Enrollment Rx
CRM | HIGHER EDUCATION

West Texas A&M

Enrollment Rx

Proposal

Enrollment Rx, LLC
www.EnrollmentRx.com

salesforce.org

100% force.com native app

*Contract addendum is attached and incorporated. nmm 10/8/19

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September 25, 2019

James Webb, Chief Information Officer
West Texas A&M
2501 4th Ave.
Canyon, TX 79016

Dear Mr. Webb:

Thank you for the opportunity to respond to your request for information on Enrollment Rx . We are very pleased to provide the following proposal to implement our award-winning Constituent Relationship Management (CRM) system at West Texas A&M.

Enrollment Rx is the leader in CRM for higher education, having deployed our solutions at many higher education institutions, such as: University of Alaska System, University of Wyoming, Saint Louis University, University of Nevada – Las Vegas, and Babson, to name a few.

Enrollment Rx's solutions are built on the Salesforce (NYSE: CRM) platform - the world leader in CRM technology with an unrivaled track record of innovation, security, and customer satisfaction in the CRM space. Like our clients, Enrollment Rx has choices of technology on which to build our products. We are certain that Salesforce provides the best CRM technology by far, and our customer success continues to validate our strategy to deliver Enrollment Rx's products on the platform.

Enrollment Rx is confident that we will provide the most robust CRM solution on the market with features and functionality to support the school's current and future growth needs. After the deployment, Enrollment Rx and Salesforce will continue to support West Texas A&M, including upgrades and enhancements, for the duration of the contract.

We are confident that Enrollment Rx, together with the Salesforce platform, is the right fit for WTAMU's short- and long-term CRM strategy. Thank you again for the opportunity to provide this proposal. We look forward to welcoming West Texas A&M into the Enrollment Rx community of higher education clients.
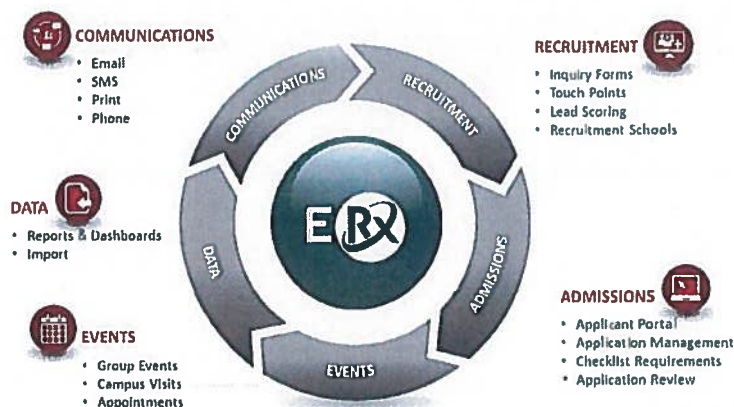
Best regards,

Lawrence Levy, President

Primary Contact:
Tim Bailey, Regional Director of Sales
847-261-7013
tbailey@enrollmentrx.com

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Executive Summary

Founded in 2008, Enrollment Rx is a higher education technology company providing innovative cloud-based CRM solutions that span the entire student lifecycle. Built on the Salesforce world-class cloud computing platform, Enrollment Rx puts enterprise-class functionality and limitless scalability within reach of any size school.

PRODUCTS

Enrollment Rx's products are designed to transform Salesforce into a world-class CRM solution for higher education. With years of development and countless hours of innovation, Enrollment Rx's products deliver strategic architecture, best-practices, and limitless scalability to the higher education market. Our CRM solutions supercharge processes and streamline operations throughout the full student lifecycle.

COMMUNICATIONS
- Email
- SMS
- Print
- Phone

DATA
- Reports & Dashboards
- Import

EVENTS
- Group Events
- Campus Visits
- Appointments

RECRUITMENT
- Inquiry Forms
- Touch Points
- Lead Scoring
- Recruitment Schools

ADMISSIONS
- Applicant Portal
- Application Management
- Checklist Requirements
- Application Review

- Salesforce Platform
- Ongoing Innovation
- Highly Scalable
- Trusted Security
- AppExchange Ecosystem

PLATFORM

Enrollment Rx's solutions are built on the Salesforce (NYSE: CRM) platform. Like our clients, Enrollment Rx has a choice of CRM systems on which to build our higher education solutions. Enrollment Rx chose to partner with Salesforce as the world leader in CRM technology because of their unrivaled track record of innovation, security, and customer satisfaction in the CRM space. Enrollment Rx remains convinced that Salesforce delivers the best CRM strategy by far and we proudly continue to partner with Salesforce in revolutionizing CRM for higher education.

PEOPLE

Enrollment Rx is exclusively focused on CRM for higher education. The Enrollment Rx implementation and support team has years of first-hand experience working in higher education. Our extensive experience translates into an array of solutions that have been successfully deployed at various types of educational institutions, both domestically and abroad.

"Enrollment Rx brings a new level of efficiency to our office, enabling our staff to communicate with prospective students in a well thought out way. We were impressed with Enrollment Rx's training, and their stellar references made it clear that Enrollment Rx delivers a trusted CRM solution that colleges and universities rely on for improved recruitment, enrollment, and student relationship management."

Director of Admissions - Northwestern Health Sciences University (Bloomington, MN)

- Deep Domain Expertise
- High-Touch Implementation
- Challenge the Status Quo
- Speed to Deployment
- Outstanding Customer Support

Partner with a Recognized Leader in Technology

Enrollment Rx is a trusted technology partner and recognized leader in the higher education CRM industry. Enrollment Rx is proud of our recent recognition in both the technology and higher education sectors.

Key Differentiators – All CRMs are not Created Equal

Higher Ed has many choices when it comes to CRM solutions. Enrollment Rx believes that the best CRM solutions deliver a scalable platform that can span the student lifecycle and rapidly innovate to provide future-proof technology.

At Enrollment Rx, we approach CRM differently.

Enrollment Rx delivers innovative products to empower our clients and end users with the ability to create, modify and configure functionality with mouse clicks (**"Clicks not Code"**). Enrollment Rx endeavors to deliver easy-to-use products that can be manipulated by non-IT personnel, rather than forcing our clients to invent functionality from scratch, write extensive lines of code and logic, or place an extra burden on their IT departments.

Our solution includes custom feature sets **out of the box** without compromising your ability to further customize and configure the Salesforce platform to any unique specifications in the future. Our unique and innovative approach has enabled us to elevate the Salesforce platform to the next level.

As proud as we are of our product features and functionality, we are equally focused on our approach to **project implementations** and customer support. Enrollment Rx implementations include the guidance and support you would expect from an experienced partner. Our team is comprised of Certified Salesforce Admins and Developers who bring extensive best-practices to higher ed CRM. We are uniquely equipped to guide our clients, and advise on process reengineering, throughout the implementation phases. In our opinion, the success of any CRM rests squarely on the effectiveness of the implementation project, and we are proud to state that our deployment approach is second to none.

Summary

We look to exceed our client's expectations by delivering a robust CRM solution that is designed for success. Enrollment Rx delivers a proven set of higher education CRM solutions that help our clients make enormous strides in operational excellence, without the huge capital expenses previously required to maintain traditional software systems.

"Enrollment Rx gave us the structure to match the higher ed model we were going for with the flexibility to mold the platform as much as needed to fit squarely with our needs. The flexibility we have has been a breath of fresh air. We can quickly adapt to changing dynamics while creating a fresh and interesting experience for students that drives a higher level of engagement."
Senior Associate Director of Graduate Enrollment Management & Marketing- Temple University Fox School of Business (Philadelphia, PA)

Enrollment Rx Sample Implementation Deployment Plan and Timeline

Integration EcoSystem

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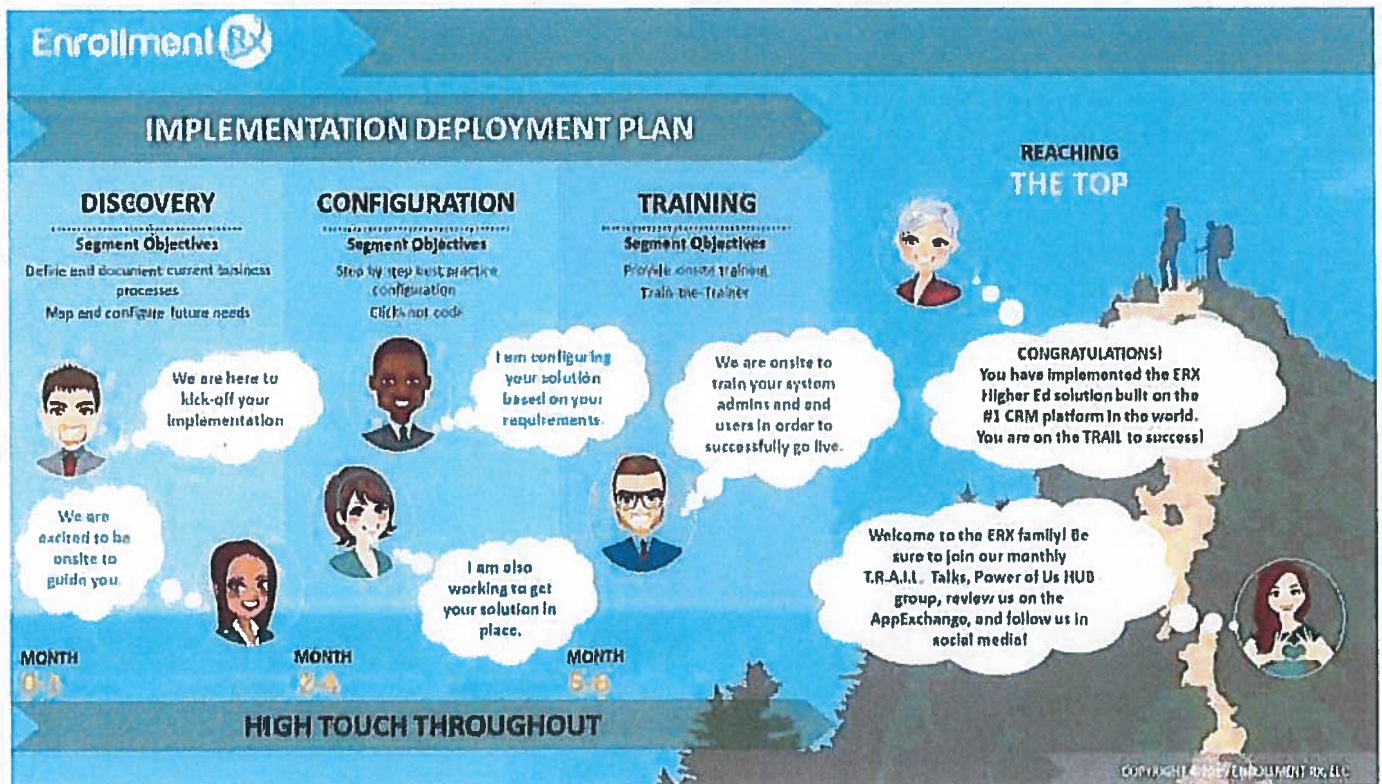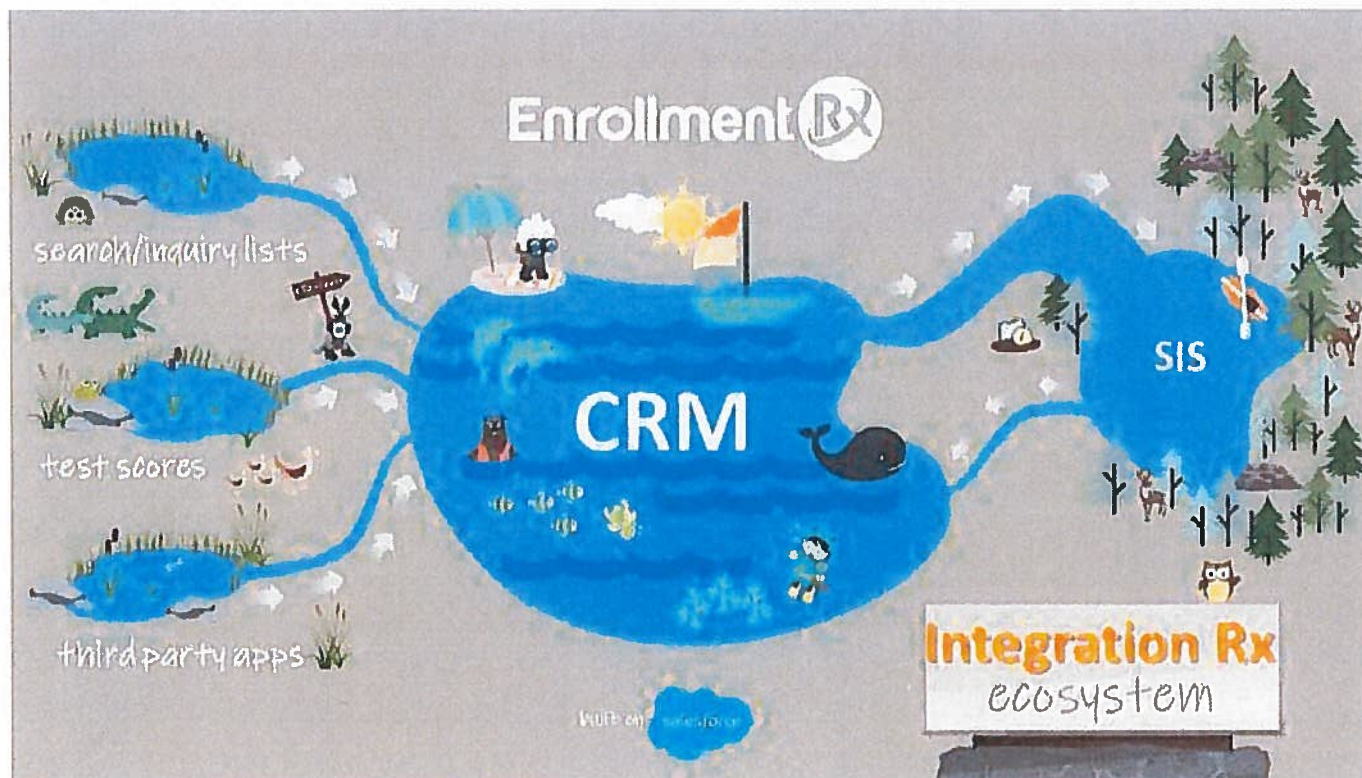
AppExchange Products

The Salesforce ecosystem, driven by the AppExchange (www.appexchange.com), is comprised of thousands of best of breed solutions. As part of an initial deployment, clients often select AppExchange products to enhance their data quality, document merge, and data integration, to name a few.

Please note that Enrollment Rx's pricing does not include AppExchange solutions. Enrollment Rx will be happy to facilitate further discovery and introductions to the AppExchange partners, whenever appropriate.

Conga Composer (http://www.congamerge.com/) allows the institution to have dynamic content based upon the student's information within any print or electronic mail. This application also facilitates enhanced batch mail generation.

CRMFusion (http://www.crmfusion.com/) provides a suite of duplicate checking/data quality tools and is free for 501C3 non-profits.

Experian (https://www.edq.com/) offers a range of data cleansing solutions that instantly detect and remove incorrect or incomplete contact data including addresses, emails and phone numbers. This helps you ensure that you are using valid, accurate and actionable data. Experian supports Address, Email, Mobile and Name validation.

Jitterbit (http://www.jitterbit.com/integrate/#i_overview) is one tool many of our clients use for integration with their SIS. Enrollment Rx offers additional integration services using Jitterbit.

Mogli SMS (http://moglisms.com/) is a USA-based native SMS texting app that can expand your global reach in real time at a fraction of the cost of paper surveys, calls and field visits. Send and receive bulk text messages and SMS surveys with the magic of Salesforce.

Clients have the discretion to select those AppExchange products that might best fit their needs. For other options, check the Salesforce AppExchange (https://appexchange.salesforce.com/).

Enrollment Rx

SOW

EXCEPTIONS TO THIS AGREEMENT ARE DESCRIBED IN THE ATTACHED EXCEPTIONS ADDENDUM.

ENROLLMENT RX, LLC
STATEMENT OF WORK

OVERVIEW. This Statement of Work ("SOW") describes the ERX Services purchased by You from Enrollment Rx, LLC ("Enrollment Rx" or "ERX"). The Pricing Addendum to this SOW explains the cost of the ERX Services. The Pricing Addendum is a part of this SOW and any reference to the SOW includes the Pricing Addendum. The terms of the Pricing Addendum prevail over the terms of this SOW in the event of a conflict. This Statement of Work is subject to, and governed by, the Terms of Service ("TOS") available for download at https://www.enrollmentrx.com/wp-content/uploads/2017/09/TERMS-OF-SERVICE.pdf, and any amendments thereto. The TOS governs your free trial of the ERX Services. If you purchase the ERX Services, the TOS govern Your purchase and use of the ERX Services. Downloading, installing, accessing or using the ERX Services are subject to the TOS. You consent to receive and read the TOS and future disclosures in electronic format. You warrant and represent that You (i) downloaded and were able to view the TOS, (ii) have full authority to bind that person, company or legal entity, on whose behalf You are acting, to the TOS., and (iii) agree with, and intend to be bound by, the TOS. If you do not have such authority, you may not download, install, use or access the ERX Services. If you do not agree with the TOS, you may not download, install, use or access the ERX Services. The terms of this SOW prevail over the terms of the TOS in the event of a conflict.

SUMMARY OF ERX SERVICES IN THIS SOW. Subject to payment for the ERX Services, ERX will provide You with the ERX Services described in this SOW. The ERX Service include: (i) the Implementation Services; and (ii) the User Subscriptions. The activities, tasks and deliverables for the ERX Services are described in this SOW.

IMPLEMENTATION SERVICES

1.   Project Kick Off Telephone Conference (PKTC). The Project Kickoff Telephone Conference (PKTC) is the initial launch of the project. The PKTC will be conducted by Enrollment Rx via an online meeting and typically lasts 1-2 hours. During the PKTC, Enrollment Rx will review the project agenda and distribute and review with You the project template documents. The PKTC will be scheduled by Enrollment Rx upon receipt of the signed SOW and payment as required under the Service Fee provision of this SOW. Prior to the PKTC, You shall identify the individuals to be trained as system administrators ("System Administrators") together with a brief description of each individual's personal computing and systems administration experience. Prior to the PKTC, You shall also designate one of the designated system administrators as the project manager ("Project Manager") responsible for this project. The Project Manager shall be the individual who organizes Your requirements and deliverables according to this SOW. The Project Manager and all System Administrators shall participate in the PKTC to facilitate the transfer of preliminary information to Enrollment Rx. The project template documents, furnished to You by Enrollment Rx during the PKTC, shall be completed by You within 14 days of the PKTC to facilitate the scheduling of the business process review.

2.   **On- Site Business Process Review (BPR).** The BPR will be scheduled by Enrollment Rx after receipt of the completed project template documents distributed during the PKTC. Enrollment Rx will provide You with the BPR agenda prior to the commencement of the BPR. The BPR shall be conducted in accordance with the agenda and this SOW. The BPR sessions will be conducted by Enrollment Rx on Your site. Your Project Manager and System Administrators assigned to this project shall attend the BPR and participate in the transfer of information to Enrollment Rx in accordance with the agenda and this SOW. During the BPR, Enrollment Rx will gather data and information from Your project team to be incorporated into the subsequent phases of the project.

3.   **Post BPR Discovery & Project Management.** During the Post BPR discovery phase of the project, Enrollment Rx will distribute an Implementation Workbook ("Implementation Workbook") which shall be completed by You to provide ERX with the functional requirements for the configuration of the ERX Managed Packages in this SOW. Your designated representatives will be available to furnish Enrollment Rx with information and data necessary for the advancement of the implementation.   The post BPR discovery phase will be conducted by Enrollment Rx off-site, via web teleconference and conference calls. Your designated Project Manager will schedule periodic project meetings and Your System Administrators will attend the meetings. Enrollment Rx will provide You with access to various project tools which will be used for communications, collaboration, and sharing of materials in connection with the ERX Services provided under this SOW.

4.   **Product Configuration (Setup Data Model).** Enrollment Rx will customize the ERX Managed Package(s) in this SOW in Your instance of Salesforce based upon the requirements and data provided by You to Enrollment Rx during the BPR and post BPR discovery process.

4.1.   **Set up of Enrollment Rx Core.**   Enrollment Rx will setup Enrollment Rx Core in accordance with the requirements of this SOW.

   4.1.1   **Configuration of Admin Panel**

      4.1.1.1 Checklist Requirements Sets: Enrollment Rx will create up to five checklist requirements sets, templates and associated items for You to complete. Enrollment Rx will configure and test the checklist requirements set configuration before handing the configuration to You for additional testing. Enrollment Rx will train You on the setup of additional requirement sets and items. You will complete the checklist requirement set and templates, conduct testing of the administrative setup and configuration and approve the setup.

      4.1.1.2 Touch Point Configuration: Enrollment Rx will configure touch point configuration records associated with the RFI (request for information) inventory tab, in Your portal template, based upon the data and information collected from You during the BPR. Enrollment Rx will test the Touch Point configuration generation prior to handing the configuration generation to You for additional testing. Enrollment Rx will train You on the setup of additional touch point configuration records. You will complete the additional Touch Point configuration records, if applicable, and approve the configuration.

      4.1.2 Set up of Inquiry web-to-lead RFI Forms: Enrollment Rx will set up the Salesforce web to lead form, the custom lead and contact fields consistent with the requirements of the Managed Package, the appropriate field mapping, the Salesforce assignment rules and Enrollment Rx round robin functionality. Enrollment Rx will train designated System Administrators on the creation of intake forms in accordance

with the requirements of this SOW. Additional custom configuration services will also be available on an hourly basis. You will test the submission of the RFI forms and approve for deployment.

4.1.3 Set-up of Recruitment School Visit Management: Enrollment Rx will configure the Recruitment School Visit Management functionality that allows Users to manage and track data about feeder schools and organizations including contact management, prospect history, and presentation records. ERX will configure this feature by migrating data and content provided by You to Enrollment Rx and loading the data and content into the Enrollment Rx Managed Package(s) in this SOW.

4.2.   Set-up of FormBuilder Rx (with Applicant Portal). For clients purchasing the development of an applicant portal, Enrollment Rx will develop a customized user interface configured to the requirements You furnish during the BPR and post BPR discovery phases of the project, that allow applicants to complete an application for admission and submit required documentation via an upload feature designated by Enrollment Rx. Your branding, workflow and security requirements furnished to Enrollment Rx by You during the BPR and post BPR discovery phase will be incorporated by Enrollment Rx. For clients requiring a payment gateway integration, Enrollment Rx will integrate a payment gateway using providers approved by Enrollment Rx. Additional fees and costs may apply for non-approved gateway providers. Fees charged by the gateway provider are Your responsibility. Enrollment Rx will provide You with an applicant portal template, which will be reviewed during the BPR, and You will complete the template as per Your requirements. Based upon portal template, Enrollment Rx will setup the data model, creating new fields and / or object if needed, and update the portal template to include the object and API name of any new fields /attributes created. Based upon portal template, Enrollment Rx will configure Page Builder within FormBuilder Rx to set up necessary applicant experience as it relates to the application. Enrollment Rx will set up 1 home page based upon the assets, graphics, HTML and CSS You provide. Enrollment Rx recommends that the You provide an HTML wireframe based upon Your requirements for 1 home page. Enrollment Rx will train You on the setup of additional home pages as needed.

4.2.1 Meeting to review FB functionality (FB Setup) (Onboarding Call): During Onboarding Call, Enrollment Rx will review/demo the core features of FormBuilder, identify configuration related items You will manage, and discuss next steps in configuring Your application.

4.2.2 Configuration of 1 Template: FormBuilder will allow You to brand the applicant portal experience. You will provide Enrollment Rx HTML/CSS based upon Your branding requirements. Enrollment Rx will create 1 portal template based upon the HTML/CSS/assets furnished by You. Additional custom configuration services will also be available on an hourly basis. ERX will train You on the creation of additional portal templates.

4.2.3 Configuration and setup of 1 HomePage Builder: FormBuilder will allow You to personalize the applicant experience through a HomePage Builder configuration tool. Enrollment Rx will set up 1 home page based upon the requirements You provide. You will provide Enrollment Rx all graphical assets, HTML, CSS, etc. Enrollment Rx will not create or modify graphics, CSS, HTML, etc. Enrollment Rx will train You on the creation of additional pages. Additional custom configuration services will be available on an hourly basis.

4.2.4 Login Configuration: Enrollment Rx will set up the login configuration process for the applicant portal. Based upon requirements provided by You during the BPR and post BPR project meetings, Enrollment Rx

will set up additional custom fields on the login page and test the login process prior to handing the login configuration to You. Enrollment Rx will train You on the setup additional login configurations.

4.2.5 Page Builder: Custom Page setup to support applicant portal: Enrollment Rx will configure/setup the necessary pages based upon Your portal template requirements. Enrollment Rx will train Your System Administrators to make additional modifications and will set up a revision tracker after the pages related to the portal template have been completed. You will update the revision tracker based upon Your testing. There will be 2 rounds of revisions. After the portal template is complete, Enrollment Rx will setup the page(s) based upon the requirements provided by You in the portal template during the BPR.

4.3.   Set Up of Import Rx. Enrollment Rx will setup Import Rx in accordance with the requirements of this SOW.

4.3.1 Review Call 1 (Onboard Call to review functionality)

4.3.2 Set Up of 1 Data Source: Import Rx permits data sources to be setup to serve as saved import templates for specific sets of columns of data. Importing of data files can be achieved using saved data sources to import the data. Enrollment Rx will set-up one data source and train You on the creation of additional data sources.

4.3.3 Set up of 1 Field mapping with Transformation and de-dupe rule associated to Data Source: Setting up field mappings for a data source requires a complete inventory of fields to be created on the Big Table object. The inventory of fields must be mapped to the appropriate Salesforce field in the designated Salesforce object. The Import Rx drag and drop interface allows Users to drag the Big Table field onto the Mapping section of the page and then select the Salesforce object/field for mapping. In addition to mapping the fields, Import Rx permits transformations to be defined to allow data imported as M or F, as an example, to be mapped to Salesforce as male or female. Multiple rows of criteria-based logic can be created to define a duplicate match to an existing record. Based on a sample file provided by You, Enrollment Rx will create one data source and the fields on the Big Table object. Enrollment Rx will map the Big Table fields to the appropriate Salesforce object and fields, and create the transformations and duplicate-check logic. Enrollment Rx will train You to use Import Rx.

4.3.4 Review Call 2 (Call to review knowledge transfer and client engagement)

4.4.   Set-up of Events Rx. Enrollment Rx will train you on event set-up, the creation of additional campaign member fields, and the set-up of one visit series with activities.

4.4.1 Review Call 1 (Onboard Call to review functionality)

4.4.2 Configure 1 event campaign template: Events Rx allows You to create and store multiple event registration templates. Enrollment Rx will create one event registration template and train You to edit and create additional templates.

4.4.3 Configure 1 event registration / campaign (with custom fields): Events Rx allows You to create event-specific registration fields. Stored custom fields can be added to a registration form via a drag and drop interface. Enrollment Rx will create one Event Registration form, including custom fields. Enrollment Rx will

train You to create custom registration forms which will include customizable sections, descriptive text, and custom fields.

4.4.4 Configure Table Configuration (Configure/Setup Visitor Lists): Events Rx permits the creation of a one-time event and an ongoing series of events which are defined as a visit series (e.g. recurring campus visit or recurring open house). Sets of individual activities that are associated to the visit can also be created. If applicable, Enrollment Rx will create a one-time event or visit series and/or train You to create a one-time event or visit series.

4.4.5 Configure / Set up 1 Custom Email Template: With Events Rx, You can customize and send an email upon successfully registering for an event or upon being placed on a Waitlist for events with a fixed capacity. Enrollment Rx will train You to customize these two existing templates and create new templates, if so desired.

4.4.6 Call 2 (Call to review knowledge transfer and client engagement)

4.5.   **Salesforce Admin Feature Customization.** Enrollment Rx will configure the Salesforce administrative features currently available in the admin setup console in accordance with the requirements of this SOW:

4.5.1 System Administrator orientation training: Enrollment Rx will provide an initial on-line orientation training session to the individuals designated during the PKTC as System Administrators. The purpose of this online orientation training is to familiarize System Administrators with Salesforce, provide an initial knowledge transfer on native setup features, and to engage the System Administrators' full participation in the orientation training.

4.5.2 Creation of Reports and Dashboards: Enrollment Rx will work with Your System Administrators to assist in creating custom reports tailored to Your needs based upon information furnished to Enrollment Rx during the BPR and post BPR discovery phase. Enrollment Rx will assist in the native report type setup, create native custom report types as needed, and set up dashboards.

4.5.3 Set Up of Automated Workflow: Enrollment Rx will work with Your System Administrators to assist in the creation of Salesforce workflow rules. Salesforce workflow rules automate business process based upon specific defined criteria. Each rule consists of criteria that determine when Salesforce should execute the rule, immediate actions to take when the rule is executed, and time dependent actions that Salesforce will queue when the workflow rule executes. The 4 specific actions that can be set up are; Email Alerts, Tasks, Field Updates, and Outbound messages. Enrollment Rx will assist in setting up of workflow rules based upon information furnished to Enrollment Rx during the BPR and post BPR discovery phase.

4.5.4 Setup of Communication Template: Enrollment Rx will work with Your System Administrators to assist in the creation of Salesforce communication templates. Salesforce communication templates are used for email and print communication, and can be connected to Salesforce workflow rules. Enrollment Rx will assist in setting up communication templates based upon information furnished to Enrollment Rx during the BPR and post BPR discovery phase.

4.5.5 Set-up of Salesforce Security and Governance Settings: Enrollment Rx will work with Your System Administrators to establish governance within Salesforce. Governance within Salesforce is a combination of

setting up "roles" and "profiles." A "role" within Salesforce governs user hierarchy and will be set up based upon parameters discussed during the BPR and post BPR discovery phase. A "profile" within Salesforce manages user access to data, permissions against each field or object, and overall system and user permissions. Enrollment Rx will work with Your System Administrators to identify best practices, and customize or create profiles and roles based upon information furnished to Enrollment Rx during the BPR and post BPR discovery phase.

5. **Data Migration Services:** Enrollment Rx will develop a data migration plan for You based upon information furnished to Enrollment Rx during the BPR and post BPR discovery phase. You will be responsible for providing the field mapping(s) and/or translation of fields/values from Your system to Enrollment Rx. Enrollment Rx will be responsible for the migration (import, upsert, update and/or upload) of files provided by You into Salesforce. Enrollment Rx will have no responsibility for translating Your data. Data migration will typically be handled in 3 phases. In the first phase, Enrollment Rx will import a sample data set based upon a small population of records. Typically the recommended sample data set will include 50-100 unique prospect/application records that include all elements related to the recruitment/enrollment process (examples include bio, demo, application, education history, activity, etc. data.) In the second phase, Enrollment Rx will import a larger data set based upon the remediation and success of the first data import. The second phase will be completed prior to Sandbox Review and this data set will be used as part of System Administrator and General User training. In the third phase, Enrollment Rx will conduct a full data import after training is concluded and prior to go live. Enrollment Rx will work with Your System Administrations during each of the three phases and You will be responsible for review/feedback to confirm the successful migration of the data.

6. **Sandbox Review:** You and Enrollment Rx will engage in a sandbox review ("Sandbox Review") as part of the final phase of product configuration. The purpose of the Sandbox Review is to review and approve product functionality defined by You during the BPR and post BPR discovery. The Sandbox Review will take place online and shall be conducted in accordance with this SOW. Your designated Project Manager and all designated System Administrators shall attend and participate in the Sandbox Review. Following the completion of the Sandbox Review, You shall furnish Enrollment Rx with a list of outstanding or incomplete requirements within the scope of the SOW and as specified during the BPR and the post BPR discovery process.

7. **Integration Advisory Services:** Enrollment Rx will provide You with integration advisory services in accordance with this SOW. Integration Advisory Services consist of three elements. First, Enrollment Rx will work with Your System Administrators to document/understand the flow of data between Your system and the ERX Services. Enrollment Rx will provide You with a dataflow workbook and an integration plan based upon Your requirements identified during the BPR and post BPR discovery phase. Second, Enrollment Rx will advise You on integration methodology (based upon the data flow requirements). Integration methodology could consist of leveraging the Salesforce API, utilizing an integrated ETL solution, or utilizing a data exchange tool to batch import/export/update). Third, Enrollment Rx will work with You to document/understand the frequency of data exchange between systems. You are responsible for all aspects of the implementation and achievement of the integration including the writing of scripts necessary to send and receive data.

8. **Training.** Enrollment Rx will provide System Administrator and general user training. You will provide an environment conducive to training including but not limited to the provision of a projector, high speed internet access, and a computer or laptop for each individual attendee.

8.1 System Administrator Training. System Administrator training will be scheduled by Enrollment Rx at the completion of the sandbox review. The System Administrators are the "power users" with rights to features and functionality beyond typical users. System Administrator training will be based upon the number of hours specified in the Pricing Addendum. Training will be scheduled and completed in one on-site visit with all training to take place on consecutive business days and each training day to last approximately 8 hours. All System Administrators and the Project Manager designated during the BPR and post BPR discovery shall attend the System Administrator training. Attendees will be limited to System Administrator and the Project Manager designated during the BPR and post BPR discovery phase. Enrollment Rx may limit System Administrator training to 3 or fewer persons.

8.2 General User Training. General user training will be scheduled by Enrollment Rx at the completion of System Administrator training. Attendees of general user training must be proficient in personal computing functionality and internet and basic web browser usage. General user training will be based upon the number of hours specified in the Pricing Addendum. Training will be scheduled and completed in one on-site visit with all training to take place on consecutive business days and each training day to last approximately 8 hours. Enrollment Rx may limit general user training to 12 or fewer persons.

8.3 Stabilization Period. The "Stabilization Period" will be the two weeks following the completion of training specified in this SOW. During the Stabilization Period, Enrollment Rx will provide online training, support and review to System Administrators and general users on any topics addressed during their training under this SOW. Only System Administrators and general users attending training are eligible for online training, support and review during the Stabilization Period. The online training, support and review is designed to provide a refresher to System Administrators and general users who may have forgotten or misunderstood concepts during training. Changes to the Managed Package, re-architecting, or code changes are not part of the online training, support and review under the Stabilization Period. Upon the conclusion of the Stabilization Period, Enrollment Rx will provide standard support in accordance with this SOW.

8.4 Additional Training. Training of System Administrators and general users beyond the number of hours designated in the Pricing Addendum is available upon request at an hourly charge.

8.5 Training For New System Administrators. New System Administrators, including replacement System Administrators, are required to attend a minimum of two days of Enrollment Rx on-line System Administrator training. Additional System Administrator training is available at an additional charge.

9.   **Support Services.** During the Subscription Term, Enrollment Rx will use commercially reasonable efforts to support the standard functionality of the ERX Managed Packages in this SOW. Standard functionality of the ERX Managed Package includes customization and configuration of workflow rules, reports and fields, the creation and maintenance of User accounts, security and administration setup, troubleshooting setup, configuration, reports, dashboard, and errors messages. Support Services under this SOW will be provided online exclusively to Your System Administrators (i) that participated in Enrollment Rx System Administrator training under this SOW, and (ii) who submit support requests via the ERX Support Portal ("ESP"). ERX may respond to support requests submitted via the ESP by telephone, email or via the ESP. ERX will furnish You with a trouble ticket number which You can use to track the status of the request via the ESP. Support Services will be available Monday to Friday 8:30am to 5:30pm Central Time. ERX will respond using commercially reasonable efforts to resolve all inquiries and perform all Support Services in a prompt and professional manner. If ERX cannot promptly and adequately resolve a

technical support issue relating to its Support Services, ERX may escalate the case to SFDC or may seek assistance from SFDC's support organization. Support Services under this SOW end when Your Subscription Terms ends or this SOW is otherwise terminated in accordance with the Agreement. ERX may close a support ticket submitted by Your System Administrator via the ESP without further obligation if ten (10) days have passed and (a) the reported incident that cannot be reproduced by ERX, (b) Your System Administrator fails to respond to requests for information from ERX, (c) Your System Administrator does not permit ERX access to the Your hardware, software or third party applications necessary for ERX to provide support, or (d) Your System Administrator fails or declines to follow ERX's recommendations. Support Services under this SOW do not extend to technical support beyond the scope of this Statement of Work. The creation or modification of code, creation or modification of portals, visual force pages, automation that is not supported by the native workflow, portal fixes, downloading of additional apps, modification of any ERX Managed Package made by You or third parties, support of third party functionality introduced by You or third parties, and other services beyond the scope of this Statement of Work are not covered by the Support Services under this SOW. Programming support, including the development, modification and customization of code, including but not limited to Apex and Visual Force, and on-site support are available at an additional charge.

10.   **AppExchange Tools.** Enrollment Rx will introduce You to the AppExchange and will identify the AppExchange tools most often selected by Enrollment Rx customers. You will be responsible for investigating, evaluating and selecting the AppExchange tools that are most appropriate for Your intended purposes.

YOUR RESPONSIBILITIES

11.   **Key Individuals.** Prior to the scheduling of the Project Kickoff Telephone Conference (PKTC), You will assign a dedicated Project Manager (PM) with whom all communications related to the ERX Services will be addressed and who will have authority to act on Your behalf in all matters relating to this SOW. Your PM will serve as a liaison between Enrollment Rx and Your departments participating in the services and will attend all scheduled meetings with Enrollment Rx, be responsible for obtaining and securing all requested information, data and approvals for Enrollment Rx in a timely manner, and will be responsible for solving Service and Licensing issues and escalating issues within Your organization as necessary. To the extent You require Enrollment Rx to communicate or work with Your third-party vendors, Your PM and Your other appropriate personnel will (a) schedule and coordinate all meetings with the third party vendor, (b) schedule and coordinate all meetings with Enrollment Rx, (c) personally attend and participate in all aspects of each meeting, webinar and telephone conference. In the event Your PM resigns, is terminated or is no longer willing or able to perform his or her responsibilities, You will assign a new dedicated PM upon request by Enrollment Rx. In addition to a dedicated PM, You will assign at least two System Administrators to participate in the training described in this SOW. Enrollment Rx may suspend or delay any meeting, webinar, or telephone conference not attended by the PM.

12.   **Your General Responsibilities.** Enrollment Rx's performance is dependent upon Your management and fulfillment of Your responsibilities under this SOW. Any delays in Your performance of Your responsibilities under this SOW may result in delays in the completion of the Services under this SOW. You will:

(i) Make appropriate personnel available to Enrollment Rx for the duration of the ERX Services;

(ii) Provide safe, accessible, suitable office space, supplies, furniture, high speed connectivity to the internet and other facilities for Enrollment Rx personnel while working onsite;

(iii) Ensure that current maintenance and license agreements are in place with applicable vendors for those products and services upon which Enrollment Rx is relying to provide the ERX Services described under this SOW;

(iv) Abide by the licensing requirements of Salesforce;

(v) Acquire the requisite number of salesforce.com user licenses within 14 days of the initial Project Kickoff Telephone Conference (PKTC);

(vi) Conduct regular backups and maintain appropriate backup recovery procedures at Your location;

(vii) Obtain any necessary consents and take any actions required by applicable laws, including but not limited to data privacy laws, prior to disclosing any of Your employee, staff, faculty or student information to Enrollment Rx;

(viii) Maintain and be liable for the security of Your passwords, access credentials and other access control measures for Salesforce and the ERX Managed Packages;

(ix) Grant ERX access to Your Salesforce development and production environments as is necessary to perform the services under this SOW; and

(x) Pay the Service Fees and Expenses described in this SOW and the Pricing Addendum.

SUBSCRIPTION TERM

13.   Subscription Term. Your Initial Subscription Term for the ERX Services described in this SOW is five years commencing on the date this SOW is signed. The parties may specify a different Initial Subscription Term and/or commencement date in the Pricing Addendum. The Initial Subscription Term shall automatically renew at the expiration of the Subscription Term, at ERX's then current rates, unless cancelled in writing by either party at least sixty (60) days prior to the last date of the then current Subscription Term.

SERVICE FEES AND EXPENSES

14.1   Implementation Fees. Implementation fees are based upon the number of hours allotted for the various components of the implementation. The number of hours allotted for each component of the implementation and the fees associated therewith are described in the Pricing Addendum.

14.2   User Subscriptions. Subscription fees are based on the number of User Subscriptions purchased.   The number of User Subscriptions purchased and the fees associated therewith is described in the Pricing Addendum.

14.3   Reimbursable Expenses. Reimbursable expenses include transportation, mileage, hotel (if traveling), meals (if traveling), hotel phone and internet charges, and any necessary copies or postage. Enrollment Rx will invoice You separately for travel and travel related expenses and all invoices are due upon receipt.

14.4   Staffing from a Remote Location. In certain situations, such as accommodating a project date or subject matter expertise, it may be necessary to staff Your project with a resource from a remote location. If this scenario occurs, You would be responsible for the resource's time and travel related expenses. Enrollment Rx will invoice You separately for time and travel related expenses for resources from a remote location and all invoices are due upon receipt.

OUT OF SCOPE

15.   Out of Scope. This SOW and Pricing Addendum exclusively define the scope of the ERX Services to be provided to You under this SOW and may only be amended by a written document signed by each party's authorized representative in accordance with the change management procedures described in this SOW.

*Contract addendum is attached and incorporated. nmm 10/8/19

Enrollment®

MISCELLANEOUS TERMS

16.1   Training and Support. Training and support requested by You beyond the training and support described in this SOW are available for a fee of $200 per hour or $1,600 per day. Enrollment Rx reserves the right to charge a full day for any on-site training or on-site support.

16.2   Change Orders. In order to make a change to the SOW, You must submit a signed written request specifying the proposed changes in detail. Enrollment Rx will then submit an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change. To accept the estimate and anticipated changes, You must deliver a signed copy of the estimate and proposed changes to Enrollment Rx within five days of receipt. Enrollment Rx reserves the right to modify the estimate and anticipated changes if the change order is not returned within this time frame. Service Fees may only be amended by a written change order signed by both parties.

16.3   Fees and Terms Valid for Thirty Days. Except as otherwise provided, Fees and terms detailed in this SOW are valid for 30 days from the date of issue. Enrollment Rx reserves the right to modify the Fees and terms if this agreement is not executed within this timeframe.

16.4   Time Is Of the Essence. It is agreed and understood that timely payment is of the essence of this SOW and the TOS. All Service Fees are due upon the execution of the SOW unless a different schedule is defined in the Pricing Addendum.

16.5   Hours of Operation. Enrollment Rx's Hours of Operation are 8:30am – 5:30pm Monday thru Friday Central Time, not including holidays. On-site resources will work during Hours of Operation based upon the local time zone.

16.6   Salesforce License Fees. ENROLLMENT RX FEES DO NOT INCLUDE SALESFORCE LICENSE FEES. ENROLLMENT RX FEES DO NOT INCLUDE LIMITED PORTAL AND LIMITED FORCE.COM LICENSES. YOU MUST PURCHASE SALESFORCE LICENSES DIRECTLY FROM SALESFORCE.

*Contract addendum is attached and incorporated. nmm

ACCEPTANCE

If the arrangements outlined in this engagement are acceptable, please sign one copy of this SOW and return it to us as follows:

Enrollment Rx, LLC
9511 West River Street, Suite 100
Schiller Park, IL 60176
Fax: (312) 893-2214
Email: levy@enrollmentrx.com

I acknowledge that the Pricing Addendum and TOS available for download at https://www.enrollmentrx.com/wp-content/uploads/2017/09/TERMS-OF-SERVICE.pdf are a part of this Statement of Work. I warrant that I downloaded and reviewed the TOS.

Date: ___10/10/19___

By: *Randy Rikel*

West Texas A&M University ("You")	Enrollment Rx, LLC ("ERX" or "Enrollment Rx"),
WT Box 610001	9511 West River Street, Suite 100
Canyon, Texas 79016	Schiller Park, Illinois 60176
By: *Randy Rikel*	By: _____ Brian Murnane, its CFO

Exceptions Addendum

School Name: West Texas A&M University

Date of Agreement: 10/10/19

The Terms of Service are modified as follows:

Section 11.1 is replaced in its entirety with the following:

11.1 This section intentionally omitted.

The attached **West Texas A&M University Addendum To Vendor's Contract Form** is incorporated into the Agreement.

ACCEPTED AND AGREED TO THIS ___10th___ DAY OF __October__ , __2019__ ,

BY:

| West Texas A&M University ("You")
WT Box 610001
Canyon, Texas 79016

By: _Randy Rikel_ | Enrollment Rx, LLC ("ERX" or "Enrollment Rx")
9511 West River Street, Suite 100
Schiller Park, Illinois 60176

By: _____
Brian Murnane, its CFO |

WEST TEXAS A&M UNIVERSITY
ADDENDUM TO VENDOR'S CONTRACT FORM

West Texas A&M University, a member of The Texas A&M University System and an agency of the State of Texas ("WTAMU") and Enrollment Rx, LLC, an Illinois limited liability company Services ("Vendor") are this day entering into an agreement (collectively the "Parties") and, for their mutual convenience, the Parties are using the standard contract form provided by the Vendor, including all incorporated policies and guidelines (referred to hereafter as the "Vendor's Contract Form").

This Addendum, duly executed by the Parties, is incorporated into the Vendor's Contract Form and made an integral part thereof.

Certain standard clauses that may appear in the Vendor's Contract Form cannot be accepted by WTAMU because of its status as an agency of the State of Texas and other terms require amendment or supplementation. In consideration for the convenience of using the Vendor's Contract Form instead of negotiating a separate contract document, the parties agree that the Vendor's Contract Form is amended in accordance with this Addendum and may not be waived or modified except by written agreement between the parties. As used herein, the term "Agreement" means the Vendor's Contract Form, this Addendum, and the purchase order (if any), together with any other addenda or exhibits constituting part of the written contract between the parties. To the extent the language in the Vendor's Contract Form is in conflict with any language in this Addendum or the purchase order (if any), the language in this Addendum and the purchase order (if any) shall control.

In accordance with Texas Education Code Section 51.9335(h), any provision required by applicable Texas law to be included in the Agreement shall be deemed to be automatically incorporated into the Agreement by operation of law.

1. Inapplicable Provisions. Without limiting any other inapplicable provisions, none of the provisions listed below as they may appear in the Vendor's Contract Form shall have any effect or be enforceable against WTAMU:

    a. Releasing, waiving, or limiting the Vendor or any entity or person from its legal liability for unlawful or negligent conduct or failure to comply with any duty recognized or imposed by applicable law.

    b. Requiring any total or partial compensation or payment for lost profit, consequential, punitive or liquidated damages by WTAMU.

    c. Requiring that WTAMU pay taxes.

    d. Changing the time period within which claims can be made or actions can be brought under the law, i.e. statutes of limitation.

    e. Binding WTAMU to any arbitration or to the decision of any arbitration board, commission, panel or other entity.

    f. Granting the Vendor a security interest in any property of WTAMU or subjecting any property of WTAMU to a statutory, contractual, or constitutional lien.

    g. Requiring payments or assessing interest other than in accordance with the Texas Prompt Payment Act, Chapter 2251, *Texas Government Code.*

    h. Requiring WTAMU to maintain any type of insurance either for WTAMU benefit or for the Vendor's benefit.

OGC Approved: September/2018

i. Automatically renewing or extending the contract term.

j. Requiring that the Agreement be "accepted" or endorsed by the home office or by any other officer of the Vendor subsequent to execution by an official of WTAMU before the Agreement is considered in effect.

k. Prohibiting WTAMU from recovering its lawful damages incurred as a result of a breach of the Agreement.

l. Limiting the liability of the Vendor for property damage or personal injury.

m. Permitting unilateral modification of the Agreement by the Vendor.

n. Delaying the acceptance of the Agreement or its effective date beyond the date of execution by WTAMU.

2. Applicable Requirements.

a. **Access by Individuals with Disabilities.** Vendor represents and warrants that the electronic and information resources and all associated information, documentation, and support that it provides to WTAMU under this Agreement (collectively, the "EIRs") comply with the applicable requirements set forth in Title 1, Chapter 213 of the Texas Administrative Code and Title 1, Chapter 206, §206.70 of the Texas Administrative Code (as authorized by Chapter 2054, Subchapter M of the Texas Government Code). To the extent Vendor becomes aware that the EIRs, or any portion thereof, do not comply, then Vendor represents and warrants that it will, at no cost to WTAMU, either (1) perform all necessary remediation or (2) replace the EIRs with new EIRs. In the event that Vendor fails or is unable to do so, then WTAMU may terminate this Agreement and Vendor will refund to WTAMU all amounts WTAMU has paid under this Agreement within thirty (30) days after the termination date.

3. Required Certifications.

a. **Delinquent Child Support Obligations.** "Under Section 231.006, *Texas Family Code*, the vendor or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated and payment may be withheld if this certification is inaccurate."

b. **Payment of Debt or Delinquency to the State.** Pursuant to Section 2252.903, *Texas Government Code*, Vendor agrees that any payments owing to Vendor under this Agreement may be applied directly toward certain debts or delinquencies that Vendor owes the State of Texas or any agency of the State of Texas regardless of when they arise, until such debts or delinquencies are paid in full.

c. **Franchise Tax Certification.** If Vendor is a taxable entity subject to the Texas Franchise Tax (Chapter 171, *Texas Tax Code*), then Vendor certifies that it is not currently delinquent in the payment of any franchise (margin) taxes or that Vendor is exempt from the payment of franchise (margin) taxes.

d. **Prohibited Bids and Agreements.** "Under Section 2155.004, *Texas Government Code*, the vendor certifies that the individual or business entity named in this bid or contract is not ineligible to receive the specified contract and acknowledges that

this contract may be terminated and payment withheld if this certification is inaccurate."

e. **Certification Regarding Debarment, Suspension, and Other Responsibility Matters.** WTAMU is federally mandated to adhere to the directions provided in the President's Executive Order (EO) 13224, Executive Order on Terrorist Financing – Blocking Property and Prohibiting Transactions With Persons Who Commit, Threaten to Commit, or Support Terrorism, effective 9/24/2001 and any subsequent changes made to it via cross-referencing respondents/vendors with the Federal General Services Administration's Excluded Parties List System (EPLS, http://www.epls.gov), which is inclusive of the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated National (SDN) list. Vendor certifies that it is eligible to participate in this Agreement and has not been subjected to suspension, debarment, or similar ineligibility determined by any federal, state or local governmental entity and that Vendor is in compliance with the State of Texas statutes and rules relating to procurement and that Vendor is not listed on the federal government's terrorism watch list as described in Executive Order 13224.

f. **Conflict of Interest.** By executing this Agreement, PROVIDER and each person signing on behalf of PROVIDER certifies, and in the case of a sole proprietorship, partnership or corporation, each party thereto certifies as to its own organization, that to the best of their knowledge and belief, no member of The A&M System or The A&M System Board of Regents, nor any employee, or person, whose salary is payable in whole or in part by The A&M System, has direct or indirect financial interest in the award of this Agreement, or in the services to which this Agreement relates, or in any of the profits, real or potential, thereof.

g. **Prohibition on Contracts with Companies Boycotting Israel.** To the extent that Texas Government Code, Chapter 2270 applies to this Agreement, Vendor/Contractor certifies that (a) it does not currently boycott Israel; and (b) it will not boycott Israel during the term of this Agreement. Vendor/Contractor acknowledges this Agreement may be terminated and payment withheld if this certification is inaccurate.

h. **Certification Regarding Business with Certain Countries and Organizations.** Pursuant to Subchapter F, Chapter 2252, Texas Government Code, Vendor certifies it is not engaged in business with Iran, Sudan, or a foreign terrorist organization. Vendor acknowledges this Agreement may be terminated if this certification is inaccurate.

4. <u>Loss of Funding</u>. Performance by WTAMU under this Agreement may be dependent upon the appropriation and allotment of funds by the Texas State Legislature (the "Legislature"). If the Legislature fails to appropriate or allot the necessary funds, WTAMU will issue written notice to Vendor and WTAMU may terminate this Agreement without further duty or obligation hereunder. Vendor acknowledges that appropriation of funds is beyond the control of WTAMU.

5. <u>State Auditor's Office</u>. Vendor understands that acceptance of funds under this Agreement constitutes acceptance of the authority of the Texas State Auditor's Office, or any successor agency (collectively, "Auditor"), to conduct an audit or investigation in connection with those funds pursuant to Section 51.9335(c), *Texas Education Code*. Vendor agrees to

cooperate with the Auditor in the conduct of the audit or investigation, including without limitation, providing all records requested as related to this Agreement. Vendor will include this provision in all contracts with permitted subcontractors.

6. Force Majeure. Neither party is required to perform any term, condition, or covenant of this Agreement, if performance is prevented or delayed by a natural occurrence, a fire, an act of God, an act of terrorism, or other similar occurrence, the cause of which is not reasonably within the control of such party and which by due diligence it is unable to prevent or overcome.

7. Entire Agreement; Modifications; Assignment. The Agreement supersedes all prior agreements, written or oral, between WTAMU and the Vendor and constitutes the entire Agreement and understanding between the parties with respect to the subject matter hereof. The Agreement and each of its provisions will be binding upon the parties and may not be waived, modified, amended, altered, or assigned except by a writing signed by WTAMU and the Vendor.

8. Independent Contractor. In Vendor's performance under the Agreement, the Vendor acts and will act as an independent contractor, and not as an agent or employee of WTAMU.

9. Limitations. The Vendor is aware that there are constitutional and statutory limitations on the authority of WTAMU (a state agency) to enter into certain terms and conditions that may be part of the Agreement, including, but not limited to, those terms and conditions relating to liens on WTAMU's property; disclaimers and limitations of warranties; disclaimers and limitations of liability for damages; waivers, disclaimers and limitations of legal rights, remedies, requirements and processes; limitations of periods to bring legal action; granting control of litigation or settlement to another party; liability for acts or omissions of third parties; payment of attorneys' fees; dispute resolution; indemnities; and confidentiality (collectively, the "Limitations"), and terms and conditions related to the Limitations will not be binding on WTAMU except to the extent authorized by the laws and Constitution of the State of Texas.

Neither the execution of the Agreement nor any conduct, action or inaction of any representative of WTAMU relating to the Agreement constitutes or is intended to constitute a waiver of WTAMU's or the state's sovereign app to suit.

10. Public Information.

(a) Vendor acknowledges that WTAMU is obligated to strictly comply with the Public Information Act, Chapter 552, Texas Government Code, in responding to any request for public information pertaining to this Agreement, as well as any other disclosure of information required by applicable Texas law.

(b) Upon WTAMU's written request, Vendor will provide specified public information exchanged or created under this Agreement that is not otherwise accepted from disclosure under chapter 552, Texas Government Code, to WTAMU in a non-proprietary format acceptable to WTAMU. As used in this provision, "public information" has the meaning assigned Section 552.002, Texas Government Code, but only includes information to which WTAMU has a right of access.

(c) Vendor acknowledges that WTAMU may be required to post a copy of the fully executed Agreement on its Internet website in compliance with Section 2261.253(a)(1), Texas Government Code.

11. Notice. Any notices, consents, approvals, demands, requests or other communications provided for or permitted to be given under any of the provisions of the Agreement must

be in writing and shall be deemed to be delivered (whether actually received or not) when deposited with the United States Postal Service, postage prepaid, certified mail, return receipt requested, and addressed to the intended recipient at the address set out below. Notice may also be given by regular mail, personal delivery, courier delivery, facsimile transmission, email or other commercially reasonable means and will be effective when actually received. WTAMU State University and the Vendor can change their respective notice address by sending to the other party a notice of the new address. Notices should be addressed as follows:

<div style="margin-left: 4em;">

If to WTAMU: WTAMU
WT Box 610001
Canyon, Texas 79016
Attn: VP of Finance & Administration

If to Vendor: Enrollment Rx, LLC
Attn: President
9511 W. River Street
Schiller Park, IL 60176

</div>

12. <u>Severability</u>. Each provision of this Agreement is severable. If any provision is rendered invalid or unenforceable by statute or regulation or declared null and void by a court of competent jurisdiction, the remaining provisions will remain in full force and effect if the essential terms of this Agreement remain valid, legal, and enforceable.

IN WITNESS WHEREOF, the parties have caused this Addendum to be duly executed, intending thereby to be legally bound.

WTAMU   **Enrollment Rx, LLC**

Randy Rikel 10/10/19	_(signature)_ 10/9/19
Signature Date	Signature Date
	BRIAN MURNANE
Randy Rikel	Printed Name
	C FO
Vice President of Business and Finance	Printed Title

Enrollment Rx Pricing Addendum

PRIVATE AND CONFIDENTIAL

SERVICE FEES	Location	Total Labor Hours	Rate per Hours	Cost
IMPLEMENTATION FEES - Enrollment Rx				
Discovery				
Project Kick Off Telephone Conference (PKTC)	Remote	2	Included	Included
Business-Process-Review (BPR)	On-Site	16	Included	Included
Product Configuration				
Enrollment Rx Core				
Set Up of Data Model	Remote	8	Included	Included
Configure of Admin Panel	Remote	2	Included	Included
Configure Checklist Requirement Sets	Remote	5	Included	Included
Touch Point Configuration	Remote	5	Included	Included
Set Up of Inquiry Web to Lead RFI Forms	Remote	4	Included	Included
Set Up of Recruitment School Visit Management	Remote	4	Included	Included
Enrollment Rx - Reader Rx				
Review Call 1 (Onboard Call to Review Functionality)	Remote	1	Included	Included
Configure Application Review Steps	Remote	2	Included	Included
Configure Summary Fields	Remote	2	Included	Included
Configure Application Feedback Forms	Remote	2	Included	Included
Configure Field Sets, Record Types, Workflow & Process Builder	Remote	3.5	Included	Included
Review Call 2 (Knowledge Transfer)	Remote	1	Included	Included
Assignment Rules: Approval Process Setup	Remote	2.5	Included	Included
System Admin Training	Remote	2	Included	Included
Enrollment Rx - Events Rx				
Review Call 1 (Onboard Call to Review Functionality)	Remote	1.5	Included	Included
Configure 1 Event Campaign Template	Remote	4	Included	Included
Configure 1 Event Registration / Campaign (with custom fields)	Remote	4	Included	Included
Configure 1 Visit and Activity Series	Remote	2	Included	Included
Configure "Manage Visitor Lists"	Remote	4	Included	Included
Configure / Setup 1 Custom Email Template	Remote	4	Included	Included
Review Call 2 (Knowledge Transfer)	Remote	1	Included	Included
Enrollment Rx - Import Rx				
Review Call 1 (Onboard Call to Review Functionality)	Remote	1.5	Included	Included
Setup of 1 Data Source	Remote	1	Included	Included
Setup of 1 Field Mapping	Remote	6	Included	Included
Review Call 2 (Knowledge Transfer)	Remote	1	Included	Included
Enrollment Rx - FormBuilder Rx				
Meeting to review FB Functionality and Setup/Onboarding Call	Remote	1	Included	Included
Configuration of 1 Template	Remote	6	Included	Included
Configuration and Set Up of 1 HomePage	Remote	16	Included	Included
Login Configuration	Remote	4	Included	Included
Page Builder: Custom Page Setup to Support Applicant Portal	Remote	40	Included	Included
Salesforce.com Admin Feature Customization				
System Admin Orientation Training	Remote	4	Included	Included
Creation of Reports and Dashboards	Remote	5	Included	Included
Set Up of Automated Workflow	Remote	8	Included	Included
Set Up of Communication Templates	Remote	4	Included	Included
Set-up of Salesforce Security and Governance Settings	Remote	10	Included	Included
Data Migration	Remote	16	Included	Included
Integration Advisory Services	Remote	16	Included	Included
Training				
System Admin Training	On-site	8	Included	Included
General User Training	On-site	24	Included	Included
Project Management				
Project Management and Post BPR Discovery	Remote	60	Included	Included
SubTotal Implementation Fees - Enrollment Rx		314	$200	$62,800

*Contract addendum is attached and incorporated. nmm 10/8/19

Enrollment Rx

	Location	Total Labor Hours	Rate per Hours	Cost
Implementation Fees - Salesforce Pardot				
Discovery				
Project Kick Off Telephone Conference (PKTC)	Remote	1	Included	Included
Product Configuration				
Installation and Configuration of Salesforce Pardot Connector	Remote	2	Included	Included
Pardot Admin Configuration	Remote	4	Included	Included
Configuration of Prospect Custom Fields	Remote	8	Included	Included
Feature Customization				
Pardot Onboarding Call (number 1)	Remote	1.5	Included	Included
Configuration Assistance: Email Drafts & Templates	Remote	1.5	Included	Included
Configuration Assistance: Segmentation Lists and Rules	Remote	2	Included	Included
Pardot Onboarding Call (number 2)	Remote	1.5	Included	Included
Configuration Assistance: Forms, Form Handlers, Layout Templates,	Remote	2.5	Included	Included
Configuration Assistance: Engagement Studio	Remote	1	Included	Included
Training				
System Admin Training	Remote	4	Included	Included
Project Management (10%)	Remote	3	Included	Included
Subtotal Implementation Fees - Salesforce Pardot		32	$200	$6,400
West Texas A&M Implementation Fees Discount (reduced rate to $125/hr)				($25,950)
TOTAL ERX IMPLEMENTATION FEES		346		$43,250

ANNUAL LICENSING FEES		
Included Managed Packages	**Number of User Licenses**	
Enrollment Rx Core	150	$45,000
Reader Rx	85	$8,500
Events Rx	Included	Included
Import Rx	Included	Included
FormBuilder Rx for Communities	Included	$15,000
TOTAL ANNUAL MANAGED PACKAGE LICENSING FEES		$68,500
West Texas A&M Enrollment Rx Managed Package Licensing Fees 50% Discount		($34,250)
TOTAL ANNUAL MANAGED PACKAGE LICENSING FEES		$34,250

CONTRACT FEES SUMMARY				
Description	**Year 1**	**Year 2**	**Year 3**	**Total Contract Fees**
Implementation Fees	$43,250	$0	$0	$43,250
Licensing Fees	$34,250	$34,250	$34,250	$102,750
TOTAL FEES	$77,500	$34,250	$34,250	$146,000

TERMS	
Contract Term	36 Months
Implementation Fees	due 10 days after effective date of contract
Licensing Fees	Year 1 - due 10 days after effective date of contract
	Year 2 - due on the first day of the 10th month after contract execution
	Year 3 - due on the first day of the 22nd month after contract execution

OPTIONS	
Additional licenses can be purchased at the following rates:	$1,200 Per User/Per Year
	$10,000 for 10 Additional Users/Per Year

SIGNATURE AND ACCEPTANCE

West Texas A&M University

Signature: *Randy Rikel*
Signed By: Randy Rikel
Date: 10/10/19

Enrollment Rx LLC

Signature: _____
Signed By: BRIAN MUENANE
Date: 10/9/19