

# WorkXpress Agent Terms



## Agent Terms for Selling WorkXpress Engine

An “Agent” is a partner who generates new outside customers under a WorkXpress Portal Account. Typically, this customer would be managed under the WorkXpress account, or they would have their own Account. By bringing the customer under another account, the agent is not responsible for billing, as billing is always direct to the holder of the Account. An agent receives a share of revenues collected by WorkXpress for that customer;

### Revenue Shares & Services Provided:

Monthly aggregate collections	Revenue share	Included annual sales training	Sales & technical support
Up to \$2500	8%		WorkXpress website
\$5000	10%	x	Named Inside Rep
\$10,000	12%	x	Named Inside Rep Promotional material
\$15,000	15%	x	Promotional material Named technical sales support Named Inside Rep

### Agent Responsibilities:

- Lead generation and referral:
  - Seeking out and introducing prospective customers to WorkXpress
  - Registering leads
  - Supporting WorkXpress sales team during the sales cycle as needed
- Ongoing Account Management:
  - Maintaining a strong relationship with the client, serving as the relationship sales manager of the account (yearly review required)
- Maintain product and sales knowledge:
  - Participate in training sessions as scheduled

## **WorkXpress Responsibilities:**

- End-client sales and management:
  - Contracting
  - Account management
  - Invoicing & collections
- Product licensing, maintenance/support, hosting/operations

***Details of end-client services are presented on the following pages.***

## Summary of Services

### Licensing

- Right to use the WorkXpress application for the number of user seats purchased
- Unlimited access to non-protected off-the-shelf content, such as CRM tools, Project Management, Inventory and much more.

### Support

- 7/24/365 support for “down” issues
- Tier 1 “Help desk” and Tier 2 “Application” support during business hours
- Tier 1/2 support hours up to allowance (time above allowance billed at \$150/hour)
- Tier 3 “Engine” support included in all service plans

### Maintenance, Hosting & Operations Services

- Locally-managed hardware, “cloud” hardware, or WorkXpress hardware hosting
- Automatic software updates
- Automatic data backups delivered locally to the hosting server or optionally transmitted to an offsite location
- Automated monitoring of all critical system variables with automatic notification
- Note: WorkXpress maintains the right to request applications be moved to some non-WorkXpress hosting environment at any time.

### Training

- Each quarter, WorkXpress may host a remote training session or an in-person training session (with expenses), for users, train-the-trainer, tools or sys admin.
- Includes 1-hour sessions for each item, conducted remotely. In-person training available on an expenses-basis.

## **Additional Professional Services**

\$150 per hour + GSA per diem if traveling, sold in 1 week minimum blocks.  
Includes project management, design, customization and software development as needed

## **Additional Training**

\$500 per one-hour class, up to fifteen attendees, conducted remotely.

## Licensing

### Users

WorkXpress is licensed on a per seat basis. There are multiple seat-types allowed to account for the diverse needs of any business. These types include;

1. **Standard User** – a traditional user of a software product or service
2. **Infrequent User** – for example a customer or vendor who is expected to log into the application very infrequently, if ever. As a general guideline, a User who logs in less than 10 times per year would qualify as an Infrequent User.

All billing and per-seat charges are based on the number of Standard Users only. WorkXpress maintains the right to audit User types at any time, and to make retroactive changes to billing arrangements as appropriate.

### Applications

WorkXpress does not charge for off-the-shelf content. WorkXpress is designed to support the creation, transfer and installation of application files by the Customer and the Community. You may install any freely available WorkXpress application file into a licensed production WorkXpress application. Examples of the types of freely available applications may include CRM, Project Management, Inventory, Issue Tracking and Accounting.

Note that some providers may produce proprietary applications based on the WorkXpress engine, and that use of these applications may incur additional charges as determined by that vendor.

**As a licensed WorkXpress user, you are encouraged to add as much functionality to your WorkXpress application as is necessary to make your organization operate more effectively.**

## Maintenance & Support

### Help Desk

The WorkXpress team provides a help desk to answer questions related to the product. Issues related to application configuration will be forwarded to Tier 2 support, while possible defects in the WorkXpress engine will be forwarded to Tier 3 support. Tier 1 support will be available during business hours for any questions.

### 7x24 On-Call Support

7x24 on-call support will be provided for reporting “down” or “critical” issues.

### Help Desk / Tier 1 Support

The WorkXpress team provides a help desk to answer questions related to the product. Tier 1 support will be available during business hours for any questions.

### Tier 2 Support

Issues related to application configuration will be forwarded to Tier 2 support.

### Tier 3 Support

Possible defects in the WorkXpress engine will be forwarded to Tier 3 support. Support time related to engine defects will not be charged to the client.

## Hosting & Operations Services

### Option 1: Locally Managed Hardware (optional)

For a corporate customer purchasing 25 seats or more, if desired, the application can be hosted on the customer's servers at its data center. Note that the WorkXpress team must have networked access to the WorkXpress servers if required to monitor and maintain the configuration.

To support a locally-managed hardware environment, WX currently requires an Open Virtualization Format (OVF)-certified virtual server environment (other formats are planned to be supported soon). OVF greatly simplifies the installation and support of server-based applications.

Under this option, WX provides the customer with tools to administer its own WX implementation. Administrative support will be covered under Maintenance & Support as described above.

### Option 2: WX Hardware Hosting (optional)

The WorkXpress application will be hosted at a secure data center. Some key features included are:

Each production application installed on its own Virtual Appliance. Each Virtual Appliance is configured with:

- Dual to Quad Core processors.
- 2GB to 16 GB of RAM
- 2-480GB of Hard Drive.

Gigabit access to the hosting site's internet connection.

Professionally-managed firewall locks out all non-web traffic.

### Hosting Site Features

- 99.999% resource availability
- Redundant Power (Grid, Battery, Generator)
- Dual Climate Control
- Connectivity to several internet backbones
- 24/7 Support at server site.

For this option, WX will provide systems & security management and data backups.

Hosted Service Terms and Conditions, including monthly per-user storage and bandwidth caps, apply.

**NOTE:** For customers wishing to take over management of their WX environment gradually, transition between WX hosted and locally-hosted servers is offered (build-operate-transfer model).

## Automatic Software Updates

Regardless of the hosting option chosen, WX will automatically load and install new versions of the application program into all Project applications as they become available. The application manager will then be able to perform Testing and Production updates according to their own schedule.

## System Monitoring and Diagnostics:

WorkXpress provides tools for automatically monitoring and diagnosing systems issues or troubles. In the case of WorkXpress hosting, all systems diagnoses are handled by WorkXpress.

In the case of local hosting, WorkXpress will make the systems administration tools available to the client upon request, at which point the client will become the first line of support for Systems Administration issues.

## Training

WorkXpress is passionate about seeing its customers be successful, and training is an important part of that success. WorkXpress offers remote and in-person training sessions on a regular basis of both standard information and based on customer-specific needs. For in-person training, additional costs may apply. The standard training sessions include;

### User Training

This training shows clients how to use applications built on the WorkXpress platform. Training can target end-users or the client's training department (train-the-trainer).

### Tools Training

In these classes, users are shown how to work with WorkXpress configuration and development tools to build custom business applications.

### Systems Administration Training

Students in these classes will learn how to manage a WorkXpress installation in their data center, including systems management, data management, providing and managing security, etc.