



**P&L TECHNOLOGY, INC.**

Putting our Customers in a Position to Win

**100% ACCOUNTABILITY**

*Primary Contact Handbook*

*V1.09*

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## Introduction

Thank you for selecting P&L Technology to provide Managed IT Services to your business. We are looking forward to working closely with you and your company to optimize your IT experience. This is a guidebook for our “Primary Contact”, or the person we work closest with in the delivery of these services. This guidebook will serve as a guide to help smooth and optimize the interactions between our organizations and let you know what to expect from us.

## Role of the Primary Contact

The primary contact serves many critical roles in the interface between P&L Technology and the client.

### Receive proactive notifications

- We are proactively monitoring your systems and will call or email you depending on the severity of the issue detected. Issues detected could be low disk space, Internet outage, server outage, or backup failures.
- On some issues, we may need you to help us make a decision such as the authorization to add more disk space to the server. Some decisions may require authorization of an extra expense to properly resolve the issue.
- Because we are monitoring your systems outside of business hours, we will record a mobile phone number for our primary contact and will call you if a critical outage is detected. We can then jointly make plans to address the problem before it becomes a work-stoppage situation.

### Add or remove users from the support service

- Only the primary or backup contact is authorized to add or terminate employees from the support contract as well as associated accounts, email systems, VPN access, etc.
- You will contact our service desk with any new hires or employee terminations
  - New Hires - It is important to communicate as early as possible when a new hire is made so P&L Technology can create accounts, email addresses, and apply security settings. Occasionally, the primary contact may forget to notify

- P&L Technology until the person has actually started and this can create a lot of difficulty in getting the new employee up and running in a timely manner
- Employee Terminations - We recognize that these can often need to be done on little to short notice. For critical response needs, please call our service desk team or after hours team. We will work to disable accounts, reroute email, and ensure your needs are taken care of. For terminations when you know when the last day for that user is, you can let us know as far in advance as possible. We can create a request and set the date to handle the termination on that date.

**Keeping us aware of changes.** For the best experience, we need to hear from our primary contacts when their organization is making changes to the IT system. Changes may include things like bringing in new software, changing phone systems, new multi-function copier devices, or changing Internet service providers. Often, P&L Technology will get a call when the other company is already onsite trying to hook up the new technology and then we aren't in a position ensure the outcome is timely and positive for you.

## What's included in your Managed Services Agreement

P&L Technology's goal is to make your agreement simple, and as a result, almost all activity relating to your IT network will be covered under your monthly service agreement. However, there are a few items that are not included in your agreement. Should you need any of the below services, simply ask us for a quote. They include:

- Installation labor for new software that you are adding to your network.
- Installation labor for new equipment that you may purchase for your business. This could include PCs, Servers, Routers, Wireless Devices, Printers, and so on.
- We will perform upgrades to existing software on your system as long as they can be done remotely and in under one hour. If a software packages requires an onsite visit or more than one hour, we will provide a quote to perform this upgrade as a project.
- Replacing equipment under warranty. P&L Technology will facilitate the replacement of any IT equipment under warranty. For equipment out of warranty, P&L Technology will consult with you to determine if repairing or replacing the equipment is the better option.
- We can cover under your service agreement the labor on any IT asset that is 6 years old or newer. Computer equipment at this age requires significantly more

maintenance, so if you choose to run an IT asset that is 6 years or older, we will assess a nominal hourly fee to perform repair or maintenance.

**Third-party software support agreements.** P&L Technology strongly recommends that you keep support agreements in place with all third-party software that you rely upon to run your business. By keeping an agreement in place, you benefit from software fixes, upgrades, and most importantly, have the support necessary when something goes wrong. P&L Technology supports over a thousand different software packages for our customers and we cannot be an expert in every package. We rely on the ability to contact these third-party companies and they usually won't take our calls if your support agreements aren't in place.

We will automatically upgrade/patch your Microsoft software applications (Operating System and Microsoft Office) as updates are released by Microsoft, but we rely on our Primary Contacts to direct us when upgrades for your third-party software packages are available and it is desirable for the installation to occur. Most third-party software products do not have an automatic notification mechanism, and many of our clients do not want to install the update immediately upon release, so we will need direction from you regarding the timing of these updates.

## How to get help when you need it

### Self-Help resource site

P&L Technology has made available a comprehensive library of resources to you and your staff. To access these resources, click on the black and gold icon that appears down near the system clock (see graphic below). Resources that are available include:

**Online documentation center.** This resource includes guides to complete many common tasks, such as setting up a new smartphone, setting up an email signature, or learning new tips and tricks with common software products. Guides are available in written and video form. This resource also includes information about our upcoming live webinars and links to archived webinars that are useful for learning more about relevant technology topics.

**New employee onboarding resources.** This section has some great information that you can use when you hire a new employee. We suggest making this website required reading as part of your new hire process. The resource will orient your new hire to the technology services they have at their disposal, teach them how to get help when they need it, let them know what to expect when working with us, and also contains educational resources for growing their skillset over time.

**Get to know your support team.** By clicking this icon, you will look up your specialized dedicated support team in our systems and be able to put a face to the names of the engineers who help you on a monthly basis. By clicking the name of the engineer, you can learn a bit more about them.



\*This is the icon that you click to access the self-help resources,

### Live Technical Support Services

P&L Technology live support services can be reached for all your support needs in several ways.

**\*\*Via desktop icon.** The *best and default* way to open a ticket is to click on the black and gold icon that appears down near the system clock (see graphic below) and choosing the *Open a Support Request Ticket* option. This will take you to a webpage where you or your employees can enter the details of what they would like us to handle. After submitting, a ticket will automatically be created and the next available technician will contact them. Using the desktop icon saves time over calling and will result in the quickest response.



\*This is the icon that you click to access this resource

**Via phone.** 402-330-9006 - Our Service desk is reachable via phone from 7AM to 5PM. Our goal is always to have a live answer, and we deliver on this promise 98% of the time or better. We typically recommend calling us for critical issues.

**Via email.** [support@pltechnology.com](mailto:support@pltechnology.com)

**After hours.** P&L Technology has a technician on call that is available from 6AM to Midnight (18x7), 365 days a year. To reach the after-hours technician, simply call the 402-330-9006 number and leave a message. This will page the on-call technician who will return your call in a maximum of two hours.

**Ticket priority system.** P&L Technology will work with you to assign a priority to your request. We do this to ensure that we don't leave critical issues going unattended while working on non-critical or non-time sensitive issues. For example, we would give priority to a

situation where a client's server is not functioning over setting up a new employee account that doesn't start until next week.

Priority	Response Guidelines	Examples
Standard	4 Hour Response	General requests. Most tickets will fall into this category Ex: Need application installed, problem printing document, error in application not majorly impacting productivity
High	1 Hour Response	Entire office down, other major impact to business. (Note we typically respond to these instantly)  One person unable to work or multiple employees unable to partially work. Ex: Employee's PC down, one application down for entire office.
Low	8 Hour Response	Lower priority requests. Ex: Need a new user setup that doesn't start until a future date.  Items that may occur far into the future, long range planning requests.

**Onsite dispatch.** After a technology support team has reviewed your issue, we occasionally determine that it would best be solved by an onsite visit from one of our field technicians. In this case, our dispatch coordinator will schedule a time for the field technician to come onsite and resolve your problem. These visits are generally done for installation of new computer hardware or repair of existing hardware, but can be done for advanced troubleshooting needs as well. For any new PC installations or PC reloads/reimages, we want to be ensure your end user is available to run through the installation at the completion of the setup to ensure they are comfortable that everything they need is working correctly and they are satisfied. *This is a very important step, as it is often hard for our technicians to anticipate every possible nuance that the end-user expects.*

**Post-ticket survey.** After each request for service, you will receive an email stating the resolution of your service request. Attached to this email are two links that can be clicked to let us know if you were satisfied with your support, or if we fell short, that you were not satisfied. There is also an option to provide additional comments. Please encourage your staff to honestly respond to these requests. The surveys allow us to ensure the issue was properly resolved, and also gives us feedback into the quality of support we are delivering to

your organization. We review these surveys daily in our support department as well as weekly in our management meetings. We read each survey we get back!

## Procurement of New Computer Systems

**What to do if you need new computer hardware.** If you are considering new computer systems such as PCs, Printers, or making any other change to your IT systems, be sure to give us a call or email. Our procurement specialists will work with you to select the exact systems necessary to fit your needs, budget, and ensure that everything works together. We do recognize that a small percentage of our clients will purchase their own IT gear, but please make sure to involve us so we can ensure everything will work together. We've seen many instances of a customer purchasing their own equipment only to find that the wrong operating system was purchased, for example. P&L Technology also has volume buying power which can often save you money over purchasing on your own. If you do purchase your own hardware, P&L Technology will still need to assess the new computer installation fee as outlined above.

**Technology reviews.** P&L Technology will call our primary contacts once a year to review current technology hardware. We will bring old, slow or out of warranty PCs to your attention and recommend other upgrades that can improve your business function. However, at any time you are considering introducing new software or PCs, we will do a complimentary review upon request - just give us a call. We have software in place on your network that can produce a report of all IT assets including specifications, warranty status, and software versions at the click of a button that can facilitate these conversations.

**Lease and finance options.** P&L Technology also has leasing finance options for any order over \$5,000, so if you are interested in financing any purchase, simply let us know.

## Staying in Touch

**Monthly Reports.** P&L Technology will send a monthly report to all primary contacts. Included in the report will be a listing of closed tickets for the month, currently open tickets, a breakdown of which of your staff called the service desk, a list of the issue categories, and some statistics such as server disk space usage. These reports help us keep in touch with you, our primary contact, so you can know what is going on with your support services.



One special area of these reports we would like to call specific attention to is the list of active users. We've encountered situations where our clients have terminated one of their employees, yet forgets to notify P&L Technology support of this event. As a result, we can't ensure that security of the system is maintained by disabling the account and we can't update the per-seat invoice price to reflect that this user is no longer working for the client's company. Please make sure to review this list monthly and let us know of any additions or subtractions to this list.

If you have any questions about these reports, please feel free to contact us at any time.

**Client Portal.** In addition to the monthly reports, P&L Technology also has the ability to set our primary contacts up with a client portal, an Internet site where you can see in real time all support issues, open or closed, which technician they are assigned to, and the current status of such issues. We find the monthly reports satisfy most of our client primary contacts, but if you would like the client portal access, please feel free to contact us so we can set you up an account.

#### **Opportunities to Engage Further.**

- P&L Technology hosts an annual users conference called *NOLOGY Delivered Users Conference* that is packed with technology seminars, hands on training, executive only roundtables, and other great content. The conference is designed for business owners and front line staff alike and can really take your team's usage and skill in technology to the next level. This conference is generally held in the fall.
- NOLOGY Webinars. P&L Technology holds 6-10 webinars a year where we deliver training on technology products in an online, webinar format. Watch our events page at <http://www.pltechnology.com/events> for more information on upcoming events.
- Video tip library. We put out a weekly video tip, a 1-3 minute video on how to take advantage of a neat, or time-saving feature of Windows, Microsoft Office, and other popular software products. You can follow us on Facebook or check out our tip library at <http://www.pltechnology.com/company-information/nology-education-series/video-tip-library/>