Customer Guide

Helpdesk & Product Support

[Customer Name]

FOUR

BUSINESS

SOLUTIONS

4.

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Help Desk and Product Support Summary

Four's Help Desk and Product Support is designed to help you run your business system software confident that if anything goes wrong you have the backing and support of Four who value your business and understand the consequences to you when technology goes wrong.

All clients who pay annual maintenance automatically join the user group and are entitled to the range of services detailed below.

In addition, there are a number of optional components that can be added to your Service Level Agreement (SLA). These services can be added sometimes for a small fee, you should consult with your 'Account Manager' or 'Business Director' for further details

Help Desk and Product Support include:-

Telephone Support

Our help desk is open from 08:30 to 18:30 five days a week and resolves over 90% of issues when the call is placed.

> " Four's help desk really understand customer care, I've always found them most helpful and professional."
>
> " I feel completely confident that Four are looking after my interests, both IT technology and software support."
>
> " I think what Four have done with support will make their competitors realise just what customer service really means."

Remote Support

Some issues are best resolved by accessing your system directly. We have the technology that enables us to gain secure access to your system over the web.

On Site Support

If gaining remote access to your system will not solve the problem, we will come on site. You may also want us to provide cover for any of your support staff who are away, or additional cover during a business critical period like year end or whilst part of your system is being upgraded.

Training and Skills Development

Maintaining/developing the skills and understanding of your colleagues and staff is important if you want to get the most from your system. Four offer a range of courses which can be viewed over the web or discussed with your account manager. These are high quality courses designed and tailored for each client so that documentation, reference data and location are all tailored to your specific needs at a price you would expect to pay for a public course.

User Group Membership

Our User Group is designed to be fun and informative. We share experiences and issues associated with your software and keep you up to date with product updates and development strategies. We also run workshops and seminars as appropriate so that clients with common business issues can work together.

Software Upgrades

Software upgrades are an important part of the investment you have made in your annual support contract. We install any patches or upgrades as provided by the relevant software author. We do not believe in charging for these or only helping when something has gone wrong, rather we would prefer to install them for you as part of your annual maintenance contract ensuring you receive excellent value for your annual maintenance.

Account Management

We want to be proactive. We want to understand your business issues and work with you to resolve them. Account management is one way we can do this through regular reviews throughout the year and proactive telephone contact to ensure you are happy with every aspect of our service.

Extended Telephone Support

Telephone support can be extended to provide full 24 hour and even weekend coverage if required. If this is just occasionally, simply speak to your account manager, if you require this as a permanent service then we will be happy to work with you to ensure the service is provided at a competitive cost.

Disaster Recovery Services

We can help you with disaster recovery including client survey and recovery plan design, dry runs, testing, configuration changes and in the event of a real disaster business resumption on or off site.

Systems Audit and Due Diligence

With workflow technology and electronic processing this service is designed to assess your use of your software and system, identify any immediate problems and make recommendations as to how you could make better use of your system. The service also highlights any 'Teaming and Lading' concerns and acts as a useful document to provide your auditors with comfort for their annual shareholder report.

Technical Support

In today's environment the complexities of a client's operating environment with relational databases, mail engines, firewalls, web servers, accounting systems, virus issues and many layers of integration you need a first class support operation to provide you with valuable support when failure strikes. We can tailor our service which can be on site, remote, System related only, or tailored to your individual needs.

RDBMS/Database Support

Our Help Desk consultants can also provide training and support fro MS-SQL Server and remote diagnostics support if required. Additionally, we provide database tuning services for both MS SQL Server and Oracle.

1   Four Help Desk Structure and Call Escalation

Customers can log calls by phone and email or via the Internet.

1.1   Types of Support Calls

Support calls are usually made for the following four reasons:

1.1.1   Use of the software

We ask that clients email these issues to us whether they are reports that appear incorrect, functionality that has changed or software that has 'locked up' or stopped working. By documenting the problem and what you expect to happen we can more readily diagnose the problem and will give a professional, focused response to the problem. These calls are more noticeable after an upgrade has been completed or a new module implemented and we would like to highlight that there is a clear correlation linking the level of training undertaken by a customer and the smooth use of the product. These queries can also take the form of reports which do not appear to be correct but can frequently be rectified over the telephone or using remote diagnostic facilities to look at your setup and data files.

1.1.2   Information request

Requests for product information, services or additional module enquiries can be emailed or telephoned through. The help desk will be happy to discuss any consultancy options and clients may also find useful information 24-hours a day via our web site www.four.co.uk. Your account manager is available to discuss your requirements and provide the opportunity to view the product in more detail and she/he will be asked to ensure any queries placed on the help desk are followed up.

1.1.3   Suspected bug or data corruption

These types of calls are infrequent and rarely turn out to be a genuine case. A good system back up procedure and strategy is essential to minimise the impact on your organisation where these problems are identified. Your account manager will advise you how your system can be properly backed up so that you are adequately protected.

1.1.4   Technical Problems

Whether the problem relates to your operating system, network, relational database, firewall, hardware or some sort of communications failure it is fair to say that these calls are fairly frequent but can often be complicated and difficult to resolve especially quickly. Before logging a call, it is important to write down exactly what has happened or changed since the system was last operational. It should be borne in mind that a large number of these problems are operator initiated. Carefully recording and discussing all the changes to the system with Four's help desk however remote they may seem, will speed up the resolution.

These calls are often best resolved by allowing Four remote access to your data and system files. If we need to attend your site we will liaise with you and arrange for a technically qualified consultant as quickly as possible. This may be out of hours to ensure we can resolve the call quickly but we will need a member of your staff present through the night or over the weekend as appropriate.

1.2   Help Desk Structure

Four have utilised a modern help desk structure to handle calls in an efficient and timely fashion. The objective is to try and clear all calls as they are received.

1.2.1   Call Classification

To ensure the most efficient and appropriate response to your query or problem we have introduced a call priority classification system similar to our software authors along with a call escalation procedure:

A. Mission Critical – a major systems fault, which stops you from working.

B. Operation Problems – problems experienced with a particular function.

C. Enquiry / Request for Help – difficulties you encounter with the use of the system which do not impede your work.

D. Information Request – non-urgent information or advice.

E. Hardware Maintenance – hardware related problems covered by a hardware support contract, which we notify on your behalf with a third party.

You can reach the Four help desk by calling our telephone number which is **0800 625 0025**

a dedicated support line number or alternatively you can email **helpdesk@four.co.uk**

The following call escalation methodology will be followed whenever you register your support call. Each phase as detailed below represents a different set of responses that you can expect depending on the nature of your call and the stage it has reached.

1.2.2   First Line Help Desk

The Four help desk receives your initial support query. They are trained software consultants, with a background in customer care. They use up to the minute telephone technology including caller identification and call logging software and have access to our extensive knowledge database, in addition to a team of consultants. On average we will spend up to twenty or thirty minutes on each call before escalating the call to the second line help desk.

1.2.3   Second Line Help Desk

A call is escalated to the second level when it cannot be resolved within the initial time period. The call is then either picked up by the original help desk professional during a dedicated client investigation period. The client investigation period is a dedicated time period each day used to investigate queries that could not be resolved quickly and 'timed out' earlier in the day

Calls referred to the second line help desk will be tackled by the help desk professional by attempting to simulate the problem through a process of replication initially using a local copy of the product on their system. If this does not yield results then the help desk consultant will try and recreate the problem in a similar computer environment. If the problem still persists or we are not able to duplicate the environment we will seek to investigate the data files in your environment via an internet connection.

Help desk consultants move between the first and second line desk to reflect the pressure experienced in a call centre environment. The second line help desk does not consist of more senior staff.

1.2.4   Help Desk - Virtual Team

If a problem remains unresolved after a reasonable level of second line support investigation then the client business director and account manager will be notified and a "Virtual Team" will be created to escalate the problem further. This virtual team is explained in greater detail as it represents an important stage in the resolution of the most difficult calls we receive.

To ensure that the virtual team contains the necessary expertise, team members will be resourced from throughout the company. The team may include operating systems experts, database consultants, data corruption professionals as well as help desk professionals with the most relevant skills for the product(s) concerned. Depending on the nature of the problem the team may also incorporate your account manager and the software authors. It may also be necessary to include a representative from the company that

provides your hardware or communications support. At all times the main focus and priority of the virtual team will be the resolution of your problem and a team leader will be appointed to help co-ordinate the process and report back to you on a regular basis.

The virtual team will work to eliminate those areas that may be causing the problem. These may include the database, the operating system, application(s) or application area(s), data which may be corrupted, network and communications or possibly user error. The virtual team will work to eliminate each factor that they have highlighted as important according to your unique situation. Each environmental factor will be tested both in isolation and concurrently. Progress on your problem will be reported back and discussed with you to ensure that the process remains focused and is conducted to your satisfaction. Details of the problem and the action taken will be recorded in the knowledge database and the call logging system - you can obtain password-gained access to these details through the Four web page.

1.2.5   Help Desk Calls With No Resolution

It is very rare that after an investigation has been carried out, that a support call will remain unresolved. This is only done after the appropriate consultation with our customer.

1.2.6   Remote Support

Remote support is provided via a web browser connection and connection to WebEx software suite. Frequently problems are more easily spotted and remedied by looking directly at your system and data directly. There is an technical document at the back of this document which explains the data security and secure socket layer encryption used by WebEx to ensure total security of your system and data.

1.2.7 Typical Call Resolution Flow Diagram
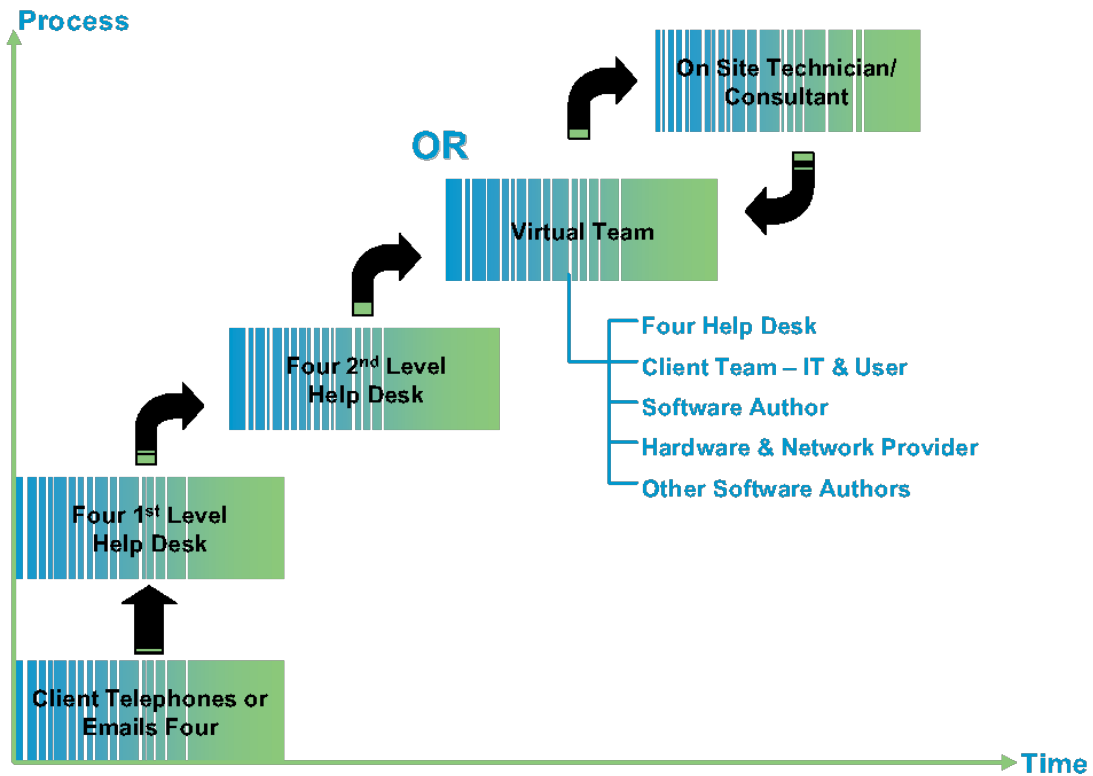
1.2.8 On Site Support

On site support is sometimes required and where this is appropriate we will arrange a convenient time for a consultant to visit on site. The consultant will be given a specification of the problems to try and resolve, and at the end of their visit they will complete a timesheet for you to sign and amend as you see fit.

1.2.9 Knowledge Database

The knowledge database is a huge project in time and resources that is intended to serve as a valuable reference tool for Four staff and our clients alike. It is a library of information to assist the help desk when solving your support queries and is designed to draw together the knowledge that exists in the company at large. All product information and documented problems experienced across the company and by our partner software authors will be entered into the knowledge database. Our application, technical and business consultants update the knowledge database so that 'work arounds' and client specific solutions can become part of a common resource which helps provide consistent service standards.

The knowledge database offers a sophisticated research tool, which can be accessed by our partners, consultants and software authors via our extranet facilities.

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2   Software Authors

Four has developed the strongest relationships in the industry with the software authors of the products we distribute and support. We only support reputable products that we feel are sufficiently robust and have undergone extensive testing. When we encounter a problem with a piece of software, we expect to receive close attention and a speedy resolution; however, software development is a notoriously difficult area and time lines are apt to shift so the resolution process can become extended. Four work with all our software authors and partners so that when we come across a particularly complex and seemingly intractable problem we are able to keep tight control of the process and the progress being made.

3   Operating Systems and Databases

Operating system support is included with your contract and entitles you to assistance with problems that are linked with the operating system. Remote support facilities are a prerequisite for operating system support. The only responsibility that remains yours is the precautionary routine of changing the backup tapes.

4   Help Desk Policies

Five policy decisions have been arrived at to ensure that the help desk provide our customers with first class advice and service at all times.

4.1   Policy Decision for New Releases and Upgrades

Where products supported by the Four help desk are upgraded or new releases are made available, we will ensure that you are not left unnecessarily exposed to the different support issues that may arise.

Four carry out internal testing and quality assurance checks to supplement the testing carried out by the software author. This helps to eliminate bugs that may be present and offers a more secure product

Upgrades are a complex area and the impact they have on your business is often not fully appreciated. We work with our partners and software authors to ensure a structured approach to clarify the process and minimise the business risk to you. We always recommend a careful planning phase before any upgrade is started to ensure the minimum disruption to your business and a well thought out contingency plan in the event of failure.

4.2   Policy Decision for Training

Four frequently receive user queries that tend to display an insufficient grasp of basic software principles. This would suggest that training is required. It should be emphasised that the help desk is not designed to offer training. Four are happy to answer these queries where possible, unless they place unnecessary pressure on genuine help desk calls. We have therefore devised the following guidelines to make clear what qualifies as a genuine support query or a training requirement.

Any number of calls can be placed to the first line help desk where a user knows the subject matter but requires confirmation that they are using the system correctly. Four welcomes you placing calls as often as you need, even if it is just to confirm a small issue.

Generally if clients cannot resolve the problem in the first ten minutes then this indicates a training deficiency which you are encouraged to address through training.

In the situation where training is required we anticipate you will want to undertake the relevant course or arrange for on site training.

4.3 Policy Decision for Chargeable Visits

Four's primary objective is to ensure that our clients receive the very best levels of customer service, help desk assistance and product support. In delivering this we are occasionally asked to rectify problems that are not related to the software and not related to what can be reasonably expected under our annual maintenance contract. In these circumstances we believe in resolving the problem first and then presenting this to our client where we can discuss how much should be charged. If at any time you feel unhappy with these charges you are welcome to speak with your account manager and cancel the charge. Where a client takes advantage of this approach the business director will agree an alternative approach for future chargeable visits.

5 Help Desk Skill Sets

It is vital to the success of Four that the help desk should include high skills levels across a broad range of product areas. The technical director is responsible for ensuring that skills are matched in all these areas and high standards maintained.

It is the technical director's responsibility to ensure that adequate skills exist across all supported products in the help desk team, to guarantee prompt answers to calls.

5.1 Quality Assurance

The technical director reviews a sample of all calls to ensure a consistent standard of response is maintained. They will check where necessary the approach, resolution and speed of response. Additionally, they will update the knowledge database and call logging system with any new operational checks to improve the quality of help desk responses.

The account manager and business director also carry out quality checks on an ad hoc basis. They call clients periodically to evaluate the level of satisfaction following an onsite visit or a series of calls to the help desk.

6 Customer Services and Account Management

Your account manager will also hold periodic review meetings with you. These offer an excellent opportunity to review the calls you have placed with the help desk and how you would rate the standard of support provided.

The account review can also examine future requirements your company may be contemplating, in addition to providing an assessment of your training requirements.

6.1 Customer Service

Information is available to customers in a variety of forms. Four produces a product-based newsletter and seminars are held regularly at our office on a variety of product and IT related issues. Your account manager can provide product, training and service information as requested.

6.2 Web Access

The World Wide Web plays a vital role in Four's service provision. Our web site gives you access to a wealth of information provided you have a valid ID and password. The following services and information are available for you to access:

- Training Information
- Product Information
- Sales Information

- Help Desk Information
- User Group Details
- Seminars

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- Conferences
- New Release Details
- Partners and Links
- Maps of Offices
- Call Statistics
- Case Studies and Links
- Training Booking Form

- Members of the Management Team
- Terms and Conditions
- Contact Information
- Company Overview
- Call Status Information
- Technical Tips

7 User Group

The Four User Group meets regularly in London and key UK locations, in order to update customers on current developments with their product. It is a workshop-based forum to update clients, present ideas, explore new ideas and exchange suggestions with other users. This event is attended by many customers and is supported by our software authors and partners.

8 Skills Development and Training

Four understands the importance of high quality training and has invested in a variety of training mediums which can be rolled out across your organisation. We develop courses to reflect the needs of our customers. Please email training@four.co.uk with any enquiries you may have or speak directly to your account manager.

9 Bugs and Patches

Software authors release patches for recognised problems that customers may be experiencing with the software they are using. If you encounter a problem, which is corrected by a particular patch we will either email it to you or you can simply download it from our web site. Where a software problem is identified and no patch is available we will endeavor to inform you of the potential issue and keep you updated as to its development.

10 Hours of Operation

Four normal hours of operation are 08:30 to 18:30.   If you anticipate the need for weekend work or increased hours during the week then these can be arranged by mutual consent. Please speak to your Account manager who can arrange this for you.

11 Customer Complaints

Four treats any areas of customer dissatisfaction and any improvements you may suggest very seriously. We actively encourage you to let us know if there is any aspect of our support – however small – that you feel needs improvement. Our account mangers and business directors handle all complaints whether written, spoken or implied and will seek to redress any area where we have failed to deliver high quality service.

Clients can expect to receive confirmation that a complaint is being dealt with, detailing the steps being undertaken and a time scale for its resolution. The complaint history will be recorded, discussed at board level and made available for public inspection.

12 Competitors' Customers

If you want to switch your support contract over to Four but already have an existing contract elsewhere, we will be interested to know what your reasons were for approaching us and if you were encountering particular problems that we should be aware of. This is in order that we can meet all your expectations and pay close attention to any pre-existing problem areas.

13 Cancellation

Four recognises that our customers may need to cancel their contracts. We ask that you give us three months notice before cancelling your agreement.

14 Statement of Staff Quality and Commitment

Quality must set us apart. Therefore, we set and maintain the highest standards for our people, products and processes.

1. Clients have to be our priority: we aim to meet their needs while always striving for market leadership.

2. We must have teamwork in order to maintain the integrity of the whole. We therefore encourage and reward teamwork in relationships among employees, clients, software authors and partners.

3. We are aiming for profitable company growth and believe strongly in developing all our people. We acknowledge the essential link between these two important ideals.

4. We want to maintain a positive work environment, characterised by openness and respect for the individual. Each and every one of us shares in the responsibility for making this ideal a reality.

5. We know that there is a clear link between developing people and ensuring they attain maximum job performance, thus ensuring Four is able to achieve its business goals.

6. We know that when our people feel they have opportunities to develop within their jobs, they will enjoy greater job satisfaction. This means they will continue to want to work for Four.