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# Introduction

Docupal Demo, LLC is pleased to present this maintenance proposal to Acme, Inc (ACME-1) for your Microsoft Dynamics 365 system. This proposal outlines our comprehensive maintenance services designed to ensure the stability, optimal performance, and longevity of your Dynamics 365 investment.

## Purpose

This document details the services Docupal Demo, LLC will provide to maintain and support your Dynamics 365 environment. Our goal is to minimize downtime, improve user satisfaction, and maximize your return on investment.

## Client Objectives

We understand that ACME-1 requires a stable and efficiently operating Dynamics 365 system to support your critical business processes and growth. Our maintenance services are specifically designed to meet these needs by:

- Ensuring system stability
- Providing timely technical support
- Optimizing system performance

## Services Overview

Docupal Demo, LLC will provide a range of services, including:

- Technical support to resolve any system issues.
- Proactive system monitoring to identify and address potential problems before they impact your operations.
- Regular updates and patches to keep your system secure and up-to-date.
- Limited customization support to adapt the system to your evolving business requirements.

We are confident that our maintenance services will provide ACME-1 with the support and expertise needed to maintain a healthy and productive Dynamics 365 environment.



# Current System Assessment

ACME-1 currently utilizes Dynamics 365 for both Sales and Customer Service. The deployed versions are 9.1 for both modules. Our assessment identifies both strengths and areas for improvement within your existing Dynamics 365 environment.

## Strengths

The primary strength of your current system lies in its robust CRM capabilities. Dynamics 365 provides a solid foundation for managing customer relationships and sales processes.

## Weaknesses & Risks

We have identified occasional performance lags as a weakness. Additionally, potential data loss during upgrades and user adoption challenges represent key risks.

## System Usage

# Maintenance Services Overview

Docupal Demo, LLC will provide comprehensive maintenance services for ACME-1's Dynamics 365 system. Our goal is to ensure system stability, minimize downtime, and maximize your return on investment. We offer a range of services designed to keep your Dynamics 365 environment running smoothly.

## Technical Support

We offer technical support to address any issues or questions that may arise. Our support team is available to assist with troubleshooting, problem resolution, and general guidance on using Dynamics 365.



## System Monitoring

We provide continuous system monitoring to proactively identify and address potential issues. This includes monitoring system performance, identifying errors, and ensuring that all components are functioning correctly. Our monitoring services help prevent disruptions and maintain optimal performance.

## Preventative Maintenance

Regular preventative maintenance is essential for the long-term health of your Dynamics 365 system. Our preventative maintenance services include:

- Regular system health checks
- Performance optimization
- Log file analysis
- Database maintenance

## Updates and Patches

Keeping your Dynamics 365 system up-to-date is crucial for security and performance. We handle the application of updates and patches during scheduled maintenance windows. ACME-1 will receive prior notification before any updates are applied. This ensures minimal disruption to your business operations.

## Customization and Enhancement Support

We understand that ACME-1 may require customizations and enhancements to meet specific business needs. We offer limited customization and enhancement services as part of our maintenance agreement. Details regarding customization and enhancement services can be found in Appendix A. These services include:

- Minor modifications to existing features
- Development of new reports or dashboards
- Integration with other systems

## Service Level Agreement (SLA)

Our maintenance services are backed by a comprehensive Service Level Agreement (SLA). The SLA outlines our commitment to response times and issue resolution. It also details the availability of our support services.



## Maintenance Schedule

We will work with ACME-1 to establish a mutually agreeable maintenance schedule. This schedule will outline the timing of updates, preventative maintenance, and other services. We strive to minimize any impact on your business operations during maintenance activities.

## Service Level Agreement (SLA)

Docupal Demo, LLC is committed to providing reliable maintenance services for ACME-1's Dynamics 365 system. This Service Level Agreement (SLA) outlines our commitments to response times, resolution targets, support hours, and escalation procedures. We aim to ensure system stability and minimize disruptions to ACME-1's operations.

### Response and Resolution Times

Our support team will provide an initial response to all support requests within one (1) hour of submission. Resolution times will vary depending on the severity and complexity of the issue. Our target resolution times are as follows:

- **Severity 1 (Critical):** 4 hours
- **Severity 2 (High):** 6 hours
- **Severity 3 (Medium):** 8 hours
- **Severity 4 (Low):** 12 hours

Severity levels will be determined based on the impact to ACME-1's business operations.

### Support Coverage Hours

Standard support coverage is available from 8:00 AM to 6:00 PM Eastern Time (EST), Monday through Friday, excluding US public holidays. Extended support coverage options are available upon request and may incur additional charges.

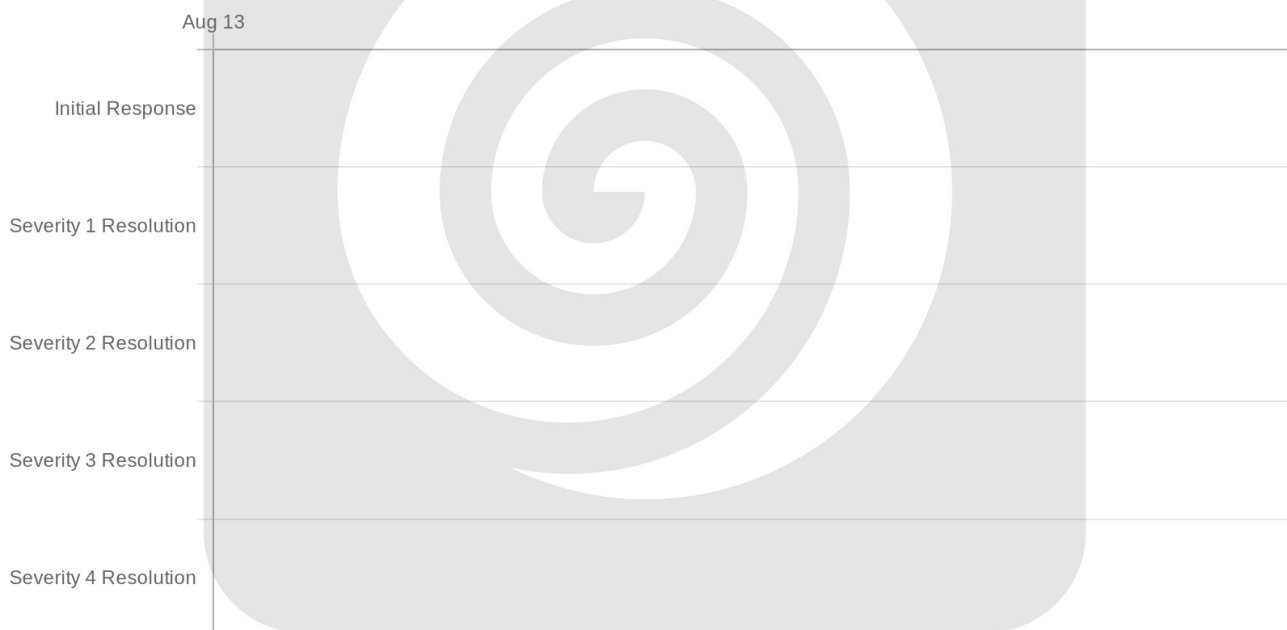


## Escalation Procedures

Docupal Demo, LLC utilizes a tiered support system to ensure efficient issue resolution. If an issue is not resolved within the target resolution time, it will be escalated to the next support tier. Escalation points are clearly defined within our internal support team, ensuring prompt attention to critical issues. ACME-1 will be notified of any escalations and kept informed of the progress toward resolution. The escalation path is as follows:

1. **Tier 1 Support:** Initial point of contact for all support requests.
2. **Tier 2 Support:** Senior support engineers with specialized knowledge.
3. **Tier 3 Support:** Technical Leads and subject matter experts.
4. **Management:** If necessary, the issue will be escalated to Docupal Demo, LLC management for further action.

## SLA Timeline





# Pricing and Cost Breakdown

This section details the investment required for DocuPal Demo, LLC to maintain your ACME-1 Dynamics 365 system. We are committed to providing transparent and competitive pricing for our comprehensive suite of services.

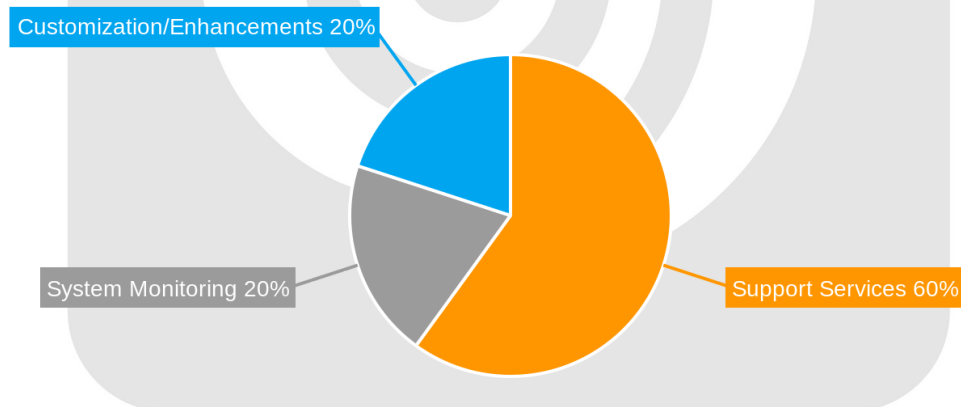
## Total Maintenance Cost

The total annual cost for the Dynamics 365 maintenance services is \$25,000. This covers all aspects of the maintenance plan as described in this proposal.

## Cost Allocation

The annual cost is broken down into the following service components:

- **Support Services:** \$15,000
- **System Monitoring:** \$5,000
- **Customization/Enhancements (up to 20 hours):** \$5,000





## Payment and Renewal Terms

We operate on a quarterly billing cycle. Invoices will be issued in advance of each quarter. Payment terms are net 30 days from the invoice date.

The maintenance agreement will automatically renew annually, providing continuous coverage for your Dynamics 365 system. You may cancel the agreement by providing written notice at least 30 days prior to the annual renewal date.

## Cost Summary

Item	Cost
Support Services	\$15,000
System Monitoring	\$5,000
Customization/Enhancements	\$5,000
<b>Total Annual Cost</b>	<b>\$25,000</b>

## Implementation Plan and Timeline

Our implementation plan ensures a smooth transition and rapid value realization for ACME-1. It's structured around three key phases, each with specific activities and timelines. We aim to minimize disruption and maximize the benefits of our maintenance services.

### Phase 1: System Assessment (1 week)

This initial phase focuses on understanding ACME-1's current Dynamics 365 environment. DocuPal Demo, LLC will conduct a thorough review of the system's configuration, integrations, and existing issues.

- **Activities:**
  - Initial meeting with ACME-1's team to define objectives and scope.
  - Review of ACME-1's Dynamics 365 setup and configurations.
  - Analysis of existing system logs and performance data.
  - Identification of potential risks and areas for improvement.
- **Deliverables:**
  - System Assessment Report outlining findings and recommendations.



## Phase 2: Onboarding & Configuration (2 weeks)

Following the assessment, we'll proceed with onboarding and configuring our maintenance tools and processes. This phase requires close collaboration with ACME-1.

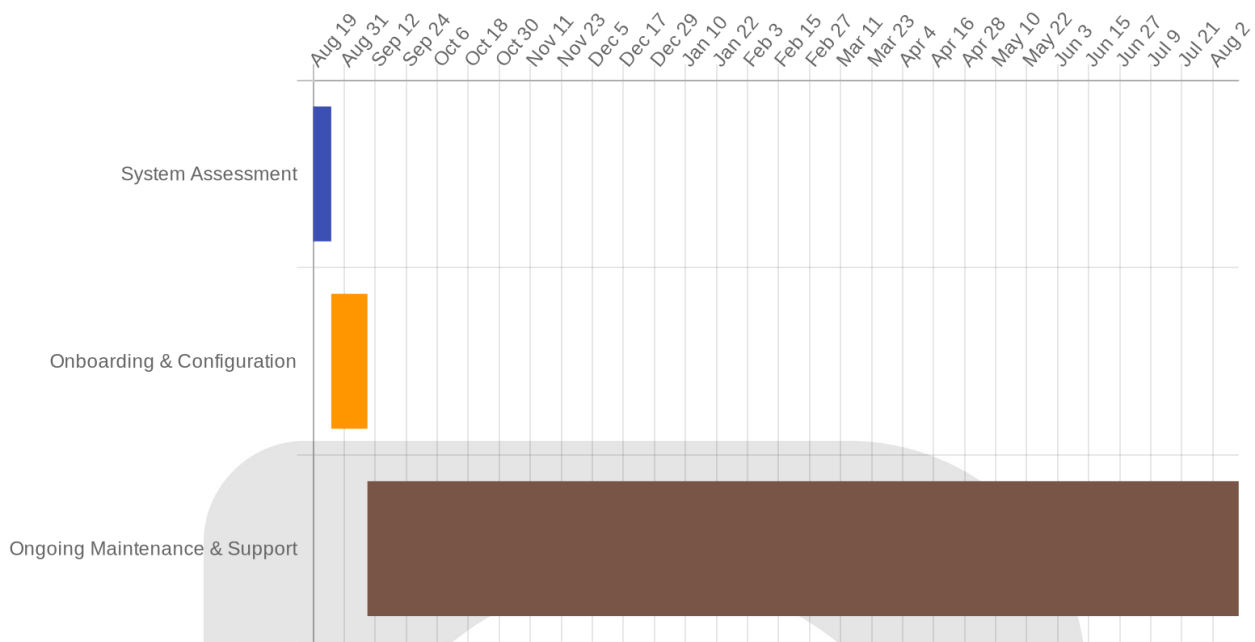
- **Activities:**
  - Configuration of monitoring tools to track system performance.
  - Setting up alerts for critical issues and potential downtime.
  - Establishing secure access for DocuPal Demo, LLC's support team.
  - Knowledge transfer sessions with ACME-1's designated point of contact.
- **ACME-1 Responsibilities:**
  - Providing necessary system access to DocuPal Demo, LLC.
  - Assigning a primary point of contact for communication and coordination.
  - Participating in initial assessment and knowledge transfer sessions.
- **Deliverables:**
  - Fully configured monitoring and alerting system.
  - Established communication channels and support workflows.
  - Documented onboarding process and knowledge base.

## Phase 3: Ongoing Maintenance & Support (Ongoing)

This phase marks the start of our continuous maintenance and support services. We will proactively monitor the system, address issues, and implement updates to ensure optimal performance.

- **Activities:**
  - 24/7 system monitoring and performance analysis.
  - Proactive issue detection and resolution.
  - Regular system updates and security patches.
  - Technical support via phone, email, and online portal.
  - Periodic performance reviews and optimization recommendations.





## Client Responsibilities and Expectations

To ensure the successful maintenance of your Dynamics 365 system, we require your active participation and cooperation. Your responsibilities include providing us with the necessary access and information.

### Access Requirements

You must grant our team administrative access to your Dynamics 365 environment. We also require access to relevant business data necessary for troubleshooting and maintenance.

### Communication Protocols

Effective communication is crucial. We will primarily communicate via email and scheduled calls. You will also have access to a dedicated support portal. Please use this portal to report issues and track their resolution.



## Issue Reporting

When reporting issues, please use the support portal. Provide detailed descriptions of the problems you are experiencing. Include screenshots or any other relevant information that can help us understand and resolve the issue quickly. Your clear and timely communication will help us maintain system stability and minimize downtime.

## Case Studies and Portfolio

We at Docupal Demo, LLC have a proven track record of successfully maintaining Microsoft Dynamics systems across various industries. Our experience ensures we can provide ACME-1 with exceptional service and measurable results.

### Contoso Ltd.: Reducing Downtime in Manufacturing

We implemented a comprehensive maintenance plan for Contoso Ltd., a manufacturing company, similar to what we propose for ACME-1. This plan included proactive system monitoring, timely updates, and responsive technical support.

The results were significant. We reduced their system downtime by 40%. This ensured smoother operations and less disruption to their manufacturing processes.

### Improved User Satisfaction and System Efficiency

Beyond reduced downtime, our maintenance services consistently improve user satisfaction and system efficiency. For our clients, we've seen an average increase of 25% in user satisfaction scores after implementing our maintenance plans. This improvement reflects the enhanced system stability and responsiveness our services provide. We have also consistently increased system efficiency across all our clients.

## Industry Experience

Docupal Demo, LLC has extensive experience maintaining Microsoft Dynamics systems in the following sectors:

- Manufacturing
- Retail



- Financial Services

Our understanding of the unique challenges and requirements of each industry allows us to tailor our maintenance plans for optimal performance and value. We're confident our expertise will translate into a successful partnership with ACME-1.

## Terms and Conditions

This section outlines the terms and conditions governing the Dynamics 365 maintenance services provided by DocuPal Demo, LLC ("DocuPal") to ACME-1 ("Client"). By accepting this proposal, the Client agrees to be bound by these terms.

### Obligations of DocuPal Demo, LLC

DocuPal will provide diligent maintenance services as described in this proposal. This includes technical support, system monitoring, updates, and limited customization. DocuPal will use commercially reasonable efforts to ensure the stability and availability of the Client's Dynamics 365 system.

### Obligations of ACME-1

The Client will provide DocuPal with timely payment for services rendered. The Client will also cooperate with DocuPal in providing access to systems and information necessary for effective maintenance.

### Payment Terms

Payment is due within 30 days of invoice date. Late payments may be subject to a late fee of 1.5% per month, or the maximum rate permitted by law, whichever is lower.

### Confidentiality

Both DocuPal and the Client agree to hold confidential all proprietary or confidential information of the other party. This includes, but is not limited to, business plans, customer lists, pricing information, and technical data. This obligation of confidentiality will survive the termination of this agreement.



## Limitation of Liability

DocuPal's liability for any claim arising out of or related to this agreement will be limited to the amount of fees paid by the Client to DocuPal under this agreement during the twelve (12) months preceding the event giving rise to the claim. In no event will DocuPal be liable for any indirect, incidental, consequential, or punitive damages.

## Termination

Either party may terminate this agreement with thirty (30) days written notice to the other party. Upon termination, the Client will pay DocuPal for all services performed up to the date of termination.

## Renewal

This agreement will automatically renew for successive one-year terms unless either party provides written notice of termination at least thirty (30) days prior to the end of the then-current term.

## Governing Law

This agreement will be governed by and construed in accordance with the laws of the State of California, without regard to its conflict of laws principles.

## Entire Agreement

This proposal constitutes the entire agreement between DocuPal and the Client with respect to the subject matter hereof and supersedes all prior or contemporaneous communications and proposals, whether oral or written.

# Conclusion and Next Steps

## Proposal Summary

This maintenance proposal details how Docupal Demo, LLC will help ACME-1 keep its Dynamics 365 system running smoothly. Our services include technical support, system monitoring, and essential updates. We aim to minimize downtime and





maximize the return on your Dynamics 365 investment.

## Next Steps

### Review and Acceptance

Please carefully review this proposal. If the terms are acceptable, we kindly request that you sign and return the proposal to Docupal Demo, LLC.

### Kickoff Meeting

Upon acceptance, we will schedule a kickoff meeting. This meeting will allow us to discuss implementation timelines, assign responsibilities, and ensure clear communication throughout the maintenance period.

### System Access

To begin providing our services, we will require appropriate access to your Dynamics 365 system. We will work with your team to establish secure and efficient access protocols.

### Getting in Touch

If you have any questions or require further clarification, please do not hesitate to contact John Doe at [john.doe@docupaldemo.com](mailto:john.doe@docupaldemo.com) or (555) 123-4567. We look forward to partnering with ACME-1 to ensure the ongoing success of your Dynamics 365 system.

