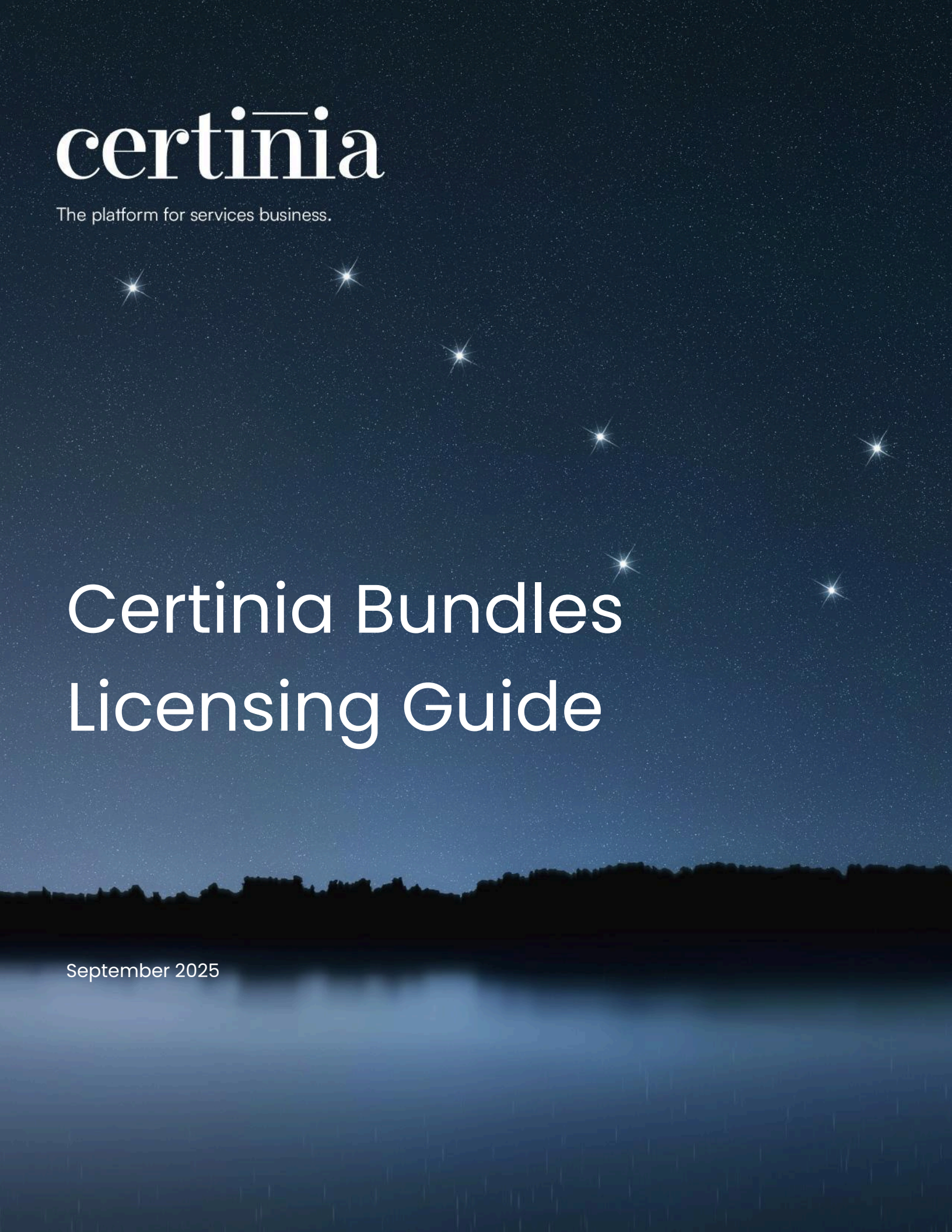




# certinia

The platform for services business.

# Certinia Bundles Licensing Guide

September 2025

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## Introduction

Certinia, formerly FinancialForce, offers customer-centric business applications on the leading cloud platform from Salesforce. We accelerate business growth with the only modern Financial Management (FM) suite and the #1 Professional Services Automation (PSA), enabling real-time insights and intelligent decision-making. See your customers in full color with Salesforce and Certinia.

This guide will discuss how Certinia licenses **Financial Management Cloud** (FM Cloud), **Professional Services Cloud** (Professional Service Automation) solutions, **Customer Success Cloud** (CS Cloud) and related products.

This licensing guide is a high-level overview only, and is subject to change without notice. It is qualified in its entirety by Certinia's documentation, product usage terms and legal agreements with the customer.

## Licensing Structure

As a cloud-based SaaS provider, Certinia offers all licenses on an annual subscription basis. Our core licensing is based on two primary vectors: engines and users. Engines are per-company licenses granting access to functionality. Users are assigned on a named-user basis, meaning each user requires a dedicated user license. "User" means an individual (natural person) who is authorized by the customer to use a Certinia product, for whom the customer has ordered the product, and to whom the customer has supplied a user identification and password. Users may include, for example, the customer's employees, consultants, contractors and agents, and third parties with which the customer transacts business.

The User license provides Users non-perpetual rights (with no buy-out rights) to use the purchased Certinia product. As long as the customer is current on its subscription payments and adheres to its legal agreements with Certinia, it will have access to the most up-to-date version.

## PS Cloud Overview

PS Cloud licensing is based on the number of users accessing the system, as well as the size of the active resource pool being managed. In PS Cloud, every person or device whose identifying information is stored in PS Cloud as an active resource (even if not performing functions like T&E entry, viewing projects, or other activities requiring logging in), requires a PS Cloud Resource license. Each Full PS Cloud User license and PS Cloud End user license include a PS Cloud Resource license. For Resources who don't need to log into Certinia, a PS Cloud Resource license must be purchased.

## Indirect Access

Any access to Certinia or Salesforce functionality, intellectual property, or data from a Certinia application, whether directly or indirectly, must have a paid User subscription for access and use of such functionality, data or other intellectual property.

Indirect Access refers to customer's access of Certinia's data or functionality by a human, device, or system through an automated intermediary connection or interface, rather than directly logging into

Certinia. This includes both the input of transactions or data into Certinia as well as automated, dynamic access to Certinia's data.

Customer's use of any APIs is subject to license limits based on the number and type of User licenses purchased.

Below are some examples of Indirect Access:

- Users update playbook tasks in a centralized data platform, which triggers updates back into Certinia's solutions.
- Users update their time spent on a project within a 3rd party solution, which is then pushed into those resources' time entry tracking
- Users query Certinia solution via their connected Instant Messaging solution

For certain types of Indirect Access, Certinia may offer license alternatives other than User licenses.

## Indirect Access via 3rd Party AI solutions

Certinia is committed to delivering secure, high quality Certinia AI solutions.

Customers who are investing in their own AI infrastructure should be aware of the following policies.

- Agents or other AI connections may not be utilized to circumvent contractual restrictions to achieve, or provide, indirect access to Certinia services. This includes but is not limited to AI models, large learning models (LLMs), AI Agents, artificial intelligence system, or similar tools to access or interact with Certinia services.
- Connection to Certinia by 3rd party AI solutions is prohibited without prior Certinia authorization. For clarity, without authorization, customers may not assign Certinia licenses to facilitate connection with custom or 3rd party AI. This includes connections via Agent to A2A protocols, MCP Servers, or any other connection method.

## License Provisioning

Technologically, Certinia initially provisions the majority of its licenses to a customer's Salesforce Org as a "full" license of a specific family type (e.g. PSA, Accounting, OPI, etc.). This full license is then to be set up with relevant restrictions during the implementation and used in line with the contractual restrictions of the license type being purchased on the Order Form (e.g. PS Cloud End User, Communities, etc.). The applicable restrictions are specified in the [Product Usage Terms](#) for the purchased product or as otherwise referenced on the customer's order form. Useful explanations of some of the restrictions can also be found in this Licensing Guide. **It is the customer's responsibility to implement the contractual restrictions for each license type.** This means that, despite the way the licenses are provisioned, our customers are legally obligated to use the purchased licenses in accordance with the User rights they purchase. For example, a Full PS Cloud User and the PS Cloud End User are technically the same provisioned license but by contract, the customer cannot use them the same way.

While Certinia products are built on the Salesforce platform, separately-purchased Salesforce licenses are not needed to use most of our products. Our User licenses are provisioned with the appropriate Salesforce OEM embedded platform license to use Certinia functionality, except where noted in this

guide or the Product Usage Terms for a small subset of specific types of users. An example of this exception is when access is required to certain Salesforce-only objects or related Salesforce data.

Licenses must be purchased in order to configure users, including add-on users of a previously purchased product. After purchase, licenses are provisioned to a customer production org, following which an administrator is entitled to replicate the production licenses in a sandbox environment. The licensing rules and policies outlined in this Licensing Guide apply to all types of Salesforce instances, including production and sandbox environments.

Note, if the customer is already a Salesforce customer and intends to implement Certinia within their existing Salesforce org, they must be running Salesforce Enterprise edition or higher in order to be compatible with Certinia. Additionally, a User license may only be associated with one production organization.

## OEM Embedded Platform license

Most Certinia user licenses include a Salesforce OEM Embedded license, as indicated in the appendix details for each license. The OEM Embedded license is a contractually restricted Salesforce Enterprise Edition Platform license which allows access to a limited set of Salesforce objects as defined in the [OEM User License Guide](#). For instance, the OEM Embedded Platform license does not include access to the Opportunity object.

A customer may not use the OEM Embedded Platform license provided by Certinia to create custom objects, or to use custom objects other than those provided by Certinia within the scope of the relevant Certinia application service. A customer may only create custom objects using CRM or platform licenses purchased directly from Salesforce.

## Embedded Platform Admin User (Admin User)

One of every 50 users of each Certinia product family will be provisioned as an Embedded Platform Admin User instead of an OEM Embedded Platform license. Embedded Platform Admin User subscriptions may be used only to configure and administer Certinia products in support of the customer's use of those products. An Embedded Platform Admin User subscription may not be used to access, distribute, or use any Salesforce CRM functionality beyond that which overlaps with the [OEM Embedded Platform license](#). Please note that each Certinia product requires at least one dedicated Embedded Platform Admin User.

## Core Offers

All core bundles below include [Sandbox - Access](#). Bundles sold with a -Standard suffix include [Standard Support](#). Bundles sold with a -Premier suffix include [Navigator Premier](#). Bundles sold with an -Elite suffix include [Navigator Elite](#). All core bundles with a -Standard, -Premier, or -Elite suffix also include web-based [on-demand training](#).

## Certinia Suite User

- PS Cloud Full User: provides full read, create, delete, edit, and approval access to certain features of Professional Services Cloud. The PS Cloud Full User includes project management, resource management, time and expense management, approvals, basic revenue forecasting, billing events, and reporting.
- Financials Full User: provides full rights to read, create, delete, edit, and approve for the FM Cloud functionality covered by the Accounting and Revenue Recognition Engines. Includes full rights to the Subscription & Usage Billing Engine when the engine is purchased separately.
- Planning Full User: provides full rights to Certinia Planning when the Planning Engine is purchased separately. Planning Full Users can enter and save data on planning sheets (budgets, forecasts, or other models), and create, view, and share reports.
- Procurement User: provides full read, edit, and approval access to purchase approval, purchase request/requisition, & purchase order fulfillment.
- [Certinia Analytics Full User](#)

## Certinia Suite View User

Note: At least one full user of a product must be on the account in order for this user to utilize the corresponding view functionality.

- PS Cloud View User: permitted full access to the PS Cloud Chatter feature and read-only access to all other features and functions of PS Cloud.
- Financials View Only User: restricted to read-only access for the FM Cloud functionality covered by the Accounting Engine and Revenue Recognition Engines. Includes read-only access to the Subscription & Usage Billing Engine when purchased separately. Includes approvals functionality for billing and invoice data.
- Order Procurement & Inventory View and Approval User: provides users access to view and approve purchase requests, view and approve sales orders, and view inventory. Also includes Quote View & Approval if there is at least one Quoting/Sales Order User on the account.
- Customer Success Cloud View User: provides read-only access to Customer Success Cloud.
- Planning View User: provides read-only access to Planning when the Planning Engine is purchased separately. Also requires Certinia Analytics View User, purchased separately.
- Certinia [Core Analytics](#)

## FM Cloud Full User

- Financials Full User: provides full rights to read, create, delete, edit, and approve for the FM Cloud functionality covered by the Accounting and Revenue Recognition Engines. Includes full rights to the Subscription & Usage Billing Engine when the engine is purchased separately.
- Procurement User: provides full read, edit, and approval access to purchase approval, purchase request/requisition, & purchase order fulfillment.
- Planning Full User: provides full rights to Planning when the Planning Engine is purchased separately. Planning Full Users can enter and save data on planning sheets (budgets, forecasts, or other models), and create, view, and share reports.
- [Certinia Analytics Full User](#)

## PS Cloud Premium User

- PS Cloud Full User: provides full read, create, delete, edit, and approval access to certain features of Professional Services Cloud. The PS Cloud Full User includes project management, resource management, time and expense management, approvals, basic revenue forecasting, billing events, and reporting.
- Limited Financials Full User: provides full rights to read, create, delete, edit, and approve functionality **restricted** to the use of the Revenue Recognition Engine and Services Billing via the Accounts Receivable & Collections functionality of the Accounting Engine. Includes full rights to the Subscription & Usage Billing Engine when the engine is purchased separately.
- [Certinia Analytics Full User](#)

## PS Cloud Full User

- PS Cloud Full User: provides full read, create, delete, edit, and approval access to certain features of Professional Services Cloud. The PS Cloud Full User includes project management, resource management, time and expense management, approvals, basic revenue forecasting, billing events, and reporting.
- [Certinia Core Analytics](#)

## PS Cloud End User

- PS Cloud End User: allows the user to enter time and expense, edit their own assignments, risk and issue management for their own assignments, self-assign to assignments, update task status, update profile and skills, read the project Gantt, and use PS Cloud chatter. This user also includes the same view rights as the PS Cloud View User.
- [Certinia Core Analytics](#)

## PS Cloud View User

- PS Cloud View User: provides full access to the PS Cloud Chatter feature and read-only access to all other features and functions of PS Cloud.
- [Certinia Core Analytics](#)

## PS Cloud Resource (Standard Bundles utilize PSA Resource)

- PS Cloud Resource: allows for the creation and management of a Resource record in PS Cloud and does not include a user login with the license. A PS Cloud Resource is any person or device whose identifying information (for example, name or employee number for a person) is stored in the PS Cloud product as a resource.

## Customer Success Cloud Full User

- Customer Success Cloud Full User: provides full rights to read, create, delete and edit within Customer Success Cloud.
- PS Cloud View User: provides full access to the PS Cloud Chatter feature and read-only access to all other features and functions of PS Cloud.

→ [Certinia Core Analytics](#)

## Customer Success Cloud Participant User

- Customer Success Cloud Participant User: provides read-only access to all features and functions of Customer Success Cloud. Additionally, this license allows the user to edit existing Playbook tasks that have been assigned to them, create and edit Objectives, update their own skills, use the Activity Tracker, and enter time.
- [Certinia Core Analytics](#)

For a detailed view of the use rights associated with the core bundled Offers, please refer to [Appendix A](#) and [Appendix B \(CS Cloud\)](#).

## Certinia Bundles – Expansion Offers

*All Expansion offers below include [Sandbox – Access](#) and the corresponding Support offering unless otherwise noted. Expansion offerings sold without a –Standard, –Premier, or –Elite suffix are assumed to be Standard Support. All expansion bundles with a –Premier, or –Elite suffix include web-based [on-demand training](#). All expansions added to –Standard core licenses also include web-based [on-demand training](#). PS Cloud Resource licenses, Analytics View licenses and communities licenses do not include web-based [on-demand training](#).*

## Order, Procurement & Inventory

OPI provides key capabilities for Procurement (Spend), Order, and Inventory Management, helping you see, simplify, and optimize the entire order-to-fulfillment process for both goods and services. Certinia OPI understands your inventory, what you can sell, what's on its way, and how to make it all profitable. Procurement capabilities provide visibility and control over the entire procure-to-pay process for both indirect and direct spend. OPI is licensed only with named users; there are no required engines. One Order Procurement & Inventory Full User is required in order to use any of the Order & Inventory features.

### Order Procurement & Inventory Full User

- Order Procurement & Inventory Full User: provides full read, edit, and approval access to Order Procurement & Inventory functionality. This includes sales order fulfillment, inventory and procurement, making changes to available inventory, account view of OPI data, OIM pro forma invoice, Chatter, and order approvals.

### Procurement User

- Procurement User: provides full read, edit, and approval access to purchase approval, purchase request/requisition, & purchase order fulfillment.

### Self Service Requisition User

- Self Service Requisition User: may be used only to raise purchasing requests within the OPI functionality. Use of approval or reporting functionality is not allowed with this user type.



## Quoting/Sales Order User

→ Quoting/Sales Order User: may be used only to access quoting.

For a detailed view of the use rights associated with Order Procurement & Inventory, please refer to [Appendix C](#).

## Services Estimator

Services Estimator provides key capabilities to streamline the services estimating and quoting process for delivery of work by professional services teams. With Certinia PS Cloud, Services Estimator users initiate an estimating process directly from the opportunity, quickly and accurately build up an estimate, manage discounts, conduct margin analysis across different scenarios, initiate an approval process, and if required feed the final estimate directly into their CPQ process. In addition, Services Estimator enables the user to create resource demand directly at the opportunity to support resource forecasting.

Services Estimator is licensed as an add-on. A PS Cloud license is also required for any add-on user of Services Estimator.

## Full Services Estimator Add-on for Full PS Cloud User

Each Full Services Estimator Add-on for Full PS Cloud User must have a Full PS Cloud license as well as an active Enterprise level (or higher) Salesforce Sales Cloud license.

→ Full Services Estimator Add-on for Full PS Cloud User: full create, read, edit, and approval access to Services Estimator functionality. Includes estimate initiation, configuration, discount management, scenario management, approvals process management, quote editing, resource request, and chatter. (Standard Bundles utilize Full Services Estimator Add-on for Full PSA User)

## View and Approve Services Estimator Add-on for PS Cloud User

Each View and Approve Services Estimator Add-on for PS Cloud User must have one of the following: PS Cloud Full User, PS Cloud End User, or PS Cloud View User. Customer must have at least one Full Services Estimator Add-on for Full PS Cloud User to utilize a View and Approve Services Estimator Add-on for PS Cloud User.

→ View and Approve Services Estimator Add-on for PS Cloud User: provides access to view and approve estimates. (Standard bundles utilize View & Approve Services Estimator Add-on for PSA User. Same user prerequisite applies.)

For a detailed view of the use rights associated with Services Estimator please refer to [Appendix D](#).

## Certinia Analytics

Built using on-platform Salesforce CRM Analytics, Certinia Analytics allows users to get out of the box insight into different areas of our product suite. In addition to pre-built dashboards, pre-built datasets are delivered that allow Advanced Analytics users to build custom reports and dashboards with the data

already in a consumable form with no need for data scientists. Certinia allows customers to mix and match different types of Analytics licenses to meet the customer and user needs.

### **Financial Reporting**

Financial Reporting functionality is included as part of the Certinia Analytics Full User license that comes with the Certinia Suite User and the Certinia FM Cloud User.

### **Certinia Core Analytics**

The Certinia Core Analytics license allows users to view a free subset of Analytics, including a limited number of out-of-the-box dashboards embedded into Certinia workspaces or record pages. Certinia Core Analytics is included in all eligible bundle types, as indicated below. Use of Certinia Core Analytics with PS Cloud or CS Cloud requires one Certinia Full Analytics User in the Customer's applicable Salesforce Org, as well as the prerequisite of a PS Cloud Full User license (for PS Cloud use cases) and/or a CS Cloud Full User license (for CS Cloud use cases).

Certinia Core Analytics users cannot create dashboards, cannot modify dashboards, and cannot view custom dashboards built using Certinia Analytics. These users do not have access to Analytics Studio and cannot export to Excel.

### **Advanced Analytics**

Certinia Advanced Analytics licenses unlock additional value with real-time visibility into key KPIs used by services – Billings, Backlog, Utilization & Capacity – for improved forecasting and actionable insights. It also provides enhanced, role-based dashboards, financial reporting, as well as access to create or view customized dashboards built from Certinia Analytics.

### **PS Cloud Analytics View User** (Standard bundles utilize PSA Analytics View User)

Customers must have PS Cloud installed but there is no per-user PS Cloud license prerequisite for this license. Must have at least one Certinia Analytics Full User on the account.

- PS Cloud Analytics View User: Can consume any prebuilt PS Cloud based analytics dashboard.

### **Certinia Analytics View User**

Customers must have PS Cloud or FM Cloud installed to use this product but there is no per-User PS Cloud or FM Cloud user license prerequisite for this license. Must have at least one Certinia Analytics Full User on the account.

- Certinia Analytics View User: Can consume any prebuilt PS Cloud or FM Cloud based analytics dashboard.

### **Certinia Analytics Full User**

To use this, Customer must purchase and assign a license containing a Financials Full User AND/OR PS Cloud Full User. Analytics functionality available will be dependent on the type of Full User (Finance or PS Cloud) licensed. Certinia Analytics Full User can also be used with Customer Success Cloud data (prerequisite of a Customer Success Cloud Full User) to create custom analytics for CS Cloud.

- Certinia Analytics Full User: Can consume any prebuilt PS Cloud or FM Cloud analytics dashboards, but can also modify these and create new dashboards based on PS Cloud or FM Cloud data. Custom fields specific to PS Cloud or FM Cloud can also be added to datasets and leveraged in prebuilt dashboards.

### Plus Upgrade Analytics

Certinia also offers a Certinia Analytics Plus User that will allow customers to connect their analytics to external data sources and Discovery and Prediction builders, in addition to custom objects. Note that any creation or use of custom objects by the customer must be done using CRM or platform licenses purchased directly from Salesforce. Only Certinia and/or our authorized implementation partners may create custom objects using platform licenses provided by Certinia, and only so long as the custom object functionality is within the scope of the relevant Certinia application. Salesforce data or objects such as “opportunity” do not count as external data.

### Certinia Analytics Plus Upgrade – 10 User Starter Pack

- Certinia Analytics Plus Upgrade – 10 User Starter Pack: This is required for any customer wanting access to Plus Analytics. There is also a prerequisite of 10 Certinia Full Analytics Users.

### Certinia Analytics Plus Upgrade User

- Certinia Analytics Plus Upgrade User: After the starter pack is purchased you may add additional Plus users with this SKU. There is still a 1:1 prerequisite of one Certinia Full Analytics Users for every Certinia Plus Analytics Upgrade User.

For a detailed view of the use rights associated with Plus Analytics, please refer to [Appendix E](#).

## Certinia AI Solutions

Certinia AI offerings, comprising Generative AI features and AI Agents, are currently available on a pre-release basis to approved Early Adopters. Please reach out to your Certinia Account Executive for more information.

## Community Licenses

Certinia Communities allow companies to create branded sites that connect customers and partners with experts, information, and each other. This portal combines the real-time collaboration of Chatter with the ability to share any file, data, or record anywhere and on any mobile device. Please note that in order to utilize Community licenses with Certinia products, the customer must subscribe to the related user-based Certinia product (such as FM Cloud, PS Cloud, CS Cloud or OPI).

Certinia sells two main types of community experiences: Certinia Community and Certinia Community Premium. Each Community type will have its own licenses and access, as well as different Certinia product and platform functionality. FM Cloud Communities and CS Cloud Communities can be used with either community type. Limited PS Cloud functionality is included with the Certinia Community whereas the full range of PS Cloud Community functionality is available on the Certinia Community Premium (please see [Appendix F](#) for the differences).

A community license allows external users to access a community, however they will not have access to the customer's internal Salesforce org. This product may be used by personnel of companies with which the Customer transacts business, including, for example, customers, subcontractors, alliance partners and vendors of Customer. **Community licenses may not be used by employees or other personnel of Customer.** However, customers may grant its internal Users with other Certinia licenses access to the same Communities.

Community licenses have two options for the frequency in which a user can access the communities: member and logins. A Member license is intended for users with frequent access. This is a dedicated license that is assigned to a specific named user which allows unlimited access to the community. A Login license is intended for users with infrequent access. A login is purchased based on the number of logins to be used every month and is measured based on consumption of logins, not user count. For each Login that is purchased, 20 login licenses are provisioned so that a larger pool of external users may access the community. These external users will then consume one login each time they log into a site. Logging in multiple times during the same day still only consumes one login, this is referred to as a daily unique login. More information is included on Salesforce's Experience Cloud User Licenses website located [here](#).

In addition, Certinia has three different types of Community licenses: Certinia Community, Certinia Community Premium or Access.

### **Certinia Community Licenses**

Within the Certinia Community we have three main product experiences - FM Cloud Community, PS Cloud Community (limited PS Cloud functionality) and CS Cloud Community. This Community may be licensed by members or logins, to access any combination of FM Cloud, PS Cloud, or CS Cloud.

#### **Certinia Community Member**

- Includes OEM Salesforce Customer Community Member license.
- Certinia Community Member: gives one user full access to the Certinia Community

#### **Certinia Community Login**

- Includes OEM Salesforce Customer Community Login license.
- Certinia Community Login: gives full access to the Certinia Community via one login per month

### **Certinia Community Premium Licenses**

Within the Certinia Community Premium we have three main product experiences - FM Cloud Community, PS Cloud Community and CS Cloud Community. This Community may be licensed by members or logins, to access any combination of FM Cloud, PS Cloud or CS Cloud.

#### **Certinia Community Premium Member**

- Includes OEM Salesforce Customer Community Plus Member license.



- Certinia Community Premium Member: gives one user full access to the Certinia Community Premium

### Certinia Community Premium Login

- Includes OEM Salesforce Customer Community Plus Login license.
- Certinia Community Premium Login: gives full access to the Certinia Community Premium via one login per month

### Community Access Licenses

Access licenses are an option for customers that already have Salesforce Community licenses for their users. This allows the customer to utilize their existing Salesforce Community Cloud with Certinia objects. Each user who will have an Access license must maintain the corresponding Community license subscription from Salesforce as this access license does not include a Salesforce OEM license.

### Community Member – Access

- This access license may be used for any Salesforce community type.
- Community Member – Access: gives one user full access to Certinia Community objects within a preexisting Salesforce community.

### Community Login – Access

- This access license may be used for any Salesforce community type.
- Community Login – Access: gives access to Certinia Community objects within a preexisting Salesforce Community via one login per month

For a detailed view of the use rights associated with Community licenses please refer to [Appendix F](#).

## Certinia Planning

Certinia Planning enables enterprise-scale planning, forecasting, and reporting that accelerates decision-making and company growth, all on one platform. The licensing model for Certinia Planning consists of an engine and users. Utilization of the Accounting Engine is a prerequisite for Planning.

### Planning Engine

- In order to utilize the Certinia Planning functionality, the Planning Engine must be purchased.

### Planning Full User

- The Planning Full User is included with the Certinia Suite User and the FM Cloud Full User. At least one Certinia Suite User or FM Cloud Full User is required for Planning.

### Planning Contributor User

- Planning Contributor User: can enter and save data on planning sheets (budgets, forecasts or other models), submit and approve budgets, and view reports. This user also requires a Certinia Analytics View User license, purchased separately.

For a detailed view of the use rights associated with Certinia Planning, please refer to [Appendix G](#).

## Conga Engine for Financial Management

Certinia is an authorized reseller of the Conga Composer, Batch (formerly Conductor), and Trigger (formerly Workflow) products, which are provided by AppExtremes, LLC (DBA "Conga"). The Conga integration enables customers to generate richly formatted and branded reports, invoices, credit notes, checks, payable remittances, and statements from Certinia FM Cloud. The Conga Engine for Financial Management is licensed once per customer.

This license is restricted to Certinia's FM Cloud capabilities only, which are included in FM Cloud licenses and may be included in select PS Cloud bundled licenses. Specifically, the restriction applies to the following:

|                    |                               |               |
|--------------------|-------------------------------|---------------|
| Accounting         | Order Procurement & Inventory | Bank Formats  |
| Revenue Management | Advanced Quoting (OPIQT)      | Lockbox       |
| Billing Central    | Service Contracts (OPISC)     | VAT Reporting |
| AR & Collections   | Fixed Assets (FAM)            | Reporting     |

## Certinia Integrations

Customers may integrate with Certinia subject to adherence to Certinia User & Indirect Access licensing requirements.

### Certinia Integration User

The Certinia Integration User is a restricted Certinia Suite User to be used solely for the set-up and administration of 3rd party integrations, e.g. the Plaid bank statement integration. There is no license prerequisite for this user, but certain integrations in the product will require this user. This license is intended only as a dedicated connection point, and does not replace the requirement to license indirect users.

## Certinia Connectors

Certinia offers prebuilt Connectors, which are licensed as below.

### PSA Direct for Concur® Expense

Certinia offers its own point-to-point connector between PSA and Concur® Expense. Concur® Expense users are able to create expenses that will then automatically sync over to PSA without the need for manual intervention. These expenses can then be approved and paid within the Certinia ecosystem. Pricing for PSA Direct for Concur® Expense is based on the total number of PS Cloud users (or PSA users), including PS Cloud Resource licenses, and is charged on a per customer per connector basis. Purchase of one PSA Direct for Concur® Connector supports the connection of one instance of Concur® to one Salesforce instance (Org) of PSA. Use of this connector requires a minimum of one Full PS Cloud User

license. In addition, a minimum of a PS Cloud Resource License (or PSA Resource license) is required for each resource record accessed by PSA Direct for Concur® Expense.

### **PSA Direct for Jira®**

Certinia offers its own point-to-point connector between PSA and Jira®. PSA Direct for Jira® makes the process of delivering precise connections to our customers pain-free by connecting Task Management for PSA and Jira®. Pricing for PSA Direct for Jira® is based on the number of Jira® users connecting to PSA. Purchase of one PSA Direct for Jira® Connector supports the connection of one instance of Jira® to one Salesforce instance (Org) of PSA. Use of this connector requires a minimum of one Full PS Cloud User license. In addition, a minimum of a PS Cloud Resource License (or PSA Resource license) is required for each resource record accessed by PSA Direct for Jira®.

## **Sandbox, Support and Storage**

### **Sandbox**

Sandboxes allow you to create copies of your environments for implementation, development, testing, and training without compromising the data and applications in your production environment. Sandboxes are completely isolated from your Certinia production organization, so anything you do in your sandboxes will not affect your production application, and vice versa. Sandboxes can be used only for development and testing, and not for production use.

There are four types of Sandboxes customers can purchase from Certinia: Access, OEM Full, Partial Copy, and Developer Pro. Sandbox licenses must be coterminous with a customer's overall subscription contract. Customers can also purchase Sandboxes from Salesforce - definitions by type are available [here](#).

Each Certinia customer receives a Developer Pro sandbox as part of their Certinia service. However, we recommend that all customers have at least one Full Sandbox. Please note in order to perform push updates customers must have one of the following:

- Certinia OEM Full Sandbox or
- Salesforce Full Sandbox plus Certinia Sandbox Access

### **Sandbox Access (included with all bundles)**

Sandbox Access allows you to enable all Certinia customizations, configurations, and data to be loaded into pre-existing Salesforce Sandboxes. This type of Certinia Sandbox license requires the customer to purchase a Sandbox from Salesforce. The access license can be used for all types of Salesforce Sandboxes. However, please note the limitations of each sandbox type below.

### **OEM Full Sandbox**

This OEM Full Sandbox allows you to copy over your entire Certinia production configuration and all of your data, including standard and custom object records, documents, and attachments. The OEM Full Sandbox has the same storage limit as your production organization. The OEM Full Sandbox is a

restricted use sandbox and can be used only to develop and test Certinia products. Testing of Salesforce products, custom object functionality, and/or other third-party functionality may be performed in an OEM Full Sandbox only to the extent necessary for the functioning of Certinia applications, product integrations, and workflows.

### **Partial Copy Sandbox**

Partial Copy Sandboxes are configuration-only Sandboxes which allow you to copy all your production organization's reports, dashboards, price books, products, apps, and customizations, but exclude all your organization's standard and custom object records, documents, and attachments. Partial Copy Sandboxes limit storage to 5 GB of files and 5 GB of data.

### **Developer Pro Sandbox**

Developer Pro Sandboxes are special Partial Sandboxes intended for coding and testing by a single developer. They provide an environment in which changes under active development can be isolated until they are ready to be shared. Just like Partial Sandboxes, Developer Pro Sandboxes copy all application and configuration information to the Sandbox. Developer Pro Sandboxes limit storage to 1 GB of files and 1 GB of data.

For a detailed view of the use rights associated with Sandboxes, please refer to [Appendix H](#).

## **Support and Navigator**

### **Standard Support**

Standard Support is included with all subscriptions. Standard Support is also included with bundles that have "- Standard" in the name. Refer to [Appendix I](#) for a full list of features.

### **Navigator Premier**

Navigator Premier is a success plan designed to offer increased user support and enhanced response times during implementation and beyond. Our collaborative team of Certinia experts are here to help you implement, adopt and troubleshoot throughout the lifespan of your Certinia solution. Navigator Premier is included with bundles that have "-Premier" in the name. Refer to [Appendix I](#) for a full list of features. A list of definitions related to this offering is below.

### **Navigator Elite**

Navigator Elite confers the highest level of benefits and support to ensure the success of our Elite customers. Our Elite program caters to fast-paced enterprise accounts, addressing their unique demands. This program offers a dedicated technical team with specialized skills to boost adoption and system functionality. Through on-demand resources, education, named technical leads, and swift access to experts, you can tackle issues promptly. Navigator Elite ensures rapid support and solutions with skilled technical experts collaborating for optimal performance.

Navigator Elite is included with all bundles that have "- Elite" in the name. Note, a minimum spend is required to be eligible for this program. Refer to [Appendix I](#) for a full list of features. A list of definitions related to this offering is below.

### Government Cloud Add-on

Customers may request to host their Certinia solution in the Salesforce Government Cloud. This option may only be used for a limited product set and is subject to internal Certinia approvals. This option is limited to the base Government Cloud Plus offering from Salesforce and is not applicable for Government Cloud Plus – Defense or Government Cloud Premium tiers. The customer must have Navigator Premier or Navigator Elite in order to purchase the Government Cloud Add-on.

Government Cloud Add-On customers may request that Certinia provide support by personnel located in and authorized to work in the United States. Certinia will provide the US-based support with certain limitations, including adjusted Response and Escalation commitments, US-only support hours (Monday to Friday, 8:00 AM to 4:00 PM Eastern Standard Time), and customer-led installations and upgrades. See [Appendix I](#) for details on how the Government Cloud Add-On will impact Navigator Premier or Elite support entitlements.

This Add-on is charged as a % of license fees, or a fixed minimum fee, depending on contract size.

### Navigator Definitions

Below are examples of the types of engagements that may be available within the Navigator program. Specific engagements and definitions are subject to change over time.

- **Technical Coaching** – Technical coaching includes two options:
  - Expert Coaching – Personalized, outcome-based guidance with specialized resources for different stages of customer engagement.
  - Expert Clinic – Live Q&A sessions with Certinia experts and peers, covering setup, optimization and adoption best practices.
- **Adoption check** – High adoption is vital for solution value. Our checks enhance usage, validate assumptions, and boost understanding, ensuring team-wide adoption across the breadth of features available.
- **Use Case Maturity Evaluation** – Similar to an adoption check, this engagement is an in-depth focus on key features the customer is already using, but may not be fully leveraging.
- **Reporting & Analytics Check** – Review and practical guidance focused on readiness, adoption, and maturity of Advanced Reporting tools.
- **Tailored Release Previews** – This is a personalized overview of the upcoming release, tailored to your unique solution – your customizations, business goals, and adoption objectives.
- **Upgrade Support Planning** – This session is focused on the process of upgrading and will focus on feature adoption, testing, timing and deployment planning.
- **Key Event Management** – Focused support for business unit go-lives, critical upgrades, and other key events surrounding Certinia products.
- **Architecture Review** – From architectural diagrams and solution documentation to enhanced plan and roadmap support – These reviews are focused on the overall design of the solution and how it positively impacts your ecosystem with improved processes and efficiencies.



- **Product Roadmap Alignment Sessions** (Elite Only) – A review of your top functional properties, followed by a review of Certinia’s investment themes and product roadmap. This ensures our alignment with your future needs.
- **Engagement Insights** (Elite Only) – Periodic review of case and escalation interactions with recommendations for improvement.
- **Technical Account Lead** (Elite Only) – A dedicated resource ensures the Customer’s technical success. They collaborate with all Certinia functions – offering guidance and support – as your main technical contact.

Please see the [Navigator Premier](#) and [Navigator Elite](#) Overviews for additional details on the services provided. For a summary view of the Certinia Support please refer to [Appendix I](#).

## Storage

Storage is divided into two categories: Data storage and File storage. Each customer is allocated default amounts for each type of storage and may purchase additional storage if needed. User licenses that include a Salesforce OEM Embedded Platform license contribute to storage allocations.

### Data Storage

For data storage, each Force.com Platform Embedded org is allocated 10 GB at the time of org creation. In addition, each org is allocated a per-user amount multiplied by the number of users in the organization. Each Certinia user is allocated 20 MB. For example, a new Force.com Platform Embedded org with 20 users at 20 MB per user receives 400 MB plus 10 GB, or 10.4-GB total data storage. A new Force.com Platform Embedded org with 100 users receives 12 GB because 100 users multiplied by 20 MB per user is 2 GB. Please note, if Certinia is deployed in a pre-existing org, the 10 GB minimum allocation was provided at the time of org creation and an additional 10 GB of data storage will not be allocated as a result of purchasing Certinia. Each applicable Certinia user purchased will still result in the allocation of the per user amount. Additional data storage can be purchased in multiples of 500 MB or 10 GB.

### File Storage

For file storage, each Force.com Platform Embedded org is allocated 10 GB at the time of org creation. In addition, each org is allocated a per-user amount multiplied by the number of users in the organization. Each Certinia user is allocated 2 GB. For example, a new organization with 600 users receives a total of 1,210 GB of file storage, or 2 GB per user multiplied by 600 users plus the organization allocation of 10 GB. Please note, if Certinia is deployed in a pre-existing org, the 10 GB minimum allocation was provided at the time of org creation and an additional 10 GB of file storage will not be allocated as a result of purchasing Certinia. Each applicable Certinia user purchased will still result in the allocation of the per user amount. Additional file storage can be purchased in multiples of 10 GB.

## Training

Certinia has a wide variety of training classes available for customers. We license training in different ways for maximum flexibility:

- Per seat licensing which allows customers to purchase seats on an a la carte basis
- Private training classes with a maximum of 15 attendees

- On-demand web based training is included for all internal users who are licensed via the bundles in this guide (-Standard, -Premier, or -Elite suffix). Individuals licensed only with an Analytics View User, a Communities license, or a PS Cloud Resource license are not eligible for On-demand web based training.

Descriptions of each class offering can be found in the [Course Catalog](#).

## Resources Summary

[Product Usage Terms](#)

[OEM Embedded Platform license](#)

[Salesforce Sandbox definitions](#)

[Standard Support Overview](#)

[Navigator Premier Overview](#)

[Navigator Elite Overview](#)

## Appendix A – Certinia Bundles (PS Cloud and FM Cloud)

| Feature                                                                                                                                                                                                                                                                                                                                          | Certinia Suite User | Certinia Suite View User | FM Cloud Full User | PS Cloud Premium User | PS Cloud Full User | PS Cloud End User                            | PS Cloud View User |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------------------|--------------------|-----------------------|--------------------|----------------------------------------------|--------------------|
| <b>PS Cloud</b>                                                                                                                                                                                                                                                                                                                                  |                     |                          |                    |                       |                    |                                              |                    |
| Full PS Cloud User                                                                                                                                                                                                                                                                                                                               | •                   |                          |                    | •                     | •                  |                                              |                    |
| <ul style="list-style-type: none"> <li>Resource Management <ul style="list-style-type: none"> <li>Planners</li> <li>Create &amp; manage Resource Requests</li> <li>Create &amp; manage Shortlists</li> <li>Capacity Planning</li> <li>Resource Optimizer</li> <li>Create and manage assignments</li> <li>Event Scheduling</li> </ul> </li> </ul> | •                   | Read-only                |                    | •                     | •                  | Read-only & edit own assignments in Planners | Read-only          |
| <ul style="list-style-type: none"> <li>Project Management <ul style="list-style-type: none"> <li>Project Creation</li> <li>Milestone Management</li> <li>Delivery Tracker</li> <li>Budget Management</li> <li>Portfolio Object</li> <li>Project Accounting</li> <li>Services Credits</li> </ul> </li> </ul>                                      | •                   | Read-only                |                    | •                     | •                  | Read-only                                    | Read-only          |
| <b>Task Management</b> <ul style="list-style-type: none"> <li>Create and manage tasks</li> <li>Create and manage project task assignments</li> <li>Project Gantt</li> <li>Task Board</li> </ul>                                                                                                                                                  | •                   | Read-only                |                    | •                     | •                  | Read-only & update assigned tasks            | Read-only          |
| <b>PS Cloud features powered by Core Analytics</b> <ul style="list-style-type: none"> <li>Skill suggestions for resource requests</li> <li>Smart rescheduling</li> <li>Schedule based availability calculations</li> </ul>                                                                                                                       | •                   |                          |                    | •                     | •                  |                                              |                    |
| <ul style="list-style-type: none"> <li>All PSA Approvals</li> <li>Services Revenue Forecasting</li> <li>Manage Billing Events</li> <li>Subcontractor Management</li> </ul>                                                                                                                                                                       | •                   |                          |                    | •                     | •                  |                                              |                    |

**PS Cloud Resource license:** every person or device whose identifying information is stored in PS Cloud as an active resource (even if not performing functions like T&E entry, viewing projects, or other activities requiring logging in), requires a PS Cloud Resource license.

| Feature                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Certinia Suite User | Certinia Suite View User                       | FM Cloud Full User | PS Cloud Premium User                                                                                                            | PS Cloud Full User | PS Cloud End User                      | PS Cloud View User |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------|--------------------|----------------------------------------|--------------------|
| RAID (Risks, Actions, Assumptions, Issues, Decisions, Dependencies) Management                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | •                   | Read-only                                      |                    | •                                                                                                                                | •                  | Read-only & manage for own assignments | Read-only          |
| <ul style="list-style-type: none"> <li>Time &amp; Expense entry</li> <li>Update Skills and profile</li> <li>Self-assign to Project or self-nominate via the Work Opportunity Hub</li> </ul>                                                                                                                                                                                                                                                                                                                                                     | •                   | Read-only                                      |                    | •                                                                                                                                | •                  | •                                      | Read-only          |
| PS Cloud Resource License                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | •                   |                                                |                    | •                                                                                                                                | •                  | •                                      |                    |
| Customer Success Cloud                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                     |                                                |                    |                                                                                                                                  |                    |                                        |                    |
| Customer Success Cloud (see CS Cloud Appendix for full features and additional user types)                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                     | Read-only                                      |                    |                                                                                                                                  |                    |                                        |                    |
| FM Cloud                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                     |                                                |                    |                                                                                                                                  |                    |                                        |                    |
| Financials Full User                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | •                   |                                                | •                  | Limited                                                                                                                          |                    |                                        |                    |
| Accounting Engine <ul style="list-style-type: none"> <li>General Ledger including Accounting Playbooks</li> <li>Invoicing &amp; Project Billing</li> <li>Receivables &amp; Collections <ul style="list-style-type: none"> <li>Collections Workspace</li> <li>Receivables accounting</li> <li>FX revaluations</li> <li>Cash Entry and Cash Matching</li> <li>Consolidated Billing</li> </ul> </li> <li>Accounts Payable &amp; Settlement</li> <li>Cash &amp; Bank Management</li> <li>Consolidations</li> <li>Fixed Assets Management</li> </ul> | •                   | Read-only + approve for Invoicing & Billing    | •                  | <ul style="list-style-type: none"> <li>(Limited to Receivables &amp; Collections and Invoicing &amp; Project Billing)</li> </ul> |                    |                                        |                    |
| Subscription & Usage Billing Engine (purchased separately) <ul style="list-style-type: none"> <li>Consolidated Billing</li> <li>Subscription Billing &amp; Usage Billing <ul style="list-style-type: none"> <li>Integration with SF Opportunities and SF CPQ (Assumes a SF license)</li> <li>Flexible pricing calculations</li> </ul> </li> <li>Billing Contract</li> </ul>                                                                                                                                                                     | \$ Full rights      | \$ Read-only + approve for Invoicing & Billing | \$ Full rights     | \$ Full rights                                                                                                                   |                    |                                        |                    |
| Revenue Recognition Engine <ul style="list-style-type: none"> <li>Revenue Recognition</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                | •                   | Read-only                                      | •                  | •                                                                                                                                |                    |                                        |                    |

| Feature                                                                                                                                                                                                                                                                                                                                                                                          | Certinia Suite User | Certinia Suite View User                                     | FM Cloud Full User | PS Cloud Premium User | PS Cloud Full User | PS Cloud End User                               | PS Cloud View User                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|--------------------------------------------------------------|--------------------|-----------------------|--------------------|-------------------------------------------------|-------------------------------------------------|
| <ul style="list-style-type: none"> <li>Recognise revenue from multiple revenue streams</li> <li>Automatically calculate amount to recognise using flexible calculation methods</li> <li>Revenue recognition templates</li> <li>Revenue Forecasting from multiple revenue streams</li> <li>Cost Amortization: Amortize costs related to revenue generation activities (i.e.commission)</li> </ul> |                     |                                                              |                    |                       |                    |                                                 |                                                 |
| Planning Engine (Purchased separately. See Planning Appendix G for Planning Engine features.)                                                                                                                                                                                                                                                                                                    | \$<br>Full rights   | \$<br>Read-only. Also requires Certinia Analytics View User. | \$<br>Full rights  |                       |                    |                                                 |                                                 |
| <b>Order, Procurement &amp; Inventory</b>                                                                                                                                                                                                                                                                                                                                                        |                     |                                                              |                    |                       |                    |                                                 |                                                 |
| See Appendix C for features                                                                                                                                                                                                                                                                                                                                                                      | See Appendix C      | See Appendix C                                               | See Appendix C     |                       |                    |                                                 |                                                 |
| <b>Quoting &amp; Sales Order</b>                                                                                                                                                                                                                                                                                                                                                                 |                     |                                                              |                    |                       |                    |                                                 |                                                 |
| Quote View & Approval                                                                                                                                                                                                                                                                                                                                                                            |                     | See Appendix C                                               |                    |                       |                    |                                                 |                                                 |
| <b>General</b>                                                                                                                                                                                                                                                                                                                                                                                   |                     |                                                              |                    |                       |                    |                                                 |                                                 |
| Multi-Currency, Multi-Entity, Global tax, Management                                                                                                                                                                                                                                                                                                                                             | •                   |                                                              | •                  | •                     |                    |                                                 |                                                 |
| Certinia Analytics Full User                                                                                                                                                                                                                                                                                                                                                                     | •                   |                                                              | •                  | •                     |                    |                                                 |                                                 |
| Certinia Core Analytics (requires at least one Certinia Full Analytics User in the org who also has a PS Cloud Full User assigned)                                                                                                                                                                                                                                                               |                     | •                                                            |                    |                       | •                  | •                                               | •                                               |
| Customer Engagement Analytics                                                                                                                                                                                                                                                                                                                                                                    | •                   | \$                                                           | •                  | •                     | \$                 | \$                                              | \$                                              |
| Chatter                                                                                                                                                                                                                                                                                                                                                                                          | •                   | •                                                            | •                  | •                     | •                  | •                                               | •                                               |
| Corresponding Support Level (Standard, Navigator Premier/Elite)                                                                                                                                                                                                                                                                                                                                  | •                   | •                                                            | •                  | •                     | •                  | •                                               | •                                               |
| On-demand Training                                                                                                                                                                                                                                                                                                                                                                               | •                   | •                                                            | •                  | •                     | •                  | •                                               | •                                               |
| Sandbox Access                                                                                                                                                                                                                                                                                                                                                                                   | •                   | •                                                            | •                  | •                     | •                  | •                                               | •                                               |
| Salesforce Reports & Dashboards                                                                                                                                                                                                                                                                                                                                                                  | •                   | (Limited use: based on user type functionality)              | •                  | •                     | •                  | (Limited use: based on user type functionality) | (Limited use: based on user type functionality) |

| Feature                                                              | Certinia Suite User | Certinia Suite View User                             | FM Cloud Full User | PS Cloud Premium User | PS Cloud Full User | PS Cloud End User                                    | PS Cloud View User |
|----------------------------------------------------------------------|---------------------|------------------------------------------------------|--------------------|-----------------------|--------------------|------------------------------------------------------|--------------------|
| Community Access                                                     | •                   | •<br>(Limited use: based on user type functionality) | •                  | •                     | •                  | •<br>(Limited use: based on user type functionality) | Read-only          |
| OEM Embedded Platform License /<br>Contributes to Storage Allocation | •                   | •                                                    | •                  | •                     | •                  | •                                                    | •                  |



## Appendix B – Customer Success Cloud

| Feature                                                                                                                                                                                                                                                                                                                                                 | Customer Success Cloud Full User                                                                                                                                                                            | Customer Success Cloud Participant User |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| Prerequisite                                                                                                                                                                                                                                                                                                                                            | Note: External data coming into CS Cloud requires applicable external licensing. For example, viewing Salesforce Opportunities or Cases within CS Cloud requires the appropriate licensing from Salesforce. |                                         |
| Customer Success Workspace                                                                                                                                                                                                                                                                                                                              | •                                                                                                                                                                                                           | •                                       |
| Success Plans <ul style="list-style-type: none"> <li>Create &amp; Manage</li> <li>Assign Owners</li> <li>Create Templates</li> <li>Success Tracker</li> </ul>                                                                                                                                                                                           | •                                                                                                                                                                                                           | Read-only                               |
| Create & Manage Business Challenges, Objectives & Objective KPIs                                                                                                                                                                                                                                                                                        | •                                                                                                                                                                                                           | •                                       |
| Objectives <ul style="list-style-type: none"> <li>Assign Owners</li> <li>Create Templates</li> </ul>                                                                                                                                                                                                                                                    | •                                                                                                                                                                                                           |                                         |
| Playbooks <ul style="list-style-type: none"> <li>Create &amp; Manage</li> <li>Assign Owners</li> <li>Create Templates</li> </ul>                                                                                                                                                                                                                        | •                                                                                                                                                                                                           | Read-only                               |
| Playbook Task Management                                                                                                                                                                                                                                                                                                                                | •                                                                                                                                                                                                           | Edit own existing tasks                 |
| CS Skills Management                                                                                                                                                                                                                                                                                                                                    | •                                                                                                                                                                                                           | Update own skills                       |
| Direct Resource Assignment <ul style="list-style-type: none"> <li>Create CS Cloud Resources</li> <li>Create Teams</li> <li>Create Resource Pools</li> <li>Assign CS Cloud Resource to Task</li> </ul>                                                                                                                                                   | •                                                                                                                                                                                                           | Read-only                               |
| Enhanced Resource Management via CS Cloud to PS Cloud Connector Package <b>(requires PS Cloud Full license)</b> <ul style="list-style-type: none"> <li>Initiate request for PS Cloud resource from within CS Cloud</li> <li>Staffing of resource request handled in PS Cloud</li> <li>Connector creates Playbook Task Assignment in CS Cloud</li> </ul> | •                                                                                                                                                                                                           | Read-only                               |
| Workflow Management <ul style="list-style-type: none"> <li>Configure workflow within a Playbook</li> <li>Configure connecting playbooks through Salesforce flows</li> </ul>                                                                                                                                                                             | •                                                                                                                                                                                                           |                                         |
| Activity Tracker <ul style="list-style-type: none"> <li>Add notes, log calls or events</li> <li>See chronological history</li> <li>View playbooks</li> </ul>                                                                                                                                                                                            | •                                                                                                                                                                                                           | •                                       |

|                                                                                                                                                                                                                                                                                                                       |   |           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-----------|
| Time Entry                                                                                                                                                                                                                                                                                                            | • | •         |
| Salesforce Reports & Dashboards (CS Cloud Objects)                                                                                                                                                                                                                                                                    | • | •         |
| Customer Health Score <ul style="list-style-type: none"> <li>Set up health score metrics &amp; data flows (user importing external data must have appropriate license to use that external data for this purpose; set up also requires Full Analytics)</li> <li>Visualize health scores via Core Analytics</li> </ul> | • | Read-only |
| Certinia Core Analytics (requires at least one Full Analytics User in the org who also has a CS Cloud Full User license assigned)                                                                                                                                                                                     | • | •         |
| Chatter                                                                                                                                                                                                                                                                                                               | • | •         |
| Corresponding Support Level (Standard, Navigator Premier/Elite)                                                                                                                                                                                                                                                       | • | •         |
| On-demand Training                                                                                                                                                                                                                                                                                                    | • | •         |
| OEM Embedded Platform License / Contributes to Storage Allocation                                                                                                                                                                                                                                                     | • | •         |
| PS Cloud View User                                                                                                                                                                                                                                                                                                    | • |           |

## Appendix C – Order, Procurement & Inventory

| Feature                                                                                                                                                                                                                    | Order Procurement & Inventory Full User | Procurement User | Self Service Requisition User                                           | Quoting/ Sales Order User          | Certinia Suite User | Certinia Suite View User                                                                                                           | FM Cloud User |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|------------------|-------------------------------------------------------------------------|------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------|---------------|
| Prerequisite                                                                                                                                                                                                               |                                         |                  | Customer must have at least one Order Procurement & Inventory Full User |                                    |                     | At least one full user of a product must be on the account in order for this user to utilize the corresponding view functionality. |               |
| Quoting                                                                                                                                                                                                                    |                                         |                  |                                                                         |                                    |                     |                                                                                                                                    |               |
| Quote Creation & Submit for approval                                                                                                                                                                                       |                                         |                  |                                                                         | •                                  |                     |                                                                                                                                    |               |
| Quote View & Approval                                                                                                                                                                                                      |                                         |                  |                                                                         | •                                  |                     | •                                                                                                                                  |               |
| Create Sales Order from Quote & Submit SO for Approval                                                                                                                                                                     |                                         |                  |                                                                         | •                                  |                     |                                                                                                                                    |               |
| Order                                                                                                                                                                                                                      |                                         |                  |                                                                         |                                    |                     |                                                                                                                                    |               |
| Sales Order View & Approval                                                                                                                                                                                                | •                                       |                  |                                                                         |                                    |                     | •                                                                                                                                  |               |
| Sales Order (SO) Fulfillment <ul style="list-style-type: none"> <li>• Create SO &amp; allocate inventory</li> <li>• Create Backorders</li> </ul>                                                                           | •                                       |                  |                                                                         |                                    |                     |                                                                                                                                    |               |
| Procurement                                                                                                                                                                                                                |                                         |                  |                                                                         |                                    |                     |                                                                                                                                    |               |
| Create Purchase Request / Requisition for inventory / services                                                                                                                                                             | •                                       | •                | •                                                                       |                                    | •                   |                                                                                                                                    | •             |
| Purchase / Spend View & Approval                                                                                                                                                                                           | •                                       | •                | Read-only                                                               |                                    | •                   | •                                                                                                                                  | •             |
| Purchase Order (PO) Fulfillment <ul style="list-style-type: none"> <li>• Convert Requisition into Purchase Order</li> <li>• Create PO for inventory or services</li> <li>• Two-way/three-way match (AP Voucher)</li> </ul> | •                                       | •                |                                                                         |                                    | •                   |                                                                                                                                    | •             |
| Inventory                                                                                                                                                                                                                  |                                         |                  |                                                                         |                                    |                     |                                                                                                                                    |               |
| Inventory Management                                                                                                                                                                                                       | •                                       |                  |                                                                         | View only within quoting interface |                     | Read only                                                                                                                          |               |
| Shipping & Receiving                                                                                                                                                                                                       | •                                       | •                |                                                                         |                                    | •                   |                                                                                                                                    | •             |

| Feature                                                                                                                                                                                                                               | Order<br>Procurement<br>& Inventory<br>Full User | Procurement<br>User | Self Service<br>Requisition<br>User | Quoting/<br>Sales<br>Order User               | Certinia<br>Suite User | Certinia<br>Suite View<br>User | FM Cloud<br>User |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|---------------------|-------------------------------------|-----------------------------------------------|------------------------|--------------------------------|------------------|
| <ul style="list-style-type: none"> <li>View inventory to be put away, picked, shipped, inspected or received into the users warehouse</li> <li>Put away, pick, ship, inspect or receive inventory into the users warehouse</li> </ul> |                                                  | Receiving only      |                                     |                                               | Receiving only         |                                | Receiving only   |
| Returns Management                                                                                                                                                                                                                    | •                                                |                     |                                     |                                               |                        |                                |                  |
| General                                                                                                                                                                                                                               |                                                  |                     |                                     |                                               |                        |                                |                  |
| Salesforce Reports & Dashboards                                                                                                                                                                                                       | •                                                | •                   |                                     | •<br>(Limited to reporting related to Quotes) | •                      | Read only                      | •                |
| Multi-Currency, Multi-Entity Management                                                                                                                                                                                               | •                                                | •                   |                                     |                                               |                        |                                |                  |
| Corresponding Support Level (Standard, Navigator Premier/Elite)                                                                                                                                                                       | •                                                | •                   | •                                   | •                                             | •                      | •                              | •                |
| On-demand Training                                                                                                                                                                                                                    | •                                                | •                   | •                                   | •                                             | •                      | •                              | •                |
| OEM Embedded Platform License / Contributes to Storage Allocation                                                                                                                                                                     | •                                                | •                   | •                                   | •                                             | •                      | •                              | •                |

## Appendix D – Services Estimator

| Feature                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Full Services Estimator Add-On<br>for Full PS Cloud User                                                                           | View and Approve Services<br>Estimator Add-on for PS Cloud<br>User                                                                                                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prerequisite                                                                                                                                                                                                                                                                                                                                                                                                                                                             | One of the following:<br>-Certinia Suite User<br>-PS Cloud Premium User<br>-Full PS Cloud User<br><br>AND a SF Sales Cloud license | One of the following:<br>-Certinia Suite User<br>-PS Cloud Premium User<br>-Full PS Cloud User<br>-PS Cloud End User<br>-PS Cloud View User<br>-Certinia Suite View User |
| Administration<br>• Manage Estimate Templates<br>• Manage Guided Scoping<br>• Manage approvals                                                                                                                                                                                                                                                                                                                                                                           | •                                                                                                                                  |                                                                                                                                                                          |
| Create Services Estimate<br>• Initiate Estimate from any source (e.g. via API)<br>• Build estimates from scratch or from Estimate Templates<br>• Create an estimate from a Guided Scope<br>• Initiate Estimate from Opportunity (with appropriate Salesforce license)<br>• Initiate estimate from Salesforce CPQ quote (with appropriate Salesforce license)                                                                                                             | •                                                                                                                                  |                                                                                                                                                                          |
| Services Estimating<br>• Scope estimates<br>• Connect Estimate to CRM Opportunity or Salesforce CPQ (with appropriate Salesforce license)<br>• Salesforce Revenue Cloud integration (with appropriate Salesforce license)<br>• Time & Materials Project Estimating<br>• Fixed Price Project Estimating<br>• Configurable Pricing Calculations<br>• Billing Schedules<br>• Estimate Versions<br>• Estimate Overview<br>• Price & Discount Management<br>• Estimate Phases | •                                                                                                                                  | Read-only                                                                                                                                                                |
| Post-estimation<br>• Approvals<br>• Create resource demand from Opportunity<br>• Create project from a primary estimate<br>• Export Estimate Builder grid data to CSV                                                                                                                                                                                                                                                                                                    | •                                                                                                                                  | Approve estimates                                                                                                                                                        |
| PS Cloud Chatter                                                                                                                                                                                                                                                                                                                                                                                                                                                         | •                                                                                                                                  | •                                                                                                                                                                        |
| Corresponding Support Level (Standard, Navigator Premier/Elite)                                                                                                                                                                                                                                                                                                                                                                                                          | •<br>■                                                                                                                             | •<br>■                                                                                                                                                                   |
| On-demand Training                                                                                                                                                                                                                                                                                                                                                                                                                                                       | •                                                                                                                                  | •                                                                                                                                                                        |
| OEM Embedded / Contributes to Storage Allocation                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                    |                                                                                                                                                                          |

## Appendix E – Certinia Analytics

For a list of dashboards included in each analytics package, please refer to [this](#) community article.

| Feature                                                                                                                                                                                                                                                                                                 | Certinia Core Analytics                                                                                                                                                                  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Licensing                                                                                                                                                                                                                                                                                               | Included in eligible Certinia bundles listed in this guide (-Standard, -Premier, -Elite bundles)                                                                                         |
| Prerequisite                                                                                                                                                                                                                                                                                            | At least one Certinia Full Analytics User in the org is required. Full Analytics User has a prerequisite of a PS Cloud Full User and/or a CS Cloud Full User, depending on the use case. |
| PS Cloud features powered by Core Analytics <ul style="list-style-type: none"> <li>• Skill suggestions for resource requests</li> <li>• Smart rescheduling</li> <li>• Schedule based availability calculations</li> </ul>                                                                               | •<br>(also requires a PS Cloud Full User license)                                                                                                                                        |
| PS Cloud Embedded Dashboards <ul style="list-style-type: none"> <li>• Utilization Analytics ('New' Utilization)</li> <li>• Project Burnup (excluding time-series prediction)</li> <li>• Revenue Forecasting</li> <li>• PSA Project Billings</li> <li>• PSA Project Overview</li> </ul>                  | •<br>(also requires a PS Cloud license)                                                                                                                                                  |
| Services Estimator Embedded Dashboards <ul style="list-style-type: none"> <li>• Services Estimator Performance Summary</li> <li>• Services Estimator Team Performance Summary</li> </ul>                                                                                                                | •<br>(also requires a Services Estimator license)                                                                                                                                        |
| Customer Success Cloud Embedded Dashboards <ul style="list-style-type: none"> <li>• Customer Success Manager Dashboard (Playbook Stage, Duration, &amp; Template Usage)</li> <li>• Objective KPI Trending</li> <li>• Team Overview</li> <li>• Time Overview</li> <li>• Account Health Scores</li> </ul> | •<br>(also requires a Customer Success Cloud license)                                                                                                                                    |
| Capacity Dashboards                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                          |
| Create custom dashboards                                                                                                                                                                                                                                                                                |                                                                                                                                                                                          |
| Modify dashboards                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                          |
| View custom dashboards                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                          |
| Export to Excel                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                          |
| Click through to object                                                                                                                                                                                                                                                                                 | •<br>(If user also has appropriate license to view that object)                                                                                                                          |
| Designer in Studio                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                          |
| Data Refresh                                                                                                                                                                                                                                                                                            | Hourly                                                                                                                                                                                   |
| Salesforce CRM Analytics OEM License                                                                                                                                                                                                                                                                    | •                                                                                                                                                                                        |

|                                                                                                                                                                                                                                                                                                                                                      | Advanced Analytics                                                                                                                      |                                                                                                                                                                 |                                                                                | Plus Analytics                                                                                                                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Feature                                                                                                                                                                                                                                                                                                                                              | PS Cloud Analytics View User                                                                                                            | Certinia Analytics View User                                                                                                                                    | Certinia Analytics Full User                                                   | Certinia Plus Analytics Upgrade - 10 User Starter Pack<br>Certinia Plus Analytics Upgrade User                                                                                       |
| Prerequisite                                                                                                                                                                                                                                                                                                                                         | Customer must have PS Cloud installed. No PS Cloud User license required. Customer must have at least one Certinia Analytics Full User. | Customer must have PS Cloud or FM Cloud installed. No PS Cloud or FM Cloud user license required. Customer must have at least one Certinia Analytics Full User. | Bundles that include a Full PS Cloud User (or higher) or Full Financials User. | <b>Starter Pack:</b> Quantity of 10 Certinia Analytics Full User<br><b>Certinia Plus Analytics Upgrade User:</b> Starter Pack plus a 1:1 mapping of the Certinia Analytics Full User |
| <b>Analytics Functionality</b>                                                                                                                                                                                                                                                                                                                       |                                                                                                                                         |                                                                                                                                                                 |                                                                                |                                                                                                                                                                                      |
| Add Custom Fields on Certinia Objects                                                                                                                                                                                                                                                                                                                |                                                                                                                                         |                                                                                                                                                                 | •                                                                              | •                                                                                                                                                                                    |
| Add Custom objects outside Certinia Objects (including custom objects)                                                                                                                                                                                                                                                                               |                                                                                                                                         |                                                                                                                                                                 |                                                                                | Only if related to Certinia objects. Limited to 10.                                                                                                                                  |
| Add Custom objects from 3rd party applications or using connectors                                                                                                                                                                                                                                                                                   |                                                                                                                                         |                                                                                                                                                                 |                                                                                | Up to 5 external connectors + 1 additional Heroku connector                                                                                                                          |
| Add/modify/View access to Datasets or Lenses                                                                                                                                                                                                                                                                                                         |                                                                                                                                         |                                                                                                                                                                 | •                                                                              | •                                                                                                                                                                                    |
| Basic Charting<br>(Basic Charts (Bar), Column (Vertical Bar), Stacked Bar, Stacked Column (Vertical S. Bar), Line, Scatter, Donut, Funnel, Classic Gauge, Timeline, Combo)                                                                                                                                                                           | •                                                                                                                                       | •                                                                                                                                                               | •                                                                              | •                                                                                                                                                                                    |
| Advanced Charting<br>(Time Bar, Time Combo, Matrix, Choropleth Map, Bubble Map, Geo Map, Heatmap, Pyramid, Stacked Pyramid, Polar Gauge, Flat Gauge, Origami Funnel, Rating, Calendar Heatmap, Vertical Dot Plot, Horizontal Dot Plot, Parallel Coordinates, Metrics Radar, Treemap, Sankey, Mixed Combo, Classic KPI, Waterfall, Stacked Waterfall) | •                                                                                                                                       | •                                                                                                                                                               | •                                                                              | •                                                                                                                                                                                    |
| Number of additional datasets                                                                                                                                                                                                                                                                                                                        | Up to 10                                                                                                                                | Up to 10                                                                                                                                                        | Up to 10                                                                       | Up to 10                                                                                                                                                                             |
| Number of dataflows                                                                                                                                                                                                                                                                                                                                  | Up to 10                                                                                                                                | Up to 10                                                                                                                                                        | Up to 10                                                                       | Up to 10                                                                                                                                                                             |
| [Designer in Studio] Editing existing Dashboards                                                                                                                                                                                                                                                                                                     |                                                                                                                                         |                                                                                                                                                                 | •                                                                              | •                                                                                                                                                                                    |
| [Designer in Studio] Creating new Dashboards                                                                                                                                                                                                                                                                                                         |                                                                                                                                         |                                                                                                                                                                 | •                                                                              | •                                                                                                                                                                                    |



|                                                                                                                                                                                                                                                                                                                          | Advanced Analytics                                                                                |                                                                                                   |                                                                                                                                           | Plus Analytics                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Feature                                                                                                                                                                                                                                                                                                                  | PS Cloud Analytics View User                                                                      | Certinia Analytics View User                                                                      | Certinia Analytics Full User                                                                                                              | Certinia Plus Analytics Upgrade - 10 User Starter Pack<br><br>Certinia Plus Analytics Upgrade User                                        |
| Number of rows                                                                                                                                                                                                                                                                                                           | 100M                                                                                              | 100M                                                                                              | 100M                                                                                                                                      | 1B                                                                                                                                        |
| Data Manager                                                                                                                                                                                                                                                                                                             | Scheduling (Start / Stop, Edit)                                                                   | Scheduling (Start / Stop, Edit)                                                                   | Scheduling (Start / Stop, Edit), Replication, External Connectors, dataflows editor, data recipe builder/Editor, Data APIs, Dataflow APIs | Scheduling (Start / Stop, Edit), Replication, External Connectors, dataflows editor, data recipe builder/Editor, Data APIs, Dataflow APIs |
| Collaboration                                                                                                                                                                                                                                                                                                            | Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views | Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views | Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views                                         | Chatter, Notification, Share to individual group, Download to Excel, Download to PDF, Saved views                                         |
| Export to Excel/CSV                                                                                                                                                                                                                                                                                                      | •                                                                                                 | •                                                                                                 | •                                                                                                                                         | •                                                                                                                                         |
| Embedding via App Builder                                                                                                                                                                                                                                                                                                |                                                                                                   |                                                                                                   | •                                                                                                                                         | •                                                                                                                                         |
| Explorer within Analytics tab                                                                                                                                                                                                                                                                                            | •                                                                                                 | •                                                                                                 | •                                                                                                                                         | •                                                                                                                                         |
| Time-series (Trend, Prediction, Burnup)                                                                                                                                                                                                                                                                                  | •                                                                                                 | •                                                                                                 | •                                                                                                                                         | •                                                                                                                                         |
| Predictive Capabilities                                                                                                                                                                                                                                                                                                  |                                                                                                   |                                                                                                   |                                                                                                                                           | 10 Discovery & Prediction builder predictions                                                                                             |
| Customer Engagement Analytics                                                                                                                                                                                                                                                                                            | •<br>Limited to PS Cloud data only                                                                | •                                                                                                 | •<br>Limited to either PSA and/or FM Cloud depending on the license purchased                                                             | •                                                                                                                                         |
| FM Cloud Only Functionality                                                                                                                                                                                                                                                                                              |                                                                                                   |                                                                                                   |                                                                                                                                           |                                                                                                                                           |
| Financial Statements via Financial Report Builder: Trial Balance, Cash Flow statements direct / indirect method Balance Sheet, Income Statement, Consolidated Statements, Various Variance reports (eg Property Plant & Equipment report), Actuals versus Budget comparison, Basic profitability analysis, Aged analysis |                                                                                                   | View only                                                                                         | •                                                                                                                                         | •                                                                                                                                         |
| Accounting Dashboards, Billing Central Dashboards, Revenue Management Dashboards, OPI Dashboards ( <a href="#">full list found on Community</a> )                                                                                                                                                                        |                                                                                                   | •<br>Only if they have the appropriate Accounting, BC, RM, OPI packages installed                 | •<br>Only if they have the appropriate Accounting, BC, RM, OPI packages installed                                                         | •<br>Only if they have the appropriate Accounting, BC, RM, OPI packages installed                                                         |
| Planning Datasets                                                                                                                                                                                                                                                                                                        |                                                                                                   | •<br>Only if they have appropriate Planning license                                               | •<br>Only if they have appropriate Planning license                                                                                       | •<br>Only if they have appropriate Planning license                                                                                       |
| Click through to FM Cloud object                                                                                                                                                                                                                                                                                         |                                                                                                   | •<br>Only if they have appropriate FM Cloud license                                               | •<br>Only if they have appropriate FM Cloud license                                                                                       | •<br>Only if they have appropriate FM Cloud license                                                                                       |

|                                                                                                               | Advanced Analytics                                                                                |                                                                                                   |                                                                                                   | Plus Analytics                                                                                              |
|---------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| Feature                                                                                                       | PS Cloud Analytics<br>View User                                                                   | Certinia Analytics<br>View User                                                                   | Certinia Analytics Full<br>User                                                                   | Certinia Plus Analytics<br>Upgrade - 10 User<br>Starter Pack<br><br>Certinia Plus Analytics<br>Upgrade User |
| PS Cloud Only Functionality                                                                                   |                                                                                                   |                                                                                                   |                                                                                                   |                                                                                                             |
| PS Cloud Dashboards,<br>Services Estimator<br>Dashboards ( <a href="#">full list found on<br/>Community</a> ) | •<br>Only if they have the<br>appropriate PS Cloud or<br>Services Estimator packages<br>installed | •<br>Only if they have the<br>appropriate PS Cloud or<br>Services Estimator packages<br>installed | •<br>Only if they have the<br>appropriate PS Cloud or<br>Services Estimator packages<br>installed | •<br>Only if they have the<br>appropriate PSA or Services<br>Estimator packages installed                   |
| Click through to PS Cloud<br>object                                                                           | •<br>Only if they have appropriate PS<br>Cloud license                                            | •<br>Only if they have appropriate PS<br>Cloud license                                            | •<br>Only if they have appropriate PS<br>Cloud license                                            | •<br>Only if they have appropriate<br>PSA license                                                           |
| General                                                                                                       |                                                                                                   |                                                                                                   |                                                                                                   |                                                                                                             |
| Corresponding Support Level<br>(Standard, Navigator<br>Premier/Elite)                                         | •                                                                                                 | •                                                                                                 | •                                                                                                 | •                                                                                                           |
| On-demand Training                                                                                            |                                                                                                   |                                                                                                   | •                                                                                                 | •                                                                                                           |
| Salesforce CRM Analytics<br>OEM License                                                                       | •                                                                                                 | •                                                                                                 | •                                                                                                 | •                                                                                                           |

## Appendix F – Communities

| Feature                                      | Access<br>(Certinia<br>Community)                             | Access<br>(Certinia<br>Community<br>Premium)          | Certinia<br>Community User | Certinia<br>Community<br>Premium User |
|----------------------------------------------|---------------------------------------------------------------|-------------------------------------------------------|----------------------------|---------------------------------------|
| Prerequisite                                 | SFDC Customer, Customer<br>+, or Partner Community<br>License | SFDC Customer Plus or<br>Partner Community<br>License | None                       | None                                  |
| <b>FM Cloud Functionality</b>                |                                                               |                                                       |                            |                                       |
| Up to 1 Million Users                        | •                                                             | •                                                     | •                          | •                                     |
| Certinia Objects                             | •                                                             | •                                                     | •                          | •                                     |
| Financial Management Chatter                 | •                                                             | •                                                     | •                          | •                                     |
| View Invoices and Credit Notes               | •                                                             | •                                                     | •                          | •                                     |
| Print Invoices and Credit Notes              | •                                                             | •                                                     | •                          | •                                     |
| View Cash Entries                            | •                                                             | •                                                     | •                          | •                                     |
| Pay Invoice (with required Asperato License) | •                                                             | •                                                     | •                          | •                                     |
| Customization and Branding                   | •                                                             | •                                                     | •                          | •                                     |
| View Invoicing & Billing Notes & Attachments | •                                                             | •                                                     | •                          | •                                     |
| <b>PS Cloud Functionality</b>                |                                                               |                                                       |                            |                                       |
| Scalability                                  | Millions                                                      | 300K                                                  | Millions                   | 300K                                  |
| Includes PS Cloud Resource                   |                                                               | •                                                     |                            | •                                     |
| Accounts                                     | Read and edit                                                 | Read, edit, create                                    | Read and edit              | Read, edit, create                    |
| Contacts                                     | Read, edit, create                                            | Read, edit, create                                    | Read, edit, create         | Read, edit, create                    |
| Certinia Objects                             | •                                                             | •                                                     | •                          | •                                     |
| Salesforce Reports & Dashboards for PS Cloud |                                                               | •<br>(Read only for<br>dashboards)                    |                            | •<br>(Read only for<br>dashboards)    |
| Create Resource Requests                     |                                                               | •                                                     |                            | •                                     |
| Self-Assign to Assignments                   |                                                               | •                                                     |                            | •                                     |
| Self-Service Profile & Skills Mgmt           |                                                               | •                                                     |                            | •                                     |
| Enter Time & Expense                         |                                                               | •                                                     |                            | •                                     |
| Submit Records for Approval                  | •                                                             | •                                                     | •                          | •                                     |
| Approve Records                              |                                                               | •                                                     |                            | •                                     |
| Project Gantt                                | •                                                             | •                                                     | •                          | •                                     |
| Task Board                                   | •                                                             | •                                                     | •                          | •                                     |

| Feature                                                            | Access<br>(Certinia<br>Community)           | Access<br>(Certinia<br>Community<br>Premium) | Certinia<br>Community User                  | Certinia<br>Community<br>Premium User        |
|--------------------------------------------------------------------|---------------------------------------------|----------------------------------------------|---------------------------------------------|----------------------------------------------|
| Task Management                                                    | •<br>Limited to update of<br>existing tasks | •                                            | •<br>Limited to update of<br>existing tasks | •                                            |
| Risk & Issue Management                                            |                                             | •<br>Limited to resources<br>own assignments |                                             | •<br>Limited to resources<br>own assignments |
| Project Header and Milestones                                      | Read-only                                   | •                                            | Read-only                                   | •                                            |
| Project Status Reports (via Output Builder)                        | Read-only                                   | •                                            | Read-only                                   | •                                            |
| Project Budgets                                                    | Read-only                                   | •                                            | Read-only                                   | •                                            |
| PS Cloud Chatter                                                   | •                                           | •                                            | •                                           | •                                            |
| Invoicing (PS Cloud Billing events)                                | Read-only                                   | Read-only                                    | Read-only                                   | Read-only                                    |
| Customization and Branding                                         | •                                           | •                                            | •                                           | •                                            |
| Expense & Project Notes                                            | Read-only                                   | •                                            | Read-only                                   | •                                            |
| Project Attachments                                                | •                                           | •                                            | •                                           | •                                            |
| View and Approve Services Estimator<br>Estimates                   | •                                           | •                                            | •                                           | •                                            |
| <b>Customer Success Cloud Functionality</b>                        |                                             |                                              |                                             |                                              |
| Select Success Plans, Objectives & Objective<br>KPIs               | •                                           | •                                            | •                                           | •                                            |
| Value Tracker                                                      | •                                           | •                                            | •                                           | •                                            |
| Playbook Tasks                                                     | •                                           | •                                            | •                                           | •                                            |
| Collaborate with Success Manager via chatter                       | •                                           | •                                            | •                                           | •                                            |
| <b>General</b>                                                     |                                             |                                              |                                             |                                              |
| Salesforce OEM License                                             |                                             |                                              | •<br>Customer                               | •<br>Customer Plus                           |
| Corresponding Support Level (Standard,<br>Navigator Premier/Elite) | •                                           | •                                            | •                                           | •                                            |

\*Note: Credit card payment available for purchase separately from one of our ISV Partners, Asperato

## Appendix G – Planning

| Feature                                                                                                                                                                                                                                                                                                                                              | Planning Full User (via the Certinia Suite User or the FM Cloud Full User)                                                                                      | Planning Contributor User             | Planning View User (via the Suite View User) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|----------------------------------------------|
| Note: This Planning offering is limited to use with Accounting.                                                                                                                                                                                                                                                                                      |                                                                                                                                                                 |                                       |                                              |
| Prerequisite                                                                                                                                                                                                                                                                                                                                         | Customer must have at least one Certinia Suite User or FM Cloud Full User & be utilizing the Accounting Engine. Planning Engine required to use Planning Users. |                                       |                                              |
| Analytics prerequisite                                                                                                                                                                                                                                                                                                                               | Certinia Full Analytics included in bundle                                                                                                                      | Certinia Analytics View User required | Certinia Analytics View User required        |
| Budget Creation <ul style="list-style-type: none"> <li>• Templates</li> <li>• Approval workflow &amp; permissions management</li> <li>• Set budget hierarchies/rollup levels</li> <li>• Top-down allocations/bottoms-up budgets</li> <li>• Budget from last year's actuals</li> <li>• Multi-currency support</li> <li>• Embedding budgets</li> </ul> | •                                                                                                                                                               |                                       |                                              |
| Budgeting Participation <ul style="list-style-type: none"> <li>• Budget scenarios &amp; version management</li> <li>• Excel import/export</li> <li>• Create budget allocations</li> <li>• Enter/edit budget values and export/import budget lines</li> <li>• Cell commentary</li> <li>• Submit and approve budget</li> </ul>                         | •                                                                                                                                                               | •                                     | Read-only                                    |
| Reporting (via Analytics) <ul style="list-style-type: none"> <li>• Actual vs. budget</li> <li>• Variance analysis</li> <li>• Income statement</li> </ul>                                                                                                                                                                                             | •                                                                                                                                                               | Read-only                             | Read-only                                    |
| Corresponding Support Level (Standard, Navigator Premier/Elite)                                                                                                                                                                                                                                                                                      | •                                                                                                                                                               | •                                     | •                                            |
| OEM Embedded Platform License / Contributes to Storage Allocation                                                                                                                                                                                                                                                                                    | •                                                                                                                                                               | •                                     | •                                            |

## Appendix H – Sandbox

| Features                                                      | Sandbox – Access (included)                                                                       | OEM Full Sandbox                                                                          | Partial Copy Sandbox                                                   | Developer Pro Sandbox                                                                     |
|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| Primary use case                                              | Upgrade Testing, Integration Testing, Performance Testing in your pre-existing Sandbox from SFDC. | Upgrade Testing, Integration Testing, Performance Testing in a Certinia OEM Full Sandbox. | Testing configuration changes using subset of production data volumes. | Single-user access for development and configuration testing using a minimal set of data. |
| Pricing                                                       | Included with Bundles                                                                             | \$                                                                                        | \$                                                                     | One included for each customer                                                            |
| Prerequisite                                                  | SFDC Sandbox                                                                                      | None                                                                                      | None                                                                   | None                                                                                      |
| Able to perform push updates                                  | •<br>(only for full SFDC sandbox)                                                                 | •                                                                                         |                                                                        |                                                                                           |
| Replica of entire production organization's data              | •<br>(only for full SFDC Sandbox)                                                                 | •                                                                                         |                                                                        |                                                                                           |
| Access standard objects                                       | •                                                                                                 | •                                                                                         | •                                                                      | •                                                                                         |
| Access custom objects                                         | •                                                                                                 | •                                                                                         | •                                                                      | •                                                                                         |
| Access reports and dashboards                                 | •                                                                                                 | •                                                                                         | •                                                                      |                                                                                           |
| Access to Certinia data via existing Salesforce sandbox       | •                                                                                                 |                                                                                           |                                                                        |                                                                                           |
| Access documents/ attachments                                 | •<br>(only for full SFDC Sandbox)                                                                 | •                                                                                         |                                                                        |                                                                                           |
| Complete copy of setup data (customization and configuration) | •                                                                                                 | •                                                                                         | •                                                                      | •                                                                                         |
| Data storage capacity                                         | Production org                                                                                    | Production org                                                                            | 5GB                                                                    | 1GB                                                                                       |
| Access price books, products, and apps                        | •                                                                                                 | •                                                                                         | •                                                                      |                                                                                           |
| Access application and configuration information              | •                                                                                                 | •                                                                                         | •                                                                      | •                                                                                         |
| Configure, develop, and test non-Certinia applications        | •                                                                                                 | Only as needed to support Certinia functionality (ex: integrations and workflows)         | •                                                                      | •                                                                                         |

## Appendix I – Standard Support & Navigator Premier/Elite

|            | Benefit                      | Standard Support                | Navigator Premier                                                              | Navigator Elite                                                         |
|------------|------------------------------|---------------------------------|--------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Pricing    | Pricing                      | Included with all subscriptions | Included with Premier bundles                                                  | Included with Elite bundles                                             |
|            | Minimum Spend (annual)***    | N/A                             | \$60,000 in Premier Bundled Licenses*<br>OR<br>\$10,000 in Navigator Premier   | \$1,000,000 in Elite Bundled Licenses*                                  |
| Support    | Access to support***         | 12x5                            | 24x7***<br>(P1 & P2 issues)                                                    | 24x7***<br>(P1 & P2 issues)                                             |
|            | Target initial response time | 2 business days                 | P1: 1 hour<br>P2: 2 hours<br>P3: 6 hours<br>P4: 12 hours<br>P5: 1 business day | P1: 1 hour<br>P2: 2 hours<br>P3: 6 hours<br>P4: 8 hours<br>P5: 12 hours |
|            | Support Users                | 4                               | 10                                                                             | 25                                                                      |
|            | Community access             | •                               | •                                                                              | •                                                                       |
| Technical  | Success Engagements          |                                 | up to 3/yr<br>(Up to 5/yr at 100K* of license spend)                           | up to 20/yr                                                             |
| Elite Only | Technical Lead               |                                 |                                                                                | targeted at 8 hrs/week (400 hours/yr)                                   |
|            | Product Roadmap Alignment    |                                 |                                                                                | up to 2/yr                                                              |
|            | Support Insights**           |                                 |                                                                                | up to 4/yr                                                              |

\* Sandbox, Storage, and Training subscriptions charges are not included in the calculation of minimum spend.

\*\* Delivered by Technical Lead either independently or alongside Account Team

\*\*\*For US Government Cloud Add-on customers, program adjustments apply, including a % of license fee, with a fixed minimum charge that must be met. Access to support and response times will be 8x5, Monday-Friday EST. Support personnel will be authorized to work in, and located in, the United States.