



Your Intacct Support Services Handbook

Transforming business
through technology

CPIO | Platinum Sage Business Partner

Welcome to CPiO Support Services

Get the most from your Sage Intacct software. CPiO Support Services improves the extensive software help files and resources already available to you via Sage. Our team of Sage Intacct experts are here to help you throughout your journey with personal advice and support when you need it most.

Our Sage Intacct team is trained and certified in the software and is available to you Monday to Friday from 08:00 to 18:00 excluding statutory holidays. Please note a reduced service may be provided between Christmas and New Year, details of which are sent out via a support bulletin.

Outside of normal working hours, e.g. before 8.00 am, after 6.00 pm or at weekends, you can contact the hotline support team by email ready for the problem to be logged as soon as possible for the next working day.

There may be exceptional circumstances when you require assistance outside of the normal working hours including weekends or public holidays. Arrangements can be made to allow you to contact a nominated consultant, subject to prior agreement.

How to access CPiO Sage Intacct Support



0344 880 6155



hotline@cpio.co.uk

As a Sage Intacct customer, you have several ways to contact one of our experts, including by telephone. The dedicated support line is answered directly by a Support Consultant to provide the shortest possible response time to a problem.

You can contact us for:

Analysis of fault logs and provision of program fixes and workarounds

Although software authors make every effort to supply defect-free software, it sometimes does not function as designed, which affects the operation of the products. In this event the support team is responsible for working with you to, where possible, supply a temporary solution, whilst the problem is reported to the author to gain a permanent fix to the issue. Where the problem is intermittent, immediate diagnosis is not possible, or non-defect related issues adversely affect the software, appropriate advice, or assistance will be provided.

We will log any system issues with Sage direct through the Sage Intacct Support portal. Then provide you with details and timings of the fix/update required.

For some problems, it will be necessary for the Support Consultant to request full recreation details from you to enable them to recreate the problem before it can be reported to the software author for investigation or testing resolutions.

Training and guidance

Sage Intacct offers world-class support to users. But sometimes, you may need that little bit of extra help or advice that you simply can't get from an online help file. You can call us if, for instance, there is a lack of understanding of a particular feature despite appropriate training or a query as to whether the software performs a function in a particular way.

Generally, if your query can be closed satisfactorily within 15 minutes, a Support Consultant will deal with it. For any query that requires more time, we'll offer you some alternative training or consultancy routes to get you the knowledge you need.

CPiO encourages all customers to opt for a Support Plus package which provides your users with a pot of time against which additional support services can be called off. Ask a member of the team how you can access Support Plus.

Minor change requests

Customers may, from time to time, ask the Support Team to make amendments to software such as adapting a field on a screen. We call this a Minor Change Request and we may ask you to complete a short form to ensure that we understand the requirements and we can advise you of any implications. It also ensures that proper authorisation is granted, in line with any security you may have set concerning user permissions.

For some tasks such as a data cleanse we may have to work with the Software Authors to complete. CPiO reserves the right to charge for time that we deem unreasonable to expect under normal support, but this will always be identified to you and agreed upon upfront before any work commences.

We recommend that you notify us immediately of any changes to or new installations of software locally on your servers such as changes in anti-virus software that may interfere with access to your Sage Intacct solution.

We can only access your system with your permission.

Contacting the Support Desk

CPiO recommends that you have named individual(s) that contact the Support Team. This enables you to track what is happening at your site, as well as be able to prioritise the logs that have the highest business impact for you. We also recommend that all users are identified as either:

Super User: A support Super User holds full administrative access rights to your application(s), has the authority to make decisions regarding the application(s) including granting access to other users, changes of processes, routine maintenance, additions or deletions across the whole solution.

Standard User: A support Standard User has limited access rights and cannot request changes to the system without the authority of the named Super User.

Upon contacting us, and after security screening, you will be asked to supply some basic information to log your query. As soon as the query is logged a log number will be assigned and issued to you. This number is a primary reference for all further actions until the issue is resolved to your satisfaction. The log number should be quoted in all discussions and correspondence.

At this stage, please be prepared to provide the following information:

- Company name and contact details
- A description of the problem
- Screenshots or any evidence that may help us to initially resolve your call

A note on security and privacy

CPiO retains the right to ask security screening questions where we deem the information to be company or contact-sensitive. We will also seek written authorisation from you should you wish to alter security or access rights. We regret that no company or contact-sensitive information will be relayed verbally over the phone; CPiO utilises a secure messaging service to deliver such information. If you require additional security or authorisation procedures please contact the Support Team to discuss.

CPiO will conduct an audit of your support contacts annually to ensure that the information we hold is up to date and to confirm any authorisation procedure that may be in place.

Please notify the Support Team of any changes to Super User personnel as soon as possible as this could affect the level of service we can provide.

We record our calls for training and quality purposes.

How you can help us to be more efficient

Before submitting new calls to the Support Team please ensure that:

- The question has not already been logged and is awaiting a response.
- The question has not been resolved previously and an answer was provided.
- The product is/is not functioning as documented.
- Trends in queries are spotted and training is undertaken or requested where required.
- The problem can be replicated to ensure the cause is not a procedural error.

Prioritisation and responsibilities

To provide a timely and appropriate service for all our customers, you will be asked to work with us in assigning a 'Priority Level' to each problem or question raised with the Support Team. These Priority Levels not only tell the Support Consultant how each problem affects you and your end-user organisation but also assist us in prioritising and managing the work that is done for you.

The 'Priority Levels' below are initially assigned by you but may be changed by the Support Consultant. You will be advised by phone or email why the change was made. The times given for the initial response indicate the first diagnostic review, following which subsequent action will be agreed.

Priority	Description	Examples	Actions & Response Times
P1* (High)	<p>A complete loss of service, a critical feature, or function.</p> <p>Users are unable to access or use the system, a feature, or function which is critical to business continuity.</p> <p>The issue will prevent the ability to meet critical business deadlines which will result in penalties or loss of revenue.</p>	<ul style="list-style-type: none"> - Total system outage on Production; systemwide slowness or performance issues - No users are able to log in; Admin(s) cannot log in. - Unable to submit financial reports to auditors - Unable to invoice/send a document for on-demand urgent transactions - Unable to create transactions, process checks, or issue payments in the system due to system error (non-config related) - All recurring transactions failed 	<p>Initial Response:</p> <p>All Support Levels: Within 1 hour</p>
P2 (Medium)	<p>A degradation or intermittent issue with system performance.</p> <p>An issue that is resulting in a significant degradation in the use of the system.</p>	<ul style="list-style-type: none"> - Unable to print transactions - Reports timing out - The custom-built report is not working, no workaround available, the client is dependent upon this report to complete activities - Integration issues such as data/documents not syncing - Error message encountered when completing an activity; errors while importing transactions, but the user can manually create transactions in the interim. 	<p>Initial Response:</p> <p>Support Levels : Within 4 hours</p>

P3 (Low)	<p>Product questions regarding features or functionality.</p> <p>The issue is not disruptive to the customer business but does require attention.</p> <p>A reasonable workaround exists</p>	<ul style="list-style-type: none"> - Reporting issues, including runtime parameters not working; financial report formatting issues. - How-to or basic set-up questions, such as how to create a bill or how to set up an inventory item record. - Any issue that exists in only a copy or testing environment. - Typos on any pages; documentation issues; minor UI layout issues. - Not a valid response received via API but has a valid workaround. 	<p>Initial Response:</p> <p>Support Levels Within 8 hours</p>
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Where the Support Team is unable to progress a log because you have not responded to repeated requests for further details/action, the log may be closed at CPiO's discretion. Logs that have been closed for more than 3 months are archived and cannot be re-opened.

If no response is received within the agreed timeframe, you will be contacted either by phone or email reminding you that a log is outstanding. At this stage, you will either be asked for further information to resolve the problem or confirmation to close a log. This is carried out according to the priority of a log.

Definitions of the priority levels that can be assigned to your logs are as follows:

The case priority conveys the seriousness of the logged issue or inquiry. We use the priority as our guideline to determine responsiveness as well as case management. Please note, if you do not select a priority the default is a Priority 3 (P3) when creating a case. **NOTE: Priority definitions and response times pertain to production companies only.**

* For P1 issues, the customer is expected to be available to assist the Support Consultant assigned to your case. If you cannot respond within 15 minutes, or the Support Consultant is unable to contact you, your case priority will be lowered.

System Status Codes

During the lifecycle of a support log, the Support Consultant always allocates a status code to the log. The codes are detailed below:

Status	Description	Next action with
Open (and owned by unallocated)	Query logged. First response required	CPiO
In process	Adequate information obtained and log under investigation	CPiO
With customer	Response provided to the customer, awaiting update	Customer
With software supplier	Query referred to software author for further investigation	CPiO
Ticket on hold	Log on hold	CPiO
Closed	Log closed	Either

Calls on hold

CPiO will only allow a call to be placed on a HOLD status where a customer has requested time to complete their investigations/testing. After the agreed time, a call will be chased for a response and if no response is received after the first chase, they will be sent a subsequent chase with a closure date of a call. If CPiO still does not receive a response the call will be closed. A call may be re-opened at any time within the subsequent 3-month period, after which a new ticket must be raised and will be treated independently.

Escalation procedures

We track every single support ticket you raise; each is given a 'next progress date' based on the priority of the issue and the agreement between you and our Sage expert. But don't worry, if a ticket remains outstanding for more than 24 hours past its progress date it is automatically escalated for further action. Likewise, if the circumstances around your ticket have changed and you feel the priority has changed please see the below on how to escalate.

Customer-driven escalation

Where circumstances surrounding a support issue change, it may be necessary to change the priority of a log. To do this, the following actions are recommended:

- Contact the appropriate Consultant with new details.
- If he/she is unavailable, contact the Support Manager. Agree with the Support Manager on the new priority required and response dates if appropriate.
- If neither of the above routes has proved satisfactory then contact either the Operations Manager or Technical Director.

Your escalation team



Support Manager

Siobhan Finegan
siobhan.finegan@cpio.co.uk

Operations Manager

Rob Bradley
robert.bradley@cpio.co.uk

Technical Director

James Bedford
james.bedford@cpio.co.uk

Support Plus

Support Plus provides you with additional services on a time and materials basis. This 'call off' time is billed in periods of 15-minute blocks and can be used for any issues outside of our normal support services such as additional training. Support Plus gives you even greater assurance when you need it most.

