MetaRecords Support and Software Maintenance Plans

OMTI offers three different plans for supporting and maintaining your MR8 office:

- **Standard** — Regular MR support plan includes unlimited phone, live chat and remote support* during our regular office hours. Included free in MR subscriptions. Includes some fee-based services. Can be upgraded to Premium for an additional monthly fee.

- **Premium** — Full-featured support plan includes MR8 Server re-installation & database moving and faster response time. Available for a monthly fee, plus a per-incident fee for extended service hours.

- **Public** — A limited plan only available to clients who purchased MR prior to January 1, 2002. It provides support on a per-incident fee basis. Can be upgraded to Standard or Premium for an annual fee.

General support plan information

As our clients' need change and new support technologies become available, we periodically revise existing plan benefits and add new ones. For the latest benefits listing, download the latest Support plan from our website, http://www.omti.com/mr.

Most support services are only available during our regular office hours: 8 am–5 pm PT, M–F, excluding holidays. Support information and news are available 24x7 on our website. Premium clients can schedule certain support services, such as program update installations, during our extended service hours for an additional fee.

All firms using MR software are required to be on a support plan. Standard support is included in MR subscriptions. Optional MR Premium support contracts are an additional monthly fee.

You can change plans at any time. If you upgrade to Premium support, changes in services do not occur until first monthly payment is received. To change your support plan, contact OMTI Sales.

If you should fall into arrears on any support plan payment, OMTI will suspend your MR support. You will also no longer be able to get program updates. If you should call us for support while in arrears, we will ask for a credit card number to charge the per-incident fee before providing the requested support. If you wish to renew your support plan at a later date you will be charged for a minimum of one month's support plus for the unsupported time as well.

Support policies do not include: Training, beyond three (3) initial one-to-one remote sessions covering set-up and basics, plus what is provided online; hardware or third-party software maintenance and support; disaster recovery; support for your network or Internet access; off-business-hour support, except for Premium users (fee-based, by appointment only); or custom programming. We do offer custom reports starting at a base rate of $2,000 per report, plus you must be on Premium Support and pay an extra 15% annually of the total billed amount for any custom programming.

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*Remote access requires a browser that allows ActiveX Controls to be installed by MR Support.

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Support plan benefits

	Public	Standard	Premium
Online support	O	O	O
Initial product installation	X	$250 + optional data conversion	
Telephone, fax, email, & remote support*	$250/incident	O	O
Live chat support	X	O	O
Update releases	$500/incident	O	O
Upgrade releases	X	O (in subscriptions, requires data conversion for extra fee)	
Server re-installation & database moving service	$500/incident	$250/incident	O
Guaranteed response	X	w/i 24 bus. hrs.	w/i 4 bus. hrs.
Extended service hours	X	X	fee-based
Custom programming	X	fee-based	fee-based

O = included X = not included

Service descriptions

Initial product installation

To ensure that your MR software is installed correctly, OMTI Support does the initial installation of your MR Server and workstations during our regular office hours. We will consult with your staff and/or third-party technicians to coordinate your set-up with your work environment and schedule.

Due to the complex nature of MR's internal structure, we do not allow clients or third parties to install MR Server themselves. You are allowed to perform your own workstation installation, but installation by OMTI Support is included in both Standard and Premium support plans.

Online support

The OMTI KnowledgeBase contains information on product releases, answers to frequently asked questions (FAQs) and step-by-step solutions to common operational and software problems. It is available through our customer portal. You can search for articles in this online database by keyword, product, most viewed or most recently posted. The KnowledgeBase covers all areas of currently-supported OMTI products, such as the Calendar and Billing modules in MR8.

Training videos and downloadable user guides are available in the Team MR section of our website: www.omti.com/mr/.

Included in all levels of support.

Telephone, live chat, fax, email & remote support

Our support staff is available during our regular office hours to provide support in several ways. If you can't find the answer you need in online support, call OMTI Support or connect with them via live chat on our website for a direct answer.

Sometimes, it's easier to solve a problem by accessing your computer remotely. In those cases, OMTI Support will ask you to turn on OMTI Remote so they can view and control your computer while talking you through the solution.*

In addition to phone calls, you can also communicate with OMTI Support via email, support@omti.com, or fax, 650-560-6550.

Included in Standard and Premium support. Public users of MR can access telephone, fax, email and remote support for $250 per incident.

Remote access requires a browser that allows ActiveX Controls to be installed by OMTI Support.

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Guaranteed response

If you call and leave a message, send an email or fax, MR's guaranteed response time is 24 hours for Standard support clients and four hours for Premium clients, during our regular office hours.

Update releases

Updates are versions of MetaRecords that add new features, fix bugs, and improve usability or performance. They are included free in software maintenance contracts and are designated by the current version number and a serial decimal number (i.e., MetaRecords 8, version 8.7145).

Available in Standard and Premium support plans. Premium users who do not want to disrupt their work day can also schedule installations after our regular office hours for an additional fee. (See Extended Service Hours.) Public users of MR can add updates to their system for $500 per incident.

Upgrade releases

Upgrades are major releases of MetaRecords and are designated by a new version number (i.e., MetaRecords 9). Upgrades are included free in subscription software maintenance contracts, but an upgrade service fee of $250 for converting data will be charged and payment due in full when invoiced.

Available in MR subscription Standard and Premium support plans. Premium users who do not want to disrupt their work day can also schedule installations after our regular office hours for an additional fee. (See Extended Service Hours.) Upgrade releases are not included in support plans for purchased versions of MR or for Public users of MR.

MR Server re-installation & database moving services

If your server crashes, you upgrade your hardware or you decide to move your MR Server to another system, you will need to have it re-installed. If you ever have a problem with your MR database, you will need to restore it from an earlier back-up. And if you want to transfer your MR database to another computer in your system, you will need to have it moved and re-attached.

MR Server re-installation, database restoration and database moving services by OMTI Support during regular service hours is included in Premium support. Other MR clients can schedule re-installations during our regular office hours for a fee of $250/incident if they are on Standard support or $500/incident if they are not on support.

Premium users who do not want their work day disrupted can also schedule re-installations after our regular office hours for an additional fee. (See Extended service hours.)

Priority call-back

Premium clients who contact OMTI Support via voice mail, email, or fax are guaranteed a response from OMTI Support within four hours during our regular office hours.

Included in Premium support.

Extended service hours

For Premium clients who don't want to interrupt business during the day for necessities such as installing updates or upgrading their systems, MR support is available by appointment after our regular business hours. OMTI extended service hours are 7–10 pm CT, M–F, and 12–8 pm CT, Saturdays, excluding holidays.

Fee-based option in Premium support. Costs $250 for the first hour, then $125/hour after the first hour per appointment/resolution.

Not available in Standard support.

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Custom programming

If your business processes require something, such as a report or form, that is not in MR8, we can develop a customized solution for you.

Fee-based option. Costs a minimum of $2,000. Requires an on-going payment of 15% annually of total billed amount for custom programming to maintain custom code.

For more information

If you would like more information about our products or services, please contact OMTI via:

email: info4@omti.com

phone: 650-544-2147

fax: 650-560-6550

mail: 3420 Bristol St., Suite 400, Costa Mesa, CA 92626

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