

Existing Customer Sales Handover Approval Checklist (Approval Form A2)

No	Item	Pass/Fail	Notes
Section 1: Submission			
1.1	A Schedule 5 Statement of Work (SOW) must be submitted with the SHO		
Section 2: Checking the Statement of Work			
2.1	The correct, current version of the SOW must have been used		
2.2	Agreed and approved amendments and additions to the standard terms must be set out in the SOW under the heading "Additional Terms"		
2.3	The total sale value plus V.A.T. must be documented in the SOW		
2.4	For multi-year deals, payment plans and rental, the full schedule of payments for the contracted term must be documented in the SOW. The total sum of these payments must correspond exactly to the sale value in the SHO		
2.5	If the sale is an addition to an existing multi-year agreement the value of the new SOW must be calculated to be co-terminus with that existing agreement. Multiple multi-year agreements with differing termination dates are not permitted because there can only be one valid current contract with any one customer		
2.6	The COINS licence schedule that will be used to generate the additional branding must be documented in the SOW		
2.7	If the sale includes an agreement on the price of COINS licences for additional, future purchases this pricing must be documented in the SOW		
2.8	The Progress licence schedule and price of required Progress products must be documented in the SOW		
2.9	If there are multiple Progress licences then the purpose of each separate licence should be documented <i>Example: If the Customer has a separate test server and/or report servers</i>		
2.10	The product licence schedule, purpose and price of other, included 3 rd Party software products must be documented in the SOW <i>Example: Epay</i>		
2.11	The schedule of and price of COINS Cloud delivery services included must be		

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	documented in the SOW		
2.12	The schedule of and price of COINS professional delivery services included must be documented in the SOW		
2.13	If the sale includes an agreement on the price of COINS professional services for additional, future purchases this pricing must be documented in the SOW		
2.14	If the sale includes licences an updated overall licence schedule should be included		
2.15	If the sale includes licences an updated schedule of overall licence fees should be included		
Section 3: Checking the SHO			
3.1	The correct, latest version of the SHO document must be used		
3.2	Every SHO must include completed details in the following cells: <ul style="list-style-type: none"> 1. Territory 2. ALF% 3. Type 4. Company Name 5. Contact 6. Date 7. Sales Person 8. Financed (if applicable) 9. Sector 10. Order Number 		
Section 4: Comparing the Contract and the SOW			
4.1	The term dates in the contract and in the SOW must correspond exactly.		
4.2	For multi-year sales, the payment calculations in the SOW must be co-terminus with the Contract termination date		

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4.3	The schedules in the SOW for licences must match exactly to the SHO, for all licences: COINS Progress Other 3 rd Party		
4.4	The COINS Cloud values in the SOW must match exactly those in the SHO		
4.5	The Professional Services in the SOW must match exactly those in the SHO		