BGL Support Service Protocol.

This document details the software support provided to you as part of your BGL subscription.

Based Brighton East, Victoria, Australia our tertiary-qualified support staff are professionally trained to deliver sensational software support. Service delivery is managed by the BGL Support Manager and Support Team Leaders. With a Degree in Accounting or Finance and many completing their CA/CPA qualifications, the BGL Support Team has consistently had a customer satisfaction rating of over 98% - significantly higher than the industry benchmark.

This document should be read in conjunction with the BGL Cloud and Desktop Subscription agreements that can be found on the BGL website at *www.bglcorp.com.au*.

BGL Resources Hub

BGL provides you with a myriad of resources and services, which can be found at the BGL Resources Hub. The BGL Resources Hub includes a heap of practical resources to help you along your BGL journey.

- **CAS 360 and Simple Fund 360 Help**: Quickly search help articles, FAQ's and training manuals.

- **BGL Community**: Connect with BGL users and professionals in a supportive online forum.

- **Learning Channel:** An extensive self-paced online training platform.

- **Classroom Training:** Develop your skills in a hands-on classroom training environment.

- **Support and Live Chat:** Seek help to resolve technical issues with your BGL software.

- **Webinars:** Attend free webinars to improve your BGL product knowledge.

- **YouTube Channel:** Check our product feature videos, webinars, culture videos and more.

To access the BGL Resources Hub, *click here*.

BGL Client Centre

The BGL Client Centre is the one stop shop for accessing your account details, purchases, user groups, BGL Wiki, training manuals and much more. Keep your login details safe, so you can easily access it. You can also access the BGL Client Centre from your CAS Desktop and Simple Fund Desktop software.

BGL Wiki - Desktop solutions only

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 BGL Wiki icon under the Help tab or through the BGL Client Centre.

CAS 360 and Simple Fund 360 Help

Also known as the Knowledge Base (KB), the CAS 360 and Simple Fund 360 Help contain migration, getting started, help files, training manuals and videos for BGL Cloud Products. These KB centres can be accessed from your BGL cloud software by clicking on the Help link located on the top right-hand corner of the screen. The CAS 360 and Simple Fund 360 KB centres also provide you with the ability to:

- Submit a Support Request
- Check the Status of your Request
- View previous support tickets
- Follow articles or comments added

BGL Support

BGL provides product support services to all BGL clients as part of their subscription.

The purpose of support is to help clients with technical issues that arise when using the software. Consultants will, at times, refer you to support resources when the solution to your problem is clearly provided in the documentation and is not of a technical nature.

BGL consultants will not provide help for matters that fall outside the scope of product support.

Troubleshooting:

To self-resolve software issues, you can access the BGL support resources below:

- BGL Wiki - CAS Desktop, Simple Fund Desktop and Simple Ledger Help articles
- CAS 360 and Simple Fund 360 Help (Knowledge Base Centre - as previously mentioned)
- BGL Training Manuals both online and in PDF formats - Easily accessible via BGL Client Centre
- Search issue at the BGL Community to see previous comments
- Engage in Live Chat with the BGL Support Team

See the BGL Resources Hub section for more information.

Still need help?

Log a support call from within your software, the Client Centre or contact us via email or phone.

- *How to log support call within CAS 360*
- *How to log support call within Simple Fund 360*
- *How to log support call within CAS Desktop*
- *How to log support call within Simple Fund Desktop*

Support tickets should be submitted as a last resort. The majority of support matters can be resolved through Knowledge Centre resources. BGL has made a significant investment in providing you with extensive documentation. This documentation is regularly updated for changes to your BGL software.

BGL Support Online (Live) Chat

CAS 360 and Simple Fund 360 have inbuilt support chat. This resource reduces wait times and provides you direct access to the BGL Support Team. BGL recommends using chat for basic support queries that can be quickly resolved.

The team works to respond to initial chat requests within 60 seconds. Should a chat query become more technical, your conversation will be converted into a support ticket for further review. Should you wish to access the chat transcript, this is available to you within the chat interface.

BGL Support Ticketing

All BGL products provide users the ability to create support tickets within the software or via the BGL Client Centre.

CAS 360 and Simple Fund 360 have implemented suggested responses from the Help/Community databases. Should these not resolve the issue, users can create a support ticket with your specific support query. A confirmation is provided to you with your Ticket Number and Expected wait time.

BGL Support tickets are actioned in the order they are received except where the user(s) cannot access their BGL software. Should you wish to access the ticket transcript, this is available to you in the Knowledge Centre Portal.

Phone Support

BGL provides telephone support service to all clients. We aim to provide immediate access to our support team during business hours. However, where the support team is unable to provide immediate support, a ticket will be submitted, and you will receive a call-back. BGL does not guarantee a consultant will be instantly available for every call.

Hours of Operation

BGL Support is available between the hours of 07:30 and 19:30 AEST/AEDT. BGL Support is available in Australian, Hong Kong, Singapore and New Zealand. UK support is handled by BGL's UK agent. Should you contact BGL outside support hours, a Support Consultant will contact you the next business day.

Response and Resolution Times

BGL defines Response Time as the time from when a ticket is created to the time when a Support Consultant takes ownership of the ticket. Ownership is identified at the point where consultants allocate their name to a ticket. The ticket is then date and time stamped.
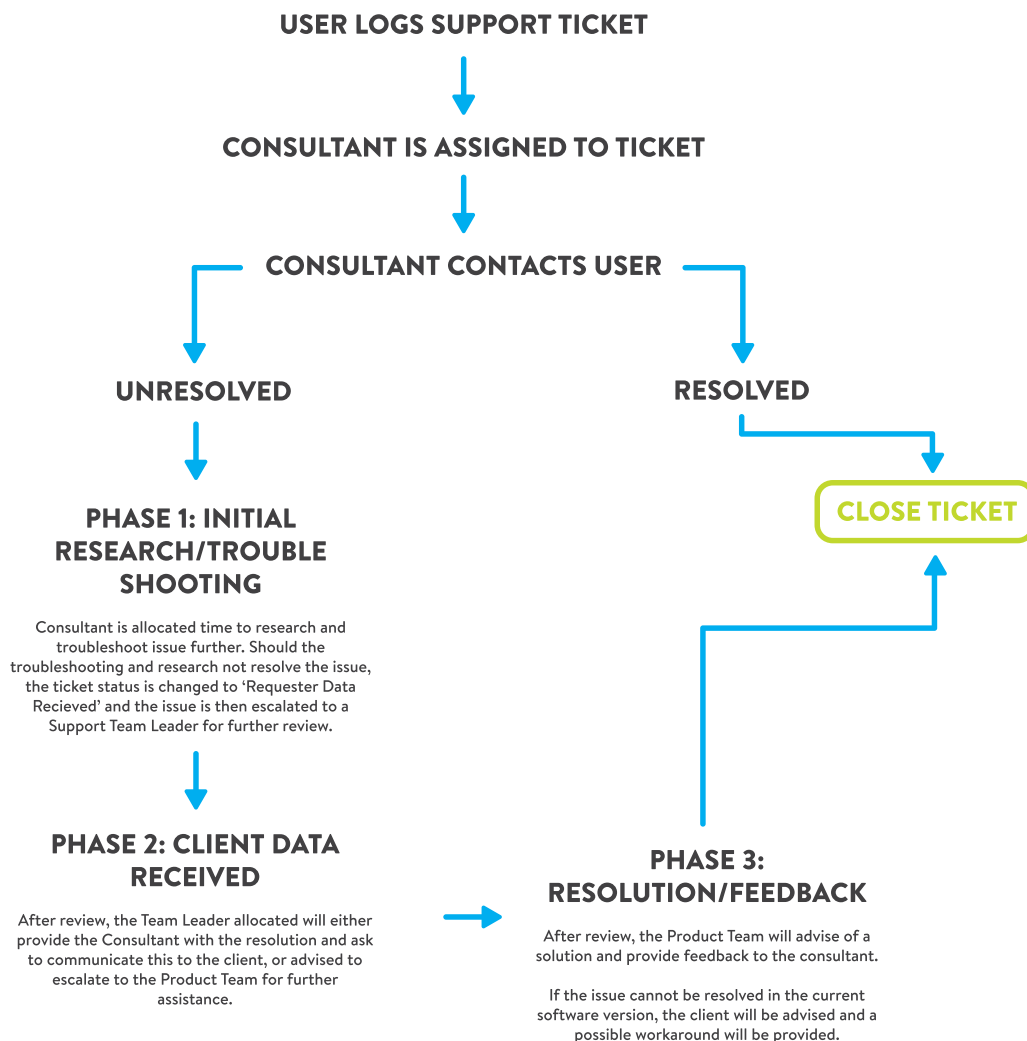
BGL defines Resolution Time as the time from when the ticket is logged to the time when the issue is resolved and marked as completed by the Support Consultant. BGL does not guarantee Resolution Times.

Ticket Monitoring and Escalation

The BGL Support Database has been designed so all support tickets can be easily managed and monitored. The Support Database includes a range of alerts, prompts and views for this purpose.

Support tickets are also reviewed by the Support Team Leaders, the Support Manager and the Client Experience Team to ensure service quality standards are met and satisfactory resolutions are delivered to clients. After a support ticket is completed, BGL will ask you how we performed. These surveys are very important as they form the basis of our CSAT or Customer Satisfaction calculation. There may be occasions where you are contacted by BGL to get more information from you on the feedback you have provided.

Ticket escalation occurs when an issue cannot be resolved during the first contact. Almost 80% of tickets are completed at first contact. The remaining 20% are escalated as follows:

USER LOGS SUPPORT TICKET

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CONSULTANT IS ASSIGNED TO TICKET

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CONSULTANT CONTACTS USER

UNRESOLVED　　　　　　　　　　**RESOLVED**

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PHASE 1: INITIAL RESEARCH/TROUBLE SHOOTING　　　　**CLOSE TICKET**

Consultant is allocated time to research and troubleshoot issue further. Should the troubleshooting and research not resolve the issue, the ticket status is changed to 'Requester Data Recieved' and the issue is then escalated to a Support Team Leader for further review.

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PHASE 2: CLIENT DATA RECEIVED　　　　　**PHASE 3: RESOLUTION/FEEDBACK**

After review, the Team Leader allocated will either provide the Consultant with the resolution and ask to communicate this to the client, or advised to escalate to the Product Team for further assistance.

After review, the Product Team will advise of a solution and provide feedback to the consultant.

If the issue cannot be resolved in the current software version, the client will be advised and a possible workaround will be provided.

Ticket Status

When a Support Ticket is in progress, you can monitor the status of your tickets.
Please see list below:

STATUS	WHAT DOES THIS MEAN?
Awaiting Customer Response	The Support Consultant is waiting on a response from the you.
Awaiting Third Party Response	The issue reported has been escalated to a third party to investigate and BGL are waiting on a response.
BGL Left Message	The Support Consultant has made an attempt to phone you and has left a message.
Escalated to Product Team	The issue reported has been escalated to the BGL Product Team and the Support Consultant is waiting on a response.
Requester Called Back	You have called the Support Consultant and left a message.
Requester Data Received	The Support Consultant has received data from you and this is being reviewed by the Consultant and/or their Team Leader.
Solution Available	A solution is available and needs to be communicated to you by the Support Consultant.
Resolved	No follow up was received from you and the issue is considered closed.

BGL Support DOES NOT include:

Please note BGL Support does not include:
- Training
- Taxation, superannuation or technical advice
- Software installations and / or update installation (Desktop Products)
- Remote desktop support
- Network or computer support
- Backing up and restoring data (Desktop Products)

Taxation, superannuation or technical advice

Many clients ask BGL consultants a range of accounting, tax, technical, Corporations Act and compliance related questions. BGL consultants are trained to provide clients with product support NOT technical advice. BGL consultants are under strict instructions not to provide technical advice 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 submit an urgent support ticket, advise they are an external consultant and BGL will provide priority support.

Remote Desktop Support

BGL uses TeamViewer to provide remote IT support. 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.

Network and PC Support

The BGL Support Team is not responsible for your file servers, networks, workstations, modems or printers. BGL Desktop 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 computer support services. If a BGL Support Consultant determines your support issue is related to your network or computer, 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 backup and restore your BGL Desktop Products. BGL takes no responsibility for your data where proper backups have not been made.

Fair Use Policy

Summary
To ensure that BGL Support Services offer continued access to all End Users, BGL has instituted a 'Fair Use Policy' to ensure services are not misused or taken advantage of.

Impact of Our Services
Should a client be found to be directly impacting the integrity of our security or performance of BGL's Support Services, BGL may suspend, restrict or cease access to BGL products or services. BGL will ensure this is communicated to the client prior to action taking place.

Excessive Use
Should a client overuse the BGL Support Services (significantly more than all other clients), BGL may suspend, restrict or cease access to BGL products or services. BGL will ensure this is communicated to the client prior to action taking place.

Illegal Use
Should BGL believe you are using our product or services either in breach of the BGL Software Subscription Agreement or in breach of the law, BGL may suspend, restrict or cease access to BGL products or services.

Inappropriate Behaviour
Should a BGL client be found to be harassing, bullying, displaying aggression or using inappropriate language towards a BGL Team member, the staff member is within their right to immediately cease their communication with the client and escalate the matter to their Team Leader. BGL may suspend, restrict or cease access to BGL products or services.

Changes
BGL reserves the right to update the Fair Use Policy at any time, to reflect our values, client feedback and to improve our services.

Disputes, Resolutions and Termination

All complaints regarding BGL support such as:
1. Expected level of support
2. Actual support offered and delivered
3. Personnel responsible for providing and delivering support

Should be forwarded to **info@bglcorp.com.au**. Complaints are attended to within one business day.
If the dispute cannot be resolved by the Client Experience Team, the matter will be escalated to a member of the BGL Management Team.

Wishlist

BGL maintains an internal list of product enhancements as requested by clients. The BGL Wishlist are reviewed regularly and used as the basis for product updates/enhancements. Wishlist items can be submitted via the feedback feature in all cloud products. Your request will be logged, and you will be contacted by the product team should any further information be required.

Quality Assurance and Feedback

BGL is committed to providing clients with the highest level of service. BGL is continually looking for ways to improve our products and services. 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 ticket or chat client survey provided to clients at the completion of every support ticket or chat.
- Via email to info@bglcorp.com.au

- Call BGL

BGL Contact Details

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