Service Level Agreement

THIS AGREEMENT dated 17th July 2023 is made between CRM Consultancy and our customers and identifies the expected level of service. The agreement may vary between vendors, services, and industries. Please note this agreement is subject to review and renewal by CRMCS.

The purpose of this SLA is to specify the requirements of the service provided by CRMCS as defined herein with regards to:

➢ Agreed Support Service Targets
➢ Roles and Responsibilities
➢ Supporting processes, limitations, exclusions, and deviations.

Term	Description
Phone and Remote Support	This defines how we will provide support and remote assistance for your CRM Solution
Response	We define a response as analysing the fault, Planning the required steps to resolve the fault, taking, or initiating a series of actions to resolve the fault, Informing the client on the plan and timescale to fault resolution.

Priority Levels	Response Times
P1	Critical Issue – Minimum Response time of 2 hours, with an intended resolution time of ASAP.
P2	Urgent Issue – Minimum Response time of 4 hours, with and intended update every 4 hours until resolved.
P3	Productivity Issue – Minor Defect/Bug Minimum Response time of 4 days. (We believe this should be 2 days)
P4	Minor Issue – allocated to your next planned dedicated consultancy day or within 4 days.
P5	Change Request, Query or Request for Assistance – estimated turnaround time of 2 weeks.

➢ **Support Response Times**

Please note: If you do not have a CRMCS Portal log on, please contact accounts@crmcs.co.uk to set up your details.

As stated above, you can raise any Cases via our CRMCS Support Portal – https://deliverable.powerappsportals.com/ (not via email as this could cause delays due to annual leave or sickness). Each Case will be categorised with a priority between P1, P2, P3, P4 or P5 which will drive the response time and preferred method of resolution.

You can submit any Support Cases through our CRMCS Support Portal, you will be able to classify the priority of the case that has been raised; however, we will review it and may amend it if we see fit.

➢ **Critical Issues (P1)**

For critical issues our response time is **2 hours**. A critical issue is any problem related to CRM which is preventing the business from trading – such as the following examples:

o   The failure of the main CRM database resulting in the system being unavailable.

o   Incident preventing multiple groups of users from completing a core business process.

The client will specify when a Critical issue has occurred, during a critical failure all members of CRMCS helpdesk team are informed of the issue so communications can be maintained with the client whilst the issue is resolved. The aim for our team will be resolve this issue as soon as possible, with an update provided every 2 hours during the period the issue is taking place.

Please note: any critical/urgent issues that we raise with Microsoft mean we are bound by their SLA's.

Urgent Issues (P2)

For urgent issues the response time is 4 hours. Any incident can be escalated by the client to urgent status, but this may not always be possible due to call prioritisation, which helps us handle support issues during busy times and ensure that clients whose trading is impacted receive the fastest service.

o A database failure that affects some people, but not all.

o A problem that prevents a few users from finishing a crucial business process.

These issues will be addressed within 4 hours and updated every 4 hours until resolved.

Productivity Issue (P3)

These are issues which do not require an immediate response but need to be calendared and dealt with on a lengthier timescale. The client has control over what is classed as a productivity issue and any issue can be escalated to urgent, however by classifying none priority issues in this manner helps us provide a better level of response to our clients.

o   A database failure affecting a couple of employees.
o   A core business process failure affecting a couple of employees.

These issues will have an estimated turnaround time of 2 days since the issue being raised.

Minor Issue (P4)

Minor changes or very occasional defects will be grouped as P4 issue that will be managed and resolved by CRMCS helpdesk team. These will be raised and resolved in our regular time allocation for the client or within 4 business days.

Change Request, Query or Request for Assistance (P5)

Where queries are raised regarding CRM, these will be tagged as P5 tickets and will have an estimated turnaround time of 2 week's – these differ from P3 or P4 issues as they do not typically require a system change or technical assistance, instead being based on assistance in how–to use a Microsoft or CRMCS Application.

These tickets will be managed using the same route to resolution as above to ensure the query is resolved effectively.

Response:

We define a response as:

o   Analysing the fault.

o   Planning the required steps to resolve the fault.

o   Taking or initiating a series of actions to resolve the fault.

o   Informing the client on the plan and timescale to fault resolution.

Typically, this would involve:

o   Receiving a case via the CRMCS Portal

o   Categorising the issue from P1 – P5

o   Assigning the issue to a relevant consultant, who will analyse the fault to determine the root cause.

o   The consultant attempts to assess and resolve the fault.

o   Informing the client of progress on the fault regularly.

This would then move to Issue Resolution:

o   The Consultant communicate the solution to the contact that logged the fault.

o   If resolved, this would act as the request to close the ticket as resolved.

o   The customer would then confirm resolution, or that further works remained pending to close the fault

o   The Consultant would then determine whether the issue should be documented as a knowledge base article for future reference.

CRMCS Service desk

The support contract covers telephone and remote assistance for day-to-day issues and troubleshooting regarding the CRM Solution, this cover includes:

- o Core Issues with Dynamics CRM

- o Issues or unexpected behaviour with customisations to CRM, such as Workflow, Forms and Views.

- o Problems with custom modules added to CRM, such as Plugins and Custom Screens.

- o The referral of issues to the infrastructure hosting partner where required.

- o Assistance with Advanced Find Reporting

- o Assistance with the Outlook Client for CRM

- o Assistance reconfiguring or reinstalling the Outlook Client

- o Onsite assistance outside of ServiceDesk is then supplied via ongoing Business Account Management.

These tickets are collected in our internal use of Dynamics 365 via our Support Team.

Client Responsibilities

Whilst the service does not include a cap on the number of issues raised the client has a responsibility to maintain the environment (where applicable if not hosted) for the core CRM Servers, and the client workstations connecting with the CRM Solution.

- o Communication of Proxy Server Details between the client network and CRM

- o Workstation Specification running CRM

- o Internet Browser Versions

- o Office Version

- o Windows Version

- o Ability to work in partner with IT Services at the client to set policies for Pop-up Blockers or Secure Sites.

- o Any Firewall or other details that may prevent connections to the CRM Solution.

Please see link for further details: https://docs.microsoft.com/en-us/dynamics365/commerce/get-started/system-requirements

Hours of Service

The Contract does not include provision for out of hours support, and so new tickets and SLAs are tracked against our standard working hours (as specified below).

With CRMCS's prior consent, we may consider performing change releases outside of working hours in unusual and specific situations, such as during scheduled downtime for maintenance.

Working Hours

Working hours are defined as:

o 09:00–17:30 Monday – Friday.

o Excluding any UK Public Bank Holidays