Migration Billing Standardization

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Purpose

This establishes a standardized billing process for customers migrating from one product or platform to another. The goal is to eliminate mid-cycle billing adjustments, reduce credit issuance driven by delivery date timing, and remove the need for individual case-by-case billing interventions.

MSA Reference – Section 7.1.2 Recurring Fees

7.1.2 Recurring Fees. Recurring Fees as identified in the Order Acknowledgement will be invoiced according to the terms identified in the Order Acknowledgement and are payable in advance. Recurring Fees are billed in full months and are not prorated based on the date of the month. Recurring Fees are effective as of the date of delivery of the software which is defined as 30 days after user acceptance testing starts, as established in an email from Company to Customer, whether or not the software is fully configured or Customer's data is fully loaded and accessible, or six months after the date of the last signature of the Order Acknowledgement, whichever is earlier (the "Delivery Date").

Policy Statement

When a customer migrates from one product to another:

1. **Existing Product | Platform Billing**
   - The customer's current product will continue to be billed through the end of the current billing month.
   - No proration or early termination credits will be applied as part of the migration process.
2. **New Product Billing**
   - The new product will begin billing on the first day of the following month, regardless of the migration or delivery date.
   - The new product will be billed in accordance with standard recurring billing terms (full-month billing, billed in advance where applicable).

Rationale

This standardization is intended to:

- Eliminate credit adjustments caused by variable delivery dates
- Remove dependency on UAT or operational delivery timing for billing triggers
- Ensure consistent monthly billing cycles across all migrations
- Reduce manual billing cases and operational overhead
- Improve auditability and SOX compliance alignment through predictable billing rules

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Operational Impact

- Billing teams should no longer create credits or prorations tied to migration timing

- Migration-related billing changes will not require case submission for standard treatment
- Revenue Operations will maintain this as a default billing rule unless contract terms explicitly override

Exceptions

Any deviation from this policy must be:

- Explicitly stated in the customer contract or Order Acknowledgement, or
- Approved by Revenue Operations leadership