EBOOK

Customer Support Guide

Process Fusion

Overview

Process Fusion Inc. (PFI) is a software company and cloud service innovator. We help organizations transform inefficient, paper (labor) intensive business processes into a secure, automated, mobile ready Digital First experience for all participants.

Organizations can easily migrate their traditional Print, Capture and Workflow systems onto our secure cloud platform to simplify IT management, reduce cost and to ensure business continuity and security compliance. By incorporating machine learning and robotic process automation (RPA) capabilities onto our intelligent cloud platform, organizations can reduce error associated with manual document processing and cost associated with inefficient workflow.

Contacting Process Fusion Support

Process Fusion support is available to our customers with Standard or Premium contracts from Monday to Friday 8:00am to 6:00pm local time, directly through the following methods:

- Our Incident Management portal https://support.processfusion.com
- By email addressed to supportteam@processfusion.com
- Phone: 1-844-746-4734 ("Ring PFI")
- Phone: +448082586832– UK ONLY

For our customers with Premium Support contracts, we are available 24 hours a day, 7 days a week, 365 days a year and directly by dialing 1-844-746-4734 (i.e. Ring PFI). You are still able to contact us by Incident Management Portal or Email as noted above. For support escalation, please contact our Technical Operations Manager at
- Email: escalations.pfi@processfusion.com

Two Support Programs Are Available

Support Program Components	Standard	Premium
New Releases	✓	✓
Maintenance Updates	✓	✓
Service Packs	✓	✓
Product Documentation	✓	✓
Web based Incident logging and Management	✓	✓
Additional support contacts for incident logging	0	2
Product Update Information and Notifications	✓	✓
Priority response time and incident routing	✓	✓
Support Review Calls and personalized product communications	Annually	Quarterly
Support Hours	8:00 am to 6:00 pm local time	24/7 **After business hour support will be provided to Critical incidents only

Please note that manufacturer support may not be available on statutory holidays therefore resolution to incidents may be delayed. Also, only critical (system down) ticket will be worked on during after hours.

Standard Support Plan*

Standard Support is available during our regular business hours of Monday to Friday, 8:00 am to 6:00 pm local time. Requests for assistance can be created via self-service web portal or email. With the purchase of a Standard Support Plan, customers receive the following elements of service:

- Standard manufacturer support
- Unlimited amount of support incidents; via Incident Management portal or by email
- Remote assistance if required

If a customer wants support outside of our regular business hours, those calls will be billed at our After Hours Professional Services billing rate.

Please note all Cloud Services customers fall under this plan

Premium Support Plan

The Premium Support program is our most comprehensive support plan. This program includes all of the elements of Standard Support along with these additional services and benefits:

- Shorter response times
- Provide customer with proactive information about upgrades, patches and other technical information as it becomes available to help avert future potential problems.
- Provide detailed quarterly support incident reports and case reviews with the customer.
- Prepare for any critical systems activity planned by your organization ensuring readiness for critical service needs.
- Support for 24 hours a day, 7 days a week, including statutory holidays

Automate. Transform. Inspire.

Process Fusion

Primary and Additional Contacts

With your Process Fusion support plan, each support contract allows one primary contact who can then assign additional contacts. For Standard and Premium Plans, they allow 2 and 6 contacts in total, including the primary one, respectively. Please submit an email to supportteam@processfusion.com to register all additional support contacts.

Standard	Premium
2	6

Primary Contact

Primary contacts listed in the support plan may contact Process Fusion Support and create support incidents, update incidents, and close incidents. the primary contact identified on the support plan is also responsible for:

- Submitting changes/updates to contact information and product license information
- Managing all other contacts within your organization

Additional Contacts

Additional contacts listed in the support plan may contact Process Fusion Support and create support incidents, update incidents, and close incidents.

Process Fusion Support Policy

Process Fusion support policy describes the definition of full support and limited support. It is our policy to provide support and fixes in current versions of Process Fusion supported software to contracted customers. Support for products that have reached vendor end-of-life is on a "best effort" basis. We will troubleshoot and attempt to support any product that has reached this status. However, if the problem is deemed a defect or a lack of functionality, our support engineer will recommend that the product be upgraded to the latest supported version and direct you to your Process Fusion Account Manager.

Full Support

Full support includes:

- Most currently released version of a product and one or more prior releases.
- Fully supported, generally available release/version.
- Enhancement requests for these releases are accepted on behalf of your organization and submitted to the software developer.
- Release/version is fully supported by both Support and the Software Developer.
- Service Packs and Updates are available for download from Support and Software Developer.

Limited Support

Limited support includes:

- Support is available for versions that have reached End-of-life, and we will use best efforts to provide support for these versions.
- No new code fixes or enhancement requests can be requested for these versions.
- Customers are encouraged to plan an upgrade to a release that is listed under "Full Support".

Process Fusion

Incident Management Process

All customer requests for assistance will be handled using the following incident management process:

1. Process Fusion technical support team will assign a unique ticket number to all customer requests for assistance. These ticket numbers allow for the prioritizing of incidents and trace all incidents through to resolution and allow the customer to request status of their support ticket.

2. All tickets are assigned a severity level and are placed in a queue which allows all of our technical support engineers to support your issue ASAP. A primary engineer will take ownership of the case and ensure your issue is resolved. The engineer will gather any information that pertains to the issue and document them within the ticket to determine the proper course of action. This may require that the engineer attempt to reproduce the issue being seen in the customer environment.

3. If the engineer determines that the issue requires a fix to the software, the engineer will contact the appropriate software development team. The engineer will carry forward as the advocate for the fix and see it through to an appropriate resolution.

Opening a Service Request

Support requests can be opened through our Incident Management Portal, or by email by a customer with standard or premium support. For support requests via telephone, a ticket will be generated through the Incident Management Portal where the customer can access the ticket and view the history of what work has been done. When opening a service request, please consider the following:

- It is helpful to clearly explain the business impact of your issues and assign the appropriate severity level to the service request when you contact the support center.

- A lower severity level does not mean that Process Fusion support devotes less time to resolving your problem in the most efficient manner.

- For issues that had been resolved in the past, please check the historical tickets first or create a new support request.

- All requests beyond the typical support service (e.g. solution design, planning, migration, upgrades, etc.) can be scheduled through the Process Fusion Professional Services Team.

Process Fusion

Ticket Urgency, Priority Level and Response Times

All incidents logged with Process Fusion support are assigned a Severity level from 1 to 4 based on the impact to your business. The customer determines the initial level when placing a request for assistance. Severity levels may be changed after initial contact and further assessment of the issue from a Process Fusion Technical Support Engineer, provided the customer is in an agreement.

The follow table defines the severity levels and the targeted initial response time for Standard and Premium Support customers.
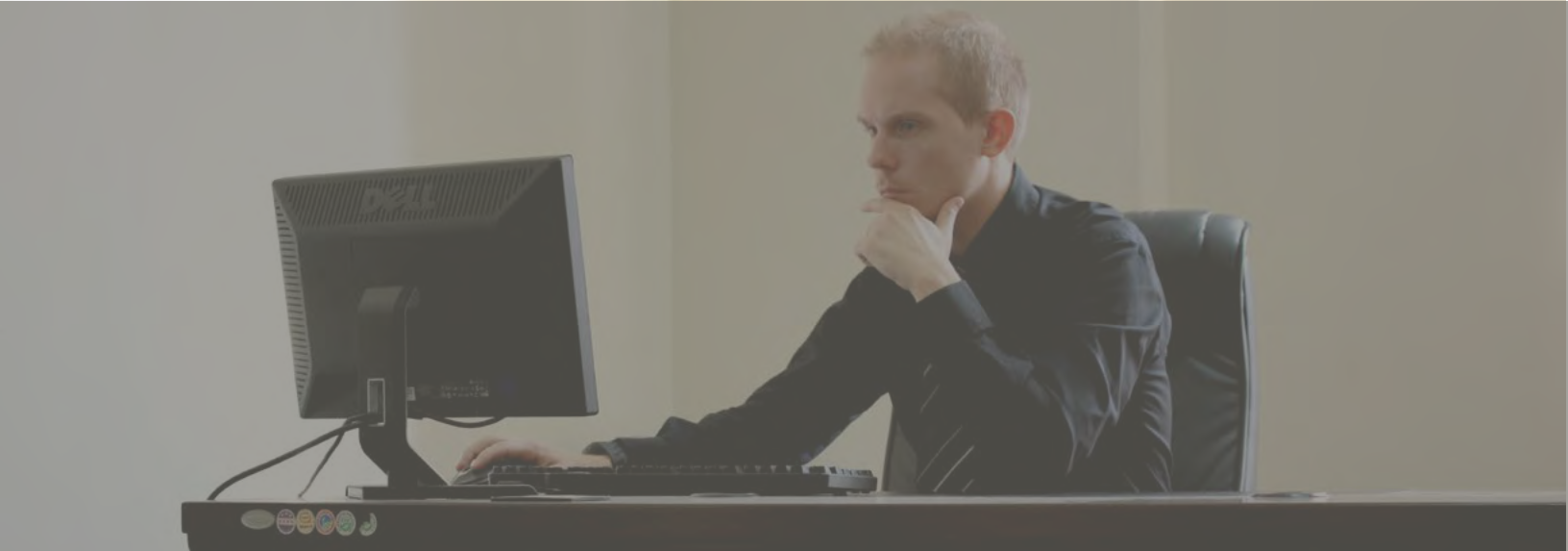
Incident Definition

Severity	Description	Example
1 Critical	Complete outage of the production environment that impacts all users.	The application server is down therefore all access to the application is no longer available.
2 High	Partial outage of or service degradation of the production environment that impacts some, if not all, users.	One of the nodes of a clustered application is down. The service is still available with the potential risk of losing the service if the remaining node goes down.
3 Normal	Certain non-critical functionality impairs impacting a small percentage of users.	A client software is not working on a user's desktop.
4 Low	Information is required with no or low impacts to users.	A product brochure is needed for the client's internal meeting.

Incident Response Targets

Severity	First response Target	Technical response Target	
		Standard	Premium
1 Critical*	30 minutes	2 hours	1 hour
2 High	30 minutes	4 hours	2 hours
3 Normal	30 minutes	12 hours	6 hours
4 Low	30 minutes	24 hours	12 hours

*only critical tickets will be worked on during after hours

Closing a Service Request

Support requests remain open until the customer is satisfied that the case can be closed. When a support request requires an upgrade or new product release before the issue can be resolved, the case will remain open with Process Fusion, and the customer will be contacted when the new release has been issued. Process Fusion employs a policy of closing support requests when customers fail to respond to requests for information. Typically, three follow-up phone calls or emails will be made over five business days and if no response is received, the case will be closed. In this case, a new support request must be created to address the same issue.

Transactional Email Based Survey

Process Fusion Technical Support strives to continually improve our service to you; therefore, every time a case is closed, we provide the customer with the opportunity to give us feedback on the quality of assistance received. The survey asks you to assess multiple items, including the engineer's performance and overall satisfaction with how your case was managed. The Process Fusion Technical Support management team reviews the responses to ensure that all customer feedback is heard and addressed, as needed.

Contact Support Renewal Sales

For information about your support plan, contact the Process Fusion Renewals Department at (905)-363-0118 or email renewal@processfusion.com. The Process Fusion Renewals department will help you with:

- Purchasing support plans
- Renewing support
- Updating primary and secondary contacts
- Upgrading support
- Updating lapsed support
- Licensing questions

Process Fusion

Managed Application Services

Process Fusion provides Managed Application Services (MAS) so that our customers can focus on the business results instead of spending time to implement, operate and support the applications. Our MAS comes in two flavors:

On-Premise Co-Managed:

When applications are required to be running on your network and data center for compliance reasons, you can leverage our On-premise Co-managed application services, which outsource the application management responsibility to PFI, while your organization takes care of the infrastructure that supports the application.

Cloud Managed:

With the cloud managed application service model, you continue to own your application software, it just will not live in your infrastructure. Instead, Process Fusion will host your application solutions in our dedicated private Cloud infrastructure.

About Process Fusion

Process Fusion is a software company and a cloud service provider. We help organizations transform inefficient, paper(labor) intensive business processes into a secure, automated, mobile ready Digital First experience for all participants.

Automate. Transform. Inspire.

Contact:
3250 Bloor Street West
Suite 1000, East Tower
Toronto, Ontario, Canada
M8X 2X9

processfusion.com

Process Fusion