



Service Definition – Service Charge Pro

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G-Cloud 15

Lot 2 – Software as a Service (SaaS)

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1. Service overview

Service Charge Pro is a cloud-hosted software service that supports organisations in the management of service charges. The service is designed to enable the budgeting, actualisation, apportionment, reconciliation and reporting of service charges across property portfolios.

The service provides real-time visibility of service charge positions, including reporting and analysis of charges, deficits and variances, and the production of resident-facing statements and statutory information. Service Charge Pro is delivered as a software-as-a-service (SaaS) solution and is accessed via a web browser.

The service is intended for use by organisations managing service charges across residential or mixed-use property portfolios, including portfolios with varied property types, tenures and service charge structures.

2. Service scope

Service Charge Pro is provided as a standard software product. The core service includes functionality to support service charge budgeting, actualisation, apportionment, reconciliation, reporting, audit support and the production of resident statements and statutory documentation.

The service is configurable to align with an organisation's service charge rules, property structures and resident requirements. Configuration includes, for example, apportionment rules, recharging hierarchies, recharging percentages, cost groupings and exclusions. Configuration is performed through the service interface by authorised users and, where required, with supplier support during implementation.

The service is provided as a standard software product and does not require bespoke development of the core application to operate. The service is typically deployed with integrations to core customer systems, such as finance and housing management systems, which are delivered as part of implementation. Any additional development, integrations or enhancements beyond standard configuration and core integrations are subject to separate agreement.

3. Hosting and service architecture

Service Charge Pro is hosted on Microsoft Azure cloud infrastructure and is deployed within the United Kingdom. The service is delivered using a single-tenant deployment model, with each customer environment logically separated from others.

The service uses managed cloud services and infrastructure components provided by the cloud hosting provider. Physical datacentre security, resilience and underlying infrastructure management are provided by the third-party cloud provider.

The service is accessed via a secure web interface using modern web browsers. Further details of the service architecture and hosting model can be made available on request.

4. Security and data protection

The service is designed and operated with security and data protection as core considerations. Service Charge Pro is hosted on secure cloud infrastructure provided by a third-party cloud hosting provider, with physical datacentre security and underlying infrastructure controls managed by that provider.

Data is encrypted in transit using industry-standard transport encryption and encrypted at rest using strong encryption mechanisms. Access to the service is restricted through authentication controls and role-based access permissions, ensuring users can only access data and functionality appropriate to their role.

The organisation operates defined information security policies and processes covering access control, incident management and data handling. Independent penetration testing and ongoing vulnerability monitoring are used to identify and address potential security issues. Security practices are reviewed periodically and updated as the service evolves.

Customer data is logically segregated between customer environments.

5. Availability, maintenance and resilience

The service is operated to support high levels of availability using resilient cloud infrastructure. Service Charge Pro is hosted on managed cloud services designed to minimise single points of failure and to support continuity of service.

Planned maintenance activities are scheduled to minimise disruption to users and, where possible, are undertaken outside of core business hours. Where maintenance is expected to impact service availability, customers are notified in advance.

Unplanned service interruptions are managed through defined incident management processes. Where an incident affects service availability, affected customers are informed and updates are provided as appropriate until service is restored.

The underlying cloud infrastructure provides built-in resilience and redundancy, with physical datacentre operations and infrastructure resilience managed by the third-party cloud provider.

6. Backup, restore and disaster recovery

The service uses managed cloud services that support data protection and resilience. Customer data is backed up as part of normal service operation to protect against data loss and support recovery in the event of system failure or data corruption.

Backups are designed to support the restoration of service data where required. Restore activities are prioritised based on the nature and severity of the incident and are managed in line with the organisation's incident management processes.

Disaster recovery activities are supported by the resilience and redundancy features of the underlying cloud infrastructure, with physical datacentre resilience and infrastructure recovery managed by the third-party cloud provider. Recovery actions are undertaken to restore service

availability and data integrity as quickly as reasonably practicable, based on the circumstances of the incident.

7. Onboarding and getting started

Onboarding is supported through a structured implementation approach agreed with the customer. This typically includes initial setup of the service, configuration to align with service charge rules and structures, and the establishment of integrations with core customer systems.

Support is provided for data migration activities, including guidance on data preparation and validation to support accurate setup and testing. Customers are supported through testing to confirm that outputs align with expected service charge calculations and reporting.

Training is provided to support effective use of the service. This is typically delivered using a train-the-trainer approach, supported by online sessions and guidance materials. Training and support can be delivered remotely or onsite, depending on the scope and nature of the training required.

Ongoing use of the service is supported through standard support channels once onboarding is complete.

8. Support and service management

The service is supported through defined support and service management processes. Users can raise support requests via email, phone or an online helpdesk, with requests logged, tracked and prioritised according to severity.

Support is provided during standard business hours, Monday to Friday, with response times dependent on the nature and priority of the issue. Incidents impacting service availability or data integrity are handled through defined incident management processes, with escalation applied where required.

Support activities and changes undertaken by the supplier are controlled and logged to support traceability and auditability. Where incidents or issues affect customers, communication is provided directly to affected users, including updates and summary information as appropriate.

Service management activities are reviewed periodically to support continuous improvement of the service.

9. Service constraints and assumptions

The service is accessed via a web browser and requires a modern, supported browser and an internet connection. The service is designed for use within organisational environments and is not intended for consumer self-service deployment without implementation support.

Service Charge Pro is provided as a standard software product. Configuration options are available to align the service with customer service charge rules and structures; however, the service does not support unrestricted bespoke customisation of the core application.

The service is typically deployed with integrations to customer finance and housing management systems. The successful operation of these integrations is dependent on the availability, quality and structure of customer data and the timely involvement of relevant third-party system providers where applicable.

Customers are responsible for ensuring the accuracy and completeness of source data provided for configuration, migration and ongoing operation of the service.

10. Exit management and access to data

On termination or expiry of the service, customers can obtain a copy of their service data. Data is provided in commonly used export formats to support transition to alternative systems or archiving.

Data exports are generated to include relevant service charge data and associated records held within the service. Where required, guidance can be provided to support the interpretation and use of exported data.

Following completion of data export activities and confirmation from the customer, customer data is securely deleted from the service in line with the organisation's data sanitisation processes.

Exit support beyond standard data export, including additional assistance or bespoke data handling, can be provided by agreement.