iDocuments

Support Guide

20 November 2020

Contents

Foreword

This document supersedes all other previous versions of this document whether written or verbal.

The current version of this document is available for download at

www.idocuments.co.uk/supportguide

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Related Documents and information

Please also refer to the following important documents:

- iDocuments Specification and configuration documentation www.idocuments.co.uk/help/
- iDocuments Technical Specification www.idocuments.co.uk/technical/
- Support Guide www.idocuments.co.uk/supportguide
- The terms on which Synantix Limited licenses its software to customers is available online at www.idocuments.co.uk/terms-and-conditions

Feedback and Questions

If you have any questions, feedback or require any clarification on matters relating to this document or any aspect of iDocuments products or services then please email **support@synantix.com**

1. Introduction

This document is designed to assist Synantix customers get the most from our support service. It also provides customers with an understanding of how support tickets will be dealt with and resolved.

2. Hours of service

The Synantix Customer Support Services will be available during the period 09:00 hours to 17:30 hours Monday to Friday excluding UK Bank Holidays.

Support tickets may be logged via our CRM Support portal at any time.

3. Customer nominated support representative

The customer should appoint a nominated representative who acts as a single point of contact for reporting support tickets, questions and issues. Synantix Support will liaise with that person and in particular agree priorities and the order of resolution of support tickets.

4. Logging a support ticket

The customer nominated support representative should raise support tickets, questions and requests via the Synantix CRM portal, details of which are provided in Appendix 1 of this document. Each customer is given unique login details and customer can advise Synantix who in their organization should receive alerts and notifications form the system.

The Synantix CRM portal then provides the customer and Synantix with real time status and progress of any open support tickets.

5. Support ticket priority levels for production systems

Support tickets for customer production systems will be allocated a priority level (agreed between Synantix and the Customer) according to the table in Appendix 2.

The process for logging support tickets during User Acceptance Testing stage of implementation will be agreed with you with your Project Manager.

6. Escalating support tickets

All support tickets are monitored by Synantix to ensure that they are being dealt with within the agreed timescale and to the Customer's satisfaction.

In the event that you need to escalate a support ticket then you can do so at any time using the CRM portal.

7. How to make a complaint

Synantix is committed to providing a quality service to its customers and partners and working in an open and accountable way. One of the ways in which we can continue to improve our service is by listening and responding to the views of our customers and partners and in particular by responding positively to complaints, and by putting mistakes right.

If you are unhappy with any aspect of our product or service then please contact a Synantix Director who will work with you to resolve the issue.

8. Customer review meetings

Customer review meetings are important, your nominated Synantix customer relationship manager will agree and schedule these with you.

APPENDIX 1 - Using online CRM portal

The iDocuments CRM Portal enables customers to register support issues and question and track the status.

Please use the URL provided in details we set for your account.

Login
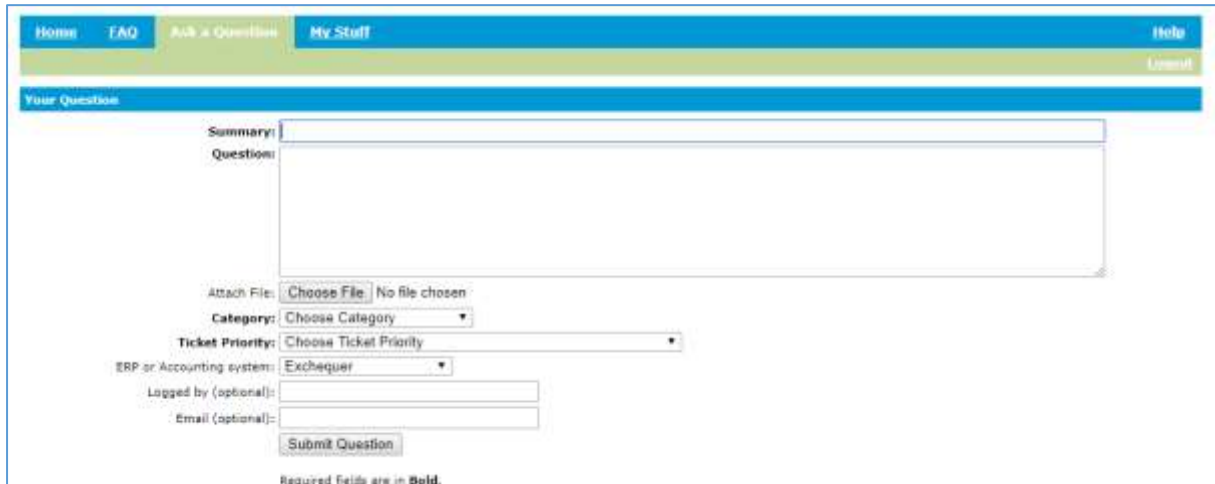
Login using your unique User ID and Password which is availab;le upon request from iDocuments Support.

Record Issues and Questions
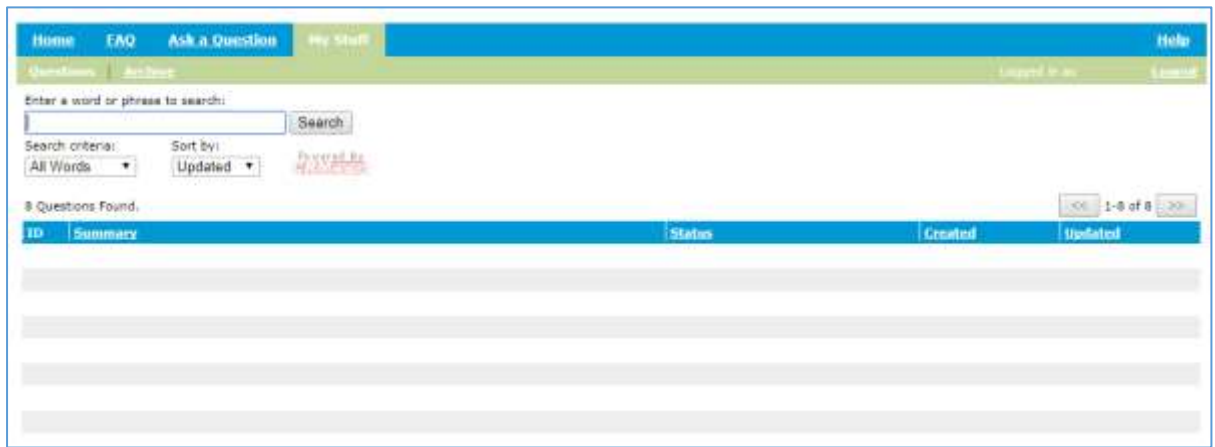
You can add items and questions using 'Ask a Question menu option. Please note you can can attach files to the item to assist the iDocuments Support team in dealing with your question.
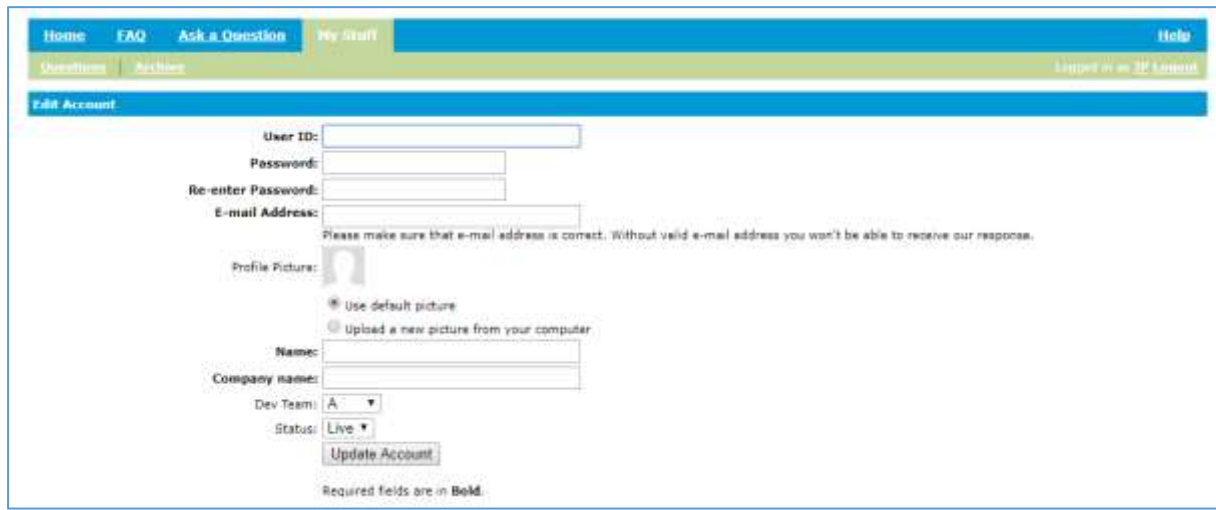

Tracking Questions

You can add items and questions using the 'My Stuff' menu option. You will automatically be alerted by email when the status of one of your issues change and you can follow the thread of information relating to you question br drilling down into question from this form.

Administer your account

Click on your user name – top right, marked with red box in screen shot below and the screen shown allows you to edit and administer your account.

APPENDIX 2 – Support ticket priority for production systems

Support tickets are logged via the CRM and will be acknowledged by the system and a unique ticket reference number allocated and emailed to the customer's nominated support contact. Customers can check the status of any open tickets at any time on the CRM portal.

Priority	Description	Example	Response times
1	Production system down or failure.	Major system failure that prohibits users from logging in or using the system.	We aim to give customer progress reports every 2 hours via CRM, call or email or at interval agreed with customer for that issue.
2	A particular application or module is down or failure.	Purchasing or expense process failing for all users.	We aim to give customer progress reports every 3 hours via CRM, call or email or at interval agreed with customer for that issue.
3	Application issue	Problem affecting one user, one transaction or a non-business critical function.	We aim to give customer progress reports every 8 hours via CRM, call or email or at interval agreed with customer for that issue.
4	Other.	How to questions, configuration enquiries, enhancement requests, or documentation questions.	Current status on open items shown on CRM porta.