

Enterprise Edition

Implementation Package



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SysAid

Professional Services

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Overview

This Statement of Work (SOW) defines the framework, methodology, and mutual responsibilities for a successful implementation of the SysAid platform. It outlines the working relationship between SysAid and the Customer, ensuring a structured approach to configuration, training, and deployment.

SysAid's implementation strategy is designed to deliver value quickly while enabling long-term success through a collaborative, phased approach. The project is based on ITIL-aligned best practices and includes hands-on support, knowledge transfer, and continuous engagement to ensure operational readiness and self-sufficiency post go-live.

This engagement includes the implementation of SysAid Spaces, an intuitive workspace designed to streamline ticket resolution, improve collaboration, and enhance the user experience for both IT and end-users. Additionally, SysAid Copilot, our AI-powered assistant, will be configured to support automation, intelligent categorization, and self-service capabilities, driving efficiency and reducing resolution time across IT operations. SysAid's AI Agents will also be introduced to assist end-users and agents by providing automated responses, guiding users through common processes, and reducing the load on support teams. These agents enhance self-service adoption and streamline resolution for routine requests.

Following the initial Discovery phase, SysAid will develop a tailored Project Plan specific to the Customer's business goals, technical environment, and operational priorities. This Project Plan will define project milestones, timelines, key deliverables, and a customized configuration path, ensuring alignment with the Customer's success criteria.

SysAid Services and Responsibilities

SysAid will provide a designated Onboarding team, which includes the following roles:

1. **Executive Sponsor** Responsible for executive oversight of partnership Provides and sets vision for SysAid implementation and rollout
2. **Dedicated Project Manager** that will function as a peer to Client's assigned Project Manager and provide guidance towards the execution of the overall implementation, assistance with project planning, resource assignments and project communications. The Project Manager will be Client's primary escalation point for all project concerns and will have direct and constant communications between Client and SysAid Operations for all pre Go-Live activities

3. **Dedicated Customer Success Manager** focuses on ensuring client satisfaction and alignment with business goals, providing guidance on best practices to maximize value, managing the client relationship post-implementation, and coordinating feedback and ongoing evolving needs.
4. **Implementation Manager(s)** that is familiar with ITSM (IT Service Management), ITIL (Information Technology Infrastructure Library) and the SysAid IT Product. The Technical Consultant(s) will provide primary technical assistance and technical configuration and tailoring of the SysAid Product.
5. **Technical Resource** Serves as main contact for technical components of SysAid Helps guide and execute SysAid system configuration Serves as key technical resource and subject-matter expert

Engagement Model

SysAid is responsible for hands-on configuration and tailoring tasks and activities and remediation of errors resulting from Unit testing and User Acceptance testing.

SysAid will host ongoing project updates with the Customer Project Manager and key / limited Client stakeholders as part of the project communications plan to verify the project is progressing properly. This is in addition to any project status and work tasking meeting hosted by the Client Project Manager.

In addition, the Implementation manager will meet with the Client's System Administrator to transfer configuration knowledge and ensure smooth knowledge handover throughout the implementation.

Customer Responsibilities and Pre-Requisites

To ensure a smooth and efficient implementation, the Customer is required to fulfill the following responsibilities and complete the necessary pre-requisites prior to and throughout the engagement. Delays or gaps in these areas may impact the project timeline, scope, and cost.

Pre-Project Requirements

- Assign a dedicated Project Manager to oversee the implementation and serve as the primary point of contact for SysAid.
- Identify and assign qualified personnel, including:
 - System Administrator(s): At least one administrator who completes SysAid training and participates throughout the project.

- Process Owner(s): Subject matter experts for key ITSM areas (e.g., Incident, Change, Problem Management).
- Ensure access credentials and system connectivity are in place for required integrations (e.g., authentication services, APIs).
- Confirm participation in the project kickoff and assign internal roles accordingly.

Ongoing Responsibilities

- Ensure timely and active participation in all scheduled sessions. Adhere to the attendance policy:
 - Confirm sessions at least 48 hours in advance.
 - Provide 24-hour notice for rescheduling.
 - "No-shows" (over 15 minutes late or absent without notice) may lead to delays, added fees, or escalation.
- Actively participate in configuration discussions and provide required documentation, including:
 - Use case definitions and process documentation
 - Categories, catalog items, and knowledge base content
 - SLA definitions and example reports
- Manage internal communications, schedule stakeholders, and facilitate availability for all relevant team members.
- Troubleshoot integration and connectivity issues related to the Customer's systems.
- Lead User Acceptance Testing (UAT), including:
 - Scheduling and managing test cycles
 - Documenting test results
 - Identifying defects and tracking their resolution using an agreed methodology
 - Assigning a dedicated focal point for testing and remediation
- Participate in and confirm readiness for Go-Live, including:
 - Final testing
 - Agent training attendance
 - Operational sign-off

Scope of Work

Discovery Calls

SysAid will conduct structured discovery sessions with key Customer stakeholders, including IT leadership, system administrators, and operational leads. These sessions will uncover the Customer's business goals, service delivery model, technical architecture, challenges, and strategic initiatives. Each session will focus on a domain such as incident management, service request handling, change and problem management, asset management, and end-user experience. Outcomes will be documented and validated with the Customer.

Tailored Project Plan

Based on discovery outcomes, SysAid will create a detailed Project Plan. This plan will define the project scope, key milestones, deliverables, timelines, detailed session breakdowns, a risk mitigation strategy, and a communication plan to ensure clear, ongoing collaboration throughout the implementation.

Implementation

As a Part of the package, the following modules will be tailored to your needs and will be presented to you in the agreed project plan:

1. Core System Configuration
 - a. Technical enablement
 - i. Email Integration
 - ii. User Repository Integration
 - iii. Single Sign On
 - b. Initial Setup
 - i. Operating times
 - ii. Categories
 - iii. Custom Lists
2. Asset Management (ITAM)

- a. Service Desk Integration
 - i. Agent Deployment
 - ii. Agent-less network discovery
 - b. Asset Monitoring and alerts
3. Admin and End-User Experience
- a. Designing End User Experience
 - i. Self-Service Catalog
 - ii. Automated End-User Notifications
 - iii. Self-Service Portal Forms
 - iv. Survey engagements
 - b. Designing Admin Experience
 - i. Incident Management
 - 1. Admin templates and form design (14)
 - ii. Priorities
 - iii. Automated Admin communication - notifications
 - iv. Role-based permissions control
 - c. Advanced Automation
 - i. Routing rules
 - ii. Automation rules
 - iii. Email Rules
 - iv. Alerts
 - d. Efficiency
 - i. SLA Management
 - ii. Dues Dates

- iii. Timers
- 4. Copilot / AI
 - a. Branding and Appearance
 - b. Configuring Data Pools
 - c. Configuring Prompts & Guardrails Rules
 - d. Monitor & Fine-Tuning
 - e. AI data usage monitor
 - f. AI Insights
 - g. AI Agents and Studio Builder
- 5. Request Management
 - a. Request Management
 - i. Workflows and templates design (19)
 - ii. Application Flows
 - iii. Automation and notifications
 - b. Change Management
 - i. Change management Flow
 - ii. Automation and notifications
 - c. Problem Management
 - i. Problem Management Flow
 - ii. Automation and notifications
- 6. CMDB
 - a. Relationship Mapping
 - b. Impact analysis
- 7. Analytics

- a. Analytics
 - i. Custom Reports
 - ii. BI Analytics
 - iii. Manager Dashboards
 - b. Knowledge Base
 - i. Knowledge base articles
8. Training
- i. Super Admin training
 - ii. Admin Training
 - iii. Best practices to End-User Adoption

** Certain modules and functionalities described in this scope may require additional licensing*

Go-Live, Hypercare, and Stabilization Support

The Go-Live, Hypercare, and Stabilization phase marks the critical transition from system configuration to active operational use. Prior to the official Go-Live, SysAid will conduct a comprehensive readiness review to validate that all necessary configurations, integrations, workflows, and user training are complete and meet project objectives.

On the Go-Live date, SysAid's implementation team will actively support the transition, providing real-time assistance to ensure a seamless launch. This includes monitoring system performance, addressing any unexpected issues, and reinforcing end-user adoption strategies.

Following Go-Live, the Customer will enter a dedicated Hypercare period. During Hypercare, SysAid will provide elevated support focused on stabilizing the environment, fine-tuning system configurations, and helping Customer administrators manage initial live operations. The Hypercare phase is designed to proactively address challenges, ensure operational continuity, and build Customer confidence in system usage.

At the conclusion of the Hypercare period, SysAid will conduct a formal stabilization review to ensure the platform is performing as expected. Remaining open items will be transitioned to SysAid's Customer Support team, and the Customer will officially move into steady-state operations with full ownership and knowledge of the platform.

Continuous Improvement

Following Go-Live and the successful completion of the stabilization phase, SysAid will continue to partner with the Customer through a Continuous Improvement process. This phase is designed to ensure that the platform evolves alongside the Customer's changing business needs and service management goals.

SysAid will conduct regular reviews of system usage, service delivery performance, and key operational metrics. Through these reviews, areas for further optimization, automation, and efficiency gains will be identified.

Recommendations will be shared with the Customer, along with strategic guidance on how to enhance workflows, self-service adoption, reporting capabilities, and AI-driven service improvements. The Continuous Improvement process aims to help the Customer derive increasing value from SysAid over time, ensuring sustained alignment with best practices, operational excellence, and the Customer's long-term ITSM strategy.

Optional Services

On-Site Delivery Option

SysAid offers the flexibility to deliver Discovery sessions, Workshops, Configuration Sessions, and Training at the Customer's premises (additional cost). On-site delivery enables direct engagement with Customer stakeholders, promotes faster knowledge transfer, and facilitates real-time feedback and collaboration, ensuring alignment between SysAid's team and the Customer's operational environment.

White Gloves Option

SysAid provides an enhanced "White Gloves" engagement model, where the implementation team takes on a larger operational role in fully configuring, fine-tuning, and optimizing the Customer's SysAid environment. This service significantly reduces the internal resource load on the Customer's team, accelerates time to value, ensures best practice configuration, and minimizes risk during the implementation process.

Assumptions and Constraints

- The Services described in this Statement of Work will be performed remotely unless is stated otherwise
- Service availability is valid during normal business hours of 8 am through 5 pm local time, based on Client location Monday through Friday excluding holidays.

Session attendance policy

Clients must confirm sessions at least 48 hours in advance and provide 24-hour notice for rescheduling. A "no-show" (failure to attend without notice or arrival over 15 minutes late) may result in delays, fees, or escalation, at SysAid's discretion.

Change of Scope

Any request to modify the scope of this engagement, including but not limited to additional features, modules, services, or changes to existing deliverables, must be submitted in writing. SysAid will review the requested change and determine the impact on timelines, resources, and cost. If accepted, a formal Change Request (CR) will be issued for mutual approval before implementation begins.

Acceptance Criteria

- Completion of each session's deliverables
- Successful go-live with functional SysAid environment
- Knowledge transfer completed to designated client stakeholders

Approval

Customer Representative

Name: _____

Title: _____

Signature: _____

Date: _____

SysAid Representative

Name: _____

Title: _____

Signature: _____

Date: _____



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Essential Edition

Implementation Package

SysAid

Professional Services

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Overview

This Statement of Work (SOW) defines the framework for the SysAid Essential Package Implementation, which includes leveraging AI capabilities to enhance automation, streamline processes, and improve overall IT service efficiency through SysAid Copilot and AI-driven features. The engagement consists of a 2-hour hands-on Workshop followed by two additional focused sessions.

The objective is to enable participants to configure and optimize their SysAid environment efficiently, establish best practices in notifications and SLA/SLM management, and implement essential workflows to ensure operational readiness.

Engagement Structure

Workshop Agenda (Duration: 2 Hours)

Topic	Content	Time Allocation
Introduction & Workshop Goals	Quick overview of the workshop goals, agenda, and setting expectations. Icebreaker to identify participants' key challenges.	10 minutes
General & User Management	Hands-on setup of general settings including account defaults, categories, and branding. User management and role-based permissions configuration.	20 minutes
Automation & Efficiency	Introduction and creation of email rules, routing rules, and an overview of escalation rules for SLA enforcement. Live exercise to build simple automations.	25 minutes

Break	Short 5-minute pause for recap, Q&A, and refreshment.	5 minutes
Admin Portal & Templates	Queue management, building ticket workflows, creating incident and request templates, and introduction to chatbot capabilities.	25 minutes
Self-Service & Copilot	Branding the Self-Service Portal, creating catalog items, KB article setup, and a deep dive into configuring Copilot (datasets, prompts, guardrails).	30 minutes
Wrap-Up & Q&A	Recap of key learnings, open Q&A, feedback collection, and defining next steps.	5 minutes

Post-Workshop Sessions

The Post-Workshop Sessions will be conducted as personal virtual sessions with a dedicated SysAid Implementation Manager assigned to the Customer. These are not group sessions and will be tailored to the Customer's specific environment and needs.

Session	Content	Customer Responsibilities
Session 1: Setup Review & SLA/SLM Configuration	Review environment setup. Configure 3 Notifications (Admin, End Users, Survey). Define Priorities, set Due Dates (5), configure Timers (4), and create Escalation Rules (8).	Participate in session, implement settings in system
Session 2: Request Management	Configure the following processes: Joiner/Mover/Leaver, Hardware/Software Request, Change (Standard, Emergency, Pre-Approved). Setup 1 Workflow Notification.	Participate in session, review and apply workflow configurations

Prerequisites

- The Customer must complete the initial environment setup before scheduling the workshop.
The following integrations must be configured using training videos provided by SysAid:
 - Email integration (incoming and outgoing)
 - User repository setup (importing users and groups)
 - Asset management setup (deploying agents and setting up discovery services)
- Confirmation of completed prerequisites must be provided to SysAid prior to scheduling the workshop.

Assumptions and Constraints

- The implementation will be based on SysAid's Out-of-the-Box (OOTB) capabilities.
- Custom developments, complex integrations, or highly customized workflows are not included unless explicitly agreed upon via a separate Change Request.
- The Customer will provide Workshop participants with access to a test/demo SysAid environment.
- Participants will attend with appropriate permissions to perform configuration tasks.
- Sessions will be scheduled with appropriate breaks if conducted consecutively.
- Sessions will be recorded upon request.
- The Customer will actively participate in hands-on exercises.

Session Attendance Policy

- The Customer must confirm workshop and session attendance 48 hours in advance.
- If rescheduling is needed, 24-hour notice must be provided.
- No-shows or late arrivals (over 15 minutes) may require additional scheduling and fees.

SysAid Services and Responsibilities

SysAid will provide a Workshop Facilitator and Implementation Specialist with expertise in SysAid platform configuration, ITSM best practices, and Copilot/AI capabilities.

SysAid Responsibility

- Hosting the workshop and subsequent sessions based on the defined agenda.
- Delivering hands-on guidance, best practices, and live demonstrations.
- Answering questions and providing tailored configuration support.

The Customer Responsibility

- Preparing an environment for hands-on work.
- Ensuring active participation of attendees.
- Bringing real-world use cases where possible

Acceptance Criteria

- Completion of the 2-hour Workshop and two additional sessions.
- Participant engagement in all hands-on activities.
- Successful configuration of notifications, SLA/SLM settings, and workflows.

Approval

Customer Representative

Name: _____

Title: _____

Signature: _____

Date: _____

SysAid Representative

Name: _____

Title: _____

Signature: _____

Date: _____

Pro Edition

Implementation Package

SysAid

Professional Services

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This engagement includes the implementation of SysAid Spaces, an intuitive workspace designed to streamline ticket resolution, improve collaboration, and enhance the user experience for both IT and end-users. Additionally, SysAid Copilot, our AI-powered assistant, will be configured to support automation, intelligent categorization, and self-service capabilities, driving efficiency and reducing resolution time across IT operations. SysAid's AI Agents will also be introduced to assist end-users and agents by providing automated responses, guiding users through common processes, and reducing the load on support teams. These agents enhance self-service adoption and streamline resolution for routine requests.

SysAid Services and Responsibilities

SysAid will provide a Project Manager and a Technical Consultant familiar with ITSM (IT Service Management), ITIL (Information Technology Infrastructure Library) and the SysAid IT Product. The Technical Consultant(s) will provide primary technical assistance and technical configuration and tailoring of the SysAid Product. The Project Manager will function as a peer to Client's assigned Project Manager and provide guidance towards the execution of the overall implementation, assistance with project planning, resource assignments and project communications. The Project Manager will be Client's primary escalation point for all project concerns and will have direct and constant communications between Client and SysAid Operations for all pre Go-Live activities.

Engagement Model

SysAid is responsible for hands-on configuration and tailoring tasks and activities and remediation of errors resulting from Unit testing and User Acceptance testing.

SysAid will host a weekly project update with the Client Project Manager and key / limited Client stakeholders as part of the project communications plan to verify the project is progressing

properly. This is in addition to any project status and work tasking meeting hosted by the Client Project Manager.

In addition, the SysAid Technical Consultant will meet with the Client's System Administrator up to twice a week to transfer configuration knowledge and ensure smooth knowledge handover throughout the implementation.

Customer Responsibilities and Pre-Requisites

To ensure a smooth and efficient implementation, the Customer is required to fulfill the following responsibilities and complete the necessary pre-requisites prior to and throughout the engagement. Delays or gaps in these areas may impact the project timeline, scope, and cost.

Pre-Project Requirements (To be completed before Session 1)

- Complete the following initial system setups using SysAid-provided training materials:
 - Email integration (incoming/outgoing)
 - User repository setup (e.g., Active Directory or Azure)
 - Asset management setup
- Assign a dedicated Project Manager to oversee the implementation and serve as the primary point of contact for SysAid.
- Identify and assign qualified personnel, including:
 - System Administrator(s): At least one administrator who completes SysAid training and participates throughout the project.
 - Process Owner(s): Subject matter experts for key ITSM areas (e.g., Incident, Change, Problem Management).
- Ensure access credentials and system connectivity are in place for required integrations (e.g., authentication services, APIs).
- Confirm participation in the project kickoff and assign internal roles accordingly.

Ongoing Responsibilities (During the Implementation)

- Ensure timely and active participation in all scheduled sessions. Adhere to the attendance policy:
 - Confirm sessions at least 48 hours in advance.
 - Provide 24-hour notice for rescheduling.
 - "No-shows" (over 15 minutes late or absent without notice) may lead to delays, added fees, or escalation.
- Actively participate in configuration discussions and provide required documentation, including:
 - Use case definitions and process documentation

- Categories, catalog items, and knowledge base content
 - SLA definitions and example reports
- Manage internal communications, schedule stakeholders, and facilitate availability for all relevant team members.
- Troubleshoot integration and connectivity issues related to the Customer's systems.
- Lead User Acceptance Testing (UAT), including:
 - Scheduling and managing test cycles
 - Documenting test results
 - Identifying defects and tracking their resolution using an agreed methodology
 - Assigning a dedicated focal point for testing and remediation
- Participate in and confirm readiness for Go-Live, including:
 - Final testing
 - Agent training attendance
 - Operational sign-off

Project Phases & Sessions

Session	Focus Area	SysAid Deliverables	Customer Responsibilities
Kickoff	Project overview & alignment	45-minute kickoff call	Assign project roles, attend session
Session 1	Project alignment, Go-live planning, Integrations, SharePoint Connector (AI Copilot)	Configure integrations, confirm feasibility	Complete setup of Email, User Repo, Asset Mgmt; Prepare Azure Groups (if applicable)
Session 2	Account setup, User management, Categories, Permissions	Configure defaults, create roles & permissions framework	Create and share categories
Session 3	Automation, AI setup, Branding, Catalog, Knowledge Base	2 Email rules, 2 Routing rules, SSP branding, AI Copilot setup	Create catalog items, KB articles, datasets, AI use cases

Session 4	Forms, Custom fields, Notifications	1 Admin + 1 SSP template, 3 notification types	Modify templates, create custom fields, watch WF mapping video
Session 5	Request & Change Management, Notifications	Configure 5 workflows: Joiner/Mover/Leaver, Hardware/Software + notifications	Map SLAs, provide 1 report example
Session 6	SLA/SLM: due dates, timers, escalations	Configure 5 due dates, 4 timers, 8 escalation rules	Begin full UAT process
Session 7	UAT support, Go-live readiness	Support for testing & readiness validation	Finalize testing, report critical feedback
Session 8	Agent training: Admin views, Ticket journey, AI Agent chatbot and AI agents	Deliver training session	Ensure agent availability
Go-Live	Final implementation phase	Provide go-live support	Confirm readiness, approve launch
Post Go-Live	Handoff and operational continuity	Analytics, reporting, Customer Care and CSM handoff	Transition to ongoing operations

Resources

SysAid Provided Resources

SysAid will provide the following resources for the project:

	Responsibility
Project Manager	Lead project planning, provide implementation expertise, follow the project plan, allocate appropriate resources from SysAid, and act as a single point of contact. Facilitate weekly status calls to track the target project progress.
Onboarding Consultant(s)	Undertake the application configuration and assist with knowledge transfer and training to the Customer.

Required Client Resources

The Customer will provide the following resources and make them available throughout the duration of the project:

Role	Responsibility
Project Manager	Responsible for the project and meet regularly with the SysAid's Project Manager to review progress and resolve issues.
System Administrators	At least one (1) Customer system administrator must complete SysAid Training and be available throughout the duration of the implementation.
Process Owner(s)	Subject matter expert(s) responsible for the implemented process

Assumptions and Constraints

- This scope is based on Customer's stated desire to accept an Out of the Box configuration and that significant deviation from this stated goal will require additional services priced separately.
- The Services described in this Statement of Work will be performed remotely

- Service availability is valid during normal business hours of 8 am through 5 pm local time, based on Client location Monday through Friday excluding holidays.

Session attendance policy

Clients must confirm sessions at least 48 hours in advance and provide 24-hour notice for rescheduling. A "no-show" (failure to attend without notice or arrival over 15 minutes late) may result in delays, fees, or escalation, at SysAid's discretion.

Change of Scope

Any request to modify the scope of this engagement, including but not limited to additional features, modules, services, or changes to existing deliverables, must be submitted in writing. SysAid will review the requested change and determine the impact on timelines, resources, and cost. If accepted, a formal Change Request (CR) will be issued for mutual approval before implementation begins.

Acceptance Criteria

- Completion of each session's deliverables
- Successful go-live with functional SysAid environment
- Knowledge transfer completed to designated client stakeholders

Approval

Customer Representative

Name: _____

Title: _____

Signature: _____

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SysAid Representative

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