Privia Support Model (Small Business)

Contents

Synopsis

Privia Small Business is targeted at small organizations that lack IT infrastructure. It is a reduced product offering specifically designed for small businesses that need to collaborate on document development, perform basic business management of a pipeline, and have little or no IT infrastructure.

Key Features

The Privia Small Business offering boils the product down to the core feature and it provides mechanisms to help the end users use the product without administrative overhead. In this product offering, the Privia support system is utilized and accessible for all end users of the Small Business product. The support organization will help users get clients installed, change passwords, create accounts, delete accounts, and manage license allocation.

When a customer purchases Privia Small Business, the same support model is used for end users as is provided to all other Privia customers. Privia Small Business customers have access to the Privia support site including all of the technical documentation and professional services training materials. But in addition to the standard support, Privia support will also do the administration of user access to the system, reset passwords, and provide basic installation support to the end users of a Privia Small Business subscription.

Differences between Privia Small Business and Full Privia

There are a number of key differentiators between the standard Privia offering and the Privia Small Business offering:

	Privia Small Business	Privia Full
End user installation assistance	Included	Additional fee
User Admin by support@privia.com	Included	No
Access to support site	Yes	Yes
Full Document management with version control	Yes	Yes
Commenting Tool	Yes	Yes
Import Toolbar	Yes	Yes
Delegate access	Yes	Yes
Search	Yes	Yes
Create individual rules on file, folder and workspaces	Yes	Yes
End User Password Reset	Yes	Yes
Per user pipeline	Yes	Yes
Installed Platform Client (Window XP/Windows 7 only)	Yes	Yes
Enhanced Web Client (Windows XP/Windows 7 only)	Yes	Yes
Pure Web client (IE9, IE10, IE11, Safari, Firefox)	Yes	Yes
Groups	No	Yes
Dedicated System	No	Yes
Vanity prefix on DNS name	No	Yes
Access to all personas	No	Yes
Multiple organizations	No	Yes

Process engine	No	Yes
Admin tool	No	Yes
Reporting	No	Yes
Run reports on a schedule	No	Yes
Launched Opportunities	No	Yes
Transfer ownership of opportunities	No	Yes
Accounts feature	No	Yes
Contracts/Past performance feature	No	Yes
Modify lookup/pull down lists	No	Yes
Modify label names	No	Yes
Modify system logo	No	Yes
Transfer between pipelines	No	Yes
Import CSV/XLS pipeline data	No	Yes
Transfer ownership of rules	No	Yes
Sign-in Notice	No	Yes
Create Workspaces from Process Templates	No	Yes

Support Model for Privia Small Business

Privia support hours are provided between 8am and 6pm Eastern time. Exceptions can be made for emergency situations.

Just like the standard support model for Privia, the design of the Privia support model for Privia Small Business is that of a "Level 2" and above support system. Every customer of Privia can identify a limited number of people, called technical support contacts, that can contact Privia Support (typically 3, but can be changed through a contract modification). Typically these individuals act as first level support and will field questions from end users. Since every customer has a different environment and different methods of using the Privia product, the technical support contacts act as the helpdesk for Privia for end users so that they can field any questions that come up that are unique to their method of using Privia.

Privia support is not a replacement for a company's helpdesk. But for the Privia Small Business users, Privia support is also providing assistance through regular web meetings to train users on how to install the client and how to do basic document management. Questions about what content to put in the system or what structure to use should be addressed by the technical contacts. In general, the end user should send their questions to the technical contacts first so that the contacts can identify if the issue is something that is business related or something in which they need Privia support to work with the end user on. If the technical contact would like assistance for the end user, the technical contact just needs to forward the situation to support@privia.com and include the end user as a CC so that they are automatically added to the ticket.

The Privia support staff will not add or remove content from the system or take ownership of content in the system.

Below are some common problems that are appropriate for Privia support:
- Technical contact forgot how to perform a task in Privia, request directions on performing the task

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- End user is receiving an error that the technical contact has never seen
- Technical contact has identified a possible bug or problem with the system
- End user having problems installing the software or accessing the system
- Add, Delete, or change licensing assignments

Below are some common misconceptions about what Privia support will do:
- Add users to workspaces
- Download or manage documents in a Privia system
- Create groups or manage users in groups within a system
- Provide end-user installation support on untested or unsupported systems
- Provide end-user support after hours on home systems
- Need to increase number of licenses or storage (note that this should be directed to the customer sales executive in order to modify the contracted services)

Technical Contacts

Only the designated technical contacts are allowed to contact Privia LLC support for assistance. Technical contacts must have email addresses that are in the company domain that has contracted with Privia and cannot be generic email addresses such as gmail.com, aol.com, or earthlink.com. If any user attempts to contact the Privia support system that is not a technical contact, the system will automatically reroute the request to the technical contacts for the company identified by the user's email domain and close the ticket. If the end user isn't in the technical contact's email domain, the end user needs to identify who the customer is that they are working with so that the support organization can connect the end user to the customer that has contracted with Privia. The technical contact is then expected to work with the end user to resolve the issue if it is business related. In the event that the issue cannot be resolved by the technical contacts for Privia, any of the technical contacts can open a ticket with Privia support to get assistance on resolving the issue.

Technical contacts will only be updated under the following conditions:
- An existing technical contact sends a support ticket in to add or remove a technical contact (note that the other technical contacts will receive a copy of this request so any request to delete a technical contact will be known by the other technical contacts)
- If all technical contacts have left a company, the contracting officer that signed the Privia contract can contact the sales executive through email to request new contacts be established. This must be received in writing so that there is a record of the request.

Opening Tickets

Tickets are opened by sending an email to support@privia.com. Response times to the tickets are defined in a latter section of this document. The support system will compare the email domain of the sender of the email and then associate the ticket with the appropriate customer. Thus it is extremely important that users send messages from their company domain.

When a ticket is opened with the support system, the system will:
- Automatically copy all other technical contacts on the ticket and send a message back to the originator letting them know that the ticket has been opened.
- If the person sending the ticket in is not one of the company technical contacts, then the user will receive a message that the issue has been forwarded to the technical contacts and the ticket

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will automatically be closed. In this case, the technical contacts will receive a copy of the support request and can then respond to the end user to gain information about the issue. If the technical contact believes that additional Privia support is needed, the technical contact should respond to the ticket to cause the system to reopen the ticket and route it to the support queue.

Since the system correlates the tickets to the appropriate company based on the email of the sender of the message, it is important that the technical contacts use their company domain when communicating with Privia support. If a technical contact were to ask to use a Gmail, AOL, MSN, or other generic domain for an email address, the technical contact will likely receive spam from the Privia support system because any spam that hits support@privia.com from that generic domain will be routed to the technical contacts for the company that used that generic domain.

Closing tickets

When work has been completed on a ticket, Privia support will request confirmation that the issue can be closed. If no response is received from the technical contacts relating to closing the ticket, the ticket will be closed automatically after 3 attempts to make contact with the technical contact.

Getting Ticket updates

Technical contacts have access to the support system through a Web interface where they can check the status of all tickets that have been opened.

Severity definitions

Severity 1: System down, all users out of service
Severity 2: System impaired, most users out of service, but some still have access
Severity 3: One (or a few) customers have an issue
Severity 4: Question about usage of the product or request for information

Hours of operation/phone support

- Normal business hours: Phone support and email support is available from 8am Eastern Time through 6pm Eastern Time Monday through Friday excluding Privia LLC company holidays.
- After Hours: Not available for Privia Small Business

Severity 1 & 2

Severity 1 & 2 will be handled with a max of 2 hour response time from when the ticket is opened during normal business hours. If a Severity 1 or 2 ticket is opened after hours, on weekends, or on holidays, the ticket will be address the next business day.

Severity 3 & 4

Severity 3 & 4 will be handled with 4 hour response time when the ticket is opened during normal business hours. If a Severity 3 or 4 ticket is opened after hours, on weekends, or on holidays, the ticket will be addressed the next business day.