

## Custom Packaging Offering by Chocolatey Software

## Summary

Chocolatey Software provides an optional Professional Custom Packaging ("Custom Packaging") that **Chocolatey for Business (C4B) customers** can take advantage of at a reduced price point. This allows customers to pass along complex or not easily automatable installation processes and have our team provide a package that takes care of the automated installation.

There are some important things to consider with Custom Packaging, and understanding the process is also important. Please read over this to understand both the process and frequently asked questions.

## Process

- Purchase Custom Packaging credits in advance for a version of a piece of software (note that you will need at least one custom package credit per version of a piece of software). If you need to purchase Custom Packaging credits, please use this link: <u>https://checkout.bluesnap.com/buynow/checkout?sku3330984=1&storeid=269004</u>
- Open a Support Request once you have a number of Custom Packaging credits, you can request a package for a software version by having one of your Technical Contacts file a Support Request with a title such as "Package For \_\_\_\_\_". Don't worry if you don't quite get this right. Our team will ensure it is tagged properly for count purposes.
- 3. **Provide Binaries** Chocolatey Software's technical support team will provide you with instructions on where to upload binaries and supporting files for the software installation. Please note that if you have any special considerations, Chocolatey will attempt to meet those as long as they do not provide a burden. For the most part, the purchase of the Custom Packaging is to ensure a successful unattended installation see FAQs below for more information.
  - a. If your files are less than 20MB, you can log into the help center (<u>https://chocolatey.zendesk.com/</u>) and upload your binaries directly to the ticket.
  - b. If your environment is locked down or secured in such a way that you are unable to upload binaries, the onus is on your team to provide a secure means for our team to download your binaries and upload the completed package to a secure document repository in your environment, such as a secure FTP (SFTP). You will need to work with your teams to provide our technicians credentials with download and upload permissions.
  - c. **NOTE: It is** *required* **that you provide us with the binaries.** Our team is not allowed to download them from the internet for security reasons and to validate that you have access/licenses for the software that you are asking our team to package.

- 4. Wait approximately 5-10 business days per package. At this stage, once the files are received, your wait time is approximately 5-10 business days per package, depending on the queue. Support folks should let you know if there is a queue, but in case they do not, do not hesitate to ask approximately how long the process may take from here. During this time period, the Technical Support Team will work to adjust the installation media if necessary, build a package that supports unattended installation/upgrade, then package that up.
- 5. **Receive Packages -** the Technical Support Team will then upload the completed package to the agreed location and notify you on the ticket. Your team will then download the package version and put it on your organization's repositories for your use.
- 6. This completes the Custom Packaging workflow. If you have any questions, feel free to reach out to your Chocolatey Software Representative or email <u>sales@chocolatey.io</u>.

## **Frequently Asked Questions**

- Can I get Custom Packaging before I pay for the credits? Unfortunately not, we must receive payment before any packaging can be completed. "Receive payment" means we've received payment, not waiting on payment terms such as may be with a valid purchase order.
- I have a new software version, do I need another Custom Packaging credit? Yes, each version requires at least one new Custom Packaging credit.
- Can I ask for custom things to be completed as part of this process? For the most part, no. The team is ensuring a successful unattended installation process of a particular version of software. Customizing the installation with additional things falls outside the scope of what is provided at the price point we provide them. That said, the team may allow for some customization at their discretion for additional packaging credits.
- If I stop being a customer, can I still use my unused package credits? Unfortunately, no. The packages may only work being deployed to licensed machines.
- If I stop being a customer, can I get a credit or refund for unused Custom Packaging credits? Unfortunately, this is also not a possibility. Please plan accordingly.
- How can I find out what Custom Packaging credits I have used and what I have left? File a Help Desk ticket with the query. It will not count against your monthly ticket quota. A Technical Support person will then provide a count used and, if you are interested, can also provide details of what software/versions you have requested.
- Will there be a better way to query in the future? Yes, we have it on our roadmap to have a customer portal. Some point after the customer portal has been deployed, we will add Custom Packaging information to the portal. Unfortunately, this is roadmapped out quite far into the future, so I would not plan on this being available for a number of years.
- Are you really able to create a package for all software? While we can't guarantee we can create a package for every software version, due to unknown complexities, our

track record is excellent and our team will make best efforts to ensure the installation, upgrade, and uninstall process can be completed successfully. If there is a particularly troublesome installer or uninstaller, you may wish to double up (use 2 packaging credits) to handle both installation/upgrade and uninstallation, and that is allowed for the additional effort of a troublesome uninstaller.

- What if something doesn't quite work right with the package in my environment? Please let our team know as soon as possible, so that it can be handled under the context of the same Custom Package credit(s). Please be prepared to screen share and provide detailed logs back to the support team.
- How long do you provide support for the package created under Custom Packaging? We will support the package installation as long as you are a customer on the current version(s) of Windows being used at the time the Custom Package was created (be sure to let our staff know what versions you are currently using).
- If the package does not work as I need it, can I request a refund? If the package can be successfully installed in an unattended way, then our team has done the due diligence of the request. Unfortunately, our team is still dealing with the limitations of software installers that Chocolatey Software did not produce, so the realm of possibilities only comes within what is possible in the context of those installers. As long as your expectations are staying within the realm of what is possible, you should be good. That said, obviously if our team is unable to provide a package that would install / upgrade software in an unattended way, then we would be happy to provide a refund.
- We have changed the configuration on our machines (new GPO's being applied, upgraded operating system etc.) and the package you provided does not work.
  What can we do? Depending on what has changed within a given timeframe, you may be able to request changes within the context of the same Custom Packaging credit(s). In most cases though, it does mean new Custom Packaging credits will be necessary.
- Once a package has been created for us, does it become our property (legally and intellectually)? Due to the nature of pricing, Chocolatey Software retains the intellectual property rights of what is produced and grants you a perpetual, worldwide, non-exclusive, irrevocable license to use the packaging that is produced.
- Can we share the packages you have created for us with our customers, subsidiaries, affiliates, or other companies in our group? This would be answered on a case by case basis. Every situation could be different, so the answer is that it depends. If your subsidiaries, affiliates, and other companies in your group are under the umbrella of the *same* Chocolatey for Business license, that situation is a known acceptable use.
- We currently use systems integrators to assist with this. How is this the same or different? Systems Integrators (SIs) typically will provide a very customized MSI for an organization, and the turnaround time is typically two or more weeks. In contrast, Chocolatey Software's Custom Packaging will ensure that the installation is automated and will provide a Chocolatey package with everything in it, with potentially a little customization in 5-10 business days, depending on the queue for a heavily discounted cost. SIs typically charge quite a bit more for what they do. In some cases, you may want

what they are able to provide as far as customization goes, and Custom Packaging is not a 1 to 1 match for the services provided by systems integrators.

• Can we have you download binaries from the official sources? Unfortunately, for our team to provide Custom Packaging, you will need to provide us with the binaries. Our team is not allowed to download binaries or other resources from the internet. This is done for a variety of reasons, including security and proof that you have access/licenses for the software that you are hoping for us to package.