PA SunSystems Solutions Service Level Agreement

Contact Us

Portal: https://support.professionaladvantage.co.uk/

professional advantage

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Overview

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 from our website - Client Support - Professional Advantage.

To the extent there is any inconsistency between the provisions of this Agreement and the Commercial Agreement, the provisions of the Commercial Agreement prevail.

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 Professional Advantage Account Manager.

Note: *If your application support is being provided by a PA Partner, please log all support queries via your partner who will then liaise with Professional Advantage.*

The Professional Advantage Team

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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:

1. Swift issue resolution
2. Comprehensive support coverage
3. 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.

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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

If you are on premise, your organisation is solely responsible for safeguarding company data, including:

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

Maintaining a Test Environment

A dedicated test environment is crucial for:

- Minimising risks to your production environment
- Testing new solutions and upgrades

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- Isolating and troubleshooting specific issues

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

If you are on PA Cloud, your SaaS fee includes a Test environment.

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.

If your maintenance or subscription fees are not paid, you are not entitled to support . For PA Cloud sites, your PA Cloud Platform may be deactivated.

Your Pre-Support Checklist

Do Some Initial Investigation

Consult your internal Nominated Support Representatives to:

Review available resources:

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- Previous Cases on PA 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 PA 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)

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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

Our team can be contacted via:

Portal: https://support.professionaladvantage.co.uk/

Initiating and Managing Support Cases via PA Portal

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 PA Portal Services:

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

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

How to register for PA Portal

To register for PA Portal, go to https://support.professionaladvantage.co.uk/. Click on the "Register" button and complete all details. Your Username and Password will be emailed to you within the next working day.

Support Hours

Our Help Desk operates during the hours between 9:00am and 5:30pm (GMT/BST), Monday to Friday, excluding UK public holidays (Support Hours).

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On Call Support

If you need out of hours support, you can pre-arrange to have your call diverted to a mobile phone. There is a minimum charge, (double time at weekends), to divert your call to the on-call Support consultant who will determine the appropriate next course of action.

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")

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:

Priority	Severity Description	Example	Target Response Time
1	Critical	Your entire system is inoperable, and your organisation is critically impacted	1 hour
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.	3 hours
3	Medium	A function is not working correctly but is not mission critical. Often a workaround	5 hours

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		will exist although the issue does need to be resolved. Your business is not seriously affected.	
4	Low	A question or request for information regarding existing systems, new product or functionality.	One business day

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

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- 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.

For more details on confidentiality, please refer to your Commercial Agreement.

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 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.

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 your Commercial Agreement. 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:

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- 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 info_uk@professionaladvantage.co.uk addressing it to the Country Manager.

Further Escalation

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

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.

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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 chargeable 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. Examples below (not exclusive):-

1. Problems arising from Client performed installations or upgrades
2. Problems arising from data imports or data conversions.
3. Consultative activities:
    a) Creation of reports and dashboards, or non-performance of reports and dashboards created or altered by Client.
    b) Complex usage questions addressed during training in the implementation phase
    c) Training (user or administrator)
    d) System setup, configuration, or re-configuration
    e) Solution installation
    f) Report writing
    g) Software development
4. In-House IT responsibilities relating to your environment, not PA Cloud
5. Resolution of issues caused by incompatible or unstable software not provided by or represented by PA.

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6. Troubleshooting computer devices at the Client's locations, i.e., machines (computers, printers, devices) which do not form part of the applications you use.

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 22.1 but the current active point release is 22.1.2, then a new defect repair will be released via 22.1.3 and the Client will be required to accept said defect repair in 22.1.3.

The charge for any Professional Services associated with the application 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.

- **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.
- **Support Manager** – Responsible for reviewing your overall engagement with the Client Support Team. The objective of the review is to ensure that you are utilising our services effectively and efficiently.

To manage our relationship, a programme 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 Account Manager will work together to ensure your overall satisfaction with your existing system and plan for continued future success.

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