

## SECOND AMENDMENT

### TO THE AMENDED AND RESTATED PROFESSIONAL SERVICES AGREEMENT

This Second Amendment to the AMENDED AND RESTATED PROFESSIONAL SERVICES AGREEMENT (this “**Amendment**”) is effective as of June 21, 2022, by and between VertexOne Software LLC f.k.a Vertex Data Utility Services, a Delaware limited liability company (“**VertexOne**”), and Pinellas County (“**Client**”). VertexOne and Client are sometimes referred to herein individually as a “**Party**” and collectively as the “**Parties**”. Capitalized terms used but not otherwise defined herein shall have the meaning ascribed to them in the Agreement (as defined below).

#### RECITALS

A. VertexOne and Client are parties to the AMENDED AND RESTATED PROFESSIONAL SERVICES AGREEMENT signed on July 23<sup>rd</sup>, 2019, and Amendment No. 1 signed July 31, 2021. (the “**Agreement**”).

B. VertexOne and Client have agreed to amend and modify certain terms and conditions of the Agreement as specified in this amendment.

NOW, THEREFORE, in consideration of the premises and other good, valuable, and binding consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties intending to be legally bound, agree as follows:

#### **Attachment 1 – Statement of Work**

The Parties agree to implement changes to VertexOne CIS Enterprise™ to include MDM functionality. Implement VertexOne WaterSmart™ and changes to VertexOne Digital Customer Engagement™ to ensure a smooth end customer experience as indicated in Attachment 1 – Statement of Work.

#### **Attachment 2 – Charges**

The Parties agree to the additional charges listed in Attachment 2 – Order Form

#### AGREEMENT

1. **Amendment to Exhibit A**. Exhibit A, Definitions shall be amended to include the following:

“**VertexOne WaterSmart**” means, VertexOne analytics portal for water utility services.

The additional services provided for in this Amendment are intended to expand the scope of services only, the terms of this Amendment will be governed and subject to the original Agreement with respect to the essential terms and conditions provided therein. In the event of conflict or the resolution of any ambiguities or inconsistencies the original Agreement will be the controlling document, except as specifically changed or modified herein. All provisions and conditions of the original Agreement and any amendments thereto shall remain in full force and effect.

IN WITNESS WHEREOF, the Parties have executed this Amendment, or caused this Amendment to be executed by their authorized representatives, as of the date set forth above.

**VertexOne Software LLC :**

By: *Keith Foerster*

Name: Keith Foerster

**PINELLAS COUNTY**

By: *Charlie Justice*

Name: Chair, Commissioner Charlie Justice

ATTEST: KEN BURKE, CLERK

By: *Judith Keire*



**APPROVED AS TO FORM**

By: *Keiah Townsend*  
Office of the County Attorney

# SOFTWARE AND SERVICES STATEMENT OF WORK (“SOW”)

## 1 Project Summary

VertexOne will provide all services typically utilized to implement all Software and Services described within this SOW for the Client. As the single point of accountability, VertexOne will be solely responsible for implementing the System and providing ongoing support. VertexOne has developed this SOW in response to address software and reporting aspects of Pinellas County Request for Proposal No. 21-0057 P (JJ) as well as the Southwest Florida Water Management District CFI Agreement No. 22CF0003711 between Client and Southwest Florida Water Management District.

## 2 Definitions

Definitions can be found in the Agreement, unless otherwise defined in this document.

## 3 Implementation

### 3.1 Implementation Scope

VertexOne will deploy a single instance of VertexOne WaterSmart™, a single instance of MDMS powered by SAP EDM within VertexOne CIS Enterprise and add functionality in the existing VertexOne CIS Enterprise as part of the Client’s AMI rollout project.

The Client and VertexOne understand the Project scope and Project timeline and agree to communicate and adhere to that scope and timeline, thus setting proper expectations with the Project team, stakeholders, and management. Changes to scope and/or timeline will be addressed based on the terms of this Agreement.

#### 3.1.1 VertexOne CIS Enterprise™ MDM Scope

VertexOne CIS Enterprise™ MDM Scope includes activation of SAP EDM functions for capturing Time Series data. This includes

- Configuration of Profiles and Profile Types
- Synchronization of Profile data with External Systems
- Capturing of time series data from smart meters
- Profile management (status, versioning etc.).
- Performing VEE (validation, estimation, and editing) on imported data.
  - **Consistency Check (Validation)**  
Consistency check provides the ability to validate the imported time series data that is captured from the external systems. The following Consistency Checks are included in scope - High/Low Check, Unit of Measure (UOM) Check, Zero Consumption, Missing Data, Overlap Check, Status Check.
  - **Replacement Value Procedures (Estimation & Editing)**  
Replacement value procedures provides the ability to link and prioritize many procedures within one group and determine what to do if the estimation procedure fails. Standard SAP Replacement Value Procedures are in scope, for example – Linear Replacement, Maximum Value, Minimum Value etc.
- Integrated with Business Process Exception Management (BPEM) which is the SAP Exception tool
- Converting the time series data into billing determinants and integrated to the ISU Billing engine

### 3.1.2 VertexOne WaterSmart™ Scope

The Client is purchasing VertexOne WaterSmart™ to be an expansion of their current instance of VertexOne Digital Customer Engagement. WaterSmart will specifically implement the following Products as defined in this Schedule.

If Client requires any change, addition, or reprioritization of the services set forth in this Schedule, then the parties shall assess and agree to the scheduling and cost implications of such a request in accordance with a change management process.

Client recognizes that the proposed solutions are developed to meet best practices for other similar utilities being served by VertexOne. VertexOne will work with Client to configure the system, where possible, to meet Client business and regulatory requirements.

The following sections will further detail out the systems and implementation approach for each of the primary systems that will be deployed for Client.

VertexOne WaterSmart™ is a customer engagement and analytics platform. As a software-as-a-service (SaaS) system, VertexOne WaterSmart™ provides all major program elements to Client including:

- Program setup and implementation, including data collection.
- Hosting of VertexOne WaterSmart™ Customer Portal and Utility Analytics Dashboard; and
- Services to assist in implementation and ongoing delivery.

WaterSmart will provide Client with detailed descriptions of how information is gathered and from what resources in order for Client to provide disclaimers and privacy policy information to their customers and other parties as needed.

The program is comprised of the following elements, which are explained in more detail below.

#### **Utility Analytics Dashboard**

The Utility Analytics Dashboard provides analytical insights regarding customer consumption (use by account type, high users, etc.), outbound and inbound communications (outgoing leak or other alerts, incoming emails, etc.), and use of the Customer Portal (visit frequency, device access, most visited pages, etc.) The Dashboard also identifies and notifies Client staff about suspected leaks in both AMI and non-AMI environments, and allows Client staff to monitor compliance requirements. The Dashboard delivers information on all customer classes whose data are provided to VertexOne WaterSmart™ and integrates external data sources like property records, weather, and maps. The Utility Analytics Dashboard is available to all Client staff, each with their own unique login.

#### **Customer Portal**

VertexOne WaterSmart™ Customer Portal, provided as an extension of the current web portal VertexOne Customer Advantage, available to customers through a mobile and web application interface. This will provide a single place for customers to see consumption, check and resolve leaks, view and understand bills, learn about assistance programs, and receive targeted messages about Utility promoted events and programs. By helping customers resolve the most common issues themselves, Utility staff can reduce low-value calls, reduce costs, and increase customer satisfaction.

#### **Alerts and Notifications**

VertexOne WaterSmart™ provides alerts to customers to notify of potential high volume or continuous use leaks, to notify a customer that they have reached a self-selected consumption threshold, or to inform customers before the end of the billing cycle that they are likely to have high water use on their upcoming

bill. Threshold notifications and leak alerts are further enabled by AMI, though they are also available for non-AMI customers. Alerts can be sent through multiple channels — email, SMS text message, automated voice call, or (optionally, if selected) print. Burst leak alerts are currently targeted at single-family residential accounts and irrigation-only accounts, whereas continuous leak alerts are available for all meter classes. The leak resolution workflow helps customers identify the source of their leak and resolve the leak on their own.

### **List Builder**

List Builder is a module within the Utility Analytics Dashboard that allows for the creation of targeted lists based on account attributes, consumption behavior, or geography; geographic regions can be defined by hand-drawing a polygon or importing a GIS file. The user can also import a file from their GIS system to identify the appropriate customers that need to be notified. The integrated 'List Builder' system allows Client to create a custom list of accounts to analyze or to communicate with.

### **Customer Welcome Letter**

Client can send a Customer Welcome Letter to explain Client's services and the WaterSmart program and its benefits to end-use customers. The Customer Welcome Letter will be branded for Client including logo, contact information, and a signature line from an appropriate representative, and informs recipients about the company and the program and what they can expect.

### **Print Leak Alerts**

Print Leak Alerts are generated and mailed for leak events if the following conditions are met: the account has an ongoing irregular consumption ("leak") event, the account cannot be alerted by email, text, or phone, the account has not opted out of the VertexOne WaterSmart™ program, the account has not already received a Print Leak Alert for the same leak event, or the leak event has not been alerted or cancelled by staff. The alerts are sent on either a daily or weekly basis for printing and mailing, depending on Client's configuration. Customers who receive Print Leak Alerts will not receive another in the 30 days following a prior Print Leak Alert. Client has the option to set leak detection thresholds for generating alerts. The default leak rate and time threshold values are the same as Client's standard leak alerting thresholds. Print Leak Alerts are available for all meter classes for "Continuous" AMI leaks and for non-AMI accounts. For "Burst" leaks, Print Leak Alerts are currently only available to AMI Single Family Residential and Irrigation-Only customers.

### **3.1.3 VertexOne CIS Enterprise™ Enhancements Scope**

VertexOne CIS Enterprise™ Enhancements Scope includes activation of SAP Device Management (DM) and SAP Advanced Metering Infrastructure (AMI) functions for synchronizing Meter data and defining Meter Capabilities. This includes

- **SAP Device Management**
  - Managing and monitoring AMI capable devices. This includes the whole life cycle of the AMI device, from creation of device, installation, inspection to retirement
  - Device relationship between devices (Meter, ERT etc.)
  - Capturing AMI details on the device. Defining the capabilities and network that the device will communicating through
  - Link consumption profiles to devices
  - Device is fully integrated with the service order and Enterprise Asset Management modules
- **SAP Advanced Metering Infrastructure (AMI)**

- Manages and monitors the integration to external AMI systems using SAP Process Orchestration
- Defines the Remote Capabilities available for smart meters
- Fully Integrated with Device management module
- Enhances and automates business processes by utilizing the remote AMI capabilities of the smart meter (example On Demand Read)
- Ability to capture meter events and provide the ability to process them using the Business Rule Framework plus
- **Integration with External Headend System**
  - Asset Updates
  - On Demand Reads
  - Interval Reads
  - Processing of Event Data reported by Headend System
  - Remote Disconnect/Reconnect Requests
- Changes to SAP Bill Print are not included and, if needed, will be handled via the Change Management Process.
- **Integration with other 3<sup>rd</sup> Party Systems**
  - **Cityworks for Service Order Integration:** Defining additional Service Order Types (SAP Notification Configuration) for potential new AMI related Service Orders is included but it is assumed the existing SAP to Cityworks integration will be able to handle new Service Order Types. Any changes to SAP to Cityworks integration will be handled via the Change Management Process.
  - **Pedal Valve:** Integration with Pedal Value to include
    - Providing Pedal Valve with Customer/Premise/Meter information by Route/Cycle etc to facilitate AMI deployment efforts
    - Processing Meter Exchanges in SAP based on exchange data provided by Pedal Valve (in a standard file format)

### 3.1.4 VertexOne Digital Customer Engagement™ Enhancements Scope

VertexOne will deploy a single instance of the VertexOne Digital Customer Engagement platform including all applicable modules required to deliver the scope defined within this SOW.

The Client and VertexOne understand the Project scope and Project timeline and agree to communicate and adhere to that scope and timeline, thus setting proper expectations with the Project team, stakeholders, and management. Changes to scope and/or timeline will be addressed based on the terms of this Agreement.

VertexOne has provided Exhibit A – VertexOne DCE Project Requirements. Exhibit A has been reviewed by both Parties to determine the Project implementation scope. Column D responses will determine the Project scope and are defined below:

**In-Scope** – requirement will be implemented during the implementation timeline.

**Waived** – not a current requirement for the Client and will not be implemented the current timeline and scope.

Unless agreed upon through the Change Management Process, only items in Exhibit A - VertexOne DCE Project Requirements labeled 'In Scope' will be within the scope of this implementation Project.

New scope items that are not documented as part of this SOW will require Client and VertexOne to work cooperatively to minimize schedule extensions.

If new scope is identified that is not contained in Exhibit A, VertexOne may request a Change Request (CR).

If after signing off on the Explore Phase, the Client determines any of the “Waived” requirements are critical for the initial Go-Live, the requirement can be re-classified to “In-Scope”, but it must follow the Change Management Process as identified in the Agreement. The same process applies to “In-Scope” requirements which are re-classified as “Waived” after the Explore Phase.

“Final Acceptance” after Go-Live is based on the agreed upon “In-Scope” requirements at the end of the Explore Phase plus any requirements which have been re-classified as “In-Scope”.

Client and VertexOne agree that simply adding resources may not be adequate to maintain the timeline and deliver a quality product. Changes to the timeline must follow the Change Management Process.

For purposes of this SOW, a “Defect” means any failure of the Software to meet the requirements set forth in this Attachment or in the Attachments hereto. VertexOne owns the responsibility for the management and correction of all Defects as they relate to the Software defined within this SOW. VertexOne is responsible for the resolution of all Defects created by their delivery of Software/Services for this SOW. VertexOne will facilitate resolution of Defects as part of the VertexOne Solution, and/or Services used to deliver the Software and Services as defined in this Agreement on behalf of the Client. Client agrees to provide all reasonable efforts to facilitate the resolution of Defects including, but not limited to, providing documentation of Defects and/or assisting with related testing.

#### **3.1.4.1 Base Customer Self Service Portal**

VertexOne will deploy a single instance of the VertexOne Customer Advantage web and mobile self-service site, integrated to Client’s corporate web site.

- Integration of VertexOne Customer Advantage and VertexOne Communication Advantage to Client provided web services for real time data exchange with Client’s CIS solution.
- Integration of VertexOne Customer Advantage to web services for all Client’s electronic bill payment and presentment services currently provided by vendor (i.e., KUBRA).

#### **3.1.4.2 End Customer Communications**

VertexOne will deliver a single instance of the VertexOne Communications Advantage communications engine. Client will have the functionality to proactively communicated with end users through various channels as well as publish site wide alerts and messages based on specific customer attributes.

#### **3.1.4.3 Utility Management Portal**

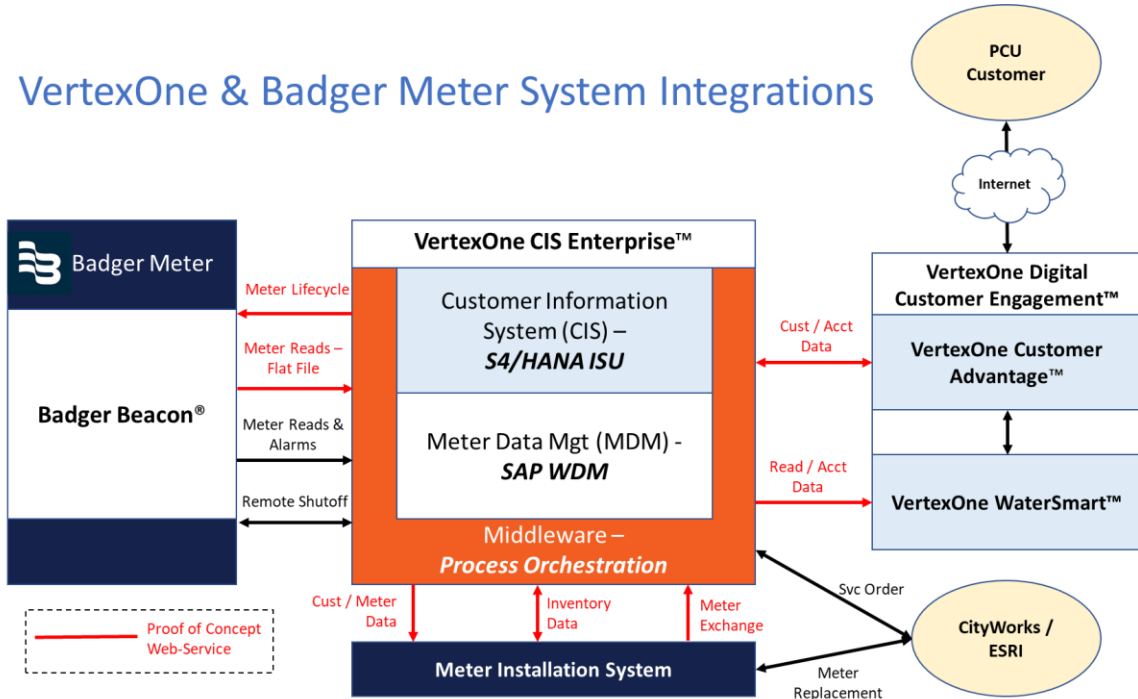
VertexOne will deploy a Utility Management Portal for Client staff to access VertexOne Digital Customer Engagement. This portal will allow Client staff to preform admin functionality for the site, including create communications, send communications, update campaigns, search customer accounts, preform Proxy Logins on behalf of customers, etc.

### **3.2 Integration Scope**

VertexOne will be using web-services wherever possible to integrate the VertexOne Software and Badger Beacon software. Below is a high-level overview of the integration points for this project. In the diagram all lines will be integrations, with the red lines being delivered as part of the Proof of Concept phase.

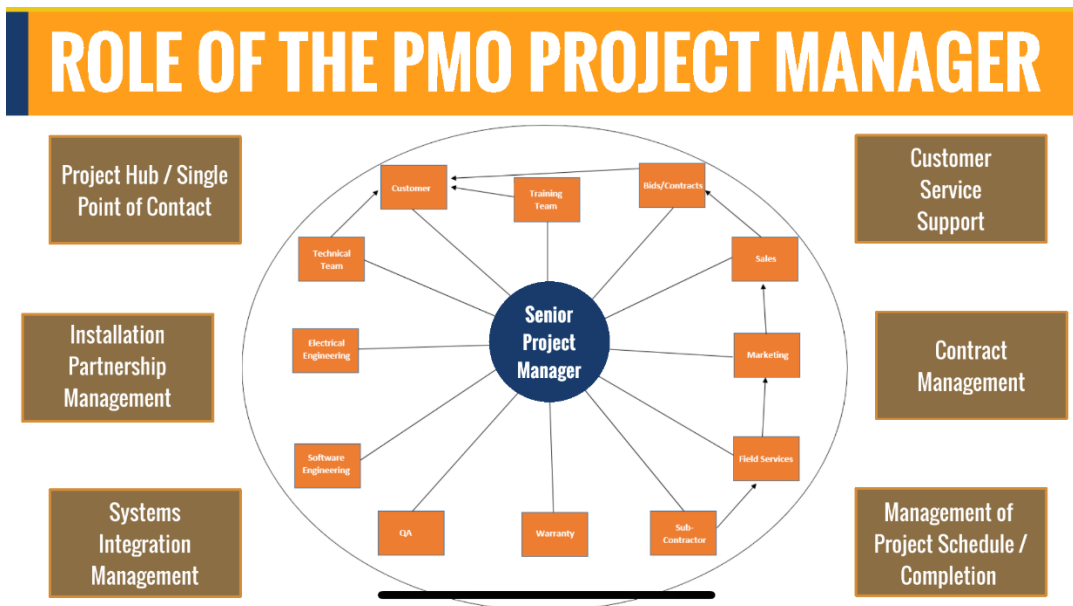


# VertexOne & Badger Meter System Integrations



### 3.3 Project Management

VertexOne Project Management will report to the Badger Project Management Office during the 10-month VertexOne implementation identified in section 3.7 below. Once the VertexOne systems are live, support and project management will transition to VertexOne’s Client Success team. The Client Success Team will also report to the Badger Project Management Office for any AMI specific issues from the Start of the Project to the Final System Test and Acceptance per the Project Timeline & Schedule in Badger Meter Inc.’s Agreement. A visual representation of the overall Project Management can be seen in the graphic below.



### 3.4 Organizational Change Management (“OCM”) VertexOne SOW



VertexOne will provide base organizational change management materials as well as guidance and support to the Client OCM Lead.

### 3.5 End User Training

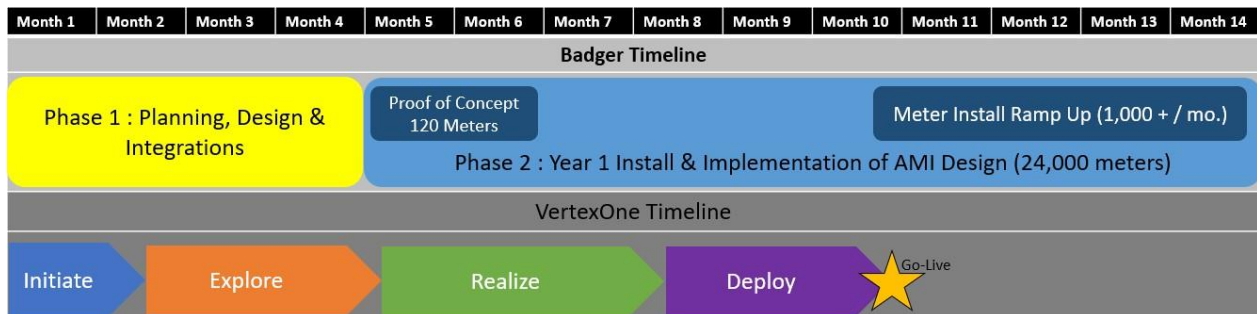
VertexOne will provide base training via standard user stories and assist in the development of Client-specific training materials by updating baseline user stories with Client specific gap information, as well as guidance and support to the Client Training Coordinator and trainers.

### 3.6 Change Management Process

VertexOne and Client will follow the Change Management Process provided as Exhibit A to this SOW.

### 3.7 Implementation Schedule

The preliminary implementation schedule below depicts the high-level schedule phases, and associated durations. A detailed schedule will be developed and updated, as needed, during the Project which will utilize these phases. Any changes to the dates and/or durations, and requisite cost adjustments will be handled by the Change Management Process.



### 3.8 Travel

When Client and VertexOne determine it is safe to begin on-site activities, expenses will be billed based on actual costs incurred and will comply with VertexOne Policy for travel.

VertexOne has documented success in delivering implementations using a distributed delivery model which requires less onsite presence.

### 3.9 Scope Attachments

Exhibit A	VertexOne DCE Project Requirements
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### 3.10 Implementation Sign-Off

After Sign-Off for Project closure and results acceptance of the Solution by Client, this Attachment 1 – Statement of Work and Exhibit A – Project Requirements will be formally closed with Client and VertexOne Sign-Off.

## 4 Assumptions

This statement of work is based on the following assumptions. Any changes to these assumptions may result in changes to the project schedule, timelines, costs, etc. Any such change will be brought to the attention of the steering committee and as applicable, the Change Management process.

#	Assumption
	<b>General</b>
1.	Any required travel and related expenses related to the services specified in this SOW will be passed through to Client as per agreed upon travel policies. All such travel will be pre-approved by Client.
2.	Client will provide a dedicated team and will integrate their activities with our project plan.
3.	Any resource constraints either from Client, Badger, or any other 3 <sup>rd</sup> party vendors that results in change in Project Timelines will result in a change request, that will follow the Change Management Process.
4.	VertexOne assumes that Implementation will start at least 30 days after Effective Date. Any delays past 45 days from Effective Date could in schedule and financial changes, that will be handled via the Change Management Process.
5.	Client's responsiveness and prompt provisioning of necessary program inputs is also critical to schedule adherence.
6.	Unless otherwise stated in this SOW, Client is responsible for delivery and development of all training and end user training materials.
7.	Client will provide subject matter experts dedicated to the project that have knowledge of Client's internal processes.
8.	Any changes to 3rd party vendors not stated in this proposal may result in changes to the timeline, project scope and cost.
9.	Client is responsible for providing dedicated hosted services connectivity.
10.	Client will manage 3rd party vendor relationships, where the vendor has contracted through Client.
11.	Client responsible for any regulatory requirements, defining and providing to VertexOne. Any system changes as a result of regulatory changes are the responsibility of Client and managed via the Change Management Process.
12.	Any audit requests by Client will follow the Change Management Process, and all associated cost with any audits requested by client will be charges following the Change Management Process.
13.	User functionality is determined by Client business rules.
14.	Bill Print Vendor cost impacts are not included in this estimate.
15.	<p>VertexOne assumes for the Proof of Concept("POC"), Pedal Valve will provide (Details on Current Meter and New Meter, corresponding meter reads and activity date) Meter Exchange details in a flat file (example csv). These exchanges can then be processed in one of the below options</p> <ul style="list-style-type: none"> <li>- <b>Option 1</b> – Processed manually in CityWorks and CityWorks pushing these updates to VertexOne CIS Enterprise.</li> <li>- <b>Option 2</b> - Upload meter exchanges to VertexOne CIS Enterprise. The corresponding updates will then be processed in CityWorks and GIS with meter exchange as manual tasks.</li> </ul> <p>Client will identify a group that can process these manual steps during POC.</p>

16.	Once Proof of Concept is complete, VertexOne assumes the meter exchange process following the Proof of Concept will be automated through web-services. Solutioning for these integrations will take place during the project.
<b>VertexOne CIS Enterprise</b>	
17.	Standard SAP webservices and/or Beacon webservices will be utilized where available for VertexOne CIS Enterprise to Beacon integration.
18.	VertexOne Enterprise to Beacon integration will be limited to the below data exchange, considering there are Use Cases for the corresponding data exchange. <ul style="list-style-type: none"> <li>• Asset Synchronization (Meter &amp; ERT data)</li> <li>• Profile Synchronization</li> <li>• On Demand Reads</li> <li>• Interval Data</li> <li>• Event Data</li> <li>• Remote Disconnect/Reconnect</li> </ul>
19.	VertexOne assumes any changes to Client dunning process during this project are not in scope. Any changes to Client dunning process will follow the Change Management Process.
20.	VertexOne CIS Enterprise is the system of record for Premise, Meter & ERT information.
21.	VertexOne doesn't anticipate any system build during Proof-of-Concept phase (POC).
<b>Meter Data Management</b>	
22.	Client needs to identify the final system of record for interval data by end of Explore Phase of the VertexOne implementation. If SAP is going to be the final system of record for interval data; Additional change request may be required once this decision is made.
23.	Functional and Technical requirements on integration with Badger and Pedal Valve will be discussed during Explore phase of the VertexOne implementation. VertexOne expects the resources needed (from Client, Badger and Pedal Valve) to provide technical expertise and make decisions, will be available during Explore Phase.
24.	Integration build for Badger and Pedal Valve will be scheduled during Realize Phase. Testing environments for Badger and Pedal Valve should be available based on the Sprint Schedule to facilitate end to end testing. VertexOne expects the resources needed (from Client, Badger and Pedal Valve) to provide technical expertise and make decisions, will be available during Realize Phase.
25.	Client Functional/Technical resources for AMI system will be responsible for changes required in the AMI system to facilitate communication between systems and standard SAP webservices will be utilized where available.
<b>VertexOne Digital Customer Engagement</b>	
26.	End User view of interval data is dependent on the intervals Badger can provide VertexOneDigital Customer Engagement.
27.	Client is responsible for providing VertexOne key program inputs including account information, regular feeds of meter data, and logos and contact information.
28.	VertexOne WaterSmart™ system requirements are subject to change in the future.
29.	Content and design of all materials are subject to change over time, as VertexOne WaterSmart™ incorporates new features.
30.	Client maintains responsibility as the primary contact for customer inquiries and technical assistance.
31.	VertexOne does not communicate directly with Client's customers; end-user support is the responsibility of Client.
32.	Should Client implement new data management systems after the first initialization process, which require VertexOne to re-onboard new file structures or map historical identifiers (e.g., customers, accounts, premises, service points), VertexOne assesses an additional one-time fee upon receipt of first test files from the new system.
33.	Client and VertexOne agree to complete this process in a timely manner. Client should provide final approvals to VertexOne no more than ten (10) business days from when initial materials are provided to Client.

34.	VertexOne assumes all Move In & Transfer Service Request functionality will be remaining the same as in the current solution. The ability for automation of these Service Request using a Wizards will follow the Change Management Process to enable the functionality in VertexOne CIS Enterprise.
35.	VertexOne assumes Client will Go-Live with Platinum Monthly Chatbot response library updates. Changes to this level of support can be handled via the Change Management Process.
	<b>License</b>
36.	Client is responsible for procuring any SAP licenses that are required for VertexOne to provide the System. Any SAP licensing impact is not included in this SOW.

## ORDER FORM

<u>Address Information</u>	
Address Information	Pinellas County ("Client") 14 S Fort Harrison Ave, Clearwater, FL 33756
<u>Order Form Details</u>	
Effective Date	Final Signature Date on the Amendment
Subscription Start Date	Order Form Effective Date
Subscription End Date	July 23rd, 2029
Billing Frequency	Monthly
Billing Terms	Net 30
VertexOne Software	VertexOne Digital Customer Engagement <ul style="list-style-type: none"> <li>• VertexOne Customer Advantage™</li> <li>• VertexOne Communication Advantage™</li> <li>• VertexOne Document Advantage™</li> <li>• VertexOne WaterSmart™</li> </ul> <p>These Software components will be implemented and supported per the Services defined in this Agreement. These systems are deployed in a SaaS environment on a private cloud that is fully hosted and managed by VertexOne. Users will utilize a computing device with an Internet Browser to access the VertexOne provided services. All licenses are provided to the Client on a subscription basis and charged by metric and/or fixed fees defined below.</p>

### 1. Subscription Fees

Starting on the Effective Date, Client shall pay VertexOne the Monthly SaaS Fees for Hosting and Application Management Services according to the Fee Schedule below. The monthly subscription fee is subject to COLA defined in the Agreement.

The monthly subscription Fees are made up of the following items:

Component	Monthly SaaS Fee
WaterSmart Platform	\$0.1125 per Billable Account
SAP Enterprise Data Management	\$5,563.00 per Month
Communication and Document Advantage	\$488.67 per Month
eMail Water Reports	\$5,625.00 per Month
Live Chat first block of 10 users <sup>1</sup>	\$600.00 per Month

<sup>1</sup>Pricing assumes Live Chat through the VertexOne consolidated inbox. Integration to 3rd party chat tool, such as Genesys, requires additional discovery to estimate.

The monthly subscription fee is subject to COLA defined in the Agreement.

### 2. Transactional Fees

The table below describes VertexOne's operational fees & charges for work activities related to the provision of VertexOne's Software and Services for Client.

For this Agreement and any additional Order Forms, Transactional Fees shall be subject to the following terms:

- (1) Transactional Fees are determined by the volume of Services consumed and will be invoiced on the first full business day of the month following the provision of the Service, or the first full business day of the month following the availability of invoices or tracking data required to determine the payment amount.
- (2) Except as expressly provided otherwise Transactional Fees are not cancelable and Fees paid are not refundable.
- (3) As an express condition of the Client's use of Services, the Client agrees to pay the Transactional Fees. Any amount owing under this section not paid in accordance with its due date shall be a default and subject to the rights and remedies set out in the Agreement.
- (4) The transactional fees are subject to COLA defined in the Agreement.

Price Component	Unit of Measurement	Unit Price
VertexOne WaterSmart Customer Letters <sup>1</sup>	Per Letter	\$ 0.90
VertexOne WaterSmart Print Leak Alerts <sup>1</sup>	Per Alert	\$0.90
VertexOne WaterSmart Print Water Reports <sup>1</sup> (assumes 23,000 accounts w/6 cycles annually)	Per Report	\$ 0.90
VertexOne Communication Advantage - Ad-hoc Email	Per Block of 50,000 emails	\$ 420
Optional – VertexOne Communication Advantage – Ad-hoc SMS	Per Block of 50,000 SMS	\$ 420
VertexOne Document Advantage	Per Block of 240,000 documents stored	\$ 1,200
Additional Blocks of Live Chat Users	Per Block of 10, after the initial 10 users	\$450
Platinum Chatbot Training – Monthly <sup>2</sup>	Per Response Library Update	\$2500
Chatbot Completed Transactions <sup>3</sup>	Per Block 10,000 Completed Transactions	\$1000

<sup>1</sup> Includes all print consumables and postage

<sup>2</sup>Gold Chatbot Training will follow a quarterly update to the response library. This can be selected after Go-Live (\$1,250 per month).

<sup>3</sup>VertexOne and Client will mutually agree to library of Chatbot transactions to enable.

### 3. Implementation Fees

Badger Meter Inc. will include VertexOne implementation services in the amount of \$172,490 per the terms of the Badger Meter Inc. Agreement. Client shall also pay VertexOne directly for these additional following Fees and expenses in the amount of \$553,434 in respect of the Implementation Services and activities.

Component	Implementation Fee
VertexOne Program Management	\$39,362
VertexOne SAP EDM (MDM) Implementation	\$96,728
VertexOne WaterSmart Platform Setup	\$22,000

VertexOne Water Reports Setup	\$14,400
<b>Sub Total</b>	<b>\$172,490</b>
VertexOne Communication Advantage and VertexOne Document Advantage	\$33,191
VertexOne CIS Enterprise Enhanced Functionality	\$439,950
Merger of VertexOne DCE & WaterSmart Layout specific to Client	\$35,000
Additional Features – Disconnect Service and Compare Bills	\$15,293
Live Chat Activation	\$15,000
Chatbot Activation	\$15,000
<b>Sub Total</b>	<b>\$553,434</b>
<b>Grand Total</b>	<b>\$725,924</b>

Throughout the Implementation VertexOne has a set a budgetary amount of \$50,000.00 for travel. Travel within this dollar amount will be managed and approved by both VertexOne and Client Project Managers. Desired travel in excess of the \$50,000 will follow the Change Management process

The above fees will be due and payable by Client in three equal installments as indicated below:

Payment Due on the Effective Date	\$201,144.66
Payment Due on 9/15/2022	\$201,144.67
Payment Due at Go-Live	\$201,144.67
<b>Total Payments</b>	<b>\$603,434.00</b>

#### 4. Expenses

Each party will bear their own expense and costs for this Agreement unless specifically agreed in the Agreement or any SOW. Expenses, travel and accommodation costs incurred by VertexOne in performing the Services under this Agreement shall be handled and paid, if applicable, in accordance with the SOW for the Implementation Services and as identified in additional SOWs.

#### 5. Rate Card

Additional requested work that falls under Exhibit B (Change Control Procedures) will be billed, in one quarter hour increments, at the following hourly rate and do not include any requisite travel expenses. Blended Rate prices are subject to annual COLA increases.



Rate Card	Price	Note
VertexOne Blended Rate	\$ 175.00	Per hour for professional services

## 6. Invoicing

Invoicing will follow the delivery process described in Section 14 of the Agreement.

## 7. Optional Pricing

The following optional pricing is provided to the Client as budgetary pricing. Activation and pricing of the optional items after Effective Date, will follow the Change Management Process. All optional pricing items are subject to an annual escalation of 3%.

VertexOne Assist – Service Offering	Monthly Service Fee	Description
Communication Template Administration <sup>1</sup>	\$1,350	VertexOne will provide administration for up to 5 Communication Templates per month.
Communication Campaign Mgt <sup>2</sup>	\$2,400	VertexOne will manage up to 5 Communication campaigns per month. Campaign management includes generating customer target lists, sending of communications and reporting / analysis / insight on results.
Promotional Campaign Mgt <sup>3</sup>	\$2,025	VertexOne will administer up to 3 on-site Promotional Campaigns per month. Promotion Campaign admin include monthly design meetings, promo configuration, campaign monitoring, reporting and analysis.

<sup>1</sup>VertexOne will administer the creation of Communication Templates on Client's behalf. Client will provide verbiage, branding and business rules for VertexOne to configure. Additional service levels are available if Client desires more than 5 templates per month.

<sup>2</sup>VertexOne will create and deploy Communication Advantage campaigns. Client will provide criteria for identification of target customers. VertexOne will create/maintain, deploy campaign and report on results. Additional service levels are available if Client desires more than 5 campaigns per month.

<sup>3</sup>VertexOne will configure, test and review up to 3 on-site Promotional Campaigns on Client's behalf. Client is responsible for supplying artwork to specifications and related business rules / criteria. VertexOne will provide monthly reporting related to each campaign and results.

## 8. Pricing Assumptions

The above prices incorporate the following pricing assumptions.

Emails	
1.	There is no charge for emails related to self-service customer activity confirmation notifications (password changes, forgot password, autopay enrollment, paperless billing enrollment, profile updates, leak alert, water reports, etc.).
2.	The ad-hoc email fees apply for any emails composed by VertexOne resulting from the receipt and processing of a file or transaction originating outside of the self-service application.
SMS	
3.	There is no charge for the initiation of SMS (text) messages related to self-service customer activity confirmation notices (password changes, forgot password, autopay enrollment, paperless billing enrollment, profile updates, etc.).
4.	The ad-hoc SMS fees apply for any SMS composed by VertexOne resulting from the receipt and processing of a file or transaction originating outside of the self-service application. VertexOne's SMS fees do not include required SMS Gateway services.
5.	SMS Gateway fees are the responsibility of the Client and are incremental to VertexOne's SMS fees.
a.	VertexOne currently supports integration to Twilio and can integrate to Twilio at no additional cost to the client. Any SMS gateway provider other than Twilio, may be subject to one-time integration/set-up charges.
b.	For analysis, Twilio's published per transaction price for plain text SMS is \$0.0075/msg.
Print File Transaction	
6.	Print & Call File Generation. Price is for: <ul style="list-style-type: none"> <li>a. The creation and delivery of a .pdf (print ready) file sent to Client's document print and mail vendor. VertexOne's price does not include the applicable print and mail costs (i.e. KUBRA fees)</li> <li>b. If applicable - The creation and delivery of a file sent to Client's outbound dialer platform. VertexOne's price does not include outbound dialer/telephony costs.</li> </ul>
7.	Any VertexOne Communication Advantage initiated documents that result in print/mail are subject to document processing Charges (if processed through KUBRA).
8.	VertexOne reserves the right to adjust the price for the VertexOne WaterSmart Customer Letters and VertexOne WaterSmart Print Leak Alerts through the Change Management Process. VertexOne would initiate such a change if the wholesale cost of paper/postage consumables materially changes.
Document Archival	
9.	The Electronic Document Archival fee is a one-time fee for any items archived in VertexOne Document Advantage. The fee is incurred at the point an item is archived and covers archival for up to 24 months.
10.	For performance reasons, a size limit of 20 MB per document applies to documents loaded into VertexOne Document Advantage. Any requested increase in the max file size will be addressed through the Change Management process.
Chatbot	
11.	Platinum SLA includes monthly reporting on Chatbot responses and applicable 'Training' of Bot to update response library.

12.	Gold SLA includes quarterly reporting on Chatbot responses and applicable 'Training' of Bot to update response library.
13.	Completed Transactions Fee applies to requests handled by Chatbot that result in completed customer care transactions. Incomplete requests (i.e., response not found) are not counted.

Client Specific DCE	
CIS Integration	VertexOne CIS Enterprise
Client Staff SSO Capability	
Payment Vendor	Paymentus
WCAG 2.0	Yes
Client Staff 2 Factor Authentication	No
End User 2 Factor Authentication	No
SMS Integration	Twilio
Email Integration	SensGrid
Dialer Integration	Twilio
Printer & Mail Integration	
User Migration	No
VertexOne WaterSmart	Yes
VertexOne GasSmart	No
VertexOne ElectricSmart	No
Outbound Communication Types :	
3rd Party Integrations :	

Client Specific Customer Advantage		Included in Scope	Description	Comments	
#	Page/Feature				
Sign In Page	Customer Sign In Page	1 Login	In Scope		
		2 Forgot User ID	In Scope		
		3 Forgot Password	In Scope		
	Guest Features on Sign In Page	4 Sign Up/Register Page	In Scope	Ability for end user to create a login profile with a username and password.	This is the section that details features that can be available on the sign-in page of VertexOne DCE.
		5 Pay bill as Guest	In Scope	Ability for un-authenticated users to make a one time payment without having to create an account.	
		6 Start Service	In Scope	Ability for end user to submit a 'Start Service' request. This link can be a step-by-step wizard that automatically creates a service order in the CIS (if approved by customer service) or it can be a form that is sent to a CSR for processing.	
		7 Install App	In Scope	Ability for end user to install a shortcut for the web self service portal on the mobile home page.	
		8 Disconnect Service (Add-On)	In Scope	Ability for end user to submit a 'Disconnect Service' request. This link can be a step-by-step wizard that automatically creates a service order in the CIS (if approved by customer service) or it can be a form that is sent to a CSR for processing.	
	Overall Site UI - Pre Login	9 Link to Live Chat /Chatbot (Add-On)	In Scope	Ability for end user to interact with VertexOne chatbot OR a live chat agent. Available only if Chat is enabled. Because the users are un-authenticated, only general, non account specific information is available.	
		10 ENG/SPA Language Translations	In Scope	Ability for end user to select language of portal content between English and Spanish. Spanish language content is required to be provided by the utility.	
		11 Language Preference (Add-On)	Waived	Ability for end user to select language of portal content to anyone of 100 machine translatec languages.	
Overall Site UI - Post Login	12 Customized Logo by LOB/Brand	In Scope	Branding of the self-service portal align with the selected account's Line of Business and will reflect the Logo, customer care contact information and applicable links.		
	13 Link to Live Chat (Add-On)	In Scope	Ability for end user to initiate a live chat session with customer service staff. Available only if Chat is enabled.		
	14 ENG/SPA Language Translations	In Scope	Ability for end user to select language of portal content between English and Spanish. Spanish language content is required to be provided by the utility.		
	15 Language Preference (Add-On)	Waived	Ability for end user to select language of portal content to anyone of 100 machine translatec languages.		
	16 Link to Message Center Inbox	In Scope	Available with Secure Message Center.		
	17 Utility Social Media Links	In Scope	Ability for end user to access links to utility social media sites e.g. Facebook, Instagram, YouTube, etc. The links are configurable.		
	18 Dropdown Menu to Select Different Accounts for Users with Multiple Accounts	In Scope	Ability for end user to select account for which they would like to conduct self-service.		
Account Summary	19 Billing Summary	In Scope	Ability for end user to view last bill, last payment, current balance and make a payment.		
	20 Compare Usage	In Scope	Ability for end user to view current usage and historical usage trend.		
	21 Temperature Overlay	In Scope	Overlay of high/low temperatures on usage graph.		
	22 Quick Links	In Scope	Links to other websites and pages with relevant information for the end use.		
	23 'I want to' widget	In Scope	List of actions and transactions from an end customer's perspective. (e.g. Understand a high bill, Check if I have a leak, Change my payment options, etc.)		
	24 Home Utility Report	In Scope	Ability for end user to view comparison of usage against other households with similar profile.		
	25 Update Preferences	In Scope	This allows customers to quickly update specific preferences in the system like Paperless billing or primary contact preference.		
Billing	26 Billing & Usage History Table	In Scope	Ability for end user to view billing and usage history for the past 24 months (if available).		
	27 Download Billing & Usage History	In Scope	Ability for end user to download or print billing and usage history for the past 24 months (if available) in a csv file format.		
	28 View Bill Images	In Scope	Ability for end user to view bill images.		
	29 Bill Delivery Options	In Scope	Ability for end user to select bill delivery options to paperless or page.		
	30 Budget Billing	Waived	Ability for end user to enroll into budget billing based on utility business rule.		
	31 Water Budget Management	Waived	Ability for end user to estimate water and sewer bill based on tiered water budget rate.		
	32 Electric Vehicle Billing Management	Waived	Ability for end user to manage a billing account for EV charging.		
	33 Compare Bills Menu Option	In Scope	Ability for end user to view a comparison of billing and usage across multiple periods in tabular and graphical format, and download this information.		
Usage Insight	34 View Usage in different consumption measurements	In Scope	Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	35 Water Leak Detection with Recommended Actions	In Scope	This is pop up that will alert a end customer that there is a possible leak. From there it will provide step by step recommended actions to find and resolve a possible leak. Functionality available with VertexOne WaterSmart.		
	36 Disaggregated Usage	In Scope	This is a graph they will allow end customers to view their specific usage across a period of time. Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	37 Interval Usages Graphs	In Scope	This graph will allow customer to view Interval Usage (if interval usage is available from client) with options to view multiple intervals and have a slider at the bottom of the graph to view specific times. Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	38 Seasonal Usage Graphs	In Scope	Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	39 Usage vs Tiered Rates	In Scope	Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	40 Weather Overlay on Usage Graphs	In Scope	Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	41 Forecast Future Bills	In Scope	This functionality will allow end customers to view a forecast bill based on previous usage compare to the current billing cycle usage. Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	42 Estimated Usage based on Home Profile	In Scope	Customers will have the ability to view estimated usage per billing cycle based on a home profile. The Home Profile will be based aggregated data across the utility and VertexOne data for specific criteria (i.e., zip code, family size, yard size, number of bathrooms, etc.) Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
	43 Update Home Profile	In Scope	Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart.		
Payments Page	44 Payment Transactions	In Scope	Ability for end user to view, download or print historical payment transactions.		
	45 Ledger History	In Scope	Ability for end user to view, download or print historical ledger information (billing and payment transactions as they occurred).		
	46 Request Letter of Credit	In Scope	Ability for end user to request a Letter of Credit to be emailed to them.		
	47 Payment Arrangement	Waived	Ability for end user to setup a Payment Arrangement based on utility business rule.		
	48 Payment Extension	Waived	Ability for end user to setup a Payment Extension based on utility business rule.		
	49 Set Up Autopay	In Scope	Ability for end user to setup automatic payments by ACH or credit card.		
	50 Make a Payment	In Scope	Ability for end user to view payment options and make a one time payment to either one or multiple accounts.		
	51 Pre-Pay Account Management	In Scope	Ability for end user to pre-pay their account.		
Manage my Profile	52 Manage Payment Methods	In Scope	Ability for end user to setup and manage payment methods (bank, credit card, etc).		
	53 Pending Payments	In Scope	Ability for end user to view pending payment.		
Service Requests	54 Contact Information	In Scope	Ability for end user to update contact details (mailing address, profile email address, phone numbers, mobile number for SMS, etc.)		
	55 Preferences	In Scope	Ability for end user to set preferred contact channel (email, text, voice) for all notification.		
	56 Account Settings	In Scope	Ability for end user to add or remove accounts visible into this profile.		
	57 Password Settings	In Scope	Ability for end user to update password and set preferences for two-factor authentication.		
	58 Customer Inquiry - Consolidated Inbox	In Scope	A customer can send a inquiry about Service Request or a Service Order in progress through Secure Message Center.		
	59 Service Request Wizard 1	Start Service	VertexOne will work with Client to determine the service request.		
	60 Service Request Wizard 2	Disconnect Service	VertexOne will work with Client to determine the service request.		
	61 Service Request Wizard 3	Transfer Service	VertexOne will work with Client to determine the service request.		
	62 Service Request Form 1	Workshop Discussion Item	VertexOne will work with Client to determine the service request.		
	63 Service Request Form 2	Workshop Discussion Item	VertexOne will work with Client to determine the service request.		
	64 Service Request Form 3	Workshop Discussion Item	VertexOne will work with Client to determine the service request.		
	65 Service Request History	In Scope			
	66 Appointment Booking (Add-On)	Waived	Ability for end user to schedule Service Work within the customer portal. Requires integration with Mobile Work Management (MWM) solution using web services provided by the MWM.		
	67 Dynamic Form Completion with or without e-Signature (Add-On)	Waived	Ability for end user to fill out forms created by the utility. The forms may or may not require digital signatures as determined by the utility.		
68 Acquire E-Signature on Document	In Scope	Ability for end user to view a document and save a signature (drawn, typed, etc.) in the document for it to be captured and saved, along with time and date of signature.			

Register User Logged In	Documents	69	Customer Upload Documents	In Scope	Ability for end user to upload documents to save in the Document Management repository Document types supported include: i. Document types of PDF, DOC/DOCX, XLS/XLSX, PPT/PPTX, TXT, etc. ii. Image types of PNG, JPG, GIF, TIFF, etc. iii. Video types of MP4, MKV, AVI, MOV, etc. iv. Audio types of MP3, WAV, ALI, etc.	This is the section that details features that can be available on the sign-in page of VertexOne DCE.
		70	Customer View Documents	In Scope	Ability for end user to view document associated with their account(s)	
		71	Upload and Download Documents from utility provided Document Management System	In Scope	Ability for end user to view and upload documents from a utility provided Document Management System (DMS). This requires integration with utility provided DMS via web services provided by the DMS.	
		72	Customer Upload Documents with Secure Message Center	In Scope	Ability for end user to attach documents with a secure message	
	Secure Message Center	73	View Inbox for Messages	In Scope	Ability for end user to view all messages received through the Secure Message Center	
		74	View All Sent Messages	In Scope	Ability for end user to view all sent messages from through Secure Message Center	
		75	Archive Messages	In Scope	Ability for end user to archive any messages that have been sent or received through Secure Message Center	
		76	Configurable Message Types	In Scope	Ability for end user to select a message type before sending a message through Secure Message Center. E.g., Request Call Back, General Inquiry	
		77	Utility Dynamic Form Completion (Add-On)	Waived	Ability for end users to see and complete specific dynamic forms created by utility staff	
		78	Set Message Priority	In Scope	Ability for end user to set a priority level for the message, based on utility predetermined priority levels.	
	Products and Add-on Services	79	Internal Catalog (Add-On)	Waived	Ability for end user to view a catalog of products and features setup by the utility	
		80	External Catalog (Add-On)	Waived	Ability for end user to view a catalog of products and features setup by an external vendor	
		81	Shopping Cart (Add-On)	Waived	Ability for end user to view a shopping cart containing products/services they have selected for purchase	
		82	Enroll/Order Products or Services (Add-On)	Waived	Ability for end user to select products/services from the catalog and add to shopping cart	
		83	Unenroll/Cancel Products or Services (Add-On)	Waived	Ability for end user to view currently enrolled products/services and un-enroll from the service if desired	
		84	Display Account History for all Products and Services (Add-On)	Waived	Ability for the end user to view all purchases, the type of purchase and the cost of the product and/or offer.	
		85	Recurring Charge Setup	Waived	Ability for the end user to sign up for products and offer that have recurring charges. The portal will pass this information back to the CIS.	
		86	Fulfillment Integration through CIS (Add-On)	Waived	Ability for end user to have the product or service order fulfilled on the back end through the CIS and receive a charge for an enrolled service on their utility bill	
	Notifications Preferences	87	Fulfillment Integration through External Vendor (Add-On)	Waived	Ability for end user to have the product or service order fulfilled on the back end by the appropriate external provider, and receive a charge for an enrolled service on their utility bill	
		88	Water Leak Alert	In Scope	Ability for the end user to opt in/out to receive a notification about a possible leak, as well as preferred method of contact for leak notification. <i>Functionality with VertexOne WaterSmart</i>	
		89	High Usage Notification based on Factor of High Usage	In Scope	Ability for the end user to opt in/out to receive a notification about high usage, as well as preferred method of contact for high usage. Notification can be set on specific factors of high usage compared to normal usage. <i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>	
		90	Bill Forecast Notification	In Scope	Ability for the end user to opt in/out to receive a notification about an update for bill forecast, as well as preferred method of contact for bill forecast notification. <i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>	
		91	Unplanned Usage Notification	In Scope	Ability for end user will be able to set periods of time there will be unplanned usage. Ability for the end user to opt in/out to receive a notification about unplanned usage, as well as preferred method of contact for unplanned usage. <i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>	
		92	Home Utility Reports	In Scope	Ability for the end user to opt in/out to receive a notification about an updated home utility report, as well as preferred method of contact for updated home utility reports. <i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>	
		93	Print Home Utility Report	In Scope	Ability for the end user to opt in/out to receive a print and mailed letter about an updated home utility report. <i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>	
		94	Utility Connect Messages	In Scope	<i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>	
		95	Urgent Notices and Service Alerts	In Scope	Ability for the end user to opt in/out to receive a notification about an urgent notices and service alerts, as well as preferred method of contact for notices and alerts. <i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>	
96		Unsubscribe from all notification option	In Scope	Ability for end user to unsubscribe from all forms of notifications. <i>Functionality with VertexOne WaterSmart, VertexOne ElectricSmart, and/or VertexOne GasSmart</i>		

Chat/Chatbot	97	Live Chat Sent to CSR (Add-On)	In Scope	Ability for the end user to request a live chat session with utility staff.	add assumption around decision during explore phase
	98	VertexOne Chat Virtual Assistant (Add-On)	In Scope	Ability for the end user to receive help from a chat virtual assistant in a question and answer format	
	99	Monthly Chatbot Training (Add-On)	Waived	Ability for the system to receive additional training to the chat virtual assistant on a monthly basis to improve the accuracy and effectiveness of virtual assistant responses.	
	100	Quarterly Chatbot Training (Add-On)	Waived	Ability for the system to receive additional training to the chat virtual assistant on a quarterly basis to improve the accuracy and effectiveness of virtual assistant responses.	
Outage	101	View Live Outage Map (Add-On)	Waived	Ability for end user to view a map of outages impacting service to their location	
	102	Report Outages (Add-On)	Waived	Ability for end user to report outages to the utility	
	103	Set Alerts based on Outages (Add-On)	Waived	Ability for end user to set up and update preferences related to proactive outage communication from the utility	
Mobile Application	104	Native Mobile App (Add-On)	Waived	Ability for end user to download and save a customer service mobile app on their smart phone from the App store	
	105	Progressive Web App	In Scope	Ability for end user to use a mobile responsive customer service web application via the web browser in their smartphone. The progressive web app has the exact same functionality provided on a desktop web application	
Additional Portals	106	Landlord (Add-On)	Waived	Ability for a landlord to setup a landlord profile that allows them to establish and manage a Continuous Service Agreement for all service locations owned by the landlord	VertexOne can provide additional portal for specific types of users that need specific access to Client CIS information. These portal will have base functionality. Each portal will require scoping to meet Client specific needs
	107	Builder (Contractor) (Add-On)	Waived	This portal is for builders or contractor that need specific service requests and additional information based on their permits.	
	108	Realtor / Community Access (Add-On)	Waived	This portal allows realtor and/or specific community group to access aggregated data for specific service location or larger service areas.	
	109	Agency (Add-On)	Waived	This portal is for agencies that make pledges for specific customer and allows those agencies to view and manage their payments and pledged account selections.	
	110	Integrated Solution	Waived	This functionality will allow for the Landlord portal to be integrated with VertexOne DCE so authorized users will not need to log into a separate portal to manage the premises under their CSA they can utilize the same portal they use to manage their primary, non landlord service location	
	111	Stand Alone	Waived	A standalone portal for landlords to manage continuous service agreements for properties owned by them	
	112	View All Premise on CSA	Waived	Ability for authorized users to view a list of all premises they manage.	
	113	Add/Remove Premise on CSA	Waived	Ability for authorized users to add and/or remove premises under their CSA.	
	114	Per Unit Breakdown for all Properties under CSA	Waived	Ability for authorized users to view data related to their premises. e.g., consumption, billing, move in/move-out dates, current balance, responsible party.	
	115	Update Contact Information	Waived	Ability for the authorized user to update their contact information specific to the CSA	
	116	Manage Authorized Users	Waived	Ability for users to add and/or remove additional authorized users that can have access to the portal to assist in management of CSA and premises.	
	117	Consumption History Billed to Landlord	Waived	Ability for authorized users to view consumption billed to landlord by premise and in total across all premises.	
	118	View Available Lots	Waived	Ability for a builder user to view all current service location that are part of their projects.	
	119	Temporary Service Turn On	Waived	Ability for a builder user to request that temporary meter and lines are put in place to complete project.	
	120	Temporary Service Turn Off	Waived	Ability for a builder user to request that temporary shutoffs are put in place to complete project.	
	121	Install Permanent Meter	Waived	Ability for a builder user to request that new permanent meters are installed once the project is completed.	
	122	Transfer to Owner	Waived	Ability for a builder user to transfer the service location to the new owner.	
	123	View All Lot History	Waived	Ability for a builder user to view all service locations of past projects.	
	124	Service Location Search	Waived	Ability for a realtor user to search for a service location using address or account number	
	125	Manage User Profile	Waived	Ability for a realtor user to setup and manage user profile, including contact information	
	126	Retrieve Historical Consumption	Waived	Ability for a realtor user to view historical consumption for a specific premise	
	127	Retrieve Historical Bill Amounts	Waived	Ability for a realtor user to view historical bill amounts for a specific premise	
	128	Search for Customer Accounts	Waived	Ability for an Agency user to search for accounts by address or account number	
	129	View Customer Account Details/History	Waived	Ability for an Agency user to view account and/or service location data. e.g., consumption, balance, payment, payment due-date, collection activity	
	130	Establish Pledge for Account	Waived	Ability for an Agency user to establish a pledge for specific account based on CIS business rules.	
	131	Submit Payment for Pledged Account	Waived	Ability for an Agency user to process payment for pledge(s). Requires Payment Vendor Support	
	132	Add Comment to Pledge Accounts	Waived	Ability for an Agency user to can add comments to pledge accounts.	
	133	Update Agency Profile	Waived	Ability for an Agency user to update their profile	
	134	View Total Agency Pledge Balance	Waived	Ability for an Agency user to view the total agency pledge balance	
	135	View Current Pledged Accounts	Waived	Ability for an Agency user to view the current accounts against which the Agency has pledged payments	
	136	View Agency Pledge Ledger History	Waived	Ability for an Agency user to view a ledger of past pledge credit and debit transaction	
	137	View Agency Pledge Payments	Waived	Ability for an Agency user to view history of payments against various account	

Feature	Client Specific Management (Admin) Portal	Page	Included in Scope	Description
Customer Advantage	1	Customer Profile Search Based on Account Attributes	In Scope	Ability for authorized utility staff to search for customers based on specific attributes related to CIS or VertexOne DCE.
	2	Customer Activity History	In Scope	Ability for authorized utility staff to view a log of customer profile activity, including details such as IP address, account number, event, date and time, etc.
	3	Content Management	In Scope	Ability for authorized utility staff to manage utility content (e.g., customer care phone number, SMS verification message, etc.)
	4	CSR Profile Updates	In Scope	Ability for authorized utility staff to view customer profile information (username, email address, invalid logins, last updated date/time, active/inactive, account numbers, default account, bill delivery option for each account, service address for each account, etc.) and make updates to the profile (e.g., Update Email Address, Reset Password, Reset Invalid Logins, Delete profile, etc.). This activity is tracked and logged.
	5	View Live Website Stats	In Scope	Ability for authorized utility staff to view live stats for the portal. (e.g., registered accounts, daily logins, monthly logins, communications sent, etc.)
	6	CSR Proxy Login	In Scope	Ability for authorized utility staff to login to a customer's web self service portal profile and perform actions on behalf of the customer.
	7	CSR Proxy Login Auditing	In Scope	Ability for the system to track all actions performed by utility staff on behalf of the customer through the proxy login and save in searchable audit logs
	8	Create Broadcast Messages	In Scope	Ability for authorized utility staff to create targeted broadcast messages to be displayed on the portal after user login based on various user attributes. The messages can be displayed for all end users or specific end users that meet defined criteria. Messages displayed can be categorised as urgent, informational, or important.
	9	Promotional Campaign (Add-On)	Waived	Ability for authorized utility staff to create targeted promotional campaigns displayed to the end user on the portal after login. The campaigns can be displayed for all end users or specific end users that meet defined criteria. Campaign types include modal, banner and paperless. Configurable features of the campaign include start/end date, maximum number of impressions, reminder interval, do-not-disturb interval, etc.
	10	Campaign Tracking	In Scope	Ability for authorized utility staff to search campaigns using various criteria (e.g. user,dates,account,email address,category, etc.) and view/download promotional campaign stats (e.g. user impressions, user selections, last impression date, etc.)
Communication Advantage	11	Customer Search based on Pre Defined Attributes	In Scope	Ability for authorized utility staff to send communication based on a search of customers that meet defined attributes.
	12	Upload Customer Spreadsheet	In Scope	Ability for authorized utility staff to send communication based on an upload of customer spreadsheet.
	13	Non-Customer List	In Scope	Ability for authorized utility staff to send communication based on a list of non-customers.
	14	Respond to Customer Secure Message Center Communications	In Scope	Ability for authorized utility staff to respond to customer messages within the Secure Message Center.
	15	List Creation via CIS Search	In Scope	Ability for authorized utility staff to create a customer list for communication based on a search of the CIS attributes.
	16	List Creation via Map Search	In Scope	Ability for authorized utility staff to draw a polygon over a map that will generate a customer list for communication.
	17	List Creation via DCE Search	In Scope	Ability for authorized utility staff to create a customer list for communication based on a search of the VertexOne DCE attributes.
	18	Communication Queue	In Scope	Ability for authorized utility staff to view all current and pending communications.
	19	View All External Communication History	In Scope	Ability for authorized utility staff to view all communications for a specific customer or across all customers.
	20	Create Multiple Communication Templates based on Communication Method	In Scope	Ability for authorized utility staff to create custom templates that will use defined attributes. These templates can be based on communication method, and grouped together based on overall communication reason.
	21	Manage Communication Templates	In Scope	Ability for authorized utility staff to manage custom communication templates
	22	Manage Utility Content	In Scope	Ability for authorized utility staff to manage utility specific variables that are user throughout communications
	23	View Consolidated Inbox for Secure Message Center	In Scope	Ability for authorized utility staff to view all messages received through the Secure Message Center
	24	View Sent Messages from Consolidated Inbox	In Scope	Ability for authorized utility staff to view all sent messages from through Secure Message Center



Live Chat	25	Participate in Live Chat (Add-On)	In Scope	Ability for authorized utility staff to receive an alert of an incoming live chat request and respond to a live chat request from an end user.
	26	Chat Knowledgebase (Add-On)	In Scope	Ability for authorized utility staff to respond to a customer message by clicking on a canned message in the chat message repository
Product Advantage - Requires client specific discussions	27	Catalog Source (Add-On)	Waived	The utility will be able to define where the catalog of products offered will be stored. (VertexOne, Utility CIS, 3rd Party)
	28	Add Remove Products from Catalog (Add-On)	Waived	Ability for authorized utility staff to add and/or remove products offered if the catalog is store in VertexOne.
	29	Update Products in Catalog (Add-On)	Waived	Ability for authorized utility staff to Update attributes for products offered, if the catalog is store in VertexOne. (e.g., Product Code, Product Type, Cost, Product Group, Business Rules for Exceptions, etc.)
	30	Manage Orders (Add-On)	Waived	Ability for authorized utility staff to view and manage orders if VertexOne is the catalog source and fulfillment vendor.
	31	Create Product Offer (Add-On)	Waived	Ability for authorized utility staff to create offers of products that the end user can see and purchase. This also defines the accounting based on products and catalog items. VertexOne must be the catalog source.
	32	View All Purchases (Add-On)	Waived	Ability for authorized utility staff to view all purchases made by end users. Note: VertexOne must be the catalog source and fulfillment vendor.
VertexOne Document Advantage	33	Account Search by Customer Attributes	In Scope	Ability for authorized utility staff to search for documents that can be associated with Accounts, Premise or Unique Document ID.
	34	CSR Uploaded Documents	In Scope	Ability for authorized utility staff to upload document that can be associated with accounts, premise or have a unique document ID.  Document types supported include: i. Document types of .PDF, DOC/DOCX, XLS/XLSX, PPT/PPTX, TXT, etc. ii. Image types of PNG, JPG, GIF, TIFF, etc. iii. Video types of MP4, MKV, AVI, MOV, etc. iv. Audio types of MP3, WAV, AU, etc.
	35	View Customer Uploaded Documents	In Scope	Ability for authorized utility staff to view documents that were uploaded by end users to review and process if needed.
	36	Modify Document Attributes	In Scope	Ability for authorized utility staff to manage documents and add notes, reassign or update attributes.
	37	Integration with External Document Management System	In Scope	Ability for authorized utility staff to view documents stored in an external DMS
Promotional Campaign Manager	38	Advanced Style Campaigns (Add-On)	Waived	Ability for utility staff to designed campaigns can include images and multiple colors.
	39	Campaign Business Rules (Add-On)	Waived	Ability for utility staff to set business rules for campaigns to ensure specific end users can see campaigns. Utility can also adjust the reoccurrence that end users see the campaign.
	40	Banner Messages (Add-On)	Waived	Ability for utility staff to display banners on self-service pages targeted banner messages based on customer account attributes configured
	41	Rotating Banner (Add-On)	Waived	Ability for utility staff to create multiple banner campaigns that can cycle through for end user viewing in specified location.
Reporting / Analytics	42	Aggregated Consumption Dashboards & Reports	In Scope	Ability for utility staff to view aggregated consumption across multiple accounts or all accounts in a dashboard view, with additional table reports.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	43	Leak Detection Dashboards & Reports	In Scope	Ability for utility staff to view a dashboard and multiple table reports of leak statistics across the utility base.  <i>Available with VertexOne WaterSmart, and/or VertexOne Gas Smart</i>
	44	Tier Consumption Dashboards & Reports	In Scope	Ability for utility staff to view a dashboard and multiple reports that break down consumptions and usage across multiple predetermined tiers.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	45	Budget Dashboard & Reports	In Scope	Ability for utility staff to view reports and dashboards that break down the utility's customers consumption budget statistics.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	46	Drought Restrictions Dashboards & Reports	In Scope	Ability for utility staff to view dashboards and reports that break down the usage and consumption in areas that are determined to be in drought restrictions.  <i>Available with VertexOne WaterSmart</i>
	47	Customer Engagement Dashboards & Reports	In Scope	Ability for utility staff to view and breakdown end customer engagement through the portal and external communications through reports and dashboards.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	48	Customer Efficiency Dashboards & Reports	In Scope	Ability for utility staff to view across their customer base how efficient service location are based on predefined customers, geographic regions or business lines segments  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	49	Reports based on Customer Attributes	In Scope	Ability for utility staff to build reports based on a list of customer meeting specific attributes.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	50	Reports based on CIS Fields	In Scope	Ability for utility staff to create reports based on fields specific to utility CIS.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	51	Reports based on Spreadsheet Upload	In Scope	Ability for utility staff to upload a spreadsheet of customer and generate a report based on the customers included in the spreadsheet.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	52	Reports based on Map Drawing Overlay	In Scope	Ability for utility staff to draw a polygon over a map and generate a report based on customers and service locations within the selected area.  <i>Available with VertexOne WaterSmart, VertexOne Electric Smart and/or VertexOne Gas Smart</i>
	Admin	53	My Profile Settings	In Scope
54		Modify User Profile	In Scope	Ability for authorized utility staff to manage authorized utility staff profiles and permissions
55		Add User Profile	In Scope	Ability for authorized utility staff to add profiles for new authorized users
56		Manage Groups	In Scope	Ability for authorized utility staff to manage groups that have specific user permissions on the management portal
57		Add Group	In Scope	Ability for authorized utility staff to create new groups that have specific user permissions.
Outage Mapping	58	Outage Mapping - Manual Map Creation (Add-On)	Waived	Ability for utility staff to manually draw an Outage Map using a polygon or square for display to end users within the customer self service porta. Ability for the system to utilize the map to pull a list of customers from the CIS, and provide a proactive notification to customers. End users will be able to see the outage map within the portal and sign-up for additional alerts or report additional outages.
	59	Outage Mapping - Automated Map Creation (Add-On)	Waived	Ability for the system to accept a gis file containing list of service locations impacted by an outage for proactive communication to the customers, based on customer selected preferences

Dynamic Forms	60	Dynamic Form Development Module (Add-On)	Waived	Ability for authorized utility staff to create forms that can be made available to end users in the self service portal for various transactions. These forms can be used for Service Requests, collect information for a business process, conduct a customer survey, etc.
VertexOne Assist	61	VertexOne Manages Promotional Campaigns (Add-On)	Waived	Ability for vendor staff to provide administration services for Promotional Campaigns within portal. Vendor will also provide additional reporting around campaigns, and best practices.
	62	VertexOne Manages Communication Campaigns (Add-On)	Waived	Ability for vendor to provide administration services for Communication Campaigns within portal. Vendor will also provide additional reporting around campaigns, and best practices.
	63	VertexOne Provides Communication Template Admin (Add-On)	Waived	Ability for vendor to provide administration services for communication template management and development.. Vendor will also provide additional reporting around templates, and best practices.