

Packaged Services by Journey Stage

Adoption



Success4U packages are organized around three journey stages — Onboard, Adopt, and Operate — reflecting the natural lifecycle of every customer. Each stage helps you progress confidently from initial setup, to optimization, to long-term operational excellence. Please find below some examples of Adoption packages.

Packaged Service	Outcome Category	Description	Function	Product Applicability
Advisory - Release Notes Assessment	Advisory & Execution	Translates upcoming release notes into clear, customer-specific insights so you can understand impacts and prepare confidently.	Universal	ERPx, ERP CR, FP&A, U4F
Onboarding for ERPx - AVA Setup and Functionality Overview	AI Smart Automation Services	Implements and configures Ava, Unit4's AI virtual assistant, to automate routine tasks and enhance daily productivity.	CIO	ERPx, ERP CR
CSS Cloud Requests - Customization Code Validations	Cloud	Validates custom code for security, stability, and cloud compliance before deployment.	CIO	ERP CR
Execution - Expenses Mobile App	Extensibility	Enables fast, mobile expense entry and submission to keep reimbursement processes moving while employees are on the go.	Universal	ERP CR, ERPx, U4F
Integrations - Extension Kit Annual Review	Integrations	Assesses and optimizes your Extension Kit flows to improve performance, reduce manual work, and leverage new platform capabilities.	CIO	ERPx, ERP CR
Desktop to Web Migration Availability Self-Service	Reporting	Provides analysis and knowledge transfer so your team can independently migrate desktop reports to the web interface.	Universal	ERP CR
Reporting - Workspace Enhancement Analysis	Reporting	Evaluates ERPx Workspaces to identify misconfigurations, reporting gaps, and improvement opportunities.	Universal	ERPx