

Workflow Pros

Master Services Agreement and Statement of Work

September 21, 2026

Effective Date: _____

Subscriber Legal Name: _____

Subscriber Operating Name if different: _____

This Master Services Agreement and Statement of Work (the “Agreement”) is entered into between [Workflow Pros Legal Entity Name], a corporation incorporated under the laws of the Province of Ontario with its principal office at [Workflow Pros Business Address] (“Workflow Pros”), and the Subscriber identified in Schedule “A” (the “Subscriber”). Workflow Pros and the Subscriber are each a “Party” and together the “Parties”.

Schedules A through D form part of this Agreement. Schedule D records the migration scope, approved AI receptionist rules and disclosed external charges for the Subscriber.

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Section 1:

Welcome and Commitment Letter

Workflow Pros

[Workflow Pros Business Address]

Date: [_____]

To: [Subscriber Business Legal Name]

[Subscriber Address]

[City, Province/State, Postal/ZIP Code]

1.1 Commitment Letter

Dear [Subscriber Name],

Welcome to Workflow Pros.

We built this platform specifically for operations like yours — the 5 to 15 truck HVAC, plumbing, and home services business that has outgrown the basic tools but does not need the complexity or the price tag of enterprise software. Workflow Pros sits right in that gap, and we are genuinely proud to have you here.

This agreement is not just a legal document. It is a mutual commitment. It documents what you can expect from us, what we ask of you, and the operational framework that makes this partnership work from day one. We have written it to be honest, straightforward, and respectful of your time.

From the moment you sign, our team takes responsibility for your onboarding. You will not be handed a login and a help article. A dedicated implementation lead will work alongside you through your 15-day deployment sprint, configure the system to reflect how your business actually runs, and remain available through your 15 to 30 day coaching window to make sure your team is confident, efficient, and getting results.

There are no lock-in terms. No hidden escalation clauses. No surprise fees beyond the subscription fees, applicable taxes and any usage-based third-party charges disclosed in this Agreement. Your subscription runs month to month, and you are free to cancel at any time with written notice. We keep your business because we earn it — not because a contract forces you to stay.

Everything in this agreement applies to your account as issued. Should you have any questions before signing, or at any point during our partnership, please do not hesitate to reach out directly.

We are looking forward to building something great with you.

Warm regards,

Authorized Signatory

On Behalf of Workflow Pros

[Workflow Pros Business Address]

1.2 Statement of Mutual Operational Accountability

By entering into this agreement, both parties acknowledge and accept the following commitments:

Workflow Pros commits to: delivering the platform and services described in this agreement with professionalism and care; assigning a dedicated implementation lead throughout the onboarding and coaching period; maintaining the platform with reasonable uptime and timely support; and treating all subscriber data with strict confidentiality in accordance with applicable Canadian and US privacy law.

The Subscriber commits to: providing accurate business information at the time of onboarding; making designated team members available during the deployment sprint and coaching period; maintaining timely payment of monthly fees; and using the platform in accordance with the permitted use policy outlined in this agreement.

Neither party shall hold the other responsible for outcomes that result from a failure to meet their own stated commitments. Both parties agree to communicate openly and in good faith when challenges arise.

1.3 Communication Protocol and Escalation Framework

Formal communications, including cancellation requests, billing disputes and amendment notices, must be submitted in writing using the notice methods in this Agreement. Human technical support is included in the subscription and is available twenty-four (24) hours per day, seven (7) days per week, including weekends and holidays, by telephone and email and through the designated account portal where available. Current support contact details must be supplied at activation and kept accessible in the account portal; email support is available at info@workflowpros.io.

Workflow Pros will provide an initial substantive response from a human support representative within the following elapsed-time targets from receipt: Priority 1, a platform-wide outage, suspected active security incident, or complete loss of calling, dispatch or payment functionality with no reasonable workaround: one (1) hour; Priority 2, a material impairment of a core function with operations still partly available: four (4) hours; Priority 3, routine questions, configuration assistance and other non-critical requests: twenty-four (24) hours. These targets apply around the clock. An automated acknowledgement does not count as a human response. Workflow Pros will use commercially reasonable efforts to meet these response targets; they are not guaranteed resolution times.

Priority 1 incidents are escalated promptly to the on-call technical lead, with progress updates at least every four (4) hours while unresolved. For other issues, support will communicate the next action and expected update time. A Subscriber may request escalation through the same channels. Formal contractual escalations receive a good-faith response within five (5) business days; urgent support and security obligations continue independently.

1.4 Authorized Signatory Block

This Welcome Letter and Commitment Statement forms part of the Workflow Pros Master Services Agreement. The Agreement is executed by both Parties once, in the Authorized Signatures and Digital Execution Block in Section 16. Separate signatures on this letter are not required.

Section 2:**Schedule “A”, Subscriber Profile and Order Form**

This Schedule forms part of the Workflow Pros Master Services Agreement. All fields must be completed accurately at the time of signing. This information will be used to configure the subscriber’s platform account, establish billing, and assign the dedicated implementation lead.

2.1 Subscriber Business Legal Name and Contact Details

Business Legal Name: _____

Operating Name (if different): _____

Business Type: ☐ Sole Proprietorship ☐ Corporation ☐ Partnership ☐ Other: _____

Primary Service Trade(s): _____

Number of Active Field Trucks: _____

Business Phone Number: _____

Business Email Address: _____

Business Mailing Address: _____

City: _____ Province/State: _____

Postal/ZIP Code: _____ Country: _____

CRA Business Number (Canada) / EIN (United States):

Website (if applicable): _____

2.2 Designated Account Administrator

The Designated Account Administrator is the primary point of contact for Workflow Pros in all matters relating to this agreement, including onboarding coordination, billing, and platform access management.

Full Name: _____

Job Title / Role: _____

Direct Phone Number: _____

Email Address: _____

Preferred Contact Method: ☐ Phone ☐ Email ☐ Platform Portal

Preferred Contact Hours: _____

2.3 Billing Contact and Preferred Payment Method

If the billing contact is the same as the Designated Account Administrator, check here:

☐ Same as above

Billing Contact Full Name: _____

Billing Contact Email: _____

Billing Contact Phone: _____

Preferred Payment Method:

☐ Credit Card ☐ Pre-Authorized Debit ☐ EFT / ACH / Wire Transfer ☐ Other

Billing Currency: ☐ Canadian Dollar (CAD) ☐ US Dollar (USD) (Subscribers located in Canada are billed in CAD; Subscribers located in the United States are billed in USD)

Billing Address (if different): _____

Purchase Order Number (if req.): _____

2.4 Subscription Start Date and System Activation Trigger

The Subscription Start Date is the date on which the Workflow Pros platform account is formally activated and the first billing cycle begins. This date is confirmed upon receipt of a signed Agreement and payment authorization, and is the “Activation Date” referred to throughout this Agreement. Billing commences on the Subscription Start Date and is not deferred by the onboarding sprint.

Requested Subscription Start Date: _____

Confirmed Subscription Start Date: _____

(To be completed by Workflow Pros upon activation)

Onboarding Sprint Start Date: _____

(Within two (2) business days of the Subscription Start Date; this is the “Onboarding Sprint Start Date”)

Expected Go-Live Date (Day 15): _____

Expected Coaching End Date: _____

(15 to 30 days post go-live)

Assigned Implementation Lead: _____

(To be completed by Workflow Pros)

Schedule “A” Subscriber Acknowledgement

By signing below, the Subscriber confirms that all information provided in this Schedule is accurate and complete to the best of their knowledge, and authorizes Workflow Pros to use this information to activate and configure the platform account.

Subscriber Signature

Date

Printed Name and Title

Section 3:

Schedule “B”, Platform Pricing and Fleet Licensing Matrix

This Schedule sets out the complete pricing structure, licensing tiers, and fleet scaling rules that govern the Subscriber’s monthly fees under the Workflow Pros Master Services Agreement. All fees are recurring and billed monthly in advance unless otherwise specified. Prices are stated in the currency selected by the Subscriber in Schedule “A”.

3.1 Core Platform Base Fee

The Core Platform Base Fee is \$600.00 per month, plus \$90.00 per month for each active named field technician account under Section 3.2. No field technician accounts are included free in the base fee. There is no minimum crew size. Fees are stated in the Billing Currency confirmed in Schedule A and exclude applicable taxes.

The base fee includes hosting, data storage and backups; job management, quoting, invoicing, customer history and reporting; an unlimited number of office user seats; business phone tools; the AI receptionist and its company-wide allowance of 1,000 minutes per monthly billing cycle under Section 5.6; twenty-four-hour human technical support under Section 1.3; and platform updates and feature releases. Office users use the web platform and licensed field technicians use the mobile application, subject to Section 5.4. Setup, migration and remote crew training are included as described in Section 8 and Schedule D.

3.2 Field Unit Licensing at \$90 per Active Technician

Each active named field technician account is billed at \$90.00 per month, including the first technician. A Field Unit means one named technician with an active mobile application account. A vehicle, dispatch assignment, or additional device used by that same technician is not a separately chargeable Field Unit. Technician credentials may not be shared. Field technician licenses do not include office-platform access; dual-role users are governed by Section 5.4.

Monthly subscription formula: \$600.00 + (\$90.00 x number of active technician accounts), plus applicable taxes and charges expressly disclosed in Section 5.6. For example, five active technicians cost \$1,050.00 per month before those taxes and charges. Account additions and deactivations follow Sections 3.4, 3.5 and 6.

Active Technician Accounts at Signing: _____

Total Technician License Fee at Signing: \$_____ per month

3.3 Administrative Office User Allocation: Unlimited Office Users Included

Every Workflow Pros subscription includes an unlimited number of office user seats at no additional charge. Office users access Workflow Pros exclusively through the web-based platform. An office user is defined as any team member who logs into the web platform in a non-field capacity, including but not limited to dispatchers, customer service representatives, office managers, bookkeepers, and supervisors. Office user seats do not include or grant access to the field mobile application.

Office User Seats Included: Unlimited seats at no additional charge

No per-seat charge, office-user cap or office-seat overage fee applies.

Office users do not consume field unit licenses and are not subject to the \$90.00 per-truck fee. This allocation is fixed and does not increase the monthly base fee.

3.4 Fleet Scaling Protocol: Adding and Removing Technician Licenses

Adding Field Units: The Subscriber may add field unit licenses at any time by submitting a request through the account portal or contacting their account administrator. New licenses are activated within one (1) business day of the request and are prorated to the remaining days in the current billing cycle.

Removing Field Units: The Subscriber may request deactivation through the account portal or by email at any time before the next billing cycle begins, including on the final day of the current billing cycle. No advance-notice period or cutoff applies. A request received before the next cycle begins prevents the technician account from renewing into that cycle, regardless of when Workflow Pros processes or confirms it. The current paid cycle is not refunded or prorated; the license remains available through its end unless the Subscriber disables access earlier. See Section 6.3.

Same-Day Scaling: In circumstances where a Subscriber grows their fleet rapidly (for example, adding multiple trucks in one day), each activation will follow the same proration rules and appear as a line item on the next monthly invoice.

3.5 Proration Framework for Mid-Cycle Fleet Changes

When field unit licenses are added mid-cycle, fees are prorated based on the number of calendar days remaining in the billing period. The proration formula is as follows:

Prorated Daily Rate = Monthly License Fee ÷ Total Days in Billing Month

Prorated Amount = Daily Rate x Days Remaining in Cycle

Example: If a Subscriber adds one (1) field unit on Day 10 of a 30-day billing cycle, the prorated charge would be: $(\$90.00 \div 30) \times 20 \text{ days remaining} = \60.00 for that cycle. Proration applies to additions only; removals take effect at the end of the current billing cycle as set out in Section 6.3.

All prorated charges will appear as clearly labelled line items on the next monthly invoice. Workflow Pros does not issue mid-cycle invoices for proration adjustments unless the Subscriber specifically requests one.

Schedule B Monthly Fee Summary

Core Platform Base Fee: \$600.00 per month

Active Technician Accounts: _____ x \$90.00 = \$_____ per month

Office User Seats: Unlimited, included at no additional charge

Total Monthly Subscription: \$600.00 + technician license fees = \$_____

AI Receptionist: 1,000 company-wide minutes included per monthly billing cycle; additional minutes \$0.10 each under Section 5.6

Setup, Migration and Remote Crew Training Fee: \$0.00

Applicable Taxes and Separately Disclosed Charges: as set out in Sections 3.1 and 5.6

First Invoice Due Date: _____

Billing Cycle: monthly in advance, recurring on the same date each month

An active technician account is a named technician account activated for field use and not yet deactivated under Section 6.3. Deactivated accounts are not billed from the effective deactivation date determined under that Section. Additions are prorated under Section 3.5. The initial price lock and notice requirements in Section 6.6 apply.

Section 4:

Schedule “C”, Purchase Summary and Activation Ledger

This schedule confirms the complete cost summary associated with your Workflow Pros subscription activation. It documents your initial financial commitment, your first billing date, and your ongoing payment authorization. There are no setup charges and no penalties of any kind. Applicable taxes and the usage-based third-party charges described in Section 5.6 are the only amounts payable in addition to the monthly subscription fee. You are free to scale up, scale down, or cancel at any time.

4.1 Initial Activation Deposit Structure

Workflow Pros does not charge an activation deposit, onboarding fee, or platform setup fee of any kind. Your subscription begins on the Subscription Start Date confirmed in Schedule “A”, and your first invoice covers only your monthly recurring fee as detailed in Schedule “B”, plus applicable taxes. Initial setup and any later setup, reconfiguration or repeat setup of the subscribed platform are included throughout the active subscription and are never billed separately.

Activation Cost Confirmation:

Setup / Onboarding Fee: \$0.00

Contract Lock-in or Commitment Fee: \$0.00

Hardware or Equipment Deposit: \$0.00

4.2 First Monthly Invoice Breakdown

Your first invoice will be generated on the Subscription Start Date identified in Schedule “A”. Because billing recurs on the same calendar date each month, the first invoice covers a full monthly billing

cycle beginning on the Subscription Start Date; no first-month proration applies. Subsequent invoices reflect the full monthly recurring fee together with any prorated charges for field unit licenses added during the prior cycle.

First Invoice Summary:

Core Platform Base Fee: \$600.00 / month

Active Technician Accounts (qty: (active accounts x \$90.00)

Office User Seats (unlimited): \$0.00 (included)

Setup / Onboarding Fee: \$0.00

Applicable Taxes: \$

Total First Invoice: \$

4.3 Recurring Auto-Billing Schedule and Payment Authorization

By executing this Agreement, the Subscriber authorizes Workflow Pros to process monthly recurring charges to the payment method on file, beginning on the First Invoice Due Date shown in Schedule “B”. Charges will be processed automatically on the same calendar date each month thereafter.

Billing Authorization Terms:

Billing Frequency: Monthly, in advance

Billing Date: Same date each month as First Invoice Due Date

Payment Method: Credit card, pre-authorized debit (PAD) / ACH, EFT, or other method as authorized

Invoice Delivery: Digital invoice sent to Billing Contact email on record

Adjustments: Any licensed fleet changes will be reflected in the next billing cycle

The Subscriber may update their payment method at any time by contacting Workflow Pros support or through the subscriber account portal. Workflow Pros will provide at least five (5) business days' advance notice of any change to the recurring billing amount other than changes resulting from the Subscriber's own license additions or removals. Changes to the fee rates themselves are governed by Section 6.6.

4.4 Failed Payment Protocol and Account Suspension Policy

Workflow Pros understands that payment issues occasionally occur. Our approach is always to work with you first before any service interruption. The following protocol applies when a scheduled payment cannot be processed:

Failed Payment Response Timeline:

Day 1 (Payment Failure): Workflow Pros will send an immediate email notification to the Billing Contact on file, identifying the failed payment and requesting updated payment information.

Day 3 (First Retry): Workflow Pros will automatically retry the payment. If successful, no further action is required and no late fee will apply.

Day 7 (Second Retry): A second automatic retry will be attempted. The Subscriber will receive a second written notice.

Day 10 (Account Review Notice): Workflow Pros will contact the Subscriber directly to discuss resolution options. Access to the platform will not be suspended during this period, provided the Subscriber communicates a resolution path.

Day 14 (Account Suspension): If no payment is received and no resolution has been communicated, platform access may be suspended. No data will be deleted during a suspension period. Full access will be restored immediately upon receipt of outstanding balance.

Day 30 (Account Termination): If no payment is received within 30 days of the original failed payment date, Workflow Pros reserves the right to terminate the subscription. Subscriber data will be retained for a period of thirty (30) days following termination in accordance with Section 7.3, after which it may be permanently deleted.

No late fees or interest charges will be applied during the payment resolution period. Workflow Pros will not report payment failures to any credit bureau. This policy is designed to protect your business and your data while maintaining the integrity of the platform for all subscribers.

Schedule "C" Acknowledgement: The Subscriber acknowledges that the pricing, billing structure, and payment terms set out in this schedule have been reviewed and are accepted as part of the complete Master Services Agreement with Workflow Pros. All amounts are invoiced in the Billing Currency confirmed in Schedule "A" and are exclusive of applicable taxes.

Section 5:

Service Scope, Access Rights and Platform Use Policy

This Section defines the full scope of services provided under the Workflow Pros Master Services Agreement, establishes the access rights of each user type, and sets out the acceptable use policy that governs how the platform may be used by the Subscriber, its employees, and its authorized users.

5.1 Platform Architecture: Web Platform and Mobile Application

Workflow Pros operates as two completely separate and independent platforms that together serve the full needs of a field service business. The two platforms do not share login credentials, user interfaces, or access privileges. A user licensed for one platform cannot log into or access the other.

The Web-Based Office Platform is the administrative hub of the business. It is accessed exclusively through a web browser on a computer or tablet by office-based users. This platform is designed for and limited to administrators, dispatchers, customer service representatives, office managers, bookkeepers, and supervisors. Office platform users manage scheduling, dispatch, job management, invoicing, customer records, reporting, and business analytics. The web platform is not accessible to or designed for field technicians.

The Field Mobile Application is the operational tool for field technicians. It is accessed exclusively through the Workflow Pros mobile app installed on a smartphone or mobile device. This platform is designed for and limited to field technicians actively working assigned jobs. Mobile app users can receive job dispatches, update job status, capture photos, collect customer signatures, and process payments in the field. The mobile application is not accessible to or designed for office-based users.

Platform Separation Summary:

Web Platform: Office users only | Browser access | Admin, dispatch, CSR, management

Mobile Application: Field technicians only | App access | Job execution, field operations

Cross-platform access: Not permitted | Licenses are non-transferable between platforms

5.2 Scope of Services Included in the Subscription

The following services are included in every active Workflow Pros subscription at no additional charge beyond the monthly recurring fee outlined in Schedule “B”:

Web Platform (Office Users):

Full access to the job management, scheduling, and dispatch system

Customer relationship management (CRM) and service history records

Quoting, invoicing, and payment processing tools

Real-time dashboards and performance reporting

Technician and fleet management tools

Pricebook management and service catalog tools

Business phone and communication tools (subject to porting setup in Section 10)

Platform updates, new feature releases, and security patches at no additional cost

Mobile Application (Field Technicians):

Assigned job viewing, acceptance, and status updates

GPS-enabled job dispatch and route management

In-field photo capture, notes, and documentation tools

Customer signature capture and field invoice generation

In-field payment collection and receipt issuance

Two-way messaging with office dispatch

5.3 Services and Features Not Included in Standard Subscription

The following are not included in the standard monthly subscription and may be subject to separate arrangement, additional fees, or third-party agreements:

Third-party software integrations not natively supported by Workflow Pros (e.g., specialized accounting systems beyond standard sync)

Hardware, devices, smartphones, or mobile equipment for field technicians

Custom development or bespoke feature builds requested outside the standard platform

Unlimited office user seats and initial and later platform setup and configuration are included at no additional charge and are not excluded services.

Migration services are included without record-count, data-volume or source-system caps under Section 8 and Schedule D; they are not an excluded or separately chargeable service.

On-site training or in-person support visits (remote support is included)

5.4 Subscriber Access Rights and User Responsibilities

The Subscriber is granted a non-exclusive, non-transferable, limited right to access and use the Workflow Pros platform for the duration of this Agreement, subject to the following conditions:

Authorized Users Only: Access is limited to named, authorized users employed by or contracted to the Subscriber. Login credentials may not be shared between users or transferred to individuals outside the Subscriber's organization.

Platform Assignment: Office platform logins are reserved for office users only. Mobile app logins are reserved for field technicians only. Assigning office credentials to field techs, or mobile credentials to office staff, is not permitted and may result in billing adjustments. An individual who performs both office and field duties (for example, an owner-operator who dispatches and also runs service calls) may hold both an office user seat and a field technician license, and will be counted as one field unit for licensing purposes.

Account Administrator: The Subscriber must designate at least one Account Administrator who is responsible for managing user access, adding or removing users, and serving as the primary point of contact with Workflow Pros.

Credential Security: The Subscriber is responsible for maintaining the confidentiality of all login credentials. Any suspected unauthorized access must be reported to Workflow Pros immediately. Workflow Pros is not liable for any loss or damage arising from compromised credentials caused by the Subscriber's negligence.

Compliance: The Subscriber agrees to ensure all authorized users comply with this acceptable use policy. The Subscriber is responsible for the actions of its users on the platform.

5.5 Acceptable Use Policy

The Subscriber and all authorized users agree to use the Workflow Pros platform only for its intended business purposes in connection with legitimate field service operations. The following uses are expressly prohibited:

Using the platform to store, transmit, or distribute any unlawful, fraudulent, or harmful content

Attempting to access, reverse-engineer, decompile, or copy any part of the platform

Reselling, sublicensing, or granting platform access to any third party not employed by the Subscriber

Interfering with or disrupting the platform's infrastructure, security, or other subscribers' access

Using automated tools, bots, or scripts to scrape, extract, or manipulate platform data without written consent from Workflow Pros

Using the platform for any purpose that violates applicable Canadian or US federal, provincial, or state laws

Workflow Pros reserves the right to suspend or terminate access in the event of a confirmed acceptable use violation, following written notice to the Subscriber. Workflow Pros will act reasonably and make every effort to resolve any issue before suspending access.

5.6 AI Receptionist Allowance and Separately Disclosed Charges

The optional AI receptionist is included in the subscription. Workflow Pros configures it for the Subscriber's business at no additional charge. Its allowance is one thousand (1,000) call minutes per monthly billing cycle, shared across the Subscriber's company and all users. Unused minutes do not carry over. Additional AI receptionist minutes cost \$0.10 per minute in the Billing Currency specified in Schedule A. Usage is measured by actual AI-handled seconds, aggregated over the billing cycle and divided by sixty (60), without rounding each call up to a full minute. The resulting monetary charge is rounded to the nearest cent. Usage and remaining allowance will be visible in the account profile and overages itemized on the monthly invoice.

Only time during which the enabled AI receptionist handles a call counts toward the allowance or an overage. Calls answered and handled by a person incur no Workflow Pros per-minute voice charge. On a transferred call, only the AI-handled portion counts; human-handled time, ringing and hold time after the AI stops handling the call do not count. There is no separate Workflow Pros voice-minute charge in addition to the AI receptionist charge. No AI minutes accrue while the receptionist is disabled.

The following external charges remain separate: (a) payment processing fees charged by the third-party processor at its disclosed rates; (b) third-party accounting or other service subscriptions elected by the Subscriber; (c) SMS carrier or delivery charges, number rental beyond the first included business number, and carrier registration or compliance charges such as A2P 10DLC, only as disclosed in the External Charges Record in Schedule D before the relevant service is activated; and (d) charges imposed directly by the Subscriber's previous vendor for its own subscription, termination or release of data. Workflow Pros does not charge a migration, extraction, cleanup, preparation or vendor-coordination fee and does not mark up previous-vendor exit or data-release charges. Workflow Pros must obtain the Subscriber's written authorization before incurring such a third-party charge on the Subscriber's behalf.

The External Charges Record must identify the item, payee, rate or calculation method, currency, billing basis and any one-time amount. A blank item does not authorize an unspecified Workflow Pros charge. A portal rate card alone cannot override the included allowance, \$0.10 AI overage rate, human-call treatment, or notice requirements in this Agreement. Workflow Pros will give at least sixty (60) days' written notice before changing any rate it sets or passes through on its invoices, in accordance with Section 6.6. Separately contracted third-party services paid directly by the Subscriber remain governed by that provider's agreement.

Acknowledgement: The Subscriber confirms that the service scope, platform architecture, access rights, and acceptable use policy described in this Section have been read, understood, and are accepted as binding terms of this Agreement.

Section 6:**Billing Cycle, Fleet Scaling and Dynamic License Adjustments**

This Section sets out how Workflow Pros calculates, generates, and adjusts the Subscriber's monthly invoices. It also explains how field technician (truck) licenses can be added or removed as the Subscriber's fleet grows or contracts, and how billing is reconciled when changes are made mid-cycle. Everything here is designed to be straightforward, fair, and fully transparent.

6.1 Monthly Billing Cycle Mechanics and Invoice Generation

The Workflow Pros subscription is billed on a monthly basis. The Subscriber's billing cycle begins on the Subscription Start Date (the Activation Date) as confirmed in Schedule "A" and recurs on the same calendar date each month thereafter. Workflow Pros will generate and deliver an invoice to the Subscriber's designated billing email address on or before each billing date.

Each monthly invoice will reflect the following charges as applicable:

Core Platform Base Fee: \$600.00 per month (includes unlimited office user seats; technician accounts are charged separately)

Field Unit License Fee: \$90.00 per month for each active named field technician account, including the first

Any prorated charges resulting from mid-cycle fleet additions made in the preceding billing period

Payment is due upon receipt of invoice. Workflow Pros accepts major credit cards, pre-authorized bank debit (where available), and other payment methods as disclosed at time of activation. All amounts are billed in the Billing Currency confirmed in Schedule "A" (Canadian dollars for Subscribers located in Canada; US dollars for Subscribers located in the United States) and are exclusive of applicable taxes. Amounts not paid within thirty (30) days of the invoice date are subject to the failed payment protocol in Section 4.4.

6.2 Adding Field Unit Licenses: Scaling Up Your Fleet

The Subscriber may add additional field technician licenses at any time by submitting a written request to Workflow Pros via email or through the account management portal. Each active named field technician account, including the first, is charged at \$90.00 per month. No technician accounts are bundled into the base fee at no charge.

When a new field unit license is added mid-billing cycle, the charge for that license will be prorated based on the number of days remaining in the current billing cycle. The proration formula applied is: \$90.00 divided by the total number of days in the billing month, multiplied by the number of days remaining from the activation date of the new license to the end of that billing period. The prorated amount will appear on the Subscriber's next invoice.

6.3 Removing or Deactivating Field Unit Licenses: Scaling Down

The Subscriber may reduce the number of field technician licenses at any time through the account portal or by email. There is no five-business-day notice requirement or other advance cutoff. A deactivation request received at any time before the next billing cycle begins takes effect for that next cycle, including when received on the final day of the current cycle. The portal must record the

submission time and show the effective deactivation date. Workflow Pros processing or confirmation delays do not postpone deactivation or create another billing obligation. Actual receipt or portal submission governs deactivation requests notwithstanding the next-business-day notice provision in Section 16.4.

No technician license fee is payable for a billing cycle beginning after timely receipt of the deactivation request. The current paid billing cycle remains non-refundable and is not prorated; the license remains available until that cycle ends unless the Subscriber disables access earlier. Any next-cycle technician fee charged despite a request received before that cycle began must be reversed or refunded promptly. The account portal must show the next renewal date, time and applicable time zone. Requests received after a cycle has begun apply to the following cycle.

6.4 Dynamic License Adjustment and Billing Reconciliation

Workflow Pros monitors active field unit license counts on a continuous basis. If the Subscriber adds or removes field unit licenses during a billing cycle, the monthly invoice for the following period will reflect the adjusted license count and any applicable prorated charges from the prior period.

The reconciliation process works as follows: additions are charged on a prorated basis for the remainder of the month in which they are activated, and the full per-unit fee of \$90.00 applies from the next full billing cycle onward. Deactivations take effect at the end of the current billing cycle and are reflected in the next invoice with the reduced license count.

Workflow Pros will provide a clear line-item breakdown on each invoice showing the base fee, the total number of active named technician accounts during the billing period, and any prorated adjustments. If the Subscriber has a question about any invoice line item, Workflow Pros will respond within two (2) business days with a full explanation.

6.5 Office User Seat Management

The base subscription includes an unlimited number of office user seats at no additional charge. Office user seats are for web platform access only and are intended for personnel including administrators, dispatchers, customer service representatives, managers, supervisors, and bookkeepers. Office seats do not include access to the Workflow Pros mobile application, which is reserved exclusively for field technicians.

The Subscriber's account administrator may add, remove or modify authorized office user access at any time through the web platform administration panel. There is no limit on the number of office user seats and no additional charge, upgrade or separate agreement is required because the office user count increases. Office users do not count toward the paid technician total unless they also hold a field technician license under Section 5.4. Named-user and credential-security requirements continue to apply.

6.6 Initial Price Lock and Changes to Fees

The \$600.00 monthly Core Platform Base Fee and \$90.00 monthly rate per active technician account are fixed for twelve (12) months from the Effective Date, being the date of the last signature under Section 16.1. This price lock does not create a minimum term: the subscription remains month-to-month and may be cancelled under Section 7. Changes in the number of active technician accounts change the invoice total at the locked rate and do not constitute a rate increase.

After the initial twelve-month period, Workflow Pros may change those rates only on at least sixty (60) days' prior written notice, effective no earlier than the first billing date on or after both the expiry of the lock and the end of the notice period. Platform and technician rate changes may occur no more than once in any twelve-month period.

The AI receptionist's \$0.10 additional-minute rate is excluded from the twelve-month price lock but may change only on at least sixty (60) days' prior written notice, effective from the first billing date after that notice period. The same notice period applies to other recurring rates and external charges billed by Workflow Pros. The 1,000-minute included allowance and the absence of human-answered per-minute charges cannot be removed or reduced by a rate-card update; any such amendment requires both Parties' written agreement under Section 16.4. Changes in legally required taxes are not discretionary fee changes and apply as required by law.

A Subscriber who declines a fee change may cancel before it takes effect under Section 7 and will pay the previous rates through the effective cancellation date. No fee change may be applied retroactively. Sections 5.6 and 6.6 prevail over any inconsistent rate card or shorter billing-notice provision.

Acknowledgement: The Subscriber acknowledges the billing cycle terms, fleet license scaling procedures, dynamic adjustment rules and office seat management policies described in this Section, including proration for mid-cycle additions and the absence of any advance-notice cutoff for deactivation before the next billing cycle begins.

Section 7:

Flexible Cancellation Policy and Subscriber Exit Framework

Workflow Pros believes that trust is built when both parties can walk away freely. There are no long-term contracts, no lock-in periods, and no cancellation fees. This Section explains exactly how the Subscriber can end the agreement, what happens to their data and access when they do, and what both parties can expect throughout the exit process.

7.1 Cancellation Rights: Cancel Anytime, No Penalty

The Subscriber may cancel this Agreement at any time, for any reason, without incurring a termination fee, penalty, or early exit charge. This Agreement has no fixed term and no minimum commitment period; the subscription continues month to month until cancelled, and there is no financial consequence for choosing to end it.

Cancellation takes effect at the end of the current billing cycle in which the cancellation request is received by Workflow Pros. The Subscriber will retain full platform access through the last day of that paid billing period. No partial-month refund will be issued for the unused portion of a billing cycle following a cancellation request, as access remains available through the final day of the paid period.

The Subscriber is responsible for any fees accrued up to and including the final billing cycle. No further charges will be processed after the final billing cycle is complete and access is closed.

7.2 How to Submit a Cancellation Request

Workflow Pros will provide an accessible self-service cancellation button in every Subscriber account management portal for the authorized Account Administrator. Before confirmation, the workflow must

clearly display the date and time platform access will end, the applicable time zone, that no subscription charge will apply for the next billing period, and that the termination fee is \$0. Any separately accrued usage charges or outstanding amounts must be identified separately under Section 7.1. The Subscriber may confirm cancellation or leave the subscription active; opening the workflow alone does not cancel it. Cancellation must not require a telephone call, support approval or a reason for leaving.

Confirmation through the account cancellation button constitutes a valid written cancellation request and takes effect immediately upon submission for the purposes of Section 7.1. The portal will automatically associate the request with the account name and billing email, show confirmation, and send a written confirmation identifying the access end date. The Subscriber retains access through the current paid period, and the subscription will not renew for another period. A delay in sending or receiving the confirmation does not affect the submission time or cancellation.

The Subscriber may also cancel by email to the Workflow Pros support address supplied in the account portal or by written notice delivered to the Workflow Pros notice address. Such a request must identify the account, billing email and clear intent to cancel. Workflow Pros will confirm these requests in writing within two (2) business days, specifying the access end date. A compliant request is effective when actually received, including outside business hours; processing or confirmation delays do not postpone it. This actual-receipt rule and the portal submission rule override the next-business-day notice provision in Section 16.4 for cancellation requests. Verbal, social-media and third-party-channel requests are not accepted.

7.3 Platform Access After Cancellation

The Subscriber will retain full access to the Workflow Pros web platform (for office users) and mobile application (for field technicians) through the last day of the final paid billing cycle. On the day following the close of the final billing cycle, all user access will be deactivated automatically.

After access is closed, Workflow Pros will retain the Subscriber's data in a secure, read-only state for a period of thirty (30) days following the access termination date. During this window, the Subscriber may contact Workflow Pros to request a data export. After the thirty (30) day retention period, Workflow Pros reserves the right to permanently delete all Subscriber data from its systems in accordance with its data retention and privacy policy as described in Section 11 of this Agreement. Copies of Subscriber data held in routine backups will be purged in the ordinary course of Workflow Pros' backup rotation cycle and in any event within ninety (90) days after the end of the retention period.

Workflow Pros is not responsible for any loss of data that results from a failure to request a data export within the thirty (30) day window following access termination. The Subscriber is encouraged to export all necessary records before the final day of access.

7.4 Workflow Pros Right to Terminate for Cause

While the Subscriber may cancel at any time, Workflow Pros also reserves the right to suspend or terminate the Subscriber's access if the Subscriber is in material breach of this Agreement and fails to remedy that breach within ten (10) business days of receiving written notice from Workflow Pros identifying the breach.

Grounds for termination for cause include, but are not limited to: non-payment of invoiced amounts outstanding for more than thirty (30) days; confirmed and unresolved violations of the Acceptable Use Policy described in Section 5.5; misuse of the platform in a manner that disrupts service for other subscribers; or breach of any confidentiality, intellectual property, or data protection obligation set out in this Agreement.

In the event of termination for cause, Workflow Pros will provide written notice to the Subscriber's registered email address identifying the reason for termination. The Subscriber will retain access to export their data during a ten (10) business day window following receipt of the termination notice, after which access will be closed.

7.5 No Lock-In Guarantee and Subscriber Commitment

Workflow Pros is built on the belief that Subscribers stay because the product delivers value, not because they are contractually obligated to do so. For that reason, this Agreement contains no minimum term, no auto-renewal penalty, no early termination fee, and no financial consequence of any kind for cancelling.

The Subscriber is under no obligation to provide a reason for cancelling. Workflow Pros may, at its own discretion, reach out to understand the reason and to see if there is anything that can be done to improve the experience. Any such outreach is entirely optional on the part of the Subscriber, and declining to respond will have no impact on the cancellation process or timeline.

Workflow Pros commits to processing every cancellation request promptly, honestly, and without obstacle. The Subscriber deserves a clean, respectful exit from this relationship should they choose one.

Acknowledgement: The Subscriber acknowledges the cancellation terms set out in this Section, including the cancel-anytime policy, the written request requirement, the thirty (30) day data retention window after access termination, the five (5) business day data export window in cases of termination for cause, and the unconditional no-penalty exit guarantee.

Section 8:

System Configuration Sprint and Core Integration Setup

The 15-day onboarding sprint is one of the most important commitments Workflow Pros makes to every new Subscriber. This Section describes how that sprint is structured, what gets configured during that window, what integrations are set up, and what both Workflow Pros and the Subscriber are responsible for to make the launch successful.

8.1 The 15-Day Onboarding Sprint: Structure and Timeline

The onboarding sprint begins on the Onboarding Sprint Start Date confirmed in Schedule "A" and runs for fifteen (15) calendar days. During this period, a dedicated Workflow Pros onboarding specialist will be assigned to the Subscriber's account to oversee and execute the configuration process.

The sprint is divided into three phases. Phase One (Days 1 to 5) covers account setup, user provisioning, and platform orientation. During this phase, Workflow Pros will create user accounts for all office users on the web platform and field technician logins on the mobile application, configure the

Subscriber's branding and company profile within the platform, and walk the Subscriber's account administrator through the core settings and navigation structure.

Phase Two (Days 6 to 10) covers workflow configuration and integration setup. This phase includes building out dispatch workflows, job types, service templates, and scheduling logic based on the Subscriber's operational requirements gathered during the intake process. Core integrations identified during onboarding will also be initiated during this phase.

Phase Three (Days 11 to 15) covers testing, team training, and go-live preparation. Workflow Pros will conduct a full system walkthrough with the Subscriber's team, test all configured workflows, and confirm that the platform is ready for active use. The sprint concludes with a go-live confirmation communicated in writing to the Subscriber.

8.2 Included Configuration and Unlimited Free Migration

Workflow Pros will configure the Subscriber's company profile, branding, dispatch workflows, service territories, job types, permissions, an unlimited number of office accounts, all licensed technician accounts, price book, service catalog and reporting dashboards. Setup, migration, data import, cleanup and remote crew training carry a \$0.00 Workflow Pros fee. There is no cap on customer records, service items, agreed data volume or the number of records to be migrated. The same terms apply to off-the-shelf, legacy, custom-built and in-house source systems. All later setup, repeat setup and configuration changes to the subscribed platform are also included at no additional charge, regardless of their size, complexity or timing. This includes changes to workflows, roles, permissions, templates, service catalog settings and supported integration configuration.

Workflow Pros is responsible for extracting, obtaining, preparing, cleaning, mapping, importing and validating the agreed data, including obtaining files unavailable through an API and coordinating with the previous vendor using the Subscriber's authorization. Lack of an API does not exclude a source system. Workflow Pros will use available exports, files or authorized database access and perform manual handling where needed. Custom extraction or transformation work necessary to migrate the agreed data is included without a surcharge. Agreed existing work orders will be migrated without requiring the Subscriber to re-enter them.

Schedule D records the agreed categories, source systems, date ranges, attachments, field mapping, known availability restrictions, delivery formats and acceptance checks. It must be completed and confirmed by both Parties before migration begins. Data volume affects the agreed delivery plan, not the \$0.00 migration price. Cleanup and correction of migration errors remain included after go-live. Workflow Pros will disclose inaccessible source data promptly, pursue available authorized release routes and document any unresolved limitation and agreed alternative. No inaccessible category may be silently omitted or made subject to a Workflow Pros surcharge. A category may be excluded only with the Subscriber's express written agreement.

Customer payment credentials are handled only through secure transfers between authorized payment providers. Raw card numbers must not be supplied to Workflow Pros. The payment-token transfer status and any provider restrictions must be recorded in Schedule D before migration begins.

New product development unrelated to extracting, converting or importing the agreed data, unsupported ongoing third-party integrations, hardware and on-site visits remain subject to Section 5.3. These exclusions may not be used to charge for the included migration work. Separately charged optional work requires a written description, price and the Subscriber's advance approval. These

exclusions do not permit a separate charge for initial or later setup, repeat setup or configuration of the subscribed platform and its supported integrations. A setup or configuration request may not be reclassified as paid coaching or consulting to avoid this inclusion.

8.3 Core Integrations Supported During Onboarding

Workflow Pros supports setup and configuration assistance for the following core integrations during the onboarding sprint, where applicable to the Subscriber's subscription tier and operational requirements:

Accounting software integration (QuickBooks Online or equivalent, subject to platform compatibility confirmed at time of onboarding)

Payment processing integration for in-field and office-based payment collection

Business phone and communication integration, including business phone number porting where applicable (as further described in Section 10 of this Agreement)

GPS and fleet tracking integration for field unit monitoring, where supported by the Subscriber's device configuration

Email notification and automated customer communication setup within the platform

Integration setup is subject to the availability and compatibility of the Subscriber's existing systems and third-party service providers. Workflow Pros will make every reasonable effort to complete supported integrations within the 15-day sprint window. Where a third-party integration requires additional time due to factors outside Workflow Pros' control (such as third-party approval processes, API access delays, or data export restrictions), Workflow Pros will communicate the status to the Subscriber and complete the integration as soon as reasonably practicable.

8.4 Subscriber Authorization and Participation

The Subscriber will designate a primary contact, attend the initial data and requirements discussion, identify the source systems and required records, and provide lawful authorization and available access through secure channels. Workflow Pros will explain the access required and coordinate extraction and vendor communication. The Subscriber is not required to extract, clean, convert or prepare migration files, manually re-enter agreed work orders, or negotiate data release with its previous vendor.

The Subscriber will provide business decisions and configuration information that only it can supply, including service policies, operating hours, territories and booking rules; make appropriate office and field staff available for reasonably scheduled remote training; and review the agreed scope and configured workflows. Workflow Pros will provide representative migrated samples for optional review and remains responsible for migration validation. The Subscriber may identify corrections during onboarding and after go-live.

Requests for authorization, access or business decisions must specify the information needed and a reasonable response date agreed with the Subscriber, normally allowing at least three (3) business days unless an urgent deadline is mutually agreed. Customer-caused delays may extend only the affected milestone to the extent the delay actually prevents progress; Workflow Pros will explain the dependency and revised date in writing. Source-vendor extraction or release delays are third-party dependencies, not a failure by the Subscriber to prepare files. A delay does not create a migration

surcharge. Subscriber authorization does not permit Workflow Pros to bypass access controls or the source provider's lawful restrictions.

8.5 Sprint Completion, Go-Live Confirmation and Post-Launch Transition

At the conclusion of the 15-day sprint, Workflow Pros will issue a written Go-Live Confirmation to the Subscriber. This confirmation will summarize all configuration items completed, any open items still in progress, and the transition plan for post-launch support.

Upon go-live, the Subscriber's team assumes primary operational responsibility for day-to-day use of the platform. The onboarding specialist will remain available for a brief handover period of up to two (2) additional business days following the go-live date to answer any immediate questions that arise from active use.

Following the go-live handover, the Subscriber transitions into the 15 to 30-day post-launch mentoring and coaching program described in Section 14 of this Agreement. This coaching phase is separate from the onboarding sprint and is focused on helping the Subscriber's team build confidence, optimize workflows, and get the most value from the platform in real operational conditions.

Acknowledgement: The Subscriber confirms that the 15-day onboarding sprint structure, configuration inclusions, supported integrations, Subscriber responsibilities, and go-live transition process described in this Section have been read and are understood and accepted as part of this Agreement.

8.6 AI Receptionist Configuration and Authorized Actions

Workflow Pros will provide and configure the optional AI receptionist as an included service. When enabled by the Subscriber, it may answer calls, capture caller details and service requests, quote prices from the approved price book, create and update work orders, book appointments against live availability, and assign eligible technicians and vehicles, strictly within the Subscriber-approved services, territories, prices, schedules, permissions and booking rules recorded in Schedule D. Setup and subsequent changes to those rules are included at no additional charge.

Before enabling automated actions, Workflow Pros will test the configured rules with the Subscriber and obtain its written approval through the portal or email. An action within approved rules does not require separate human confirmation for each call. The Subscriber may disable the receptionist or revoke or change its authority at any time; revocations must be applied promptly, and new rules must be confirmed before use.

The receptionist must seek clarification or escalate to the designated human contact when a request falls outside approved rules, required information is missing, confidence is insufficient to act reliably, no eligible appointment is available, a caller requests a person, or an urgent or safety-related exception is identified. It must not invent prices, grant unauthorized discounts, make unsupported commitments, or book work prohibited by the approved safety rules. If the designated contact is unavailable, it must record the request and follow the approved fallback, without representing an unconfirmed booking as confirmed. It does not replace emergency services; the approved escalation instructions must address immediate danger. Call outcomes, automated actions and escalations must be logged for review. Minute charging is governed solely by Section 5.6.

Section 9:**Accounting Sync, Reporting and Field Mobile Application**

This Section describes how Workflow Pros connects to the Subscriber's accounting software, what financial and operational data flows between the two systems, how the platform's built-in reporting tools work for office management, and how the field mobile application functions in day-to-day field operations.

9.1 Accounting Software Integration and Sync

Workflow Pros includes built-in integration capability with QuickBooks Online and compatible accounting platforms. The accounting sync is configured during the onboarding sprint as described in Section 8.3, subject to the Subscriber's accounting software being a supported and compatible version at the time of setup.

Once the integration is active, the following data flows are supported between Workflow Pros and the connected accounting software:

Invoices created in Workflow Pros are automatically pushed to the Subscriber's accounting software upon generation or approval, eliminating manual double-entry

Customer records created or updated in Workflow Pros can be synchronized with the corresponding customer records in the accounting software

Payments received and recorded within Workflow Pros (whether collected in the field via the mobile application or in the office via the web platform) are reflected in the accounting software in accordance with the sync settings configured during onboarding

Service item and product codes used in Workflow Pros jobs can be mapped to corresponding account codes in the accounting software to ensure accurate categorization of revenue

The accounting sync operates in real time or near-real time depending on the configuration and the accounting software's API capabilities. Workflow Pros does not guarantee sync speed where delays are attributable to third-party API limitations outside Workflow Pros' control.

The Subscriber is responsible for ensuring that their accounting software credentials remain valid and that the integration connection remains authorized. If the connection is disrupted due to a password change, revoked API access, or other Subscriber-side action, the Subscriber must re-authorize the integration through the account management portal or contact Workflow Pros support for assistance.

9.2 Reporting and Business Intelligence Tools (Web Platform)

The Workflow Pros web platform includes a reporting and business intelligence module accessible to authorized office users. Reporting tools are available exclusively through the web platform and are not accessible via the mobile application, which is reserved for field technician use.

The reporting module provides access to the following categories of operational and financial data:

Job and work order reports, including completed jobs by date range, job status summaries, technician job counts, and open work order aging

Revenue and invoicing reports, including total invoiced amounts by period, outstanding balances, payment collection rates, and revenue by service type or customer

Customer reports, including new customers acquired by period, customer job history, and customer activity summaries

Dispatch and scheduling reports, including scheduled versus completed job ratios, technician utilization, and appointment lead times

Performance summary dashboards for administrators and managers, providing a real-time overview of key operational metrics

Reports can be filtered by date range, technician, service type, customer, and other available parameters depending on the report type. Subscribers with administrator or manager role assignments on the web platform can generate, view, and export reports. Report data can be exported in standard formats (such as CSV or PDF) for use in external tools or presentations.

Workflow Pros may add, modify, or enhance reporting features over time as the platform evolves. The Subscriber will be notified of material changes to reporting functionality that affect their standard workflow.

9.3 Field Mobile Application: Features and Functionality

The Workflow Pros mobile application is the exclusive platform for field technicians. It is accessed via a smartphone or tablet and is not available through a web browser. Office users do not have access to the mobile application, and field technician credentials do not grant access to the web platform. The two systems are completely separate.

The mobile application provides field technicians with access to the following features:

Assigned job queue showing all jobs dispatched to the technician, including job address, customer details, scope of work, and scheduled time

Real-time job status updates, allowing technicians to mark jobs as en route, on site, in progress, and completed directly from the field

Access to customer notes, service history, and job-specific instructions attached by the office dispatch team

Photo and document capture for job documentation, including before and after photos, site condition records, and completion evidence

In-field invoicing and payment collection, allowing technicians to generate invoices and collect payment from customers on site

Digital signature capture for customer acknowledgement and job completion confirmation

Two-way communication with the office dispatch team through the platform's messaging feature

The mobile application requires an active internet connection (mobile data or Wi-Fi) to sync job updates and communications in real time. Certain features may be available in a limited offline mode, with data syncing automatically when connectivity is restored. Device compatibility and supported operating system versions are disclosed in the Workflow Pros technical documentation available in the Subscriber's account portal.

9.4 Mobile Application Device and License Management

Each active field technician license entitles one (1) named field technician to access the Workflow Pros mobile application on one or more devices associated with their login credentials. Field technician licenses are tied to individual user logins and are not shared or pooled across multiple technicians.

The Subscriber's account administrator, operating through the web platform, is responsible for creating and managing field technician mobile logins, assigning jobs and territories to individual technicians, deactivating mobile logins for technicians who are no longer active, and resetting credentials where required.

Workflow Pros does not supply, manage, or maintain the physical devices used by field technicians. The Subscriber is responsible for ensuring that field technicians have access to compatible smartphones or tablets with sufficient data plans to support real-time use of the mobile application. Workflow Pros support is available to assist with app installation, login troubleshooting, and connectivity diagnostics, but is not responsible for device hardware issues or mobile data service interruptions.

As set out in Section 6.2, every active named field technician account is billed at \$90.00 per month, including the first, in addition to the \$600.00 base fee. Accounts can be added under Section 6.2.

9.5 Data Accuracy, Subscriber Responsibility and Integration Disclaimers

Workflow Pros provides accounting sync, reporting, and mobile application features as tools to support the Subscriber's business operations. The accuracy and completeness of data within these features depends on the accuracy and completeness of the information entered into the platform by the Subscriber's office and field teams.

Workflow Pros is not responsible for errors, omissions, or discrepancies in financial reports, accounting records, or job data that result from incorrect data entry, incomplete records, or Subscriber-side configuration choices. The Subscriber is responsible for reviewing and reconciling their accounting software records on a regular basis and for confirming that synced data accurately reflects their business activity.

The accounting integration relies on the continued availability and performance of the third-party accounting software's API. Workflow Pros will make commercially reasonable efforts to maintain the integration and address any compatibility issues that arise from third-party platform updates, but cannot guarantee uninterrupted sync in cases where the third-party provider changes or restricts their API without notice.

Acknowledgement: The Subscriber confirms that the accounting sync capabilities, reporting tools, mobile application features, license management responsibilities, and integration disclaimers described in this Section have been read and are understood and accepted as part of this Agreement.

Section 10:

Communication Infrastructure and Business Phone Porting Protocol

Clear, reliable communication between the office and the field is at the heart of every successful service business. This Section describes the communication features built into the Workflow Pros platform, the process for porting an existing business phone number into the system, what

Subscribers can expect during the porting process, and how communication tools connect the web platform and mobile application without merging their separate access roles.

10.1 Built-In Communication Features

The Workflow Pros platform includes a suite of built-in communication tools designed to keep the office and field connected throughout the workday. These tools operate across both the web platform (used by office staff) and the mobile application (used by field technicians), but each user type accesses only their designated platform as described in Section 5.1.

The following communication features are included in the standard subscription:

Two-way in-platform messaging between office dispatch staff (via the web platform) and field technicians (via the mobile application), allowing real-time job updates, instruction changes, and field-to-office communication without requiring personal phone numbers to be shared

Automated job notifications sent to customers via SMS or email when a technician is dispatched, en route, or has completed a job, triggered by status updates made from the field mobile application

Automated appointment reminders sent to customers ahead of scheduled service visits, configurable by the Subscriber's admin team through the web platform

Internal job notes and communication logs attached to each work order, visible to authorized office users via the web platform and to the assigned technician via the mobile application

Automated invoice delivery to customers via email upon job completion, initiated from either the web platform or the mobile application

All outbound customer communications (SMS and email) are sent from the Subscriber's configured business identity, including their business name and, where applicable, their ported business phone number as described in Section 10.2.

10.2 Business Phone Number Porting: Overview and Eligibility

Where supported by the Workflow Pros platform in the Subscriber's region, porting of one (1) existing business phone number is included in the onboarding sprint at no additional charge. Additional numbers may be ported or provisioned at the rates in the rate card referred to in Section 5.6. AI-handled minutes and separately disclosed SMS charges are governed by Section 5.6; human-answered calls have no per-minute Workflow Pros charge. Phone number porting allows the Subscriber to transfer their existing business phone number from their current carrier into the Workflow Pros communication system, so that all inbound and outbound calls and SMS messages operate through the Workflow Pros platform using the same number customers already know.

Porting eligibility is subject to the following conditions:

The phone number must be an active, working number currently registered to the Subscriber's business with their existing carrier

The number must be eligible for porting under applicable Canadian or US telecommunications regulations and carrier policies

The Subscriber must be the account holder of record with their current carrier and must have authority to authorize the port

The number must not be subject to any outstanding port restrictions, contractual holds, or carrier blocks at the time of the porting request

Workflow Pros will conduct a porting eligibility check as part of the onboarding intake process. If the Subscriber's number is eligible, the porting process will be initiated during Phase Two of the onboarding sprint as described in Section 8.1. If the number is not eligible, Workflow Pros will work with the Subscriber to provision a new business phone number through the platform at no additional charge.

10.3 The Porting Process: Steps, Timeline and Subscriber Role

Once eligibility is confirmed, the porting process proceeds through the following steps. Workflow Pros will guide the Subscriber through each step and communicate progress at every stage.

Step 1 - Authorization: The Subscriber provides Workflow Pros with a signed Letter of Authorization (LOA) permitting the port of the specified number, along with a copy of their most recent carrier invoice showing the number and account holder details. Workflow Pros will provide the LOA template.

Step 2 - Port Submission: Workflow Pros submits the porting request to the receiving telecommunications carrier on the Subscriber's behalf. The Subscriber's existing carrier is notified and given a regulatory window to process the release of the number.

Step 3 - Carrier Processing: The porting timeline is controlled by the Subscriber's existing carrier and applicable telecommunications regulations. Standard porting timelines in Canada and the United States range from five (5) to ten (10) business days for straightforward number ports. Complex ports (such as numbers associated with multi-line business accounts or legacy carrier systems) may take longer.

Step 4 - Cutover: On the confirmed port date, the number transfers to the Workflow Pros system. There is typically a brief service interruption of a few minutes during the cutover. Workflow Pros will notify the Subscriber of the scheduled cutover window in advance.

Step 5 - Confirmation: Workflow Pros confirms the successful port in writing and configures the number within the Subscriber's platform account for inbound and outbound use.

Throughout the porting process, the Subscriber must keep their existing carrier account active and in good standing. Cancelling the existing carrier service before the port is complete will result in the number being lost and unrecoverable.

10.4 Communication Platform Responsibilities and Limitations

Workflow Pros provides and maintains the communication infrastructure within its platform, including the messaging system, automated notification engine, and phone number management tools. Workflow Pros is responsible for the availability, reliability, and configuration of these tools within the platform.

The Subscriber is responsible for the following: ensuring that customer contact information (phone numbers and email addresses) is accurate and up to date within the platform; complying with all applicable anti-spam, telemarketing, and electronic communications laws when sending outbound communications to customers through the platform (including Canada's Anti-Spam Legislation (CASL) and the US Telephone Consumer Protection Act (TCPA) where applicable); obtaining any necessary customer consents required under applicable law before sending automated SMS notifications; and

configuring outbound communication settings in a manner that is compliant with their business and legal obligations.

Workflow Pros does not monitor or review the content of messages sent through the platform by the Subscriber's team. The Subscriber assumes full responsibility for the content and compliance of all communications sent through the Workflow Pros communication infrastructure on their behalf.

The communication features within Workflow Pros are intended for business operational use only and must not be used for unsolicited marketing, bulk promotional messaging, or any communication that violates the Acceptable Use Policy described in Section 5.5.

10.5 Number Portability Upon Cancellation

If the Subscriber cancels this Agreement and wishes to port their business phone number out of the Workflow Pros platform to a new provider, Workflow Pros will cooperate fully with the outbound porting process. The Subscriber has the right to take their business phone number with them.

To initiate an outbound port, the Subscriber must notify Workflow Pros in writing at the time of or prior to submitting their cancellation request. Workflow Pros will provide the Subscriber with the account information required by their new carrier to initiate the port, including the account number and PIN associated with the number in the Workflow Pros system.

Outbound number porting is subject to the same regulatory timelines as inbound porting as described in Section 10.3. The Subscriber must initiate the outbound port with their new carrier before the final day of platform access to avoid any interruption in number service. Workflow Pros will not be responsible for any service interruption that results from the Subscriber's failure to initiate the port before access is closed.

Where a Subscriber has a number provisioned by Workflow Pros (rather than a ported number), that number belongs to the Workflow Pros platform and will be released at the end of the subscription. The Subscriber may request to port a Workflow Pros-provisioned number to a new provider, subject to carrier and regulatory eligibility.

Acknowledgement: The Subscriber confirms that the communication infrastructure features, phone number porting eligibility and process, communication responsibilities, legal compliance obligations, and number portability rights upon cancellation described in this Section have been read and are understood and accepted as part of this Agreement.

Section 11:

Subscriber Data Ownership, Privacy Rights and AI Governance

Your data belongs to you. This Section sets out the Subscriber's rights over the data they create and store within the Workflow Pros platform, how Workflow Pros handles that data in compliance with applicable privacy legislation in Canada and the United States, what limited role artificial intelligence may play within the platform, and the Subscriber's rights to access, export, correct, and request deletion of their data at any time.

11.1 Subscriber Data Ownership

All data entered into, generated within, or uploaded to the Workflow Pros platform by the Subscriber, its office users, or its field technicians is and remains the sole property of the Subscriber. This

includes, without limitation: customer records and contact information; job history, work orders, and service records; invoices, estimates, and payment records; photos, documents, and attachments uploaded to jobs; notes, communications, and internal records; and any other business data created through the platform.

Workflow Pros does not claim any ownership, license, or intellectual property interest in the Subscriber's data. The Subscriber's data is used by Workflow Pros solely for the purpose of delivering the subscribed services and for no other purpose.

Workflow Pros will not sell, rent, trade, share, or otherwise transfer the Subscriber's data to any third party for commercial, marketing, or advertising purposes. Data is shared with third parties only where strictly necessary to deliver the services described in this Agreement (such as integrated accounting software or telecommunications carriers) and only to the extent required for that purpose.

Upon cancellation of the subscription, the Subscriber's data remains accessible for export for a period of thirty (30) days as described in Section 7.3. After that period, Workflow Pros may permanently delete all Subscriber data from its systems. Data deletion is irreversible, and Workflow Pros will have no obligation to recover data following the expiry of the thirty (30) day retention window.

11.2 Privacy Compliance: Canada (PIPEDA) and United States (CCPA/CPRA)

Workflow Pros is headquartered in Ontario, Canada and is subject to Canada's Personal Information Protection and Electronic Documents Act (PIPEDA) and applicable provincial private-sector privacy legislation (including Quebec's Act respecting the protection of personal information in the private sector, where applicable). For Subscribers located in the United States, Workflow Pros acknowledges and complies with applicable US state privacy laws, including the California Consumer Privacy Act (CCPA) as amended by the California Privacy Rights Act (CPRA), to the extent those laws apply to Workflow Pros' activities as a service provider.

In its role as a service provider processing personal information on behalf of the Subscriber, Workflow Pros operates as a data processor. The Subscriber is the data controller or business responsible for determining the purposes for which personal information of their customers and employees is collected and used within the platform.

Workflow Pros commits to the following privacy practices:

Personal information processed through the platform is collected only for the purposes of delivering the subscribed services and is not used for any other purpose without the Subscriber's consent

Workflow Pros maintains appropriate technical and organizational safeguards to protect personal information from unauthorized access, disclosure, alteration, or destruction as further described in Section 12 of this Agreement

Workflow Pros will notify the Subscriber without undue delay if it becomes aware of a data breach that involves the Subscriber's data and is required to be reported under applicable Canadian or US privacy law

Where Workflow Pros engages sub-processors to deliver aspects of the service (such as cloud infrastructure providers or telecommunications carriers), those sub-processors are bound by data protection obligations no less stringent than those applicable to Workflow Pros under this Agreement

Workflow Pros will cooperate with the Subscriber in responding to any privacy requests, complaints, or regulatory inquiries relating to the Subscriber's data processed through the platform

11.3 Subscriber Rights: Access, Correction, Export and Deletion

The Subscriber has the following rights with respect to their data at any time during the active subscription:

Right of Access: The Subscriber may access all of their data directly within the Workflow Pros web platform at any time using their administrator login credentials. Workflow Pros does not restrict the Subscriber's ability to view their own records.

Right of Correction: The Subscriber may correct or update any data within the platform at any time through the web platform's standard editing tools. The Subscriber is responsible for maintaining the accuracy of their own data.

Right of Portability: The Subscriber may export their data at any time during the active subscription using the export tools available within the web platform. Export formats include CSV and PDF where supported by the data type. If the Subscriber requires a full account data export and the in-platform tools do not meet their needs, Workflow Pros will assist with a comprehensive data export upon written request, completed within ten (10) business days.

Right of Deletion: The Subscriber may request deletion of specific records within the platform through the standard platform tools. For requests involving the deletion of the entire account dataset, the Subscriber must submit a written deletion request to Workflow Pros. Such requests will be fulfilled within thirty (30) days of receipt. Note that deletion of data may affect the Subscriber's ability to use certain platform features and is irreversible.

Requests relating to the personal information of the Subscriber's own customers (such as requests from customers under CCPA or PIPEDA for their own data) are the responsibility of the Subscriber as the data controller. Workflow Pros will provide reasonable cooperation to the Subscriber in fulfilling such requests.

11.4 AI Governance: Use of Artificial Intelligence Within the Platform

Workflow Pros provides the optional AI receptionist described in Section 8.6 and may introduce additional AI-assisted features. AI use is governed by the following principles:

Transparency: Workflow Pros will clearly identify and disclose where AI-generated suggestions, predictions, or automated decisions are presented to users within the platform. AI-assisted features will be labelled or described as such within the platform interface.

Human oversight and delegated authority: The Subscriber may authorize the AI receptionist to perform the actions in Section 8.6 within its approved rules without per-action human confirmation. Actions outside that authority require clarification or human escalation. Other AI-generated recommendations require human confirmation before a binding operational, financial or customer-facing action unless separately authorized in writing by the Subscriber. Workflow Pros remains responsible for configuring and operating the service within the approved authority; Subscriber approval does not waive Workflow Pros obligations under this Agreement.

Data use limitations: Subscriber data will not be used to train external or third-party AI models. Where Workflow Pros uses AI tools to generate in-platform features, any processing of Subscriber data for

that purpose is conducted within the scope of the services described in this Agreement and subject to the privacy obligations in Section 11.2.

No profiling or scoring: Workflow Pros will not use AI to profile, score, or make inferences about the Subscriber's customers, employees, or business performance for any purpose beyond delivering the subscribed operational services.

As AI technology and applicable regulation continue to evolve, Workflow Pros will update its AI governance practices accordingly and notify Subscribers of any material changes that affect how their data is processed.

11.5 Data Retention, Cross-Border Transfers and Confidentiality

Workflow Pros retains Subscriber data for the duration of the active subscription and for thirty (30) days following the end of the subscription as described in Section 7.3. Workflow Pros does not retain Subscriber data beyond that period except where required to do so by applicable law, a court order, or a regulatory obligation. Where data must be retained beyond the standard window for legal reasons, Workflow Pros will notify the Subscriber and retain only the minimum data necessary to satisfy the legal requirement.

The Workflow Pros platform and its underlying infrastructure may involve the storage or processing of data in Canada, the United States, or other jurisdictions where Workflow Pros or its cloud infrastructure sub-processors operate. By entering into this Agreement, the Subscriber acknowledges that their data may be transferred to and stored in jurisdictions outside their own, and consents to such transfers for the purpose of receiving the subscribed services. Workflow Pros will ensure that any cross-border data transfers are conducted in compliance with applicable privacy law and that recipient jurisdictions or sub-processors provide adequate levels of data protection.

Both Workflow Pros and the Subscriber agree to treat as confidential any non-public information received from the other party in connection with this Agreement, including business processes, pricing, platform architecture details, and customer data. Neither party will disclose the other's confidential information to any third party without prior written consent, except as required by law or as necessary to deliver the subscribed services.

Acknowledgement: The Subscriber confirms that the data ownership terms, privacy compliance obligations, individual data rights, AI governance principles, and data retention and confidentiality provisions described in this Section have been read and are understood and accepted as part of this Agreement.

Section 12:

Platform Security Standards and Regulatory Compliance

Protecting the Subscriber's data and maintaining a secure, reliable platform is a core responsibility of Workflow Pros. This Section describes the technical and organizational security measures in place across the platform, the access controls that protect user accounts, how Workflow Pros responds to security incidents, the regulatory standards the platform is designed to meet, and what the Subscriber is responsible for on their side of the security relationship.

12.1 Infrastructure Security and Data Protection Standards

The Workflow Pros platform is hosted on enterprise-grade cloud infrastructure designed to deliver high availability, data integrity, and security at scale. Workflow Pros implements and maintains the following technical security measures:

Encryption in transit: All data transmitted between users and the Workflow Pros platform, whether through the web platform or the mobile application, is encrypted using industry-standard Transport Layer Security (TLS) protocols. Unencrypted connections are not permitted.

Encryption at rest: Subscriber data stored within the Workflow Pros platform infrastructure is encrypted at rest using AES-256 or equivalent encryption standards. This applies to all stored data including customer records, job files, invoices, and uploaded documents.

Access control infrastructure: The platform employs role-based access controls (RBAC) ensuring that each user can only access the data and features appropriate to their assigned role. Web platform office users and mobile application field technicians operate in fully separate environments with no cross-platform access.

Redundancy and backup: Workflow Pros maintains regular automated backups of Subscriber data. Backups are stored securely in geographically separate locations to protect against data loss in the event of infrastructure failure. Backup frequency and retention schedules are maintained in accordance with Workflow Pros' internal disaster recovery standards.

Vulnerability management: Workflow Pros conducts regular security assessments of its platform infrastructure, including vulnerability scanning and penetration testing on a periodic basis. Security patches and updates are applied on a risk-prioritized schedule.

12.2 User Account Security and Access Controls

Each user account within the Workflow Pros platform, whether for an office user on the web platform or a field technician on the mobile application, is protected by individual login credentials. Credentials are not shared between users, and each login is tied to a unique email address or username.

Workflow Pros supports and strongly recommends the use of multi-factor authentication (MFA) for all administrator and manager accounts on the web platform. Where MFA is enabled, users must provide a secondary verification code in addition to their password when logging in. Workflow Pros may require MFA for administrator accounts as a security baseline in future platform updates.

The Subscriber's account administrator has full visibility and control over all user accounts within the Subscriber's organization through the web platform administration panel. The administrator is responsible for: creating and deactivating user accounts promptly when employees join or leave; assigning appropriate access roles that limit each user to only the features and data they need; resetting passwords for users who have lost access; and reviewing the active user list periodically to confirm that no unauthorized accounts exist.

Workflow Pros maintains server-side session management controls, including automatic session timeouts for inactive web platform sessions, to reduce the risk of unauthorized access from unattended devices. Field technician mobile application sessions are managed through the device's local security and the platform's token-based authentication system.

12.3 Security Incident Response and Breach Notification

Workflow Pros maintains a documented security incident response process. In the event that a security incident is detected that may affect the confidentiality, integrity, or availability of Subscriber data, Workflow Pros will take the following steps:

Containment: Workflow Pros will act immediately upon detection to contain the incident, isolate affected systems, and prevent further unauthorized access or data exposure.

Assessment: Workflow Pros will conduct an expedited assessment to determine the nature and scope of the incident, identify the data or systems affected, and establish whether the incident constitutes a reportable data breach under applicable privacy law.

Notification: Where the incident involves a breach of personal information that poses a real risk of significant harm to affected individuals, Workflow Pros will notify the affected Subscriber without undue delay and no later than seventy-two (72) hours after confirming that a reportable breach has occurred. Notification will include a description of the breach, the type of data involved, the likely consequences, and the measures taken or proposed to address the breach.

Regulatory reporting: Where required by law (including under PIPEDA's breach of security safeguards reporting obligations in Canada or applicable US state breach notification laws), Workflow Pros will report the breach to the relevant regulatory authority and cooperate fully with any investigation.

Remediation: Workflow Pros will implement remediation measures to address the root cause of the incident, restore affected systems, and reduce the risk of recurrence.

The Subscriber must notify Workflow Pros immediately upon becoming aware of any suspected unauthorized access to their Workflow Pros account, including suspected credential compromise, unauthorized user creation, or unusual account activity.

12.4 Regulatory Compliance Framework (Canada and United States)

Workflow Pros designs and operates its platform with reference to the following regulatory frameworks applicable to its Canadian headquarters and its service to Subscribers across Canada and the United States:

Canada: Workflow Pros operates in compliance with the Personal Information Protection and Electronic Documents Act (PIPEDA), Canada's Anti-Spam Legislation (CASL) in respect of electronic communications, and applicable provincial private-sector privacy statutes. Workflow Pros monitors federal and provincial privacy law reform and will update its privacy and data governance practices as any successor or amending legislation comes into force.

United States: For Subscribers located in the United States, Workflow Pros operates as a service provider in compliance with applicable US state privacy laws, including the California Consumer Privacy Act (CCPA) as amended by the California Privacy Rights Act (CPRA). Workflow Pros structures its subscription, billing, and cancellation practices to be transparent and to comply with applicable federal and state consumer protection and automatic renewal laws. Workflow Pros will monitor and adapt to additional state-level privacy legislation enacted across the United States as those laws come into force.

Payment card security: Where the platform facilitates payment processing, transactions are handled through PCI-DSS compliant payment infrastructure. Workflow Pros does not store raw credit card numbers or sensitive payment authentication data within its platform.

Telecommunications compliance: The platform's communication features, including SMS notifications and phone number porting, operate in compliance with applicable Canadian Radio-television and Telecommunications Commission (CRTC) regulations and US Federal Communications Commission (FCC) rules as applicable to the Subscriber's jurisdiction.

12.5 Subscriber Security Responsibilities

Security is a shared responsibility. While Workflow Pros maintains robust platform-side security controls, the Subscriber plays an essential role in protecting access to their account and their data. The Subscriber agrees to the following security responsibilities:

Credential management: All users within the Subscriber's organization must use strong, unique passwords for their Workflow Pros accounts. Passwords must not be shared between users, written down in unsecured locations, or reused from other services.

Prompt deactivation: When an employee, contractor, or other individual no longer requires access to the platform, their account must be deactivated immediately by the account administrator through the web platform's administration panel. Workflow Pros is not responsible for data access or activity by former employees whose accounts were not promptly deactivated.

Device security: The Subscriber is responsible for ensuring that devices used to access the Workflow Pros web platform or mobile application are protected by appropriate device-level security measures, including screen locks, device passwords or PINs, and up-to-date operating system security patches.

Phishing and social engineering awareness: The Subscriber must educate its users to be vigilant against phishing attempts, social engineering attacks, and fraudulent communications that may attempt to obtain Workflow Pros login credentials. Workflow Pros will never ask for user passwords via email or phone.

Reporting: The Subscriber must report any suspected security incident, unauthorized access, or data breach involving their Workflow Pros account to Workflow Pros immediately upon discovery.

Workflow Pros will not be held liable for security breaches, data loss, or unauthorized access that results from the Subscriber's failure to maintain adequate security practices on their side of the platform.

Acknowledgement: The Subscriber confirms that the platform security standards, user account controls, incident response procedures, regulatory compliance framework, and Subscriber-side security responsibilities described in this Section have been read and are understood and accepted as part of this Agreement.

Section 13:

15-Day Deployment Sprint and Milestone Accountability Framework

The 15-day deployment sprint is not a vague promise. It is a structured, accountable process with defined milestones, clear ownership, and a written go-live confirmation at the end. This Section sets out the specific milestones Workflow Pros commits to achieving within that window, the conditions

under which the timeline may be adjusted, and how both parties are held accountable throughout the deployment process.

13.1 Deployment Milestone Schedule

Workflow Pros commits to completing the following milestones within the 15-day deployment sprint, subject to the Subscriber's timely participation as described in Section 8.4:

Milestone 1 - Account Activation (Day 1): Subscriber account is created, platform access credentials are issued to the account administrator for both the web platform (office users) and the mobile application (field technicians), and onboarding intake documentation is provided to the Subscriber.

Milestone 2 - Onboarding Intake Completed (Day 1 to Day 3): Workflow Pros conducts an onboarding intake session with the Subscriber's designated contact to gather all configuration requirements, including dispatch workflow preferences, service types, migration sources and scope under Schedule D, integration authorizations, and phone porting instructions where applicable.

Milestone 3 - Core Platform Configuration Completed (Day 4 to Day 7): Web platform and mobile application are configured based on intake information. This includes user accounts, roles, dispatch workflow, job types, service items, and company profile. Customer records and service items are imported.

Milestone 4 - Integrations Activated (Day 6 to Day 10): Accounting software integration, payment processing, and communication features are connected and tested. Phone number porting is initiated where applicable. Any integration issues are communicated to the Subscriber with a resolution timeline.

Milestone 5 - Team Training and Walkthrough (Day 11 to Day 13): Workflow Pros conducts live orientation sessions with the Subscriber's office users (via the web platform) and field technicians (via the mobile application). Sessions are conducted separately to reflect the separate nature of the two platforms.

Milestone 6 - System Testing and Sign-Off (Day 13 to Day 14): Full end-to-end test of the configured platform, including a simulated job lifecycle from dispatch through invoicing. Any identified issues are resolved before go-live.

Milestone 7 - Go-Live Confirmation (Day 15): Written Go-Live Confirmation issued to the Subscriber confirming completion of the sprint, summarizing all configuration items completed and any open items with resolution timelines.

13.2 Workflow Pros Accountability Commitments

Workflow Pros makes the following accountability commitments for the duration of the deployment sprint: A dedicated onboarding specialist will be assigned to the Subscriber's account from Day 1 and will remain the primary point of contact throughout the sprint. The Subscriber will be introduced to their specialist by name on Day 1. Workflow Pros will proactively communicate progress updates to the Subscriber's designated contact at minimum every two (2) business days during the sprint, without requiring the Subscriber to ask for updates. All configuration work will be completed based on the requirements gathered during the intake session. If Workflow Pros identifies any ambiguity or gap in the intake requirements that affects configuration, it will raise this with the Subscriber promptly rather than making assumptions. If any milestone is at risk of being missed due to a Workflow Pros-side

issue, the onboarding specialist will notify the Subscriber within one (1) business day of identifying the risk, provide a revised timeline, and take all commercially reasonable steps to minimize the delay. Workflow Pros will not issue a Go-Live Confirmation until the Subscriber's account administrator has confirmed that the platform is configured to their satisfaction and the system test has been completed successfully.

13.3 Sprint Extension and Timeline Adjustment

The 15-day sprint timeline presumes that both parties fulfill their respective responsibilities. The following circumstances may result in a sprint extension: Subscriber-caused delays: If the Subscriber fails to provide required data, access credentials, or approvals within the timeframes outlined in Section 8.4, the sprint timeline will be extended by a period equal to the delay caused. Workflow Pros will document any such delays in writing. Third-party integration delays: If a third-party provider takes longer than anticipated to process a connection or approval, the related integration milestone will be extended accordingly. Workflow Pros will communicate the revised timeline for the affected milestone. Scope additions: If the Subscriber requests additional configuration items during the sprint that were not included in the intake requirements, Workflow Pros will advise whether the addition can be accommodated within the 15-day window or will require additional time. In all cases of sprint extension, the Subscriber retains full platform access and will not be charged any additional fees as a result of the extension. Billing commences on the Subscription Start Date as set out in Schedule "A" and is not deferred by a sprint extension. Where a sprint extension beyond Day 15 is attributable solely to Workflow Pros, Workflow Pros will apply a service credit to the Subscriber's next invoice equal to the Core Platform Base Fee prorated for each day of Workflow Pros-caused delay.

13.4 Initial and Later Setup and Configuration Changes

Initial setup, later setup, repeat setup and configuration changes to the subscribed platform are included in the subscription and are never billed separately, whether requested during onboarding or after go-live. Minor and major configuration changes are both included, including redesigning dispatch workflows, changing roles, permissions, service items or communication templates, and configuring or replacing a supported integration. Workflow Pros will assess a change request and advise the Subscriber within two (2) business days whether additional time is needed, with a reasonable delivery plan. Additional time, complexity or repeat setup does not create a setup, configuration, coaching or consulting fee. Changes to agreed migration categories or volumes may require a written scope and timeline update but do not create a migration surcharge. Genuinely new custom software development, unsupported integrations, hardware and on-site visits remain governed by Section 5.3; they must be identified separately and approved in writing before charges arise. Ordinary platform setup or reconfiguration may not be classified as such excluded work.

13.5 Post-Sprint Support Transition

Upon issuance of the Go-Live Confirmation, the Subscriber transitions from the deployment sprint phase into the post-launch mentoring and coaching program described in Section 14 of this Agreement. During the two (2) business day handover period following go-live as described in Section 8.5, the onboarding specialist will introduce the Subscriber's team to the coaching program structure and confirm the schedule for the first coaching session. Any unresolved open items from the deployment sprint that are documented in the Go-Live Confirmation will be tracked and resolved by Workflow Pros within the timeframe specified in that document. The Subscriber may raise any go-live

concerns with the coaching team during the post-launch window, and Workflow Pros will address them as part of the coaching engagement.

Acknowledgement: The Subscriber confirms that the deployment milestone schedule, Workflow Pros' accountability commitments, sprint extension conditions, change request process, and post-sprint transition described in this Section have been read and are understood and accepted as part of this Agreement.

Section 14:

Mentorship and Coaching Program (15-30 Day Post-Launch Support)

This Section describes the post-launch mentoring and coaching program that Workflow Pros provides to every new Subscriber following the successful completion of the 15-day deployment sprint described in Section 13. The coaching program is a dedicated, structured engagement designed to help the Subscriber's team build operational confidence, optimize their day-to-day use of the Workflow Pros platform, and transition smoothly into a fully self-sufficient operation. This program is separate from the deployment sprint and runs during the 15 to 30 days following the official go-live date. The coaching program is included as part of the Subscriber's onboarding commitment and is not subject to additional charges beyond the monthly subscription fee.

14.1 The 15-30 Day Post-Launch Coaching Program: Structure and Purpose

The Workflow Pros coaching program begins on the first business day immediately following the Subscriber's official go-live confirmation as issued under Section 13.5. The coaching program runs for a period of fifteen (15) to thirty (30) calendar days post-go-live, with the exact duration determined based on the Subscriber's team size, operational complexity, and readiness as jointly assessed by the coaching lead and the Subscriber at the outset of the program. The purpose of this program is not to re-deliver the technical setup completed during the deployment sprint, but to help the Subscriber's office team and field technicians develop real-world confidence in using the platform in their actual operational environment. Coaching covers the full scope of features relevant to the Subscriber's workflow, including dispatch coordination, job scheduling, customer record management, reporting and accounting synchronization, and field technician mobile application use. This program is built on the belief that going live is just the beginning, and that the first 30 days of real operation are where lasting habits are formed.

14.2 What Is Included in the Coaching Program

The coaching program includes a defined set of deliverables that Workflow Pros commits to providing to every Subscriber during the 15 to 30 day post-launch window. Workflow Pros will provide a dedicated coaching lead who is assigned to the Subscriber's account for the duration of the program. This coaching lead will conduct live, interactive coaching sessions via video call or screen sharing with the Subscriber's team, focusing on real operational scenarios drawn from the Subscriber's own business environment. Sessions will cover web platform navigation and advanced features for office users including administrators, dispatchers, and bookkeepers, and will separately address mobile application usage for field technicians. Coaching also includes a structured review of the Subscriber's reporting dashboards and accounting synchronization outputs completed under Section 9 to confirm that data is flowing correctly and that the Subscriber's team can interpret and act on their reports. Workflow Pros will also provide a written post-coaching summary at the end of the program noting key

skills confirmed, any outstanding questions, and recommended next steps for the Subscriber's ongoing independent operation.

14.3 Coaching Session Schedule and Delivery Format

Coaching sessions will be scheduled in advance and confirmed with the Subscriber at the start of the program. Workflow Pros will provide a minimum of three (3) structured coaching sessions within the 15 to 30 day program window, with additional sessions available on request based on the Subscriber's evolving needs. Each session will be conducted remotely via video conference or screen share and will be focused on a specific operational topic agreed upon in advance between the Subscriber and the coaching lead. Sessions will be recorded where the Subscriber consents, and recordings will be made available to the Subscriber for internal training reference. The scheduling of coaching sessions is flexible and will be set at mutually agreed times that accommodate the Subscriber's operational schedule. Workflow Pros will not impose rigid session formats and will adapt the content of each session based on what the Subscriber's team finds most useful in real time. In addition to scheduled sessions, the coaching lead will be available by email or the platform's built-in support channel between sessions to respond to questions arising from the Subscriber's daily operations during the coaching period.

14.4 Subscriber Participation and Coaching Responsibilities

The coaching program is most effective when the Subscriber's team engages actively and consistently. The Subscriber agrees to designate at least one (1) primary point of contact within their organization who will coordinate with the coaching lead and participate in scheduled sessions. The Subscriber acknowledges that office staff who will use the web platform and field technicians who will use the mobile application are best served by attending separate coaching sessions or by having the coaching lead dedicate portions of each session to their respective role-specific workflows. The Subscriber is responsible for ensuring that relevant team members are available at agreed session times. Where a session needs to be rescheduled, the Subscriber agrees to provide at least twenty-four (24) hours advance notice to the coaching lead wherever possible. The Subscriber also agrees to apply the skills and practices introduced during coaching sessions in their day-to-day operations between sessions, and to bring real-world questions and scenarios to each coaching call so that time is used practically and productively.

14.5 Coaching Program Completion and Ongoing Support Transition

At the conclusion of the coaching program, Workflow Pros will issue a Coaching Completion Summary to the Subscriber. This document will record the sessions completed, the topics covered, any outstanding items noted during coaching, and the Subscriber's transition status into fully independent platform operation. Upon completion of the coaching program, the Subscriber moves into the standard ongoing subscription support model, which includes access to Workflow Pros' platform support team for technical issues and platform-related questions as part of the active monthly subscription described in Schedule "B". The conclusion of the coaching program does not diminish the Subscriber's right to access support; it simply marks the transition from structured, guided onboarding into independent, self-directed use of the platform with Workflow Pros support available as needed. Should the Subscriber wish to engage in additional coaching sessions beyond the 15 to 30 day program window, Workflow Pros may offer such sessions at a mutually agreed fee, separate from and in addition to the monthly subscription fee. The Subscriber is under no obligation to purchase

additional coaching, and the decision to do so rests entirely with the Subscriber. Any separate coaching fee applies only to optional coaching expressly requested and approved by the Subscriber. Initial or later setup, repeat setup and configuration services remain included under Section 13.4 and may not be charged as coaching.

Acknowledgement: The Subscriber confirms that the post-launch coaching program structure, included deliverables, session scheduling format, participation responsibilities, and completion and transition process described in this Section have been read and are understood and accepted as part of this Agreement.

Section 15:

Mutual Representations, Warranties and Limitation of Liability

This Section sets out the mutual representations and warranties made by both Workflow Pros and the Subscriber as part of this Agreement, and establishes the limitation of liability framework that governs the relationship between the parties. Both Workflow Pros and the Subscriber enter this Agreement in good faith and each party makes the representations contained in this Section as a material inducement for the other party's agreement to the terms of this contract. The limitation of liability provisions in this Section reflect a fair and commercially reasonable allocation of risk between a software-as-a-service provider and its subscribers, and are consistent with standard practice in the Canadian and United States technology services industry.

15.1 Workflow Pros Representations and Warranties

Workflow Pros represents and warrants to the Subscriber that: (a) Workflow Pros is a duly organized and validly existing business with the legal authority to enter into this Agreement and to provide the services described herein; (b) the Workflow Pros platform has been developed and is maintained in compliance with applicable Canadian and United States laws and regulations relevant to software-as-a-service platforms serving field service businesses; (c) Workflow Pros will provide the platform, the deployment sprint described in Section 13, and the coaching program described in Section 14 with reasonable care and skill, using qualified personnel; (d) Workflow Pros will implement and maintain reasonable technical and organizational security measures to protect Subscriber data as described in Section 12; (e) Workflow Pros will not knowingly introduce malicious code, spyware, or unauthorized tracking mechanisms into the platform; (f) Workflow Pros will provide advance notice of any material changes to the platform's core features or pricing structure in accordance with the terms of this Agreement; and (g) Workflow Pros will handle Subscriber personal data in accordance with applicable privacy legislation including PIPEDA and any successor federal privacy legislation, CASL, CCPA/CPRA, and applicable provincial or state privacy laws as described in Section 11.

15.2 Subscriber Representations and Warranties

The Subscriber represents and warrants to Workflow Pros that: (a) the Subscriber is a duly organized and validly existing business or legal entity with full authority to enter into this Agreement; (b) the individual executing this Agreement on behalf of the Subscriber has been duly authorized to do so and that this Agreement constitutes a valid and binding obligation of the Subscriber; (c) the Subscriber will use the Workflow Pros platform only for lawful business purposes and in accordance with the terms of this Agreement; (d) the Subscriber will not attempt to reverse engineer, decompile, disassemble, or derive the source code of the Workflow Pros platform; (e) the Subscriber will not

resell, sublicense, or redistribute access to the Workflow Pros platform to third parties without the express written consent of Workflow Pros; (f) all information provided by the Subscriber in connection with this Agreement, including the Subscriber Profile in Schedule “A”, is accurate and complete to the best of the Subscriber’s knowledge; and (g) the Subscriber will comply with applicable laws in its jurisdiction, including those governing the use of customer data, employee records, and electronic communications, in connection with the Subscriber’s use of the Workflow Pros platform.

15.3 Disclaimer of Implied Warranties

Except as expressly stated in Section 15.1 of this Agreement, Workflow Pros provides the platform and all associated services on an “as is” and “as available” basis. Workflow Pros does not warrant that the platform will be error-free, uninterrupted, or free of all defects at all times, nor does Workflow Pros warrant that the platform will meet every specific operational requirement of the Subscriber beyond the features described in this Agreement. To the fullest extent permitted by applicable law, Workflow Pros hereby disclaims all implied warranties, including implied warranties of merchantability, fitness for a particular purpose, and non-infringement. Workflow Pros does not guarantee specific business outcomes, revenue results, efficiency gains, or operational improvements as a result of the Subscriber’s use of the platform. The Subscriber acknowledges that it has evaluated the platform and its features independently and is not relying on any representation by Workflow Pros beyond those expressly stated in this Agreement.

15.4 Limitation of Liability

To the fullest extent permitted by applicable law, in no event shall either party be liable to the other for any indirect, incidental, consequential, special, punitive, or exemplary damages arising out of or in connection with this Agreement, including but not limited to loss of revenue, loss of profits, loss of business opportunity, loss of data, or business interruption, even if the party has been advised of the possibility of such damages. The total cumulative liability of Workflow Pros to the Subscriber for any and all claims arising out of or relating to this Agreement, whether in contract, tort, negligence, or otherwise, shall not exceed the total amount of subscription fees paid by the Subscriber to Workflow Pros in the three (3) calendar months immediately preceding the event giving rise to the claim. The Subscriber’s total cumulative liability to Workflow Pros shall similarly not exceed the total fees paid or payable under this Agreement in the same three (3) month period. The exclusions and limitations in this Section 15.4 do not apply to: (i) the Subscriber’s obligation to pay fees and charges due under this Agreement; (ii) either Party’s indemnification obligations under Section 15.5; (iii) a Party’s breach of its confidentiality obligations under Section 11.5; (iv) the Subscriber’s breach of the Acceptable Use Policy in Section 5.5 or infringement of Workflow Pros’ intellectual property rights; (v) death or personal injury caused by a Party’s negligence; (vi) a Party’s gross negligence, fraud, fraudulent misrepresentation, or willful misconduct; or (vii) any other liability that cannot be excluded or limited by applicable law.

15.5 Indemnification

Each party (the “Indemnifying Party”) agrees to indemnify, defend, and hold harmless the other party and its officers, directors, employees, and agents (collectively, the “Indemnified Party”) from and against any third-party claims, losses, damages, costs, and expenses, including reasonable legal fees, arising out of or relating to: (a) the Indemnifying Party’s breach of any representation, warranty, or obligation under this Agreement; (b) the Indemnifying Party’s negligence, willful misconduct, or

violation of applicable law; or (c) in the case of the Subscriber specifically, the Subscriber's use of the Workflow Pros platform in a manner that infringes the rights of a third party or violates applicable law. Workflow Pros further agrees to indemnify the Subscriber against any third-party intellectual property infringement claims arising directly from the Subscriber's authorized use of the Workflow Pros platform as provided under this Agreement, provided that the Subscriber promptly notifies Workflow Pros of any such claim, cooperates fully in the defense, and does not make any admission or settlement without Workflow Pros' prior written consent. The indemnification obligations in this section survive the termination or expiry of this Agreement.

Acknowledgement: The Subscriber confirms that the mutual representations and warranties of both parties, the disclaimer of implied warranties, the limitation of liability, and the indemnification obligations described in this Section have been read and are understood and accepted as part of this Agreement.

Section 16:**Authorized Signatures, Effective Date and Digital Execution Block**

This Section constitutes the final and binding execution page of the Workflow Pros Master Services Agreement. By signing below, both Workflow Pros and the Subscriber confirm that they have each read, understood, and agreed to every page, section, schedule, and provision of this Agreement in its entirety. This Section also establishes the Effective Date of the Agreement and sets out the governing terms applicable to the entire Agreement, including the law that governs it, how disputes will be handled, and how amendments may be made. No party is obligated to sign under duress, and both parties affirm that they are entering this Agreement freely and with full understanding of its contents. This Agreement shall become legally binding on both parties as of the Effective Date specified in Section 16.1 below.

16.1 Effective Date

The Effective Date of this Agreement is the date on which the last authorized signatory affixes their signature to this Section. Where the Agreement is executed by digital means, the Effective Date shall be the date of the final electronic signature as recorded by the digital signature platform or confirmed in writing by both parties. The Effective Date is: _____. Once the Effective Date is established, this Agreement supersedes all prior discussions, proposals, emails, presentations, demonstrations, and oral or written representations exchanged between Workflow Pros and the Subscriber with respect to the subject matter of this Agreement. From the Effective Date forward, the Subscriber's monthly billing cycle, onboarding sprint, and all related obligations and rights under this Agreement shall be governed by the terms herein.

16.2 Entire Agreement and Scope

This Agreement, including all pages and schedules incorporated herein, constitutes the entire agreement between Workflow Pros and the Subscriber with respect to the Workflow Pros platform and the services described herein, and supersedes all prior and contemporaneous understandings, agreements, representations, and warranties. No terms, conditions, representations, or understandings not expressly stated in this Agreement shall be binding on either party. If any provision of this Agreement is found by a court of competent jurisdiction to be invalid, unlawful, or unenforceable, that provision shall be modified to the minimum extent necessary to make it enforceable, and the remaining provisions of this Agreement shall continue in full force and effect. The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver of that party's right to enforce that provision in the future. This Agreement may be executed in counterparts, each of which shall constitute an original, and together they shall constitute one binding agreement.

16.3 Governing Law and Dispute Resolution

This Agreement shall be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein, without regard to conflict of law principles, regardless of where the Subscriber is located. Subject to the negotiation and mediation steps below, the Parties irrevocably submit to the exclusive jurisdiction of the courts of the Province of Ontario sitting in Toronto for any dispute arising out of or relating to this Agreement. To the extent permitted

by law, each Party waives any right to a jury trial and agrees that disputes will be resolved on an individual basis and not as a class or representative proceeding. In the event of any dispute, claim, or controversy arising out of or relating to this Agreement, both parties agree to first attempt resolution through good-faith negotiation for a period of thirty (30) days following written notice of the dispute. If the dispute is not resolved within that period, the parties agree to submit the matter to non-binding mediation administered by a mutually agreed mediator before initiating formal legal proceedings. Nothing in this Section 16.3 shall prevent either party from seeking urgent interim or injunctive relief from a court of competent jurisdiction where necessary to prevent irreparable harm.

16.4 Amendments and Notices

No amendment, modification, or variation of this Agreement shall be valid or binding unless it is made in writing and signed by authorized representatives of both Workflow Pros and the Subscriber. Workflow Pros may update the platform and introduce new features without amendment to this Agreement, and may change fees only in accordance with Section 6.6. Workflow Pros may also update its Acceptable Use Policy, rate card and technical documentation on thirty (30) days' written notice, provided no such update materially reduces the services described in this Agreement. Notwithstanding that thirty-day documentation notice, all rate and fee changes require the sixty (60) days' notice and price protections in Sections 5.6 and 6.6; no rate-card update overrides them. Notices required or permitted under this Agreement shall be delivered by email to the email addresses on file for each party, or by written correspondence to [Workflow Pros Business Address] for Workflow Pros and to the address provided in the Subscriber Profile in Schedule "A" for the Subscriber. Notices sent by email are deemed delivered on the next business day after sending unless the sender receives a delivery failure notification; notices sent by courier or registered mail are deemed delivered on the date of delivery. Either party may update their notice address by providing written notice to the other party in accordance with this section.

16.5 Term

This Agreement commences on the Effective Date and continues on a month-to-month basis until cancelled by the Subscriber under Section 7 or terminated by Workflow Pros under Section 4.4 or Section 7.4. Each monthly billing cycle renews automatically unless and until cancelled in accordance with Section 7.

16.6 Intellectual Property

As between the Parties, Workflow Pros and its licensors own all right, title and interest in and to the Workflow Pros platform, the web platform, the mobile application, all related software, documentation, templates, designs and know-how, and all improvements, modifications and derivative works thereof (the "Workflow Pros IP"). Nothing in this Agreement transfers any ownership of the Workflow Pros IP to the Subscriber; the Subscriber receives only the limited right of access and use set out in Section 5.4. Subscriber data is and remains the property of the Subscriber as set out in Section 11.1. The Subscriber grants Workflow Pros a limited, non-exclusive license to use the Subscriber's name, logo and business information solely to configure and operate the Subscriber's account. Any suggestions or feedback the Subscriber provides about the platform may be used by Workflow Pros without restriction or compensation, provided that Workflow Pros does not identify the Subscriber as the source without consent.

16.7 Force Majeure

Neither Party will be liable for any failure or delay in performing its obligations under this Agreement (other than payment obligations) to the extent the failure or delay is caused by events beyond its reasonable control, including natural disasters, fire, flood, epidemic, war, terrorism, civil unrest, labour disputes (other than those involving the affected Party's own employees), governmental action, failure of public utilities or telecommunications networks, or failure of third-party hosting, carrier or payment providers not caused by the affected Party. The affected Party will notify the other Party promptly and use commercially reasonable efforts to resume performance. If a force majeure event prevents Workflow Pros from providing the platform for more than thirty (30) consecutive days, either Party may terminate this Agreement on written notice without liability, and Workflow Pros will refund any prepaid fees for the period after termination.

16.8 Assignment

The Subscriber may not assign or transfer this Agreement, in whole or in part, without the prior written consent of Workflow Pros, which will not be unreasonably withheld. Workflow Pros may assign this Agreement without consent to an affiliate or to a successor in connection with a merger, acquisition, reorganization or sale of all or substantially all of its assets or business to which this Agreement relates, provided the assignee assumes all of Workflow Pros' obligations under this Agreement and the Subscriber is notified in writing. Any attempted assignment in breach of this Section is void. This Agreement binds and benefits the Parties and their permitted successors and assigns.

16.9 Relationship of the Parties

The Parties are independent contractors. Nothing in this Agreement creates a partnership, joint venture, agency, franchise or employment relationship between the Parties, and neither Party has authority to bind the other.

16.10 Survival

Sections 4.4 (as to amounts owing), 7.3, 10.5, 11, 12.3, 15.3, 15.4, 15.5, 16.2, 16.3, 16.6, 16.10 and any other provision that by its nature is intended to survive, will survive cancellation, termination or expiry of this Agreement.

16.11 Authorized Signatures and Digital Execution Block

By signing below (including by electronic signature, which the Parties agree is valid and binding), each party confirms that they have the legal authority to bind their respective organization to the terms of this Agreement, that they have read and understood the entire Agreement, and that they agree to be bound by its terms effective as of the Effective Date set out in Section 16.1.

Workflow Pros

Signature: _____

Printed Name: _____

Title: _____

Date: _____

Business Address: [Workflow Pros Business Address]

Email: _____

Subscriber

Signature: _____

Printed Name: _____

Title: _____

Date: _____

Business Name: _____

Business Address: _____

City, Province/State, Postal/ZIP Code: _____

Email: _____

Phone: _____

Acknowledgement: Both parties confirm by their signatures above that this Workflow Pros Master Services Agreement, comprising Sections 1 through 16 and Schedules “A” through “D” incorporated herein, has been read in full, is understood, and is agreed to and accepted as a complete and binding legal agreement between Workflow Pros and the Subscriber as of the Effective Date stated above.

Schedule D Migration Scope and Service Configuration

Complete this Schedule with the Subscriber before migration begins and before automated AI actions are enabled. Both Parties must confirm it in writing. No uncompleted field authorizes an extra fee or a reduction of the included migration services.

D1 Source systems and migration plan

Subscriber and account: _____

Source systems and vendors: _____

Authorized access method and vendor contact: _____

Workflow Pros migration lead: _____

Subscriber authorization contact: _____

Agreed date ranges and cutover date: _____

Expected migration timeline and dependencies: _____

All categories below are proposed for inclusion where held in the source system. Confirm each category, its date range and attachments during the data discussion. Record any unavailable data or expressly agreed exclusion with the reason and alternative. No volume cap or Workflow Pros migration surcharge applies.

Data category	Scope and availability
Customer records, contacts and sites	Confirm sources, fields and date ranges: _____
Job history, work orders and service records	Include agreed existing orders without re-entry: _____
Equipment and service history	Confirm equipment links and history: _____
Price book, service items and catalog	Confirm item mappings and rates: _____
Estimates, invoices and payment records	Confirm dates, statuses and attachments: _____
Photos, documents and signatures	Confirm original files and record links: _____
Call recordings, logs and transcripts	Confirm available media and metadata: _____
Recurring service plans and schedules	Confirm future visits and plan status: _____
Inventory and other agreed records	Specify categories and locations: _____

Additional categories or agreed exclusions with reasons: _____

Acceptance checks: Workflow Pros will reconcile available source and imported record counts by category; validate mapped fields and linked records; verify available attachments and media; test agreed existing work orders; and maintain an exception and correction log. Subscriber sample review is optional. Migration errors and cleanup remain Workflow Pros responsibility at no additional charge.

Payment-token transfer: Provider(s): _____. Status and restrictions: _____. Secure provider-to-provider transfer plan or alternative: _____. No raw card numbers are to be recorded in this Schedule.

D2 Approved AI receptionist rules

Enabled or disabled: _____ Approval date: _____

Approved services, territories and operating hours: _____

Approved price book and quoting limits: _____

Booking windows, duration, eligibility and assignment rules: _____

Required caller details and prohibited bookings: _____

Human escalation contacts and availability: _____

Safety exceptions and emergency instructions: _____

Fallback when no human is available: _____

Approved test scenarios and results: _____

Subscriber approver and written approval reference: _____

Until these rules and escalation details are approved, the AI receptionist must not be enabled to perform automated customer-facing actions. Section 8.6 defines and limits its authority.

D3 External Charges Record

Complete before activating any chargeable external service. Write “none” where no charge applies. Identify whether the provider bills the Subscriber directly or Workflow Pros passes the charge through. No undisclosed charge is authorized.

Payment processor and fee schedule reference: _____

SMS delivery or carrier fees and calculation basis: _____

Additional phone numbers and rental rates: _____

Carrier registration or compliance fees: _____

Optional third-party subscriptions and provider rates: _____

Previous-vendor exit or data-release charges and authorization: _____

Currency, billing frequency and one-time amounts for each item: _____

Subscriber approval and date: _____

Included commercial terms: 1,000 company-wide AI minutes per monthly billing cycle; \$0.10 per additional AI minute; no Workflow Pros per-minute charge for human-answered calls; \$0.00 Workflow Pros migration, setup and remote crew training fee. Sections 5.6 and 6.6 govern charges and changes.

D4 Confirmation

The Parties confirm the agreed migration categories, responsibilities and configuration details above. This Schedule forms part of the Agreement and does not alter its billing start date or cancellation provisions. Only optional work expressly excluded under Section 5.3 may be separately charged with advance written approval; migration and initial or later platform setup and configuration remain included at no additional charge.

Workflow Pros representative: _____ Date: _____

Subscriber representative: _____ Date: _____

End of Workflow Pros Master Services Agreement