|P2 A COMPLETE GUIDE: MANAGED AND PRO SERVICES

Take a deeper look inside the details of P2's Managed and Professional Services Programs.

In order to service the full range of our customers' needs, POS Portal has developed a comprehensive range of Support and Professional Services. In line with our philosophy that is rooted in providing the highest level of customer service possible, this guide has details about our services and their benefits.

The 100,000 Foot Level Perspective

With a huge priority put on customer service, we believe that success for all aspects of P2 is a product of three necessary components:

SUPPORT (STANDARD & MANAGED)

ACCOUNT MANAGEMENT

PROFESIONAL SERVICES

The support and customized professional services available are:

1. Individually Assigned Account Management
2. POSP Standard Support Help Desk
3. POSP Managed Services Package – Advanced Needs
4. Professional Services – Custom Development

1. Account Management

The ability to properly address our customers' concerns begins with being able to maintain a focused level of accountability for each inquiry. We accomplish this accountability by providing each customer with a personal Account Manager. Your Account Manager is your go-to resource for any support issues that may arise.

Our customers talk to their Account Managers when they want to:

- Order additional P2 seats
- Bring a new functional group onto the solution
- Purchase additional products
- Outsource administration services
- Obtain custom development
- Ask questions about their accounts

2. POS Portal Standard Support Help Desk

Our goal is to provide the most complete support program possible for each and every one of our customers. Whether you're having performance issues or the solution is not functioning as expected, you can simply contact our Support Team and we'll issue a ticket number ASAP.

Our **Standard Support Help Desk** is always an email away, and available 8:00 a.m. to 6:00 p.m. PST, Monday through Friday, excluding POS Portal holidays.

Standard Support Turn Times

In order to ensure that every one of our customers' concerns and inquiries are addressed in a timely and organized manner, we've put careful thought into creating a system that helps flag, categorize, assign, and address each incoming inquiry efficiently and effectively.

Each customer's response is quickly categorized and addressed as outlined below:

Critical application defect: When issues arise that make the system inaccessible or inoperable, they are critical application defects. Initial response time is one (1) business hour from when the issue is submitted. The customer will be updated twice a day and we will continue to take action until the issue is resolved.

Important application defect: Issues that cause a major function loss that impede transactions from being completed, or cause development/test systems to be inaccessible or inoperable, are important application defects. These issues may arise even if the system is operational. Initial response time is two (2) business hours from when the issue is submitted. The customer will be updated once a day and we will take action within four (4) business hours until the issue is resolved.

Necessary application defect: Issues that do not significantly impede transactions from being completed, but still affect performance or the functioning of the development/test system are necessary application defects. Initial response time is four (4) business hours from when the issue is submitted. The customer will be updated once a day and we will take action within two (2) business days until the issue is resolved.

Minor defect: Issues that involve a cosmetic or other minor error that do not affect the performance or functionality; or client questions regarding use of the hosted service will be responded to within one (1) business day of the case being submitted.

CATEGORY	DEFINITION	RESPONSE	ACTION	FOLLOW UP
Critical	The system is inaccessible or inoperable	1 business hour		The customer will be updated twice a day
Important	Major function loss that impedes transactions from being completed, or cause development/test systems to be inaccessible or inoperable	2 business hours	Within 4 business hours	The customer will be updated once a day
Necessary	Issues that do not significantly impede transactions from being completed, but still affect performance or the functioning of the development/test system	4 business hours	Within 2 business days	The customer will be updated once a day
Minor Defect	Issues that have cosmetic or minor errors that do not affect performance or functionality; or client questions regarding use of the hosted service	One (1) business day from when the issue is submitted		

3. POS Portal Managed Services Package – Advanced Needs

If the Standard level of POS Portal Support isn't enough, you can order a variety of administration services through our Managed Services program. You can purchase administration and light - development services to suit your needs.

For all Managed Services, you will receive an initial response within four (4) business hours and we will take action on the issue within four (4) business days.

Minor Issues: If you purchase Managed Services, we will also offer regular support for concerns that do not affect performance or function. For example: cosmetic, minor errors, and your questions regarding use of P2. For minor issues, we will respond within two (2) business days after you submit the issue.

Administration Services Included in Managed Services:

MANAGED SERVICES	DESCRIPTION OF SERVICE
SETUP	
Users	Add/Edit/Deactivate Users
Roles	Manage Roles and Role Hierarchies
Profiles	Manage Profiles
Public Groups	Manage Public Groups
HOMEPAGE CONFIGURATION	
Components	Add/Modify Homepage Components
Custom Links	Links to External Websites/Pages
OBJECT CONFIGURATION	
Ownership Assignment	Set up Queues/Assignment Rules
Fields	Modify Unmanaged Fields
Validation Rules	Rules to Validate Data
Tabs	Create Custom/Enhanced Tabs
Search Settings	Setup Search Columns

Buttons	Add Custom Buttons
Links	Links to External Sites/Existing Pages
Page Layouts	Modify/Create Page Layouts
Record Types	Create Record Types
Settings	Manage Object Settings
FIELD MODIFICATIONS	
Custom Formula Fields	Creation of Custom Formula Fields
Automatic Field Updates	Write workflows/triggers to automate updates
SALES PROCESS	
Sales Reconfiguration	Modifications to Set Sales Process
WORKFLOWS	
Workflow Rules	Create and Update Workflow Rules
Workflow Tasks	Create and Update Workflow Tasks
SECURITY CONTROLS	
Sharing Rules	Manage Sharing Rules
Field Accessibility	Manage Field Accessibility
Password Policies	Manage Password Policies
REPORTS AND DASHBOARDS	
Reports	Create/Modify Logo Letterhead
Dashboards	Create/Modify Templates for Workflow Rules

4. Professional Services - Custom Development

No P2 customers are the same. We make it a priority to provide the ability to scale and meet even the most proprietary needs of our customers through a range of professional services. Professional Services are project based. Depending upon the specific project, our team will be comprised of members with the following skills and expertise:

TECHNICAL

- Modeling tools
- Functional prototyping
- Legacy systems integration experience
- Project estimating
- Salesforce Developer Certifications
- Computer Science Degrees

SOFTWARE

- Requirements
- Gap analysis
- Feasibility study
- Functional design
- Critical use case development
- API and ETL integrations
- Quality Assurance Testing, Test scripts, and test plans

BUSINESS

- Industry knowledge
- Project Management Certifications
- Salesforce System Admin Certifications
- Project plans
- Status reporting
- Resource Planning

- Project documentation
- Business use cases
- Business object modeling
- Software requirements specification
- User training manuals

Questions? Email us at p2support@posportal.com for more information.
180 Promenade Circle, Suite 215, Sacramento, CA 95834

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