Support Service Protocol

INTRODUCTION
Hello and welcome to the BGL Support Protocol (Protocol).

This document outlines important information about BGL products and services delivery.

As a BGL Client, it is important that you are aware with the contents of this document as they cover the terms and conditions of the services BGL offer to you.

It also contains information about the different service levels provided by BGL.
If you have any questions relating to the Protocol, please contact BGL's Client Relations Coordinator at clientrel@bglcorp.com.au

CONTACTING BGL
BGL's contact details are as follows:
BGL contact details can also be viewed on line at http://www.bglcorp.com/about-bgl/contact-us.

BGL RESOURCES AND SERVICES
BGL provides you with a myriad of resources and services to get you started with the BGL Products and also to increase your efficiency using the software.

BGL Client Centre
The BGL Client Centre contains resources and tools to help you maintain and manage your software subscription. It is the one stop shop for accessing your account details, product support, purchases, user groups, BGL Wiki, 360 Help, Training Manuals and much more.

BGL Wiki
The BGL Wiki contains thousands of knowledge base articles, help files, training manuals, common support queries and videos for **BGL Desktop Products**. The BGL Wiki can be accessed from within the software by clicking on the **Wiki** icon under the **Help** tab or through the BGL Client Centre.

360 Help
360 Help contains migration, getting started, help files, training manuals and videos for **BGL Cloud Products**. The 360 Help can be accessed from any BGL cloud software by clicking on the Help link located on the top right-hand corner of the screen.

Training
BGL provides hands-on product training for CAS, Simple Fund and Simple Fund 360 in all Australian capital cities. BGL provides its Training and Events Guide to all clients in December and May each year. BGL also holds training courses in major Australian regional centres and in Hong Kong, Singapore, New Zealand and the United Kingdom.
Online training webinars are also available throughout the year.
Detailed course overviews, dates, fees and registration details are available from the BGL website at www.bglcorp.com/client-services/training.
If you prefer to have training at your office, please contact our Training Coordinator at training@bglcorp.com.au or on 1300 654 401 to discuss your training requirements.

Update Seminars

BGL hold Product Update Days twice each year where our product teams introduce the many new features and enhancements in your BGL Products. The seminars will also update you on compliance and industry related matters that affect company and superannuation compliance.

The update seminars provide you with a cost effective way to keep up to date with the BGL Products. Over 1,000 clients attend these seminars each year and they find them invaluable in keeping up with software changes. You will receive notification of the seminar details and registration forms by mail and email well in advance.

User Groups

BGL assists clients to hold regular Product User Group meetings for CAS and Simple Fund throughout Australia and in Hong Kong, New Zealand and Singapore. BGL User Group meetings are run by BGL clients and provide a great opportunity for clients to meet, discuss relevant issues and network. Members determine meeting agendas, elect chairperson and raise items for discussion.

Clients need to register through the Client Centre and meeting agendas and minutes can be accessed under the User Groups section in BGL Wiki.

Onsite Services

BGL offers a range of competitively priced onsite professional services delivered by experienced BGL support consultants who are up to date with changes in technology and legislation. Our services include superannuation fund processing, corporate compliance, data conversions, etc. Refer to the BGL Website for further details. (Client Services) or email at training@bglcorp.com.au

BGL SUPPORT

BGL provides a support service to all BGL clients. All members of the BGL Support Team are tertiary qualified and have received comprehensive training to ensure they perform their work in an effective and professional manner.

The provision of services is coordinated by the Support Manager and Support Team Leaders as well as product experts from the Product Teams.

Clients have 24×7 access to support services through the BGL Client Centre.

BGL Product Supportincludes:

- Call back support service. BGL does not guarantee a support response time but aims of a 2-hour response. Some products have limited support calls. See BGL'S Service Level Agreement section.
- Access to the BGL Wiki and 360 Help
- Access to BGL Training Manuals both online and in PDF formats
- Access to the BGL Client Centre

Refer to BGL Resources and Services section for more information.

Support calls should be logged as a last resort. On many occasions, clients log support calls for matters that can be resolved by reading the documentation. BGL places a lot of emphasis on its documentation and support resources.

BGL Product Support DOES NOT include:

- Telephone training
- Taxation, superannuation or technical advice
- Software installations (Desktop Products)
- Software update installations (Desktop Products)
- Remote desktop support
- Network or PC support
- Backing up and restoring data (Desktop Products)

Telephone Training

BGL provides a telephone support service to all clients. All BGL consultants are accounting and/or IT qualified and are well trained to assist you with your support needs.
The purpose of support is to fairly assist clients with issues that arise when using the software. Therefore, consultants will at times refer you to support resources when the solution to your problem is clearly answered in the documentation. Clients should be aware of what is and is not included in support.

BGL consultants will not provide assistance for matters that fall outside the scope of product support as specified above.

Taxation, Superannuation or technical advice

Many clients ask consultants a range of accounting, tax, technical, Corporations Act and compliance related questions. BGL consultants are trained to provide clients with product support and NOT technical support. BGL consultants are under strict instructions not to provide technical/accounting/taxation services and/or advice of any nature to clients.

Software Installations and Updates

Desktop product subscriptions do not include initial software installation or the installation of software updates. BGL provides all the documentation required to successfully install/update your software on your server/PC and workstations if required. While support consultants are familiar with installing the software, they are not network engineers/administrators nor are they familiar with your IT infrastructure. As a result, BGL consultants will NOT install or update software on your network.
It is recommended that you have someone with the right expertise and a good understanding of your IT infrastructure install/update the software. If they do encounter any problems, they can log an urgent support call, advise they are an external consultant and BGL will provide priority support.

BGL can provide a software installation/update services using the latest remote login technology. If you would like BGL to provide this service, contact BGL (See Contacting BGL) and we can organise this for you. Installation/Update times will vary according to the number of users together with your current IT infrastructure.

Remote Desktop Support

BGL uses TeamViewer to provide remote IT support. Remote support is not used by consultants to carry out form processing within your BGL software. This tool is primarily employed by BGL to assist clients with database issues. Clients requesting or needing a remote login for other issues not related to database issues will be charged accordingly.

Clients with Platinum Support services have remote login included as part of their software subscription. Clients with Premium or Basic support services will need to arrange a time for a remote desktop session to be carried out.(See BGL's Service Level Agreement section). Clients will need to complete the Client Services Protocol prior to any work being carried out. This together with all other relevant information will be provided to clients at the time of enquiry which can be made at info@bglcorp.com.au.

Network and PC Support

The BGL Support Team is not responsible for your fileservers, networks, workstations, modems or printers. BGL Products will operate on Windows, Terminal Server and Citrix environments. For more detailed information, refer to the system requirements in your installation/update instructions.

BGL support does not include network or PC support services. If a BGL Support consultant determines your support issue is related to your network or PC, you will need to refer this to the person in charge of your IT network/infrastructure.

Backing Up and Restoring Data

It is your responsibility to have backup and restore procedures in place for your BGL Desktop Products. BGL takes no responsibility for your data where proper backups have not been made.**BGL'S SERVICE LEVEL AGREEMENT**
The BGL Service Level Agreement (SLA) outlines the terms and conditions of the BGL service levels that are available to BGL clients.
The purpose of the SLA is to provide clients with a range of service levels to suit their business needs.

Service Levels

The SLA applies to all current subscribers of the following BGL Products:

- CAS
- Simple Fund Professional
- Simple Ledger Professional
- Simple Fund 360
- CAS 360
- Simple Ledger 360

The support levels available are:

Platinum

- 15 minute response time to support calls and or support emails during BGL business hours
- After hours web based support call logging facilities available through BGL Client Centre for next business day response
- Remote Access Login for calls using TeamViewer or client remote access procedures.
- Unlimited support incidents per 12 month contract
- 4 x priority registrations to the CAS or Simple Fund Update Seminars held in March and August each year
- 4 x $50 Training Vouchers that can be used for CAS or Simple Fund Hands On Training courses
- Full access to beta release software and usability studies

Premium

- 60 minute response time to support calls and or support emails during BGL business hours
- After hours web based support call logging facilities available through BGL Client Centre for next business day response
- Remote Access Login for calls using Team Viewer or client remote access procedures.
- Unlimited support incidents per 12 month contract
- 2 x priority registrations to the CAS or Simple Fund Update Seminars held in March and August each year
- 2 x $50 Training Vouchers that can be used for CAS or Simple Fund Hands On Training courses
- Full access to beta release software and usability studies

Basic

- Standard telephone and email support during BGL business hours. BGL will endeavour to provide a 2 hour response to all support calls
- After hour's web based support call logging facilities available through BGL Client Centre to report a problem for next business day response.
- Unlimited support incidents per 12 month contract
- Full access to beta release software
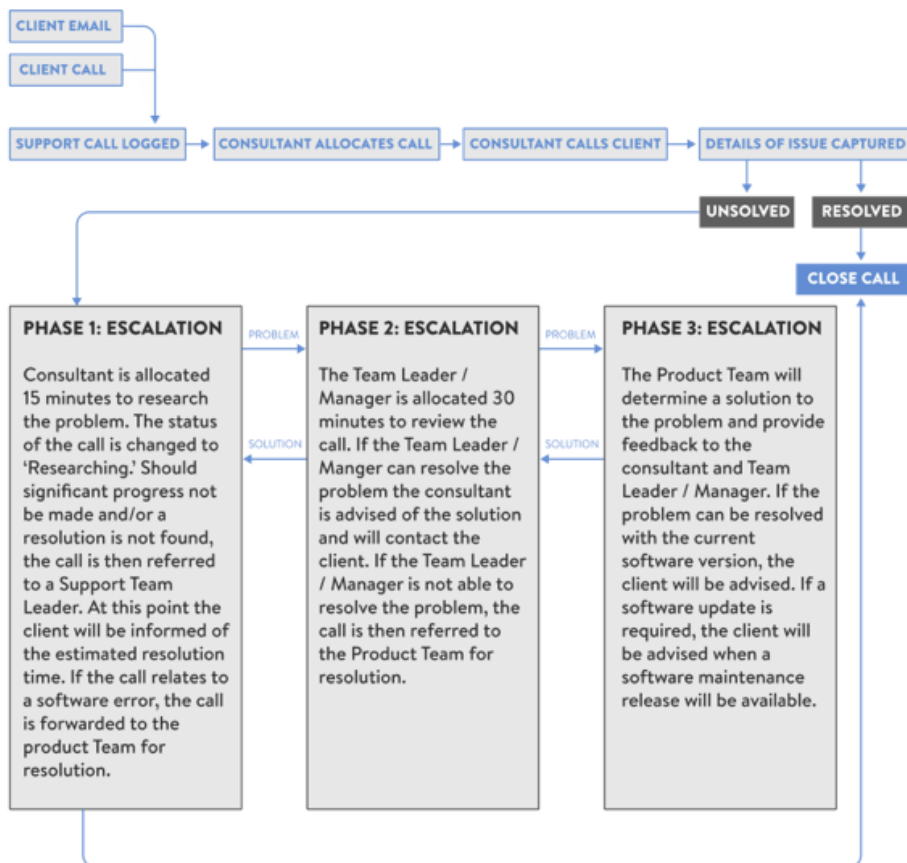
All BGL clients received Basic Support. Clients, however, can choose to move to Premium or Platinum Support for an additional subscription fee.

Period of Agreement

When clients subscribe to Premium or Platinum Support, the SLA takes effect when payment is received. The SLA will commence on the date specified on the SLA Subscription invoice and will be aligned to existing product subscriptions. In the first year, a pro rata amount will be payable if the remaining product subscription period is less than twelve months.

Subscription renewal notices are sent to all subscribers at least two months prior to the expiry date. If payment is not received by the expiry date, the software and any agreements automatically expire.

Hours of Operation

BGL Support is available between the hours of 09.00 and 17.30 in your time zone.

Geographic Coverage

BGL product support is available in all Australian States and Territories, Hong Kong, Singapore and New Zealand. UK support is handled by BGL's UK agent.

Response and Resolution Times

BGL defines Response Time as the time from when call is logged on BGL's Support Database to the time when a support consultant takes ownership of the call. Ownership is identified at the point where consultants allocate their name to a call. The call is then date and time stamped.

BGL defines Resolution Time as the time from when the call is logged to the time when the issue is resolved and marked as completed by the support consultant. BGL cannot guarantee Resolution Times.

Priority Level Response Times

BGL has a support database to log and monitor all support calls and client contacts. The system caters for the different levels of support.
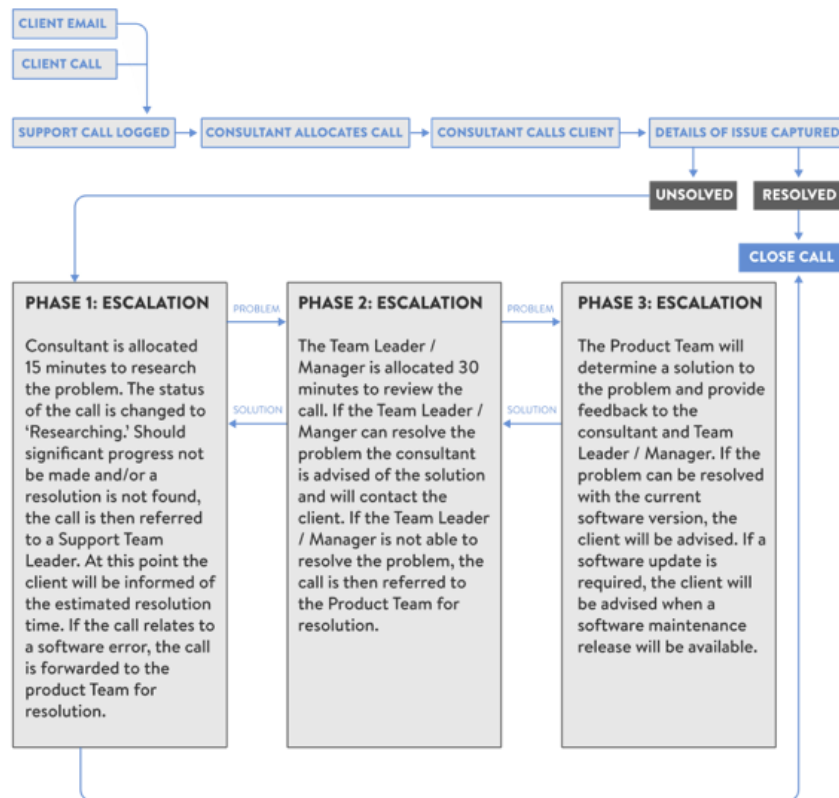When a Platinum client contacts BGL, all efforts are made to transfer the call directly to a support consultant. If no consultant is available, BGL will responded to the call within 15 minutes.

When a Premium client contacts BGL, the call may be transferred directly to a support consultant. If no consultant is available, BGL will respond to the call within 60 minutes.

Call Monitoring and Escalation

The BGL Support Database has been designed so all support calls can be easily managed and monitored based on the client's SLA.The Support Database includes a range of alerts, prompts and views for this purpose. Calls are also reviewed by the Support Team Leaders and Support Manager to ensure call quality standards are met and satisfactory resolutions are delivered to clients.
Call escalation occurs when an issue cannot be resolved during the first contact. Almost 80% of calls are completed during the first contact. The remaining 20% are escalated as outlined in Figure 2.0.

PHASE 1: ESCALATION

Consultant is allocated 15 minutes to research the problem. The status of the call is changed to 'Researching.' Should significant progress not be made and/or a resolution is not found, the call is then referred to a Support Team Leader. At this point the client will be informed of the estimated resolution time. If the call relates to a software error, the call is forwarded to the product Team for resolution.

PHASE 2: ESCALATION

The Team Leader / Manager is allocated 30 minutes to review the call. If the Team Leader / Manger can resolve the problem the consultant is advised of the solution and will contact the client. If the Team Leader / Manager is not able to resolve the problem, the call is then referred to the Product Team for resolution.

PHASE 3: ESCALATION

The Product Team will determine a solution to the problem and provide feedback to the consultant and Team Leader / Manager. If the problem can be resolved with the current software version, the client will be advised. If a software update is required, the client will be advised when a software maintenance release will be available.

Disputes, Resolutions and Termination

Resolution of Disputes

All complaints regarding the operation of the SLA including:
1.Expected level of support
2.Actual support offered and delivered
3.Personnel responsible for providing and delivering support
Should be forwarded in writing (preferably by email) to BGL Client Relations – clientrel@bglcorp.com.au.
Complaints are generally attended to within one business day.

If the dispute cannot be resolved by the BGL Client Relations Team, the matter will be escalated to a senior member of the BGL Management Team.

Penalties for not Meeting the SLA

In the event that BGL is unable to meet its obligations under the SLA due to circumstances arising from any cause beyond BGL's control such as acts of god, fire, storm, accident, riot, theft, labour disputes, disruptions in essential services (e.g. telephone orelectricity), neither party shall be liable in damages or have the right to terminate this Agreement.
In the event of such a breach, BGL will work to restore normal service as a matter of priority.

There may by times during a SLA subscription period where BGL does not meet its obligations and / or the subscriber does not meet his / her obligations.
In the event the subscriber does not meet his/her obligations pursuant to the SLA and the BGL Client Services Protocol and BGL as a result is unable to meet its obligations pursuant to the SLA, BGL shall not be held responsible for such a breach.

In the event BGL fails to provide the agreed level of support for more than 10% of contacts during the SLA subscription period, BGL will extend the SLA subscription for a period of 1 month.

Changes to Services

BGL may make changes to the scope, nature or time schedule of the services being performed under this SLA. Subscribers will receive 90 days' notice of any change. As a result of the change, should the subscriber wish to cancel the SLA, BGL will provide a pro rata refund of the SLA Subscription paid.

Termination

The SLA can be terminated by the SLA subscriber at any time during the SLA Subscription period. SLA subscribers must give BGL 90 days' notice of cancellation. BGL will provide a pro rata refund of the SLA Subscription paid.**Wishlist**

BGL maintains a list of product enhancements requested by clients. The BGL Wishlists are reviewed regularly and used as the basis for product updates. You can add your suggestions through the **BGL Client Centre | Your Feedback** .You can also vote on existing BGL Wishlist items.**Quality Assurance and Feedback**
BGL is committed to providing clients with the highest possible level of service.BGL is also continually looking at ways of improving our products and services to you. . If you are unhappy with the service, products and/or support provided by BGL or if you have feedback, please let us know. Clients can provide feedback to BGL by:

- Completing a feedback form through the BGL Client Centre under **Your Feedback**.
- Completing the automated support call client survey emailed to subscribers at the completion of every support call. Surveys are reviewed by the BGL Client Relations and any issues are referred to the BGL Support Manager and BGL Product Managers.
- Contacting the Client Relations Team – clientrel@bglcorp.com.au
- Call BGL on one of the Toll Free numbers (See Contacting BGL)