



## Support & Maintenance Guide



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## INTRODUCTION

### RFPMONKEY.COM SUPPORT & MAINTENANCE

RFPMonkey.com helps you build, categorize, and search a library of reusable RFP/RFI content. It also helps you track RFPs and their due dates, status, outcome, team assignments, and levels of progress. Our focus is on the RFP response need, unlike some other solutions that include creation of Sales Play Books or PowerPoint presentations, etc. Our focus on the RFP task keeps our solution comparatively less complex, easier to learn, more stable, and typically less expensive than other solutions.

But that does not mean that you won't need some training, won't want to take functionality updates, or occasionally need help. So we offer Support & Maintenance plans to ensure that you have the right balance between self-service independence and full-service offerings for additional fees.

To ensure everyone's success, every RFPMonkey.com account has the benefit of our Basic Support Plan for free. You may have chosen an upgraded level of support and maintenance based on your anticipated needs.

### WHAT IS INCLUDED IN YOUR SUPPORT & MAINTENANCE PLAN?

What is included in your Support & Maintenance plan depends on which plan you have selected as part of your RFPMonkey.com subscription.

	Basic Support 'Self Service'	Intermediate Support 'Guidance'	Premium Support 'Hand-holding'
Kick-Off Call	✓	✓	✓
Solution Updates	✓	✓	✓
24 X 7 Support Portal	✓	✓	✓
Email Support	✓	✓	✓
Initial Response Time	< 24 hrs	< 12 hrs	< 6 hrs
Web-based Training	✓	✓	✓
Instructor-led Training	\$175 / Student	✓ Initial	✓ Annual
Best Practices Consulting	\$75 / Session	✓	✓
Acct Review	\$75 / Session	✓ Initial	✓ Quarterly
Assigned Contact	✗	✓	✓
Cell Phone Access	✗	✗	✓
Premium Restore	\$75 / Year	\$75 / Year	✓
On-site Training	Available*	Available*	Available*

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## BASIC SUPPORT

Basic Support is self-service model, and is free. All accounts have at least a Basic Support & Maintenance Plan. The Basic plan includes the following:

- Kick-off Call
- Solution Updates
- 24X7 Access to the Support Portal
- Email Support
- Web-based Training

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## INTERMEDIATE SUPPORT

Intermediate Support offers more guidance than Basic, and is focused on getting you up and running quickly. It includes:

- Kick-off Call
- Solution Updates
- 24X7 Access to the Support Portal
- Email Support
- Web-based Training
- Initial Instructor-led Training
- Initial Best-practices Consulting Session
- An Account Review Consulting Session
- Assigned Support Contact

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## PREMIUM SUPPORT

Premium Support is our highest level of Support. It is designed for organizations that may have more complex needs and may need more assistance throughout their RFPMonkey relationship. Premium Support includes:

- Kick-off Call
- Solution Updates
- 24X7 Access to the Support Portal
- Email Support

- Web-based Training
- Annual Instructor-led Training
- Best-practices Consulting Sessions As Needed
- Quarterly Account Review Consulting Sessions
- Assigned Support Contact
- Cell-phone Access to Assigned Support Contact
- Premium Restore

#### REGISTERING YOUR POINT(S) OF CONTACT WITH RFPMONKEY.COM

Clients with either Intermediate or Premium support plans will have assigned/designated support contacts at RFPMonkey.com. Premium support plan clients will have cell-phone access to their assigned contact. With both Intermediate and Premium support, you should restrict your interactions with an assigned support contact to one or two members of your own team. The names and contact information for up to 2 designated points of contact will be logged in RFPMonkey.com's support system. Any user can submit support tickets through the On-Line Support Portal or by emailing [support@rfpmonkey.com](mailto:support@rfpmonkey.com).

While any user can submit tickets through the portal or by email, it is best if you designate one or two individuals on your team to serve as your point of contact.

Any user who submits email or portal tickets should first register within the portal. This allows us to verify your email address and properly connect you to your account, so we can provide the appropriate level of support.

Once a user registers on the RFPMonkey.com On-Line Support Portal, they will initially have limited access to the portal. To gain full portal access the new user needs to verify their email address. This is a simple task of replying to an automated email that is delivered when you register. Once verified, RFPMonkey needs to update your portal access to give you full access. Please let us know when you have registered and confirmed your email address so we can make the access update for you.

#### HOW DO YOU REQUEST HELP?

Regardless of your chosen Support & Maintenance plan, you can always submit a request using our On-Line Support Portal. Its web address is <http://www.rfpmonkey.com/support>. You may also email your request to [support@rfpmonkey.com](mailto:support@rfpmonkey.com).

Make sure to include your contact information, the name of your company, and your RFPMonkey account number. This helps us identify you and allows us to verify your account, enabled features, and the appropriate support plan.

Be as detailed as possible in your request. If you are experiencing an error, let us know which screen/function is erroring, observable symptoms, how to reproduce the error, and any on-screen error messages. A screen shot is also helpful.

If you are requesting a solution enhancement, let us know what you want, and what value it would add to you as a user. Feel free to describe how you would design the new feature. This helps us understand your need. Naturally, once we understand it, and if we decide to include it, we will design it in-house.

If you are just asking a question, try to find the answer first in the *How Do I...?* section of the Support Portal, within the *Documentation* section, or within the *RFPMonkey.com User Guide*.

Prior to submitting a ticket via either method (portal or email), you should first register as a user within the Support Portal, verify your account, and let us know to upgrade your status within the portal to Full Portal Access. Until we make this update to your personal user ID in the portal, you will have the same level of portal access as users within trial accounts.

If you have selected Premium Support, you will also have the mobile number of your assigned support contact - feel free to use it.

#### WHAT HAPPENS WHEN YOU SUBMIT A SUPPORT REQUEST?

When you send an email to [support@rfpmonkey.com](mailto:support@rfpmonkey.com) a support ticket is created within the Support Portal. You may also manually enter a new ticket directly within the portal. Either way, the ticket is officially created and associated with your account.

One or more support staff will be alerted by text message and/or email that the new ticket exists. At this time, you can sit back and relax. You have done all that you can for now. We will review your ticket, verify your account and support plan, prioritize the ticket, and respond (usually by email) within the time provided for by your chosen support plan.

In many cases, the initial response will contain the answer to your question, notification that the associated error has been corrected, or confirmation that we understand the request. However, sometimes our initial response may be to gather additional information as to the nature, severity, and/or symptoms of the issue. This is more likely if your request does not include a detailed description of the issue.

We cannot guarantee a time to final/eventual solution. For reported bugs, their nature, severity, and complexity will dictate how quickly we can correct them. Enhancement requests must be understood, prioritized, accepted, and finally coded and tested. Of course, not all enhancement requests will be adopted. General questions are usually answered right away, but may require some research prior to a final response.



## KICK-OFF CALL

The Kick-off call is vital to a successful launch and should be scheduled right away. Topics to be taken up during the call include the following:

### Order/account details including

- Subscription Edition
- Subscription Duration
- Selected options

### Training information

- Available options
- Did you purchase training
- Training schedule (if you purchased instructor-led training)

### Support & Maintenance information

- What's included in your selected level of Support & Maintenance
- Selecting an internal point-of-contact
- Registering in the Support Portal

### End-of-subscription information

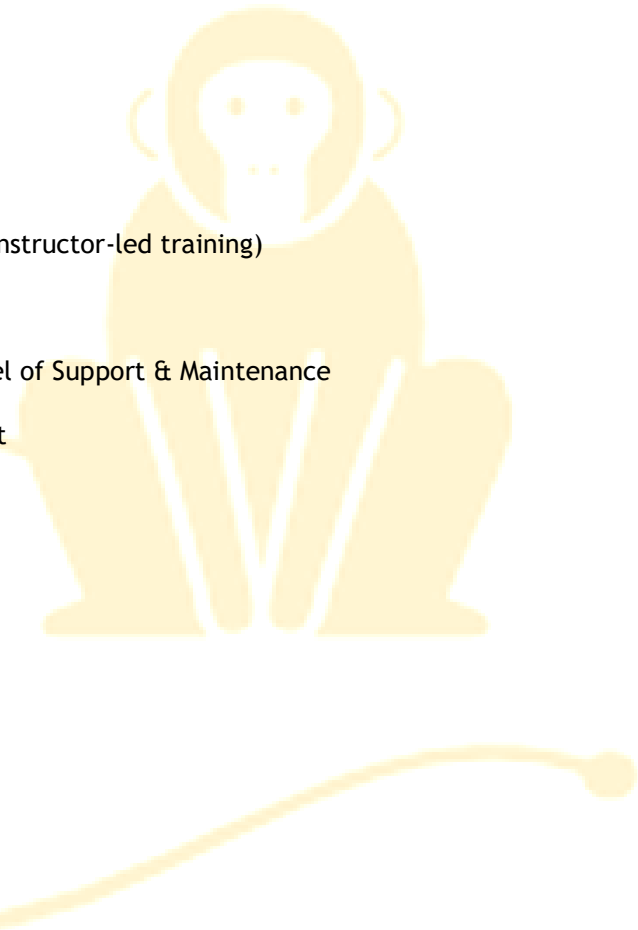
- Account expiration
- Renewal

### Accounting

- Vendor set-up for your AP team
- W9
- How to pay

### Contact information

- Main contact on the account
- Contacts for renewal reminder emails
- Contacts for invoices



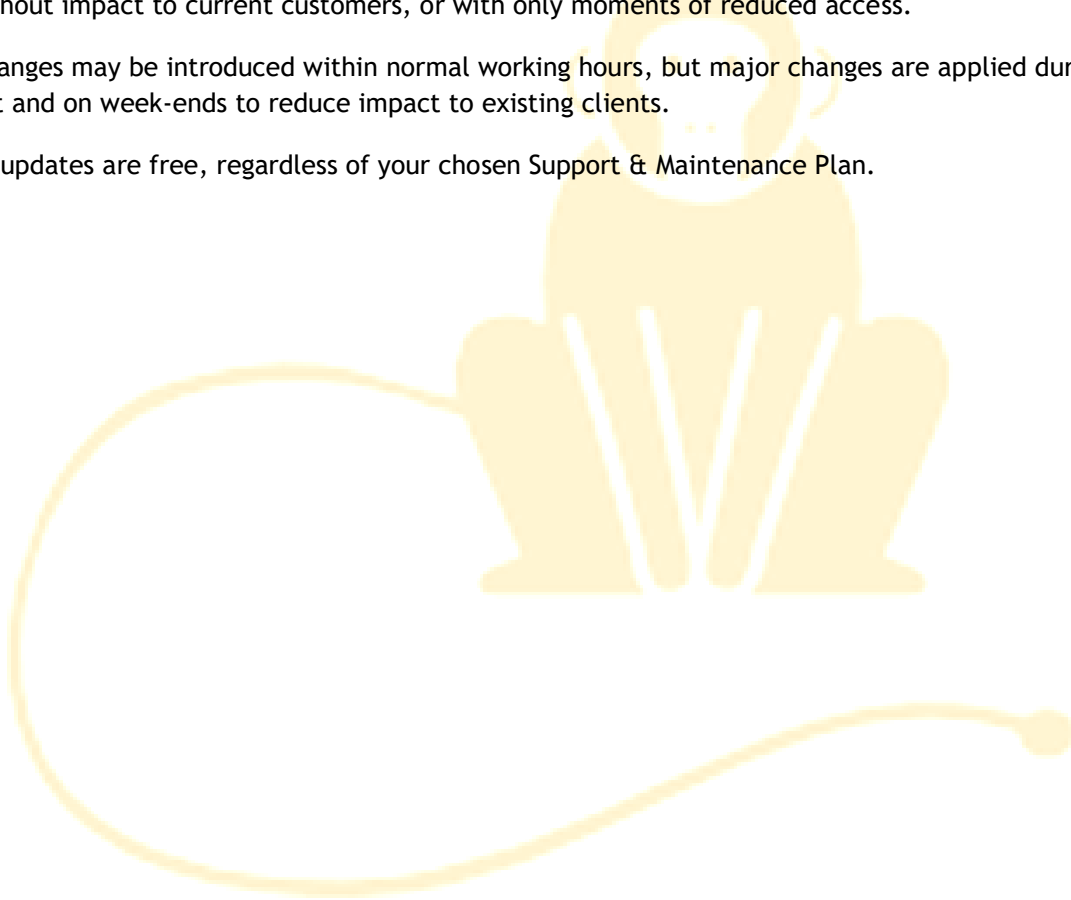
## SOLUTION UPDATES

The RFPMonkey.com solution executes from a single set of code on our production server. To enhance the product or fix bugs, we must update this code. When this is done, the solution is updated at the same time for all clients with access. Bug fixes are effective immediately. Updated features are available immediately. New functionality is available immediately (but may be subject to new licensing agreement).

Prior to releasing new code to the production server, changes to the underlying database structure may be required. This is typically done in a way that does not impact current customers, or creates only moments of reduced access. New/edited code will be deployed into a test environment to verify its function prior to being deployed to the production server. As with database updates, this is typically done without impact to current customers, or with only moments of reduced access.

Small changes may be introduced within normal working hours, but major changes are applied during the night and on week-ends to reduce impact to existing clients.

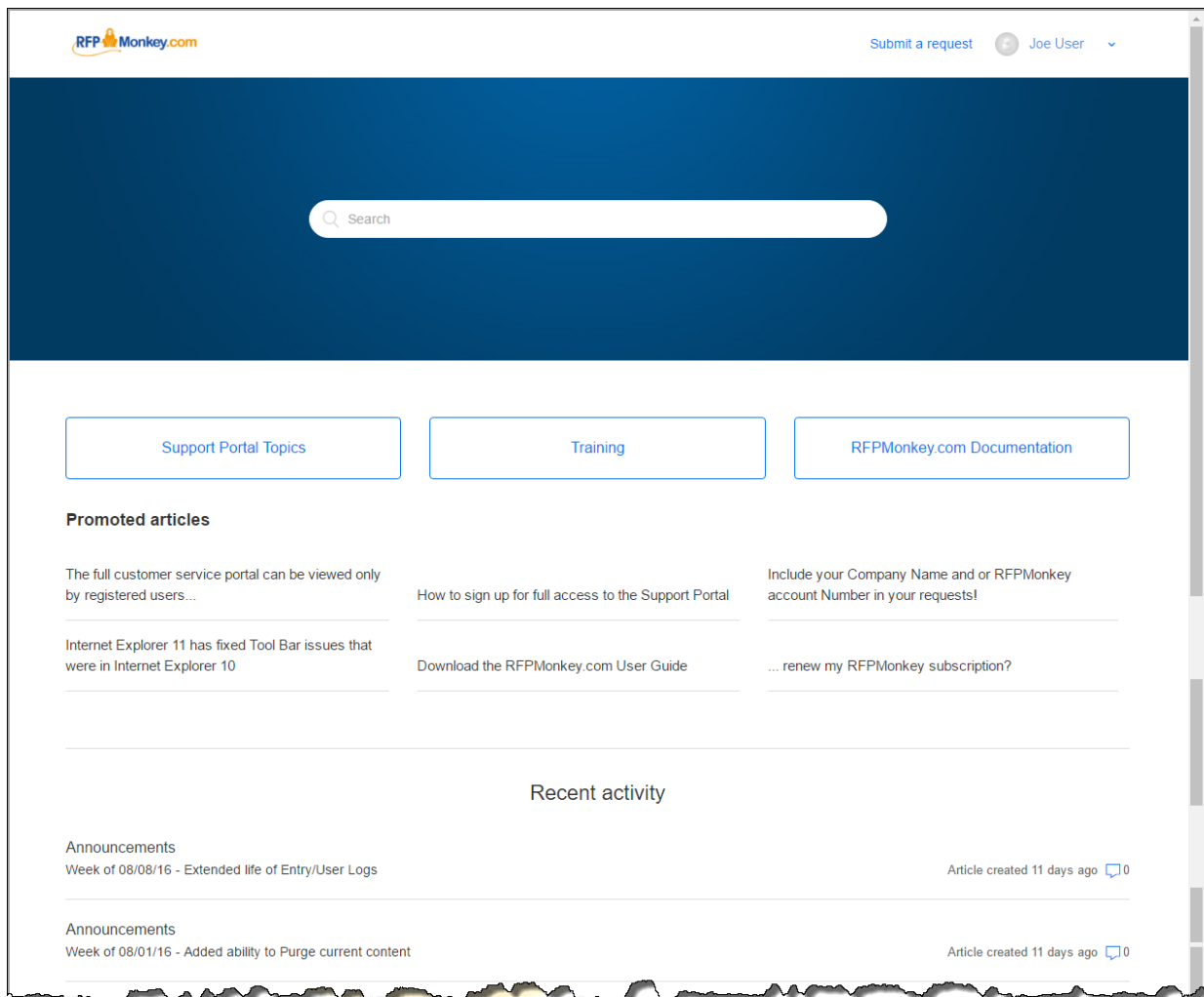
Solution updates are free, regardless of your chosen Support & Maintenance Plan.



## ON-LINE SUPPORT PORTAL

RFPMonkey.com's On-Line Support Portal is a vital part of all of our Support & Maintenance plans. It is used by registered users to submit support tickets, access documentation and training materials, submit enhancement requests, and keep up to date with recent changes.

The portal is available 24X7 at <http://www.rfpmonkey.com/support> and is available to all client organizations regardless of their chosen Support & Maintenance plan.



After signing in to the portal you will be able to submit a request, search for content, or investigate the main support categories: Support Portal Topics, Training, and RFPMonkey Documentation.

## REGISTER

You must sign in to the Support Portal to use it. And you must register prior to signing in. This is separate from your regular RFPMonkey.com user account. Registering within the portal allows us to verify your email address and properly connect you to your account, so we can provide the appropriate level of support.

Once a user registers on the RFPMonkey.com On-Line Support Portal, they will initially have limited access to the portal. To gain full portal access the new user needs to verify their email address. This is a simple task of replying to an automated email that is delivered when you register. Once verified, RFPMonkey needs to update your portal access to give you full access. Please let us know when you have registered and confirmed your email address so we can make the access update for you.

## SUBMITTING A REQUEST

Submit a new support request by going to the portal and clicking on the **Submit a request** link. Fill out the ticket request form, making sure to include your contact information, the name of your company, and your RFPMonkey account number. This helps us identify you and allows us to verify your account, enabled features, and the appropriate support plan.

Be as detailed as possible in your request. If you are experiencing an error, let us know which screen/function is erroring, observable symptoms, how to reproduce the error, and any on-screen error messages. A screen shot is also helpful.

If you are requesting a solution enhancement, let us know what you want, and what value it would add to you as a user. Feel free to describe how you would design the new feature. This helps us understand your need. Naturally, once we understand it, and if we decide to include it, we will design it in-house.

For quick questions, you may want to search the *RFPMonkey.com User Guide* or log into the Support Portal and search the *How Do I...?* section, or the Documentation section.

When you submit a request, one or more support staff will be alerted by text message and/or email about the new ticket. We will review your ticket, verify your account and support plan, prioritize the ticket, and respond (usually by email) within the time provided for by your chosen support plan.

In many cases, the initial response will contain the answer to your question, notification that the associated error has been corrected, or confirmation that we understand the request. However, sometimes our initial response may be to gather additional information as to the nature, severity, and/or symptoms of the issue. This is more likely if your request does not include a detailed description of the issue.

We cannot guarantee a time to final/eventual solution. For reported bugs, their nature, severity, and complexity will dictate how quickly we can correct them. Enhancement requests must be understood, prioritized, accepted, and finally coded and tested. Of course, not all enhancement requests will be adopted. General questions are usually answered right away, but may require some research prior to a final response.

## SUPPORT PORTAL TOPICS

The support category called Support Portal Topics contains high-level support-related information. It contains sections to organize information further. The sections include:

- **Log In To Access Full Portal** - This section contains articles reminding you to log in to the Support Portal to gain full access. (Currently you have to be logged in even to see this section, but at various times, portal access may change making this section more meaningful.)
- **Popular Resolved Requests** - This section contains a few past requests and their resolutions.
- **Known Bugs/Issues** - This section contains any system errors we are currently aware of. If you see an issue here, you do not need to bring it to our attention.
- **Announcements** - We update this section throughout the year to record changes, enhancements, and bug fixes that are performed. You can get a good idea of RFPMonkey's evolution and frequency of update by scanning this information.

## TRAINING

The Training category contains links to WBT courses and training PowerPoint decks. These self-help materials are accessible to all clients regardless of their Support & Maintenance plan. Training options are discussed in greater detail later in this document. The sections under the Training category are:

- **Web-based Training** - This section is your starting point for self-paced web-based training courses.
- **Power Point Decks** - This section contains links to training-related PowerPoint decks.

## RFPMONKEY.COM DOCUMENTATION

This category within the Support Portal contains a library of information about how to use RFPMonkey.com. It includes sections dedicated to:

- **Getting Started** - This section contains articles about logging on to RFPMonkey, setting us up as a vendor, solution configuration guidance, a trial guide, and the RFPMonkey.com User Guide.
- **How do I...?** - This section is designed as a reference for very specific tasks. If you want to know how to log on, or how to access another user's account while they're on leave, find the associated task in this section and learn how to proceed.
- **Best Practices** - These articles will guide you to some of the most effective ways to use RFPMonkey and to organize your RFP response efforts. They will also point out some common mistakes and time wasters.
- **Documentation** - This section contains articles and links to documentation files. This information includes the Trial Guide, User Guide, CSV import documentation, channel partner support information, information on implementing affiliated/linked accounts, and other coverage of specific topics.

## EMAIL SUPPORT

Clients can request assistance by emailing [support@rfpmonkey.com](mailto:support@rfpmonkey.com) at any time. Make sure to include your contact information, the name of your company, and your RFPMonkey account number. This helps us identify you and allows us to verify your account, enabled features, and the appropriate support plan.

Be as detailed as possible in your request. If you are experiencing an error, let us know which screen/function is erroring, observable symptoms, how to reproduce the error, and any on-screen error messages. A screen shot is also helpful.

If you are requesting a solution enhancement, let us know what you want, and what value it would add to you as a user. Feel free to describe how you would design the new feature. This helps us understand your need. Naturally, once we understand it, and if we decide to include it, we will design it in-house.

If you are just asking a question, try to find the answer first in the *How Do I...?* section of the Support Portal, within the *Documentation* section, or within the *RFPMonkey.com User Guide*.

Prior to submitting a ticket via email, you should first register as a user within the Support Portal, verify your account, and let us know to upgrade your status within the portal to Full Portal Access. Until we make this update to your personal user ID in the portal, you will only have the same level of portal access as users within trial accounts.

When you send an email to [support@rfpmonkey.com](mailto:support@rfpmonkey.com) a support ticket is created within the Support Portal. We will review your ticket, verify your account and support plan, prioritize the ticket, and respond (usually by email) within the time provided for by your chosen support plan.

Depending on the nature of the request, and the details provided in it, our initial response may either contain:

1. The answer to your question
2. Notification that the issue has been resolved
3. Notification that the issue has not yet been resolved, but that a resolution is under way
4. A request for more information from you about the issue, its symptoms or error messages, and/or how to recreate the condition

Final resolution time varies based on the nature of the issue and of the solution. For reported bugs, their nature, severity, and complexity will dictate how quickly we can correct them. Enhancement requests must be understood, prioritized, accepted, and finally coded and tested (if adopted). General questions are usually answered right away, but may require some research prior to a final response.

## RESPONSE TIMES

We try to respond quickly to all support tickets and inquiries; however we sometimes have to prioritize responses against other responses, and against other necessary tasks. Even though an initial response is sometimes delayed, we strive to keep them within certain time frames, based on your chosen Support & Maintenance plan.

Our service-level-objectives for the various Support & Maintenance plans are as follows:

- Basic Plan - initial response within 24 hours
- Intermediate Plan - initial response within 12 hours
- Premium Plan - initial response within 6 hours

No time frames are given for final resolution. The severity, priority, and complexity of each case, and the steps required to address it dictate the final resolution and final resolution time frame.

## ESCALATION

It is important to use the Support channels described in this document. Unless logged within RFPMonkey.com's Support Portal, requests will NOT be associated with support tickets, and therefore will not have response timers, resolution timers, or automatic escalation. Even if you have personally emailed or telephoned a contact within RFPMonkey, you need to also submit a ticket.

New support requests are assigned to a Support team member as they are recorded. At that same time, a response timer also starts, and management is alerted to the new ticket.

After a ticket is submitted, the assigned team member is automatically reminded if the response timer reaches 50% of the service-level-objective. Management is automatically alerted if the response timer reaches 80% of the service-level-objective.

## TRAINING

RFPMonkey.com training is available in multiple forms. Basic web-based training is available through the On-Line Support Portal, which is part of each Support & Maintenance Plan. Instructor-led training delivered through the web is included in the Intermediate and Premium plans. And on-site training at the customer's facility is available, although not included in any of the support plans.

Training programs not available within a particular support plan can be purchased separately.

### WBT

Basic web-based training is on the Support Portal and available to all customers. It is designed to teach you the most important RFPMonkey concepts, and get you to the point where you can use the system effectively, but it is not as thorough as instructor-led training.

WBT courses include:

- **Getting Started** - Get an overview of RFPMonkey.com, some important 'first steps', and learn about other resources that will be very helpful. Everyone should take this course.
- **RFPMonkey Fundamentals** - Learn how to log on to RFPMonkey.com, how to search RFP content in various ways, and how to use search results. Also learn about Personal Settings and Personal Profile items such as password and username. Everyone should take this course.
- **Adding, Submitting, and Approving Content** - Learn what makes up an 'entry' and how to create them. Learn how to add single entries or work in heads-down, data-entry mode. Then see how to submit new content for approval, and finally how to approve content, either individually or in batches. Anyone who will add entries should take this course. In some companies, this is everyone. In other companies, an individual or small group of users are appointed as 'custodian' of the repository. If that's the case in your companies, perhaps only the custodians should take this course.

The WBT section of the Support Portal also has links to training PowerPoint decks that you may find useful. They include:

- **Instructor-led Training PPT** - This is the same deck covered during our standard instructor-led training. You may find it useful, but of course, it does not have the benefit of the live discussion, examples, demo segments, and off-topic conversations typically found in instructor-led training sessions.
- **Search-only Training PPT** - This deck covers basic search functions. It is intended to be modified and used as part of your material if you decide to train your own users.
- **Projects Training PPT** - The Projects training deck covers tracking RFP projects, their due dates, outcomes, statuses, team assignments, and levels of progress. In addition to capturing and updating this information, you will also be introduced to the RFP Calendar, RFP Statistics, and the RFP List View.

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## INSTRUCTOR-LED TRAINING

Instructor-led training is delivered through the web with a knowledgeable RFPMonkey trainer sharing critical solution knowledge via PowerPoint presentation, live product demo, and student exercises.

One instructor-led training session is included in the Intermediate Support & Maintenance Plan, and typically delivered within the first month after a new customer account is provisioned. Premium Support & Maintenance customers are entitled to annual instructor-led training courses, typically scheduled to follow shortly after subscription renewal. Instructor-led training is scheduled at the customer's convenience and typically consists of a single 3-hour session. During this session, the instructor will use presentation, live demo, and student exercises to convey the most important topics to students.

Instructor-led training is not included in the Basic Support & Maintenance Plan, but customers with a Basic Support & Maintenance Plan may buy instructor-led training as needed.

Instructor-led training is scheduled at the client's and RFPMonkey's mutual convenience, only after being requested by the client. It is not automatically scheduled.



There is no refund or credit given for unused training. If a client's Support & Maintenance plan includes initial or annual instructor-led training, it is the client's responsibility to request it and see that it is scheduled accordingly.

## ON-SITE TRAINING

On-site training at the customer's location is available, but not included in any of the existing Support & Maintenance plans. On-site training is typically tailored to each client's needs. Typical on-site training sessions include user and admin training on the following topics:

- Fundamentals
- Searching and search macros
- Content entry
- Bulk CSV import
- User and Role admin
- Filter admin
- Acct settings and admin
- UI branding
- RFP Projects (entering, tracking, statistics, calendar)

If you are interested in on-site training, email [training\\_coordinator@rfpmonkey.com](mailto:training_coordinator@rfpmonkey.com) to arrange a discussion. We will need to discuss goals, class size, class-room facilities, course customizations, location, travel schedules, etc. before we can provide an estimate for associated charges.

Organizations receiving on-site training are responsible for furnishing the following:

- Training room or facility
  - Enough seating for the student audience
  - Podium or table/desk for trainer
  - Projector and screen (or large video display)
  - White board and markers
- PCs or laptops for each student
- Internet connectivity (wired and WIFI preferred)

## BEST-PRACTICES CONSULTING

After years of developing, teaching, and using RFPMonkey.com, we have identified several areas where the proper set up and use of the system can have significant impact on a client's overall satisfaction, and where certain other configuration decisions and/or usage patterns can lead to discontent or poor user adoption.

A Best-Practices Consulting session is a service engagement wherein a knowledgeable RFPMonkey expert explains these best-practice recommendations and the impact of choosing to use the system in another way.

Best-Practices Consulting sessions can be performed at any time, but are best placed before significant time and energy is invested in going about things in a not-best-practice way.

Customers with a Basic Support & Maintenance Plan may buy a Best-Practices Consulting session when needed. Customers with Intermediate or Premium plans are entitled to one (1) Best-Practices Consulting Session as part of their plan.

Best-Practices Consulting Sessions are scheduled at the client's and RFPMonkey's mutual convenience, only after being requested by the client. They are not automatically scheduled.

There is no refund or credit given for unused Best-Practices Consulting Sessions. If a client's Support & Maintenance plan includes a Best-Practices session, it is the client's responsibility to request it and see that it is scheduled accordingly.

## ACCOUNT REVIEWS

An Account Review is a service engagement wherein a knowledgeable RFPMonkey expert examines your account, its configuration, content, and usage. We document any issues/conditions that seem contrary to best-practice, or contrary to effective use of the system, and we make recommendations as to how you could use or configure your RFPMonkey account to be easier to use, more efficient, or less complex. Account Reviews are not a substitute for training. These reviews are intended to identify areas where you may further leverage the power of RFPMonkey to help save you additional time and money.

Account Reviews should usually be performed after you have had a short while working within the system, as opposed to immediately after receiving a new account. Conducting an account review too early will typically yield less-impactful recommendations than if the session were held after a bit of experience has been gained in the tool.

Customers with a Basic Support & Maintenance Plan may buy Account Reviews when needed. Customers with an Intermediate plan are entitled to one (1) Account Review at their convenience as part of their initial ramp up or shortly after it. The Premium plan includes quarterly Account Reviews.

Account reviews are scheduled at the client's and RFPMonkey's mutual convenience, only after being requested by the client. They are not automatically scheduled.

There is no refund or credit given for unused Account Reviews. If a client's Support & Maintenance plan includes one or more Account Reviews, it is the client's responsibility to request them and see that they are scheduled accordingly.

## ASSIGNED CONTACT

All RFPMonkey.com support issues will be handled by a well-trained RFPMonkey expert. However, customers who have upgraded their support plan to either Intermediate or Premium, are guaranteed that their support issues will be attended to by a designated person familiar with their account. Note that we use the term 'assigned' or 'designated', not 'dedicated'. A truly dedicated resource would provide the same services to no other client. RFPMonkey.com's price point simply doesn't permit us to entertain truly dedicated resources.

## CELL-PHONE ACCESS TO ASSIGNED CONTACT

Clients with the Premium Support & Maintenance Plan will have the mobile phone number of their assigned support contact. While it is still best to submit a request for help, the designated point of contact within your organization may also call or text the assigned RFPMonkey.com support rep directly, on his or her mobile phone. Use this number in a crisis, or to escalate an existing ticket. Please use your best judgement and resist using this number for general questions, enhancement requests, or for low-priority issues.

There certainly are times when a cell phone will be turned off, or when answering may be inappropriate, but generally this will give you a higher level of access to your support rep. At the very least, you will reach their personal voicemail.

Please be prepared to cite your ticket number, account number, and a description of the issue. And include your own phone and email contact information. Expect an initial response within the timeframe described for your plan.

Cell-phone access is limited to customers in the Premium Support & Maintenance Plan.

## PREMIUM RESTORE

We backup our databases every night to protect us and our clients from a failure or incident on our end. As is typical for cloud-based solutions, these backups are not client-specific. Because our backups are system-wide, we could not restore one of our backups for an individual customer. That would impact all customers in the database.

With Premium Restore service, you can request unlimited client-specific restores due to customer error. Think of it as insurance against user error.

For customers with Premium Restore, upon request, we will extract your organization's data from one of the last 7 nightly backups and restore your slice of the database back to that point. This effectively un-does any content changes made between when the backup was made and when it is restored into your library. Regardless of the severity of the error or impact of an accidental or unauthorized delete, this is the solution.

Premium Restore is included in the Premium Support plan. It is available a la carte for customers with Basic or Intermediate plans. See our pricing page at <http://www.rfpmonkey.com/pricing> for current pricing for Premium Restore.

**SUPPORT & MAINTENANCE FEES**

The Basic Support & Maintenance Plan is free, and it applies to all accounts who have not selected an upgraded plan. All accounts that were ordered prior to the existence of the upgraded plans have the Basic plan, unless they have subsequently contracted for an upgraded plan.

For current pricing of the Intermediate and Premium plans, please refer to the pricing page of the RFPMonkey.com web site at <http://www.rfpmonkey.com/pricing>.

