as well as immediate escalation to a Senior Technician for issue diagnosis and resolution. Additionally, Premium Support provides 24 x 7 support for “production down” emergencies that occur outside Bottomline’s normal CTAC hours of operation. Premium Support customers also take advantage of proactive monthly touch points to review open cases, evaluate system alignment with current business needs, answer any questions regarding system usage, and general best practice use of features and functions.

The annual maintenance fee for Premium Support is an additional 10% of the product list price and includes the following:

- 24 x 7 pager support for production down emergencies
- Access to the Premium Support phone queue providing you with direct access to Senior Technicians (2nd level support)
- Priority issue resolution: Premium Support issues will receive prioritization based on severity level.
- Priority issue escalation: Premium Support issues requiring additional assistance will receive priority
- Monthly recurring meetings between Bottomline and the customer

A – 2 24 x 7 Emergency Support

The 24 x 7 Support allows customers extra security should they experience a production down emergency outside Bottomline’s normal CTAC hours of operation. Customers who routinely execute business-critical document output off hours may want to consider this support offering to ensure help is available at any time should an emergency occur. The annual maintenance fee for 24 x 7 Emergency Support is \$4,995 US.

A – 3 Continual Support Option

Bottomline may elect to provide additional support beyond the Extended Support phase on an exception or negotiated case-by-case basis. The maintenance fee for Continual Support will increase by 30% over and above the existing Extended Support maintenance fee and increase by 30% of the previous year for each additional year of continual support available.

The Continual Support Phase includes:

- One to three years of support
- Phone support through Bottomline's CTAC
- Limited call escalation and resolution
- Limited product software patches and hot fixes
- Access to Bottomline's online Customer Care Portal