Professional Advantage

Support Service Level Guide

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Introduction

Welcome to Professional Advantage's Support Team!

At PA, we're dedicated to providing exceptional support when you need it most. Our team embodies our core values:

- Client Focus: Your success is our priority
- Integrity & Ethics: We operate with transparency and honesty
- Teamwork: Collaborative problem-solving for optimal results
- Quality: Delivering excellence in every interaction
- Courage: Tackling challenges head-on

We're here to assist you with prompt, professional, and effective support. Our commitment goes beyond just solving issues – we aim to enhance your experience with our products and services.

We encourage you to review this Guide to familiarise yourself with our Support Team's operations and procedures. To ensure you have the most up-to-date information, please note that this Guide is regularly updated. You can always request the latest version from our Support Team or download it here.

Your feedback is invaluable to us. We welcome your thoughts on any aspect of this document, particularly regarding our performance and how we can better serve you. Your input helps us continually improve our support services.

If you have any questions or need clarification on any part of this Guide, please don't hesitate to contact our Support Team or your Inside Account Manager.

Our Support Team

At the heart of our support service is a team of skilled professionals committed to your success. Here's what sets us apart:

- Expertise: Our support staff are seasoned experts, continuously trained in the latest technologies and best practices.
- Cutting-edge Tools: We utilise advanced ticketing and diagnostic systems to efficiently track, analyse, and resolve your issues.
- Collaborative Approach: Our Support Team works seamlessly with our Consulting and Development teams, leveraging a wealth of in-house knowledge.
- Strong Partnerships: When required, we leverage our strong partnerships with software vendors to address complex issues, ensuring you receive comprehensive support even for third-party components.

This powerful combination of expert staff, advanced technology, and strategic partnerships allows us to deliver:

- Swift issue resolution
- Comprehensive support coverage
- Innovative solutions to complex problems

Our Commitment to You

At Professional Advantage, we take pride in providing comprehensive support for all software applications, business solutions, and infrastructure covered by your current support plan. Our team is dedicated to ensuring your success through proactive assistance and problem resolution.

Our Primary Responsibilities

- Guidance and Support: Provide expert advice on existing applications and solutions and offer tips and techniques to optimise your software use
- Troubleshooting: Investigate and resolve issues when you experience unexpected results and assist in identifying root causes of software problems
- Defect Management: Reproduce and document product defects and provide workarounds to maintain system stability until defects are corrected
- Software Updates: Keep you informed about maintenance updates from our software vendors and advise on the importance and impact of these updates

Our Support Process

- Case Ownership: Each support case is assigned to a dedicated professional who takes full responsibility for its resolution.
- Priority Agreement: We collaborate with you to determine the appropriate priority level for each case, ensuring critical issues receive immediate attention.
- Regular Updates: You'll receive timely progress reports throughout the resolution process.
- Escalation Management: When necessary, we seamlessly escalate issues to PA Managers, specialised internal teams, or software vendors to expedite resolution.
- Resolution Commitment: We persistently work on your case until we achieve a mutually agreed-upon resolution.

Our goal is not just to resolve issues, but to enhance your overall experience with our products and services. We're committed to your success every step of the way.

Optimising Your Support Experience

To ensure a stable working environment and maximise the effectiveness of our support, we recommend implementing the following best practices:

Designate Your System Champions

Systems Administrator

Appointing a dedicated System Administrator is crucial for maximising your system's potential. This key role:

- Takes ownership of your systems and internal infrastructure.
- Serves as the primary IT liaison between your organisation and PA.
- Collaborates closely with your application administrators.

Nominated Support Representatives

You may nominate up to two representatives to contact our support team. These representatives must meet at least one of the following criteria:

- Trained by PA in the use of supported solutions
- Hold certifications for the supported solutions
- Approved by PA as a nominated support representative

Ensuring your representatives meet these qualifications helps us provide efficient and effective support.

Change Control Processes

Implementing robust change control processes is crucial for:

- Tracking all modifications to the base system
- Ensuring system stability and reliability
- Facilitating troubleshooting and rollbacks if needed

Where possible, it is beneficial to:

- Start during initial implementation
- Maintain for all subsequent changes
- Cover operating system, database, and application environments

PA offers expert assistance in developing effective change control processes tailored to your needs if required.

Safeguard Your Data

Your organisation is solely responsible for safeguarding company data, including:

- Ensuring data security and integrity
- Performing routine system backups
- Implementing disaster recovery measures

PA can provide Managed Services to assist with data security provision, enhancing your protection capabilities.

Maintaining a Test Environment

A dedicated test environment is crucial for:

- Minimising risks to your production environment
- Testing new solutions and upgrades
- Isolating and troubleshooting specific issues

Note: Your test environment may require separate licensing. Please consult your Client Management Team for confirmation and details.

By maintaining a proper test environment, you help ensure smooth operations and reduce potential disruptions to your live systems.

Invest in Staff Training

Ensuring your staff is fully trained on your organisation's software and business processes is crucial for maximising efficiency and productivity.

PA can provide tailored training and/or consulting services to enhance your team's skills and improve overall business performance.

Reporting Software Issues Effectively

Help us help you! When you encounter software errors or malfunctions; document and report all errors promptly and conduct initial investigations.

For detailed guidance, refer to the "Before Contacting the Support Team" section.

Your thorough preparation will help our Support Team diagnose and resolve your issue more efficiently.

Maintain Prompt Communication

To assist in the timely resolution of your case, it is important to respond swiftly and comprehensively to Support Team requests for information.

If we don't receive the necessary information or response from you to progress your case, we may need to close it temporarily. Don't worry – you can always request to reopen the case when you're ready to continue. Simply contact our support team, and we'll be happy to assist you further.

Keep Contracts & Account Current

By maintaining an active support agreement and up-to-date company account information ensures uninterrupted access to our support services.

By adhering to these best practices, you'll create an optimal environment for issue resolution and system stability. Remember, our support team is here to assist you every step of the way in implementing and maintaining these practices.

Your Pre-Support Checklist

Do Some Initial Investigation

Consult your internal Nominated Support Representatives to:

Review available resources:

- Previous Cases on myPA Portal
- Reference guides
- Training materials
- Online help

Attempt to replicate the issue:

- On another workstation
- Logged in as a different user
- Logged in as the administrator
- Directly on the server
- Within your test company

Conducting these steps will help expedite the resolution process and may even lead to a solution without needing to log a case.

Client Information

The quality of information you provide directly affects the speed and efficiency of case resolution. Please have the following details ready when logging a case via myPA Portal, phone, or email:

Essential Information:

- Company name
- Your contact details (name, email, phone number)
- Product name and version of installed software

Issue Details:

- Detailed description of the problem
- Screenshots of error messages or screen recordings
- Steps to reproduce the error
- Any failed reports, transaction logs, or supporting documentation
- When were you able to perform the task successfully.

Problem Characteristics:

- Frequency and predictability (e.g., intermittent, occurs every time)
- Impact (e.g., affects all users, specific PCs/workstations, one or all databases)

System Information:

- Platform deployment model (on-premise or cloud)
- Hardware configuration
- Operating system
- Database systems
- Other integration software

Recent Changes:

- Details of any recent system or infrastructure modifications (e.g., upgrades, new software installations, server migrations)

Providing this information upfront will help us accurately diagnose and resolve your issue more quickly.

Logging the Support Case

When your support case is logged with the Support Team, it is assigned to a product specialist (the “case owner”). Clarification of the case details may be necessary before in-depth analysis can be performed and before the product specialist can begin to resolve the case.

There will always be a case owner assigned to each case, however, this person may change during the resolution process. As part of managing the case details, the status and commit times of every case will be agreed with you.

In instances where a software defect is identified, the case owner will escalate your issue to the appropriate software vendor. Cases escalated to software vendors are subject to the escalation and response times of that organisation.

How to Contact Us

Client Portal	**https://my.pa.com.au**
Phone Number	1300 658 608 (within Australia) +61 2 9919 8989 (International)
Email	support@pa.com.au

Initiating and Managing Support Cases via myPA

Efficient Case Logging:

- Cases automatically update our support database
- Routed to the relevant product Support Team
- Assigned to the next available team member

Benefits of Online Case Logging:

- Enables quick analysis and research by our Support Team
- Provides an efficient method for issue resolution

Additional myPA Services:

- View status and full history of your support cases
- Update existing cases
- Review latest news and product information

We encourage using myPA for a streamlined support experience and faster issue resolution.

Support Hotline 1300 658 608

If your case is urgent and you wish to speak directly to a support team member, please phone the Support Hotline and your call will be by one of our support team members and be directed to the relevant product specialist.

Email support@pa.com.au

In the instance where you cannot access myPA or reach us by phone, you may send an email to support@pa.com.au and your email will be reviewed and assigned to the next available team member.

Our Support Hours

Normal Support Hours

The hours of operation are between 9am and 5:00pm (local Sydney time) Monday to Friday, excluding Australian National Public Holidays.

After Normal Support Hours

The Support Team offer a 24-hour contact service. Three options are available to you depending on the urgency of your problem.

Option 1	Log your support case via our myPA Portal. A support team member will take ownership of your call during normal support hours
Option 2	Leave a voicemail message with your company & contact details, plus a brief description of your problem, and a support team member will return your call at the earliest opportunity during normal support hours
Emergency out of hours support	Should emergency support be required outside the designated hours, assistance is available. Note: This service is provided as a chargeable exercise and billed at double the standard consulting rate on a time and materials basis

Case Management

A support case is any request for assistance or question that is fully and accurately logged in the PA Support Database, related to:

- Software operation
- Software keys
- Information about existing software functionality

All cases are managed by our Support Team using our comprehensive client management system.

Important Notes:

- Each Support Case must address a single, unique problem or question
- Multiple issues cannot be combined into one case ("overloading")
- Each submitted case is deducted from the Client's case entitlement

This approach ensures efficient handling of your support needs and fair usage of your support entitlement.

Initial Response Time

PA will make commercially reasonable efforts to respond within one (1) hour during normal business hours to confirm status and next actions.

A response time of one hour is given to client's initial request. Following that initial response, the severity and commit times will be agreed and managed throughout the issue resolution process.

Assigning a Severity Level

When assigning a severity level to your support case, please consider the severity of the problem, the business impact to your organisation, and whether there is a suitable workaround available. The severity level may change during the life of the support case. Please use the following as a guideline:

Severity 1 – Critical	Your entire system is inoperable**,** and your organisation is critically impacted.
Severity 2 – High	You cannot use the system, or a function of the system is not working correctly and is affecting your processing. No workaround is available. Your business is severely impacted.
Severity 3 – Medium	A function is not working correctly but is not mission critical. Often a workaround will exist although the issue does need to be resolved. Your business is not seriously affected.
Severity 4 – Low	A question or request for information regarding existing systems, new product or functionality.

Each active case will be assigned an agreed severity level. You can change the severity level of a case and therefore the priority by liaising with the Support Team.

Resolution Times

Case resolution is often an investigative process with many variables, and often requires collaboration and troubleshooting by various teams to determine the root cause to bring your case to resolution. Thus, providing target resolution times is difficult.

Our commitment to you is that we will:

- Provide regular updates, keeping you informed throughout the troubleshooting process and ensuring you know the current status of your case
- Continue to work on your issue until it is fully resolved
- Explain any challenges or complexities affecting your case.

Our goal is to resolve your issue as efficiently as possible while keeping you informed every step of the way

Closing a Case

All cases will be managed to an agreed conclusion. Cases will not be closed until confirmation that a resolution has been received.

Note: this also includes specific problems associated to the vendor.

In the instance where we are not receiving the necessary information or response from you to progress your case, we may need to close it temporarily. Don't worry – you can always request to reopen the case when you're ready to continue. Simply contact our support team, and we'll be happy to assist you further.

Confidentiality of Client Data

To investigate a support case, a client may be requested to disclose to PA certain confidential information regarding their business.

In consideration of such disclosure, PA undertakes and agrees to keep the client’s Information confidential and to maintain that confidentiality on the terms set out below.

“Confidential Information” means all information passing from the client to PA including but not limited to databases, trade secrets, confidential business information, client information, profit and loss statements, management reports, financial data, and related documentation and/or information. PA agrees to:

Store the confidential information of the client in a secure environment

Take all reasonable steps to prevent or stop any suspected or actual breach of the requirement to maintain the confidentiality of the Confidential Information of the client, and

Notify the client immediately it suspects or becomes aware of a breach of the confidentiality of the Confidential Information of the client

PA shall assume responsibility of the actions of its employees, agents and contractors who have access to the Confidential Information of the client and shall ensure that those employees, agents and contractors shall be made aware of and shall be similarly bound by the obligations created under this Guide in respect of the Confidential Information of the client.

Subject to any further agreement between the parties, and upon resolution of the support case, PA shall destroy all the Confidential Information and all copies of the Confidential Information in whatever form they may be embodied or recorded.

Interactive or Remote Access

Screen sharing tools play a crucial role in modern technical support, offering a powerful way to visualise and diagnose issues in real-time. PA will utilise platforms such as Microsoft Teams or LogMeIn, where our support team can gain direct visual access to your environment.

This immediate visual context allows for more accurate issue identification, reducing miscommunication and speeding up the troubleshooting process. Our support team can observe user actions, system behaviours, and error messages as they occur, leading to quicker and more precise diagnoses.

The support consultant may suggest an interactive web-based support session, where further clarification of an issue is required, and may request to record any session to provide to vendors if required to clearly discuss the issue or to facilitate case resolution. Clients will be asked to give permission to our Support Team member prior to us making a connection to your system.

Our screen sharing sessions are designed with security in mind. You maintain full control over the access granted to our support team, and no one can access your device without your active permission. This approach builds trust and ensures that you're always in charge of the support process.

Please note that any request for our team to independently access your environment to perform troubleshooting on your behalf is outside the scope of our standard support offerings. Such requests are considered billable exercises and will incur additional charges. Our primary support model is based on collaborative screen sharing sessions to maintain efficiency and cost-effectiveness for our clients.

Additionally, during troubleshooting, if it is identified that the user we are working with does not have the necessary permissions to proceed, we will request that an appropriately authorised user or system administrator be made available to continue the session. This ensures that troubleshooting can be conducted effectively and without unnecessary delays.

For Microsoft-based support, if an authorised user or system administrator cannot be made available, we may utilise our GDAP (Granular Delegated Admin Privileges) relationship to access your environment independently to gather the required information. This access will only be initiated with the explicit authorisation from the appropriate contact at your site, ensuring compliance with your internal security and governance policies.

In the case of remote access, clients are responsible for the protection and security of company data during such access. PA also has strict security measures, controls, and expectations related to safeguarding your data and systems. You can find more information in our Security Practices Framework document, you can request a copy from the Support Team or your Inside Account Manager. We encourage you to collaborate actively with us to enhance security and address any specific concerns.

Your Support Engagement

As part of our commitment to providing exceptional service, we will conduct regular reviews of your engagement with our Support Team. The primary objectives of these reviews are to:

1. Ensure you're maximising the value of our support services
2. Identify opportunities to enhance your experience
3. Maintain a balanced and sustainable support relationship

Our review process includes an analysis of your case volume in relation to your support plan. This helps us ensure that the support provided aligns with industry standards and the terms of our service agreement.

In instances where we identify unusually high support utilisation that exceeds reasonable use thresholds, we take a collaborative approach. Our team will:

- Reach out to discuss the findings
- Work closely with you to understand any underlying issues or challenges
- Develop tailored strategies to address high-volume areas
- Provide recommendations for more efficient use of our support services
- Offer additional training or resources if needed

In some instances, addressing high support utilisation may involve purchasing additional case packs. These case packs provide a cost-effective way to extend your support coverage, ensuring you have the necessary resources to address your ongoing support needs without interruption.

Our goal is to maintain a mutually beneficial partnership that provides you with the support you need while ensuring the sustainability of our service model. We're committed to working together to find solutions that meet your needs and align with our service capabilities.

Should any adjustments be necessary, we'll approach the process with transparency and flexibility, always keeping your best interests in mind.

Escalation Process and Feedback

Case Escalation

We strive to provide the highest quality of support for all our clients. However, we understand that there may be instances where you feel an issue requires additional attention. If you believe that a case is not being investigated properly or has not been resolved to your satisfaction, please follow our escalation process:

Initial Escalation

Document your concerns in detail, including

- The reason for your dissatisfaction
- The impact of the problem on your business
- Any relevant case numbers or references

Send this information to support@pa.com.au, addressing it to the Support Manager

Further Escalation

If your concerns are not adequately addressed within a reasonable timeframe following the initial escalation, you may escalate the issue to your Inside Account Manager, or your Client Success Manager.

We are committed to resolving your issues promptly and effectively. Our escalation process ensures that your concerns receive the appropriate level of attention and are addressed by senior members of our team when necessary.

Continuous Improvement Through Feedback

At the closure of each case, you will receive a Net Promoter Score (NPS) survey. We highly value your feedback as it helps us:

- Understand your support experience
- Identify areas for improvement
- Enhance our support processes and services

Your honest responses to these surveys are crucial in our ongoing efforts to refine and improve our support offerings. We carefully review all feedback and use it to drive meaningful improvements in our service delivery.

Whether through the formal escalation process or our NPS surveys, your input is invaluable. It enables us to continually enhance your experience and ensure we're meeting your support needs effectively. We appreciate your partnership in helping us deliver exceptional support services.

What We Support

Previously Working Issues: If a feature, function, or service that you have used successfully in the past is now malfunctioning or not performing as expected, we are here to help. Our support team is dedicated to troubleshooting and resolving these issues.

If during troubleshooting a previously working issue we identify it is relating to any of the below;

- Client specific customisation
- Configuration of integrations or workflows requiring review
- User error
- Performance diagnostic analysis
- Data Repair
- Implementation of a Vendor provided solution
- Changes to environment not implemented or approved by Professional Advantage
- Incompatible, or unstable software not provided or represented by Professional Advantage

any further work related to this will be provided on a time and material basis after obtaining Client approval.

How Else can we Assist

For any other queries or assistance beyond previously working issues, we are happy to help. However please note that these services will be billable on a time and materials basis. This includes, but is not limited to:

- Training and guidance
- Configuration/installation/Uninstallation
- Change requests for existing features or functionalities
- Reconciliation of data
- Writing SQL scripts
- Report writing
- Database backup and restore

Exclusions

While our support team understand accounting principles behind your finance software, PA is not able to provide accounting advice or assist in the reconciliation of a client's system. This is the responsibility of the client.

Review or recommendation regarding business processes.

In-House IT responsibilities not covered by an existing Managed Services Agreement with Professional Advantage.

Defect Repairs

At PA's discretion, PA may provide a software defect repair to the client based upon a variety of decision factors.

Defect repairs will be made in the latest service pack of a Supported Version. To illustrate the intention, if a Client is on Version 18.1 but the current active point release is 18.1.2, then a new defect repair will be released via 18.1.3 and the Client will be required to accept said defect repair in 18.1.3.

Notwithstanding the availability of defect repairs in this clause, the charge for any Services associated with Products upgrade or configuration, including the installation and/or upgrading of software, and the re-application or modification of Customisations, will be charged on a time and materials basis.

Client Management Team

At PA, the successful management of your account is a critical element in the delivery of our mission to help your organisation achieve more. This collaborative engagement is delivered by your dedicated Client Management Team. Your Client Management Team includes an Inside Account Manager and Client Success Manager;

- **Inside Account Manager** – Responsible for managing the engagement for your existing system. This includes the day to day operations, contract renewals, issue escalation, upgrade conversations and all contact management associated to the existing systems.
- **Client Success Manager** – Responsible for developing and managing an engagement beyond your existing system. The focus is to extend our relationship and work on a joint strategy for the medium to long term.

To manage our relationship, a program of regular meetings will be maintained with you that will cover both usual operational issues as well as relevant strategic issues. This will enable PA to contribute ideas that may enhance the achievement of your objectives. Your Inside Account Manager and Client Success Manager will work together to ensure your overall satisfaction with your existing system and plan for continued future success.