



Doing Business With Rocket®

*jBASE, AccuTerm, OpenQM, MVConnect
and MV Dashboard Products*

Dear valued Zumasy® Customers and Partners,

We are excited to take the next step in welcoming you to the Rocket® Software family. We are here to help you with transitioning to Rocket Software operational processes for transacting business, managing financials, placing orders, accessing technical support, engaging in services delivery, downloading products, managing license keys, and so much more.

This guide was created to answer questions about how to work with Rocket Software and to ease your transition to our operational processes beginning **July 1, 2022**.

The sections in this guide include:

If you have additional questions not addressed in this document, email askrocket@rocketsoftware.com and we will respond as quickly as possible.

Legal and Tax

1. Who owns my contract(s)?

- Your contract has been transferred to Rocket Software UK Ltd. Rocket Software UK Ltd will assume all rights and obligations of your Zumasys® contracts.

Legal Entity	Customers and Partners From	Legal Entity Address	Tax ID
Rocket Software UK Ltd	England	Salisbury House London Wall, London EC2M 5PS United Kingdom	VAT No. GB481860428

2. Will my terms and conditions change?

- With transition to Rocket Software on July 1, 2022, your Rocket Zumasys contract terms and conditions will continue to govern the relationship unless Rocket Software issues a new contract.
- We value your long-term business and want to ensure that we have a master license agreement to govern our relationship with your company. If you have been transacting Zumasys business without a master license agreement, we will initiate the process to establish one.

3. What if I have questions about my contracts?

- Contact your account executive or renewal account executive.
- If you are not certain who that is, or have difficulty reaching them, please email zs-license@rocketsoftware.com.

4. What if I don't have a contract?

- Customers and partners who do not currently have a contract will need to sign one before any additional transactions can be processed. Applicable customers will receive a Rocket Software Master Terms and Conditions Agreement to sign and return, and applicable partners will receive a Partner Agreement to sign and return. Please contact your account executive if you have any questions.

5. Tax matters

- Invoices issued to customers with the same "ship to" country as the Rocket Software contracting entity will include local sales, VAT, GST, or similar tax, as required by law.
- Rocket Software Inc. has sales tax nexus in most US states. Absent a valid sales tax exemption certificate for Rocket Software Inc., sales tax will be charged on any taxable goods/services according to the laws of the "ship to" state/local authority. Therefore, your invoices from Rocket Software Inc. may include sales tax, even if sales taxes were not previously included on invoices from Zumasys US and UK.

If you provided a sales tax exemption certificate to Zumasys, it will not apply to invoices from Rocket Software Inc. issued after July 1, 2022. You **must provide a new exemption certificate applicable to Rocket Software Inc.**, which can be emailed to salestax@rocketsoftware.com. We strongly encourage you to provide the Rocket Software Inc. exemption certificate before July 1, 2022, to ensure that the exemption will be applied appropriately to future Rocket Software Inc. invoices. Applicable sales tax will be charged if a valid exemption certificate is not on file at the time of invoicing.

- Supplier details for each Rocket Software legal entity are detailed in the tables on page 2 and below (page 3).

Invoicing and Payment

1. For each payment type, where and how do I remit payment?

Legal Entity	Customers and Partners From	Payment Type	Remittance Advice
Rocket Software UK	England	Bank and Wire Transfers	Barclays Bank GBP IBAN: GB26 BARC 2078 6613 4015 61 Acct: 13401561 Sort: 20-78-66 BIC/SWIFT: BARCGB22 EUR IBAN: GB45 BARC 2078 6663 6144 33 Acct: 63614433 Sort: 20-78-66 BIC/SWIFT: BARCGB22 USD IBAN: GB92 BARC 2078 6648 7053 66 Acct: 48705366 Sort: 20-78-66 BIC/SWIFT: BARCGB22

2. Which currencies does Rocket Software accept?

- Rocket Software will continue to support US Dollars, Euros, Pound British Sterling, Australian Dollars, New Zealand Dollars, Japan Yen, South African Rand, and Danish Kroner. Please refer to the table above to identify the currency assigned to your country.
- Remittances must be made in the currency identified on your invoice.

3. Zumasys already has my PO. Will it still be valid, or do I have to provide a new one?

- Rocket Software will honor existing/previously submitted POs issued to Zumasys. However, effective July 1, 2022, all new purchase orders must be issued to the Rocket Software entity and address outlined below. All POs can be submitted to rbc@rocketsoftware.com.

Legal Entity	Customers and Partners From	Legal Entity Address	Questions about Accounts Receivables
Rocket Software UK	England	Salisbury House London Wall, London EC2M 5PS United Kingdom	uk.accountsreceivable@rocketsoftware.com

4. Does Rocket Software have a refund policy?

- Rocket Software does not issue refunds.
- If you have an issue with your Zumasy products, contact your account executive or renewal account executive at zs-license@rocketsoftware.com.

5. Who do I contact if I have a question about my invoice?

- For questions about your invoice or discussion regarding an overpayment, duplicate payment, credit balance, or a payment sent in error, email the Rocket Software accounts receivable team identified in the table above based on your country.
- Include your company name, and invoice information (number, date, amount) as available.

6. Do I need to update my procurement system with new vendor and/or banking information?

- Yes, you will need to set up your Rocket Software entity as a supplier. See Invoicing and Payment #1 above for banking information.
 - Invoices dated prior to July 1, 2022, in the name of Zumasy, can be paid to the same bank account listed on the Zumasy invoice.
 - Invoices dated after July 1, 2022, will be issued by Rocket Software with the updated bank account.

7. I need to change my contact on file due to personnel changes in my company. How do I do this?

- Contact the Rocket Software team at rbc@rocketsoftware.com.
 - Information you will need to provide:
 - › Prior contact name (being replaced)
 - › The new contact's first name, last name, email address, company name, and phone number

New Business Practices for Zumasys Customers and Partners

1. How will I place orders and renew my maintenance for my Zumasys products beginning July 1, 2022?

- Beginning July 1, 2022, the [Rocket Business Connect \(RBC\) system](#) will be used to process all Zumasys license orders and maintenance renewals. RBC is a web-based, self-service application that you can use to manage your license (asset) information as well as place orders for new licenses or modify your existing licenses. You can also review, modify, and renew all maintenance renewal quotes through the RBC application.

2. How do I order a new or modify my existing Zumasys product license?

- An order will need to be entered in RBC for any new or change to your license configuration. This includes user count, version, operating system adjustments.
- Since RBC is a web-based, self-service system, users can login to manage their own licenses (send an email to rbc@rocketsoftware.com to request access.)
- Alternatively, an email can be sent to rbc@rocketsoftware.com (along with your PO for billable orders) requesting the desired change.
- New licenses, increased number of users, and add on features include 12 months of maintenance.

3. How will I renew my maintenance after July 1, 2022?

- Maintenance renewal quotes will be generated from RBC typically 90 days in advance of your renewal date.
- The renewal quote will be visible within RBC and periodic reminders will be sent prior to the renewal date.
- A PO and/or written confirmation to renew your maintenance is required.
- Adjustments to your quote, such as cancellations and user reductions, must be submitted prior to the renewal date. No further changes can be made after the renewal has been invoiced.
- If your next renewal start date does not fall on the first of the month, we will make a one-time no-charge adjustment to extend the renewal date to the 1st of the following month.
- When additional users or features are purchased for a license, the maintenance renewal is co-termed after the initial 12 months (that are included with the purchase).

4. How do I reinstate maintenance on a license?

- Maintenance reinstatement fees are assessed when maintenance coverage lapses. The maintenance reinstatement fee is significantly higher than the renewal fee.
- To reinstate coverage, contact your account executive or renewal account executive.

5. Under Zumasys, my maintenance renewal was billed each month, will that continue?

- Rocket Software does not offer monthly maintenance renewals. Please contact your renewal account executive to discuss renewal options.

6. How much will Rocket Software charge for a Standby license?

- Rocket Software charges 25% of the standard license price for a Standby license. A Standby license must mirror the primary license in number of users, add-on features, and maintenance status. If the Primary license is not on maintenance, the Standby license is not entitled to maintenance.

7. How do I download Zumasys products after July 1, 2022?

- You can download software from RBC. Partners are responsible for downloading and distributing software to their end users. RBC login access is restricted to direct partners and end users of Rocket Software.

8. Does Rocket Software provide 24x7 support with my maintenance renewal?

- Zumasys customers and partners will find Rocket Software's Support includes:
 - Rapid 24x7 response for high-impact issues
 - Timely response and resolution for all inquiries
 - Technical expertise and professional courtesies

9. Where can I find more information about Rocket Software's policies?

- Detailed information about Rocket Software MV products and policies is outlined in the Rocket Software MV Handbook. A copy of the handbook can be found under the User Documentation section within RBC.
<https://rbc.rocketsoftware.com/matrix.asp>

Professional Services

1. Will the consultants who deliver my services be changing?

- There are no planned changes to consulting assignments. We will continue to deliver our service engagements ensuring the same level and quality of service using the resources that are engaged with you today (or comparably skilled) through the end of the contract period. All contractual agreements will be honored in full.
- If a change should become necessary, the Rocket Software Customer Solutions Engineering management team will work with you to ensure a smooth transition and your continued satisfaction.

2. Will the method and frequency of project status checkpoints be changing?

- Rocket Software follows a standard project delivery process for all customer engagements. We will first work with you to understand your expectations, then adapt any status checkpoints in a manner you are comfortable with.

3. How do I initiate a new services contract?

- Contact your Rocket Software account executive to discuss new engagements.
- If you do not know who your account executive is, email solutioning@rocketsoftware.com and we will work with you to initiate your request.

4. Who will be my primary contacts for service engagements, and what roles do they play?

- Your primary contact in a Rocket Software services engagement will be your Rocket Software project manager.
- If you have an active engagement, Rocket Software's Customer Solutions Engineering team will introduce you to your Rocket Software project manager.

5. Are there any changes to the service levels I have come to expect from Zumasys?

- There will be no changes. The Rocket Software team is committed to your success and is here to help in any way we can. We will do our best to ensure that you are completely satisfied in our engagement with you.

6. I have a proposed Statement of Work in progress. Can this continue, or do we need to start a new one?

- Rocket Software will continue to work with you using your in-progress Statement of Work. The Rocket Software Solutioning team will meet with you to understand your objectives and ensure continuity with the SOW so that Rocket Software is prepared to meet your expectations once contracted.

Relationship Management

1. Will the staff who supported me at Zumasys still be available, including my sales contact?

- The Rocket Software team, along with Rocketeers who have joined Rocket Software from Zumasys, are here to support your needs. Some names and faces will be familiar, and some will be new. All are committed to ensuring you receive the highest level of service.

2. How do I reach the Rocket Software account executive or renewal representative assigned to my account?

- If you are unsure who to contact at Rocket Software or how to reach your account executive, please email zs-license@rocketsoftware.com.

3. I recently received a quote from Zumasys; will Rocket Software honor it? Where do I send the POs or signed order forms?

- Quotes are valid through the expiration date stated on your quote.
- Beginning July 1, 2022, please send renewal or sales POs, or signed order forms to rbc@rocketsoftware.com.

4. Who should I contact if I need to purchase additional products, licenses, or services, or have questions about my current licenses?

- Contact your account executive or renewal account executive.
- If you are not certain who that is, or have difficulty reaching them, please email zs-license@rocketsoftware.com.

5. Are there any product name or number (SKU) changes I should be aware of?

- Rocket Software has assigned new SKUs/product codes, effective July 1, 2022. These new SKUs will replace former Zumasys product names to align with Rocket Software's product naming conventions.
- The new SKUs will be reflected on quotes and invoices beginning July 1, 2022.
- Should you have any questions about the mapping of old to new SKUs, contact your account executive or renewal account executive and they can assist you in understanding the translation.

6. Is Rocket Software going to raise prices?

- If there are price increases, the Rocket Software team will provide advance notification.

7. Are there changes to the roadmaps for Zumasys software?

- Roadmap updates are communicated during the Rocket Software MultiValue quarterly roadmap webinars. Contact your account executive or renewal account executive for the latest schedule. If you are unsure who that is or are unable to reach them, please email zs-license@rocketsoftware.com.

Customer and Technical Support

1. How do I contact Rocket Software technical support beginning July 1, 2022?

- You may contact technical support by emailing zs-support@rocketsoftware.com or by calling 781-577-4570. Prior to July 1, 2022, you should continue to utilize your normal means of communication with technical support.

2. How long will my current software version(s) be supported?

- Rocket Software has a clearly defined Product Life Cycle.
- We have yearly PLC announcements and provide a 12-month grace period until they go into effect.
- We are currently assessing all MV products, which includes Zumasys products, and will be communicating an up-to-date PLC announcement.
- We will fully support Zumasys products for the next five years.

3. How do I submit an enhancement request to Rocket Software on July 1, 2022?

- Requests for changes and enhancements to Rocket Software's Zumasys products should be routed through your account executive.

4. How do I request a replacement or an emergency license key? Am I still able to access self-service tools in the Zumasys support portal?

- Until further notice, the self-service tools will remain intact.
- All license key requests should be directed to zs-license@rocketsoftware.com.

5. Are there self-help options available?

- Self-help is available via the Rocket Software Forum, a community of MultiValue enthusiasts, consultants, Rocket Software partners and Rocketeers. You are encouraged to create an account and start exploring. See all the MultiValue Forums here and sign-up for your free account today. <https://community.rocketsoftware.com/forums/multivalue-forums>

6. Where do I learn about product updates and roadmaps?

- Roadmaps will be shared at the Rocket Software Quarterly Roadmap Webinars.
- Sign-up for your free Rocket Software Forum account to stay informed of all product-related information and notifications. <https://community.rocketsoftware.com/register>

Engaging with Rocket Software

1. How often, and in what form, will I receive communications from Rocket Software?

- Rocket Software customer success managers will be contacting you periodically to ensure that you are 100% satisfied with Rocket Software offerings.
- We will provide notification of upcoming operational changes by email and/or phone.
- We will notify you of upcoming product release highlights and strategic updates to product direction via Rocket Software account executives and customer success team members or via email from Marketo.
- We will also post updates to the Rocket Software Forum.
- Products and version information can be found in [RBC's Product Availability Matrix](#).

2. Can I follow Rocket Software on social media?

- You can find Rocket Software on these social media platforms:
 - [Rocket Software on Facebook](#)
 - [Rocket Software on Twitter](#)
 - [Rocket Software on LinkedIn](#)
 - [Rocket Software on Instagram](#)

3. Do you offer opportunities to join Customer Advisory Boards or in-person user groups?

- For 30 years, Rocket Software has worked to build long-lasting relationships based on empathy, humanity, trust, and love. That is why we created the Rocket Software President's Advisory Council (RPAC), a hand-picked group of technology and business leaders that share our values and help shape our product roadmaps and company strategy. The insights and feedback we get from RPAC members help us make better decisions for Rocket Software on behalf of our customers and partners. Learn more about RPAC at <https://www.rocketsoftware.com/rocket-presidents-advisory-council>.
- We currently do not host in-person user-groups but encourage you to join the online Rocket Software Forum. We will return to live events in 2023. The Rocket Software Forum also hosts a variety of product-related discussions throughout the year, as well as invitation-only activities related to product futures. Register for your forum account to be alerted to product development-related discussions and experiences.

Call to Action

To summarize, the below are the action items we need in order to transact business with your company:

- Please complete the Customer Information Form on the [Welcome webpage](#).
- Sign and return the Rocket Software Master Terms and Conditions Agreement if you are a direct customer/end user.
- If applicable, please forward a copy of your tax exemption or reseller certificate to salestax@rocketsoftware.com.
- Join the Rocket Software Forum: <https://community.rocketsoftware.com/register>
- Update your company's procurement system with Rocket Software as your vendor or supplier instead of Zumasys. See [Invoicing and Payment section #1](#) above for the correct banking information.



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