SWITCHPOINT SERVICES

Capability Schedule

Schedule to the SwitchPoint Services Client Agreement · Version 1.4 · In use from October 26, 2026 · Posted at getswitchpoint.com/legal/capability-schedule

This Schedule lists what each plan includes, how SwitchPoint sets it up, when each Capability counts as Delivered, and what is not included. It is part of the Agreement and controls over the Standard Terms where the two differ. Capitalized words have the meanings in the Standard Terms.

1. Setup, Training and Go-Live (all plans)

STEP	WHAT HAPPENS	WHO
Client Setup Form	Customer completes the online form: business details, hours, service area, the business line to connect, where alerts go, booking preferences, and payment methods accepted. About 10 minutes.	Customer
Setup Call (45 minutes)	SwitchPoint reviews the form with Customer, confirms the plan's Capabilities, collects anything missing, and explains call forwarding and website access.	Both
Configuration	SwitchPoint provisions Customer's sub-account from its master configuration, loads Customer's details, builds the knowledge base from Customer's approved information, and submits Carrier Registration.	SwitchPoint
Compliance pages	SwitchPoint publishes, in Customer's account and on a domain Customer owns, a one-page site with Customer's business information, an estimate-request form, a privacy policy and messaging terms written to current carrier requirements, used for Carrier Registration. Customer supplies or purchases the domain and approves the pages before they are submitted. The pages are hosted in Customer's sub-account and are available only while a Subscription Period is active. On termination, Provider will, on request within the export period in Section 5.5 of the Standard Terms, give Customer a static copy of the pages (HTML, images and text) that Customer may host elsewhere; Customer may use the template design for that copy only.	SwitchPoint
Review	Customer reviews and approves the greeting, scripts, knowledge base and message templates. Nothing goes live before approval.	Customer
Launch Call (60 minutes)	The onboarding training call. SwitchPoint walks Customer through the system, Customer calls its own AI receptionist (plans that include it), Users are trained on the app, and the system is placed live.	Both
Go-Live	Scheduled within 14 days after the later of the Setup Call and receipt of the completed Client Setup Form. The Satisfaction Guarantee period starts on this day.	SwitchPoint

2. Essentials — $247 per month

CAPABILITY	WHAT CUSTOMER GETS	DELIVERED WHEN	CARRIER APPROVAL NEEDED
Website chat assistant	An AI chat on Customer's website that answers common questions from Customer's approved knowledge base, 24/7. It does not collect phone numbers or book appointments unless Customer enables that.	The widget is live on Customer's site and the first AI reply is visible in the account.	No
Automatic reply to every new lead	A new lead from Customer's website form or chat gets an automatic text and email reply, and Customer is notified.	The first automatic reply is sent and visible in the account.	Yes (text); email is not conditioned
Missed-call text-back	A caller Customer could not answer receives an automatic text with Customer's name and booking link.	The first text-back is sent within 10 minutes of a missed call and visible in the account.	Yes
Online booking calendar	A booking page synced to Customer's availability, with confirmation to the customer.	A test booking appears on the calendar through the public booking link.	No
Review request after a completed job	When a job is marked complete, the customer receives a review request with Customer's review link.	The first review request is sent after a job-completed event and visible in the account.	Yes
One app for leads, calls and texts	Customer's contacts, conversations and jobs in one system, on desktop and phone, with Users invited.	Customer's primary User has logged in.	No
Onboarding training call	The 60-minute Launch Call in Section 1.	The call takes place.	No

3. Automated Front Office — $497 per month

Everything in Essentials, plus:

CAPABILITY	WHAT CUSTOMER GETS	DELIVERED WHEN	CARRIER APPROVAL NEEDED
AI receptionist	An AI assistant that answers calls to the configured number 24/7, handles questions from the knowledge base, takes messages, books appointments on Customer's calendar, and transfers calls to the numbers Customer designates. Every answered call is recorded and transcribed into the account.	A test call is answered by the assistant and the call record appears in the account.	No
Structured follow-up on every lead	A seven-step sequence over 14 days that moves an unbooked inquiry toward an appointment and stops when the contact books or opts out. Email steps run for every lead. The first text replies to the lead's own inquiry; the later text steps run only for leads who agreed on the form to receive text messages about their request.	The first follow-up text is sent to an unbooked test lead and visible in the account.	Yes
AI-powered review management	Review requests (as in Essentials) plus AI-drafted replies to incoming reviews, posted after Customer's primary User approves each draft.	A draft reply to a review appears for approval.	No
Appointment confirmations and reminders	Automated confirmation at booking and reminders before the appointment, with no-show follow-up.	A confirmation and a reminder are sent for a test appointment and visible in the account.	Yes
Re-engagement of past customers	Scheduled campaigns to Customer's consented past customers inviting repeat work.	The first campaign message is sent to a consented test contact and visible in the account.	Yes

CAPABILITY	WHAT CUSTOMER GETS	DELIVERED WHEN	CARRIER APPROVAL NEEDED
Payment reminders	Automatic reminders on unpaid invoices Customer issues from its account. Reminders apply only to invoices sent from the account; invoices Customer sends from other software are not covered. To accept card payments on account invoices, Customer connects its own payment-processor account, which SwitchPoint helps Customer do on the Launch Call.	The first reminder is sent on a test unpaid invoice and visible in the account.	Yes
Sales pipeline	A seven-stage pipeline from first call to paid, loaded and ready on day one.	The pipeline exists with its seven stages and a test opportunity moves between stages.	No
Automated outcome report	A monthly email summarizing Customer's leads, bookings and reviews from the account's own data.	The first monthly report is sent to Customer.	No

4. Personalized Agentic System — priced to the build

Everything in Automated Front Office, plus the following, scoped in writing on the Order Form or an attached quote. Each item is Delivered as the quote states; if the quote is silent, an agent is Delivered when its first run record exists in the account and a page is Delivered when it is live.

CAPABILITY	WHAT CUSTOMER GETS
Dormant-lead reactivation agent	An AI agent that reviews Customer's old contacts, judges which are worth reopening, and reaches out by email. Text outreach is not included.
Support agent	An agent grounded in Customer's approved business information that handles chat and text inquiries and routes to Customer anything it should not answer alone.
Daily brief	An agent that reads the day's activity in the account and reports what needs Customer and what does not.
Private knowledge base and memory	A knowledge base built from how Customer works, grounding the agents above.
Branded dashboard	A dashboard showing what each agent did and what came of it.

5. Add-ons

ADD-ON	WHAT CUSTOMER GETS	PRICE AND TERMS
Website add-on	A five-page website for Customer (home, services, about and reviews, service area, contact), built from SwitchPoint's template with Customer's branding and content, hosted in Customer's account on a domain Customer owns, with an estimate-request form, a privacy policy and messaging terms written to the carrier requirements in force at the time of the build. Customer supplies or purchases the domain. SwitchPoint does not guarantee carrier approval or its timing. The pages are hosted in Customer's sub-account and are available only while a Subscription Period is active. On termination, Provider will, on request within the export period in Section 5.5 of the Standard Terms, give Customer a static copy of the pages (HTML, images and text) that Customer may host elsewhere; Customer may use the template design for that copy only.	$499 one time. Delivered when the pages are live. A one-time build, not covered by the Satisfaction Guarantee.

6. Technical Support

Email and in-app message support on Business Days with a first response within one Business Day; correction of Configuration Defects at no charge; adjustments to the knowledge base, greeting, hours and message templates on Customer's request, in a reasonable volume, applied in batches within two Business Days; help with carrier reinstatement; and reasonable guidance on using the app. Support is for SwitchPoint's configuration. Platform outages, app bugs, number porting, and carrier delivery are resolved by the Platform Provider; SwitchPoint relays them on Customer's behalf and reports back, and does not control their resolution.

7. Not Included

- Running Customer's marketing: ad campaigns, ad spend, social media, content writing, SEO, or managing campaigns on Customer's behalf.
- Any promise of a particular number of calls, leads, bookings, reviews or revenue.
- Custom software development, integrations with systems not supported by the Platform, or work outside this Schedule, unless quoted on an Order Form.
- Carrier approval of Customer's registration, or its timing.
- Legal advice about Customer's messaging, recording, or consent practices.
- Customer's own telephone service, internet, website hosting (other than the website add-on), or devices.

8. Phone Numbers

SwitchPoint registers Customer's existing business number for messaging where Customer ports it into the account or hosts its messaging there, and provisions an additional number only where Customer asks for one or carrier registration requires it. Customer's existing business line stays Customer's; Customer forwards it to the system as instructed on the Setup Call, ports it into the account, or hosts its messaging there, at Customer's election and where the carrier allows. Carrier registration fees for one number and one campaign are included in the Fees. On termination, Section 5.5 of the Standard Terms governs export and porting.