Policy Summary

The PDI Services policy provides details on the services provided by PDI to users of PDI software and services. By using PDI services, you agree to the terms outlined in this policy.

Responsibilities

To provide successful implementation and long-term success with PDI software, PDI will make available services to customers in the form of Professional Services, Managed Services, Technical Services and Customer Service.

The customer is responsible for operating the software as designed, maintaining system upgrades in accordance with this policy, educating staff on proper use of your system, and paying invoices in a timely manner.

Intellectual Property

PDI is the sole owner of all intellectual property produced or developed while performing services, including all materials, software, documents, plans, designs, and all other work products.

Maintenance Fee

In addition to your continued right of PDI software usage, your maintenance fees include the following services, unless your contract states otherwise:

- Answers to support questions about all current PDI software products after your implementation and migration from Professional Services
- Assistance with simple troubleshooting
- Requests for documentation and software enhancements and corrections
- Access to product improvements through standard software releases

Professional Services & Billable Support

PDI considers paid services (typically business and technical consulting, advice, and implementation assistance) to be professional services. PDI bills services not covered by your maintenance fee on a time and materials basis at the rates described in our PDI Professional Services Rates policy. Services **not covered by your maintenance fee** include:

Business Review and Implementation

- Consulting on business procedures, implementation, new feature activations, integration and configuration of third-party hardware or software to PDI products, or similar activities
- Project management for active customer engagements
- Custom programming including interfaces to third-party products such as point-of-sale (POS) devices

Nonstandard Support

- Any call directly from a store employee without prior approval
- Support work:
  - Outside Customer Service department hours
  - For a retired software version or hardware device
  - For a beta version of software after the general release version is made available
- Any work or assistance required because of failure to:
  - Use the software as intended
  - Make a complete, verified backup
  - Provide adequate disk space
  - Provide a clean, reliable power source
  - Provide operating environment within guidelines of hardware or software manufacturer

Training

- Remote training
- Onsite training

Technical Services

- Incidents requiring the retrieval of backup data or related to viruses
- System staging
- Software upgrades (PDI and third-party)
- Technical consulting
- Hardware consulting
- Third-party consulting

Expenses

All out-of-pocket expenses such as:

- Travel costs
- Shipping
- Materials
- Other items as needed for any service including services listed above

Travel Time

- All travel time incurred from home to customer and back
- Billed at 50% of the consultant's billable hourly rate

PDI considers all activity prior to project migration to be consulting and bills for that activity. PDI provides a quote with a good faith estimate of eventual charges preceding all custom programming requests, engagements expected to be larger than ten hours, and similar work.

All interactions with PDI Professional Services are billable at the rates shown on the following pages. Rates do not include travel time or expenses unless specified. PDI bills all services as they are rendered in quarter hour increments. See Hourly Rates for Billable Work for details.

PDI may close projects inactive for 90 days and must re-estimate such projects upon reinstatement.

Migration to Standard Support

The project is considered complete when the rollout objectives have been satisfied, the work has been completed, the deliverables are accepted, and your personnel are ready to use the system. When the project is complete, PDI migrates the project to PDI Customer Service.

Customer Service

Support Availability

PDI Customer Service is available Monday through Friday, 7:00 AM to 6:00 PM CST, except on published holidays. Billable callback support is available outside these hours at 150% of the standard after-hours service basis. Access to PDI Customer Service is included in your maintenance fee, unless stated otherwise in your license agreement.

Supported Software Versions

This policy, the terms of this policy, and the services described apply to supported software versions only. PDI will provide support services and software maintenance for current versions of the software. Requests for assistance on retired software versions are considered billable. For information on the status of current releases, see the Supported Products document.
For software release downloads and documentation, please refer to the corresponding *Product* page on PDI Connections.

Support Process

Please refer to the Logging a Case with PDI Support document for detail on how to log a support case with PDI and what happens after your case is created.

Service Rates

PDI Professional Services Rates

Type of Service	Rate (USD)	Comments
Project administration/coordination	$115	See Standard Rates by Position
General consulting; project management; implementation assistance; automation rollout; business review; ad hoc or project-related training; resource augmentation	$115-$375/hour – U.S. and Canada, based on consultant level International projects are priced by company and project	See Standard Rates by Position
Consulting assistance after hours, on weekends, or on published holidays	150% of the standard billable rate	By request only

PDI Technical Services Rates

Type of Service	Rate (USD)	Comments
Technical consulting; project management; implementation assistance; automation rollout; technical review; ad hoc or project-related training	$145-$375/hour	See Standard Rates by Position
Staging a new server purchased from PDI—including Windows Server® and Microsoft SQL Server®	$1,000/physical server and $500/virtual machine (flat rate)	
New application installation or migration of existing data	$145-$375/hour	Installation of all PDI software will be performed after the server is at the customer location and connected to the network
Technical assistance after hours, on weekends, or on published holidays	150% of the standard billable rate	By request only

Training Services Rates

Training through PDI University (PDIU) is conducted virtually. The PDIU class schedule is posted on the PDI Connections Training page. Class recordings are available to All-Access Pass subscribers. Any class rendered on a customer site is billable. Rates for on-site training, are as follows.

Type of Service	Rate (USD)	Comments
Onsite PDI University Classes	$2,000 per day for training $25 per manual $750 for laptop staging services $750 for handheld staging services $250 for training classroom rental (with onsite class)	Maximum of 12 students per session. Rates are for U.S. and Canada only. The cost for shipping the training classroom to and from your site will be billed at actual cost.
PDIU Online Classes (Instructor-Led)	**Rates per Internet or phone connection** $150/hour or Unlimited attendance with PDI University All-Access Pass. Details available here.	Online courses are available via Internet and conference call.
PDIU On-Demand Classes (Self-Paced)	Unlimited on-demand video-based content exclusive to PDI University All-Access Passholders. Details available here.	
Cancellation Policy: Cancellations received less than 10 business days prior to the start of class will be subject to a 50% processing fee.		

Hourly Rates for Billable Work

Standard Rates by Position

Position	USA & Canada
Professional & Technical Services	
Implementation Specialist	$145
Consultant	$205
Senior Consultant	$230
PDI Propane and Commercial Fueling Implementation Consultant	$235
Principal Consultant	$275
Consulting Manager	$295
Vice President	$375
Accounting Services	
Analyst I	$145
Analyst II	$205
Senior Analyst	$230
Principal Analyst	$275
Manager	$295
Pricebook Services	
Analyst I	$145
Analyst II	$205
Senior Analyst	$230
Principal Analyst	$275
Manager	$295
Customer Service	
All After Hours Support Basis	$205
Support Consultant / Support Analyst I and II	$205
Senior Support Consultant / Support Analyst III	$230
Principal Support Consultant / Senior Analyst	$275
Support Manager / Team Lead	$295
Vice President	$375

Position	USA & Canada
Marketing and Education	
Project Coordinator	$115
Communications Specialist	$195
Technical Writer	$225
Senior Technical Writer	$275
Principal Technical Writer	$295
Training Specialist I	$225
Training Specialist II	$275
Communications Manager	$295
Education Manager	$295
Training Manager	$295
Vice President	$375
Reporting Services	
Business Intelligence Developer	$205
Senior Business Intelligence Developer	$230
Principal Business Intelligence Developer	$275
Development	
Product Manager	$275
Developer	$275
Senior Developer	$275
Development Manager	$295
Vice President	$375
All Other Departments	
Rates determined by SME or supervisor	

After Hours and Holiday Rates

Billable work performed after hours (6 p.m.-7 a.m. CST), on weekends, or on published holidays is billed at 150% of the rate shown above.

Travel Rates

Travel time is billed at 50% of the standard hourly rate.

International Rates

Professional Services engagements outside North America are priced by company and project. Contact PDI for details.