QAD Customer Support Guide
Welcome

Thank you for investing in QAD solutions. We are pleased to have you as a part of the QAD family. This guide will help ensure you have the right connections no matter where in the world your base of operations might be located.

Each section is designed to provide answers to the most common questions you may have regarding QAD Customer Support, which include:

- Our world-wide customer support capabilities
- Descriptions of your customer support services and tools
- Tips on finding information through the QAD Support Center website at [http://supportcenter.qad.com](http://supportcenter.qad.com)
- Incident reporting steps

In the Appendix you will find:

- Information about how to find and engage our global customer support centers
- A summary matrix of services provided with active maintenance agreements

The content in this guide applies to QAD Customer Support services for a licensed Customer with an active maintenance agreement. There are many additional services and capabilities provided for customers with Cloud subscriptions or Managed Services agreements.
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QAD Global Customer Support

QAD Customer Support Mission

For 30 years, QAD and our customers have been growing and changing together. As markets have changed and manufacturing has evolved, our customers have come to rely on QAD to consistently deliver innovative, strategic enterprise manufacturing solutions that meet their changing needs, sustain competitive advantage and create tangible returns.

As times have changed, so have our customers and their support and maintenance requirements. We strive to ensure that our customers know how to reap the benefits of investing in maintenance and support—and that QAD is providing the level and type of support desired. As a result, we have developed our support services based on what our customers tell us is most important to them:

- Extensive information & knowledge resources online
- Optimal protection against downtime
- Responsiveness & timely resolutions
- Ability to fully leverage their investment in QAD applications

To deliver on this, QAD Customer Support is focused on these three priorities:

- Investing in the future through continuous R&D
- Providing support services focused on fast response and resolution
- Delivering continuous, tangible value throughout the customer relationship

At QAD, we view the Global Customer Support team as active members of your workforce. Our job is to make sure your system achieves full potential. When you choose a QAD product, you are investing in a completely integrated solution. This is why our customer support staff, partners, products, tools, services, processes, and programs have a single focus—total customer satisfaction.
QAD Customer Support Delivery Capabilities

QAD’s comprehensive global support capabilities ensure that you are always able to communicate your needs and receive accurate, timely information in a form that is most usable for your environment. With a network of Regional Customer Support Centers, a host of authorized Alliance Support Partners, global service coverage and product expertise; world-class support is a reality that our customers have come to expect.

QAD Regional Customer Support Centers

Wherever customers choose to deploy their QAD solutions, chances are there is a QAD Customer Support Center or an authorized QAD Alliance Support Partner nearby. QAD Customer Support Centers are located in the Americas, Europe, and Asia-Pacific. Please see Appendix A for a list of our major QAD Customer Support Centers. For a complete list, visit the QAD Contact Directory online.

Highly Skilled Support Specialists

QAD’s support staff is comprised of highly skilled experts in the areas of application support and technical systems support.

Application Support Experts - In addition to their in-depth industry experience, the applications support staff is thoroughly trained and skilled in the full range of QAD applications. All staff members hold, or are pursuing, certifications in each of the QAD Enterprise Application modules and industry standards such as APICS.

Technical Support Experts - The technical support staff is thoroughly familiar with the implementation of QAD applications on the many diverse system configurations available in the Open Systems arena. Our technical professionals have comprehensive training and experience in Progress®, UNIX, client/server, desktop systems, 4th GL application development, and performance tuning and testing.

QAD Global Customer Support Model

QAD’S Global Customer Support Model delivers high quality service and customer support around the globe, through a network of QAD Customer Support Centers and authorized QAD Alliance Support Partners.

Initial Problem Reporting

The QAD Customer Support model starts with the customer. Resolution to most questions and problems can be found on the QAD Support Center website through the vast array of information and solutions to previously-solved incidents in the QAD Knowledgebase, Document Library, Learning Portal and other information repositories. Should you not find the resolution online, you may report an incident directly to QAD Customer Support, or if supported by an authorized QAD Alliance Support Partner by contacting that partner for assistance.
**Multi-level Support Ensures Resolution**

Once the issue is reported to QAD Customer Support, it is logged, tracked and worked by customer support according to severity and age of report. Our customer support structure is purposely designed and staffed to provide resolution to as many issues and to as many customers on first contact as possible.

Should the issue not be resolved during your first contact with a local customer support representative, the incident will be researched and tested by an appropriate analyst. Depending on the product, the incident may be transitioned to a specialist or a dedicated product team.

Should a software correction be necessary, customer support will specify the needed product change to the product-specific maintenance support team. The maintenance group will develop a fix to the code, and test it. Determination will then be made how to best provide the correction to the Customer to ensure resolution of the issue. Product change information may also be made available online, as well as folded into a future maintenance or software update release.

**Multi-level Support Escalation**

To ensure that customer issues are responded to rapidly and resolved promptly, we have deployed a powerful multi-disciplined teaming capability. In the unlikely event that an issue is not resolved at the Service Desk level, the issue is functionally escalated to product support specialists for the given topic or product. For high urgency and high impact situations, hierarchical escalation through our regional and global support leadership team takes place. If resolution is still not achieved, we engage the global escalation team. The team is comprised of senior management from customer support, consulting services, and research and development, who meet weekly to review escalated incidents. Incidents are assigned to the best resource or team, regardless of business function or location, to resolve the issue. Such incidents maintain visibility to the escalation team until they are resolved to the customer’s satisfaction.
QAD Customer Support Services and Tools

QAD Customer Support Overview

Key Services and Tools

Key services and tools provided through QAD Customer Support are summarized below. For full details, please refer to your company’s QAD Maintenance and Support Agreement.

Access and Response

- Phone, web, chat access
- 24x7 critical down system support
- Global access to live support
- Remote access diagnostics
- Established incident response times based on severity

Online Self Service

- Unlimited personalized Web Accounts for each of your employees
- QAD Knowledgebase
- Incident creation and tracking
- QAD Learning Center
- Product Documentation Library
- Product Training Guides
- QAD Store & Download Center
- QAD License Usage Tool
- QAD Forums

New Releases and Product Updates

- Major and minor releases/upgrades
- Active Maintenance Products
- Product Changes Information System
- Proactive Advisories
- Compatibility Guide
QAD Customer Support Value and Benefits

All of the QAD Customer Support services and tools described below are included to help you receive maximum value from your QAD investment. QAD’s support team members are available globally to our customers via phone, web, and chat during your normal business hours. We are ready around-the-clock to take action on new incidents, even if your local QAD Customer Support Center is closed for the day. We do that by strategically locating QAD Customer Support Centers around the world, operating as one team, so that day or night, someone is available to assist you and drive to resolve your issues.

QAD Support Center Website

The QAD Support Center is your convenient online support web site, located at supportcenter.qad.com. Simply by registering for a QAD web account, you gain direct access to a vast network of information, including self-paced training developed by QAD product experts and analytical tools to research your questions.

Unlimited Web Accounts

Every person in your company can register for their own personal QAD Web Account and set their preferences and profile based on topic and job role interests. Training enrollment, online courses, incidents, forum posts and other areas are all personalized to the individual web account holder. Shared or group web accounts are not allowed per the QAD Terms and Conditions of Use.
QAD Support Center & Knowledgebase Search

Once logged into the Support Center, front and center is the option to search for answers, which returns results from many resources, including the QAD Knowledgebase, Document Library, Forums Learning Center and more.

Searching is your first step in finding expert answers to your questions or access information to enable you to gain more value from your QAD products. Searching the Support Center provides the power to enable you to find the right solutions quickly and easily. Options are provided to search the full Support Center, or focus just on solutions in the QAD Knowledgebase (or both).

The QAD Knowledgebase is comprised of many thousands of re-usable articles written by global experts within QAD covering all QAD, DynaSys, Precision and CEBOS products, underlying technologies, and more. Not only are new articles added daily based on new, unique topics as they are resolved, we also continually update existing articles as well. QAD customers consistently find their answers in the knowledgebase over 80% of the time.

Online Incident Management

The Incident Management functions of QAD Support Center are a direct interface to QAD Customer Support, and provide you the ability to submit, view and update incidents online. The Incident Management functions are available 24 hours a day, 7 days a week for your convenience. QAD Customer Support Centers constantly monitor for new and updated incidents to ensure you receive timely responses from the appropriate subject experts.

The Incident Report provides instantaneous visibility of the status, assignment, and details about all incidents for your site. If an incident is open, you may choose to update it directly from the Status Report. Updating incidents enables greater participation in the resolution process by which you add details, information or attachments that contribute to the resolution process. When you update an incident, both the assigned analyst and team are immediately notified.
QAD can also provide full incident management capabilities for customers with multiple sites. This allows QAD customers responsible for multiple sites to manage incidents easily. To request this feature for your company, fill out a Multi-Site Incident Management Request found in the Incidents area of the Support Center. QAD also enables Customers to limit who has incident management access via the Incident Management Control Request also found in the Incident area. When Incident Management Control is enabled, individuals without such rights still retain full access to all informational, documentation and educational areas of the Support Center.

Multi-Channel Incident Reporting

QAD Customers are provided the ability to submit issues online through the QAD Support Center, and have the option to submit via a web form, engage Support agents through live chat, or call their nearest QAD Support Center via the telephone. The incident services are the live system utilized by all QAD Customer Support agents worldwide, providing real-time visibility to new, active and historic incidents.
After-Hours Critical Event Coverage

QAD also recognizes that emergencies may occur outside your normal business hours or on weekends, and provides full support for emergency, critical system down situations at all times. If your production system is in a down condition at any time, QAD Customer Support is there to help you get your system back up and running. Guidelines for use of emergency after-hours support are as follows:

- Intended for critical down system emergencies, cannot be pre-scheduled
- Available 24 hours a days, 7 days a week, 365 days a year
- Call your local QAD Support Center
- Follow the telephone prompts for a down system
- Your call will immediately be directed to a QAD support representative

QAD Live Chat

QAD Live Chat provides you real-time support at your fingertips, without having to pick up the telephone. QAD Live Chat is an easy and convenient way to connect with QAD Customer Support Consultant, to assist you with your questions. When you use QAD Live Chat, a world of experience is at your disposal. QAD Customer Support Consultants around the globe are connected and available. When submitting a new Support incident in the QAD Support Center website, the option to submit and immediately chat with a Support agent is provided. Even if you choose not to engage in live chat, QAD Customer Support is continually monitoring and responding to all new issues as they arrive.
Remote Access Diagnostics

QAD Customer Support uses a secure remote screen-sharing application to provide an exceptional means of communication and immediate service delivery to our valued customers. This allows us the ability to identify and solve problems in real time. QAD agents can remotely view a customer's computer to accelerate issue resolution and knowledge sharing. While QAD can take control of a user's screen, mouse, and keyboard, access is controlled by the customer at all times. Within each screen-sharing session there is also the ability to use real-time chat, both send and receive files, reverse-view the QAD agent's screen, and whiteboard on top of the shared applications. Throughout the entire session, the customer is able to watch and actively participate with QAD in the screen-sharing process.

QAD Learning Center

In the QAD Learning Center, you will find online training on QAD application functionality in the areas of manufacturing, distribution, finance, and system installations. You can access the Learning Center through the Education area of the QAD Support Center.

Course Management: As a student, you can control many aspects of your online training experience on the QAD Learning Center by using such features as the course catalog, online resources including self-service lab environments, role-based training recommendations, transcript reports, and the My Learning page.

Customer Advisories

Customer Advisories are proactive notifications of critical product issues that may affect multiple customers, including full descriptions of each scenario, potential system effects, and corrective
steps for customers to follow. In the QAD Knowledgebase, you may subscribe to product categories of interest to you, or to the Customer Advisory category. Customer advisories will alert both the Customer Advisory category subscribers and the product categories that the issue relates to. You retain full control of your knowledgebase subscriptions at all times.

**Major and Minor Full Product Releases/Upgrades**

With your QAD Customer Support contract you may request product updates as soon as they become available and take advantage of the new or enhanced functionality or to obtain groups of software corrections in a packaged release. QAD provides some product functionality that is provided free with active maintenance such as Manufacturing Planning & Scheduling Workbenches (MSW/PSW), Operational Metrics and Business Process Management (BPM).

Product releases are QAD’s method of providing customers with regular maintenance updates for QAD Enterprise Applications. The maintenance and support contract for your site entitles you to the product releases for your QAD Enterprise Applications, which can be requested online through the QAD Store, or by contacting your local QAD office or distributor.

Product releases include product changes, code updates, system administration tools, and components. They provide the latest fixes and code corrections to keep your QAD applications and system stable, and to help you avoid any potential or previously reported problems.

**QAD Download Center**

The QAD Download Center, located in the QAD Store, provides a secure portal for your QAD software and license orders. The Download Center is unique for your site, and access is specific to only the individuals you designate to receive and download your products. A QAD Web Account alone does not grant access to the QAD Download Center.

**User Communities/Discussion Forums**

QAD provides discussion forums at http://community.qad.com for the QAD user community to interact, pose questions and share knowledge. Forum categories on a variety of topics are available. Through the QAD Forums you are able to:

- Share your unique knowledge and experience with other QAD users
- Post product and business related questions to the QAD community
- Search for solutions that others may have already discovered

**Compatibility Guide**

The Compatibility Guide, located in the QAD Store, allows Customers to create different product combinations with the purpose of identifying compatibility between QAD and third-party products to aid in system configuration planning to ensure supportability and verify a system configuration has been certified.
License Usage Tool

QAD Support offers the QAD License Usage Tool for active-on-maintenance customers. This tool is similar to the software used by QAD’s User Count Assessment Group, and it helps to measure compliancy with QAD applications.

The License Usage Tool:

- Tells you how many licenses are consumed over a given period
- Provides the number of IDs accessing the system
- Can help you avoid “surprises” prior to an audit
- Costs nothing if you are an active-on-maintenance QAD customer

Customer Success Organization

Within QAD Customer Support a team exists that focuses on customer engagement and success. The Customer Success Organization is dedicated to enhancing our customers overall QAD experience. The team is responsible for proactively notifying customers of QAD events such as webinars, user groups and reviewing customers’ incident activity and working with them to ensure they are using QAD Enterprise Applications to its fullest. The Customer Success Organization is here to keep you informed and satisfied with QAD working as your trusted advisor and partner.

Where to Find More Information

QAD provides a full array of Cloud, Managed and Professional Services. We operate as one team working to serve our Customers. For more information on what QAD can do for you, contact your Sales Representative or refer to information on the QAD website:

- QAD Cloud ERP – [www.qad.com/cloud](http://www.qad.com/cloud)
- QAD Professional Services – [www.qad.com/services](http://www.qad.com/services)
- QAD Industries – [www.qad.com/industries](http://www.qad.com/industries)
QAD Issue Resolution

Step 1: Prepare: Define the Problem or Question

When you first encounter a problem, take the opportunity to ask plenty of questions and fully define all the symptoms and events surrounding the issue.

- What product or function is this issue occurring on?
- Summarize the problem or question into a single sentence — be accurate and concise
- Describe the symptoms of the problem
- Capture exact error message(s) encountered
- Determine any sequence of events leading up to the problem
- What were the expected results, and actual results of the action or process?
- Determine if any customized programs or functionality may be involved, and seek to test without the customizations applied
- Be very specific; prepare screen shot images or gather log files if possible
- Assess the business impact and any work-around that may have been implemented

The largest part of any incident’s lifecycle is spent defining the problem. Your preparation and initial investigation will greatly improve your potential for finding an answer or achieving the fastest possible resolution.

Step 2: Search for solutions on the QAD Support Center

Once you have defined the problem or question, go to the QAD Support Center to find a solution. The search capabilities span many informational resources including the Knowledgebase, Document Library, Learning Center and full QAD.com website. You may narrow your search to specific topics, versions or content sources. The search engine uses common Google-based search capabilities. You may also navigate through the informational resources to find answers, instructions or training that may aid in resolving or answering your issue.

- Search the full QAD Support Center (includes Knowledgebase results)
- Check the QAD Documentation for the product or module involved

Pose questions to the QAD Forums for the given topic (ideal to gain insights from other companies using the same product(s))

If training-related – check the QAD Learning Center and any related training guides in the Document Library

If no solution is found and assistance is sought, proceed to Step 3.
Step 3: Report the Issue

If after following the preceding steps you still have not resolved the issue, proceed to log an incident with QAD Customer Support. Depending on your service provider, you may do this in one of two ways:

1. You may enter an incident in QAD Support Center at http://supportcenter.qad.com (web form and live chat submittal options), or by telephoning your nearest QAD Customer Support Center.

2. If you are a customer in a location where an authorized QAD Alliance Support Partner provides your customer support service, contact your alliance partner’s support desk using the numbers provided to you.

The information prepared from Step 1 should be included as part of the incident so that QAD Support agents can pick up where you left off, and expedite the resolution time of your issue.

When submitting an incident, also consider and include the following:

- Information about the urgency and impact of the question or problem.
- Set the initial Severity selection based on the impact and urgency assessment
- Accurate contact information so that QAD Support agents can reach you
- Your QAD Customer number
- Specify the affected product, version or subject area for the specific issue

QAD Customer Support Response

Response time is the time it takes between when your incident is received, to the time an analyst begins working the issue. We make every effort to service your request as quickly as possible, based on the initial severity selected. As you assess and select the appropriate Severity level based on the business impact and urgency of the issue. Below are QAD target response times, based on the priority assigned to the issue when registered.

QAD Customer Support shall use reasonable efforts to respond to incidents in accordance with the response times listed below. The definition of a response, as QAD has identified it, would include providing a solution, requesting additional information, or confirmation that the incident is being worked on.

<table>
<thead>
<tr>
<th>Severity</th>
<th>Support Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>less than 2 hours</td>
</tr>
<tr>
<td>1</td>
<td>less than 4 hours</td>
</tr>
<tr>
<td>2</td>
<td>24 hours</td>
</tr>
<tr>
<td>3</td>
<td>48 hours</td>
</tr>
</tbody>
</table>

Severity definitions can be found in the QAD Product Lifecycle at http://public-supportcenter.qad.com/phase-definitions.
First Contact

Reported incidents submitted to QAD Customer Support are responded to by a highly qualified team of Support agents. In most cases, the QAD Customer Support analyst will be able to resolve the issue on the first contact with the customer. In some cases, however, either more information or more analysis is required in order to make further progress. In the case where more information is required, the customer may be asked to provide more detailed information or work together to further the analysis process.

Analysis & Resolution

If the incident is not resolved after first contact, the customer support analyst will research the issue. They will perform a thorough analysis of the issues and determine if there is truly an error in the product, a process failure, a procedural issue, a misunderstanding or a design characteristic. If it is determined that an error does exist, QAD Customer Support will then develop the specification for corrective action. In all instances, efforts will be made to provide a workaround, which may be in the form of a temporary fix, solution, or procedural guidance to resolve the immediate problem.

In a small number of cases, the problem reported on an incident may be identified as a software defect, at which time the QAD Maintenance Support team is engaged. This will lead to development of a software change to be included in the next maintenance release for the given product. Software fixes are subject to the terms defined in the QAD Product Life Cycle Policy found at public-supportcenter.qad.com/product-lifecycle.

Closing Incidents

An incident may be closed only when one of the following criteria is met:

- The question has been answered and resolution confirmed by the customer.
- The customer confirms that an acceptable work-around or solution has been implemented, or that the problem is no longer an issue.
- The customer and QAD Customer Support analyst agree that the issue reported is the result of the application design or a customization, at which time the Customer may choose to submit an Enhancement request (for consideration in future product versions), or to engage QAD Professional Services for custom development work.

Incident Satisfaction Survey

The Customer guides the last step of the QAD incident process. After closure of every Customer Support incident, the incident submitter will receive an automated incident closure notification and the optional survey to rate their experience on that specific incident. QAD Customer Support values and encourages our Customers to provide timely, honest feedback to aid in continual service improvement. QAD Customer Support takes rapid action on all feedback. QAD customers consistently report they are satisfied at or above 96% of the time.
Appendix A – QAD Customer Support Centers

QAD Customer Support provides local presence and a global reach. Through our network of interconnected locations our Customers can contact their local Support Center and engage our global team at any time. The QAD office and contact directory is on the QAD website at http://www.qad.com/about/contact

In areas serviced by our authorized QAD Alliance Support Partners, the authorized alliance partner will complete a service agreement with the customer. In these instances, assisted support is provided by the alliance partner support analysts, with QAD Customer Support acting as a resource to the alliance partner. If a partner is your support service provider, they work with you to provide instructions how to contact them for assistance. For more information about QAD Partners, visit our web site at http://www.qad.com/about/partners, or contact your Sales Representative.
### Appendix B – Maintenance Matrix

Details on the full array of Support services may vary by Customer or contract. This is a basic matrix of services provided for a licensed customer with direct support from QAD.

<table>
<thead>
<tr>
<th>Service</th>
<th>Full Maintenance</th>
<th>No Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Updates &amp; Releases</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Active Maintenance Products</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Support Center Website Access</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Assisted Support Service</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Online Incident Entry &amp; Reporting</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>QAD Knowledgebase</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>QAD Learning Center</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Product Change Information</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Customer Advisories</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>QAD Download Center</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>License Usage Tool</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Enhancement Request Submittal</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Remote Diagnostics Screen Share</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>QAD Store</td>
<td>✔</td>
<td>View only</td>
</tr>
<tr>
<td>Online Forums</td>
<td>✔</td>
<td>View only</td>
</tr>
<tr>
<td>Product Documentation</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Product Lifecycle Policy &amp; Schedule</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>