



# VISTA SUPPORT OVERVIEW

Comprehensive Support. Personal Service.



## PDS CUSTOMER SUPPORT

PDS provides the best possible maintenance and support available. We pride ourselves on consistent achievement in all areas of Vista® support and maintenance. Our Customer Support group is exclusively dedicated to the day-to-day needs of our customers.

PDS Customer Support is made up of two teams:

### Application Support

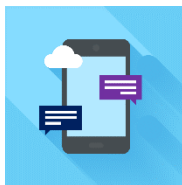
- Points of contact for your application questions
- Facilitators in resolving your technical questions

### Technical Support

- Your technical assistance for all current releases and their interactions with other third-party products, such as databases, operating systems, and embedded tools.

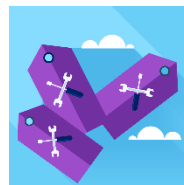
## WHAT IS INCLUDED IN PDS SUPPORT?

- “Click-and-download” software releases including enhancements and updates using Vista Fresh
- Unlimited telephone and email access to our support staff
- Support Hours: 8:30AM to 8PM (Monday-Thursday); 8:30AM to 5PM (Friday) Eastern Time
- 24x7x365 emergency response
- Toll-free service calls
- Downloadable tax compliance updates
- Quarter-end support
- Year-end support
- Dedicated support portal
- Access to online support request tracking
- Access to PDS Support Video library
- PDS Technical Support
- PDS User Group Association (UGA) membership
- Access to technical white papers
- PDS Blog with many articles written by your peers



### CALL

[1-800-2GETPDS](tel:1-800-2GETPDS)



### Ticketing

[pdsservice.atlassian.net](https://pdsservice.atlassian.net)



### Resources

[support.pdssoftware.com](https://support.pdssoftware.com)

## Daily Support Hours

8:30 AM until 8:00 PM - Monday through Thursday, Eastern Time

8:30 AM until 5:00 PM - Friday, Eastern Time

## Emergency Service

Emergency service is available after hours and on holidays and weekends to assist you with any emergency situation that may arise and require immediate attention. If there is a severe impact on a key functional area of the system or on the operation of the company for which no appropriate workaround exists, our investigation of your emergency will begin immediately after the initial call.

To contact a Customer Support Representative during this time, simply dial our toll-free number, **800-243-8737 (800-2GETPDS)** and choose Option 3 from the menu. You will automatically be connected with an operator who will contact a representative for a callback.

## Support Resources

<https://support.pdssoftware.com>

Support tools are available from the PDS Support website. Customers can access documentation, product videos, information on Vista updates, download Vista updates, tax updates, and review the R&D technical documentation site. This is also where customers maintain their user contacts.

In addition, from the PDS Support site users may “Access the Service Center” where they can enter a new support ticket and review open support tickets. <https://pdsservice.atlassian.net>

## Phone Support

To contact a Customer Support Representative during daily support hours, dial our toll-free number, 800-243-8737 (800-2GETPDS) and choose Option 3 from the menu. You will automatically be connected with the Customer Support Department.

## SUPPORT BEST PRACTICES

Before calling PDS Customer Support, please have the following information available (when applicable). This will help the Customer Support team resolve your requests in a timely manner:

- Company name and caller name
- Ticket number (if it is an existing ticket)
- Release of the software – current update
- An explanation of the problem
- Supporting documentation (including any error/audit files)
- Examples of the problem with screen shots

**Please note:** While PDS Customer Support is available to answer questions or assist you with understanding any feature of the product, it is not a substitution for implementation, upgrade, or training services. Should you have training or consulting needs, please contact PDS Professional Services or your Sales Representative.

## VISTA TIME

PDS has partnered with **nettime** solutions, LLC. to provide our customers with a state-of-the-art, cloud-based time and attendance called Vista Time®. If you use Vista Time® and are experiencing an issue or simply have questions, please call PDS Support.

## YEAR-END ACTIVITY

Year-end is defined within PDS as the months of December, January, and February of each calendar year. For our U.S. customers, the end of December, and the month of January are their most critical times to address year-end government reporting requirements. For our Canadian customers, the end of December and the month of February are the most critical times.

We hold annual year-end processing seminars in December for both our U.S. and Canadian customers to review year-end processing procedures and new updates. Though these are our standard processes, we will always consider any special request.

## WHAT IS THE TYPICAL RESPONSE TIME ONCE A REQUEST IS LOGGED?

If you encounter a problem in the PDS software, Customer Support begins a support procedure that logs your request on our internal tracking system, analyzes it, understands the impact of the issue, and then establishes an expectation for resolution.

The resolution may require action and assistance from both PDS staff and you, our customer. A priority is assigned to each request reported.

The following methodology is used to determine priorities:

- **PRIORITY CODE 1:** This priority is used for requests that require immediate attention. This priority is used for problems that have a severe impact on a key functional area(s) of the system. No appropriate workaround exists.

*Response Time:* Investigation will begin immediately.

*Resolution Time:* PDS will work with the customer until an acceptable resolution is found.

- **PRIORITY CODE 2:** This priority is used for those requests of a less critical, although important in nature. These incidents may have a minimal impact on processing and an appropriate workaround exists.

*Response Time:* Investigation will generally begin within one hour to two business days.

- **PRIORITY CODE 3:** This priority is used for those requests of a non-critical nature which have little urgency but are still important.

*Response Time:* Investigation of the issue will generally begin within one business day.

- **PRIORITY CODE 4:** This priority is used for those requests that are the lowest priority. These requests are the lowest priority with no adverse effect on production.

*Response Time:* Investigation of the issue will generally begin within one to two business days.

## WHAT ARE THE SUPPORT ESCALATION PROCEDURES?

If your request requires a higher level of support, your concerns will be escalated to the Customer Support department. A support representative can assist with any questions the customer may have concerning their PDS experience. Our customer support team is highly qualified and experienced in addressing any of the following areas:

- A software product question logged through Application Support
- A modification delivered by the Professional Services group
- A service performed by an on-site Professional Services Representative
- Training experiences
- Depending on the nature of the request, PDS may involve other support and/or development personnel for assistance
- If further escalation is needed, the Vice President of Services should then be contacted

## SOFTWARE UPDATES

Vista software updates occur a few times a year and are one of the most important and necessary things you can do to keep Vista performing at its peak.

The PDS Cloud Services team coordinates the application of Vista updates with Cloud customers in order to minimize impact on day-to-day operations.

### **What is the upgrade frequency? How are they applied? How are they deployed?**

Updates are delivered along several schedules:

- Updates are released throughout the year. These updates range from being a major release to a maintenance release. Major releases typically contain many enhancements whereas a maintenance release typically consists of minor enhancements and fixes.
- Separate from the above update process, compliance and tax changes are delivered on an as needed basis, based on tax filing schedules and state and federal law changes.
- From time to time, if an urgent update is required, we will post the update on the Customer Support website (Update Center) for immediate release. This change will also be included in the next scheduled update release.

# PDS CUSTOMER PORTAL

Quick link to the PDS Customer Portal: <https://pdsservice.atlassian.net>

## Overview

The PDS Service Center is a portal designed to support PDS customers. The portal can be accessed by selecting “Access Service Center” or by navigating to (<https://pdsservice.atlassian.net>).

This support system is designed to be an end-to-end support tool that allows for customers to submit any requests that may arise to PDS. It provides comprehensive traceability to each issue along with issue notifications upon changes.



The portal offers three options, depending on the customer’s needs. The options available are:

### Customer Support

Use this option for all general customer support inquiries. These requests are routed to Customer Support.

### Consulting Requests

Use this option for all requests related to PDS consulting services. These requests are routed to Professional Services.

### Sales or Demo Requests

Use this option for all requests related to Sales such as request for demos, or new product or service information. These requests are routed to our Sales Department.

## Customer Support

The Customer Support option is the most commonly used option for PDS customers. It is their customer support issue tracking system that is used for day-to-day support. The customer can submit new requests or view existing, previously submitted requests submitted by themselves or by anyone in their organization.

## Cloud or Managed Services

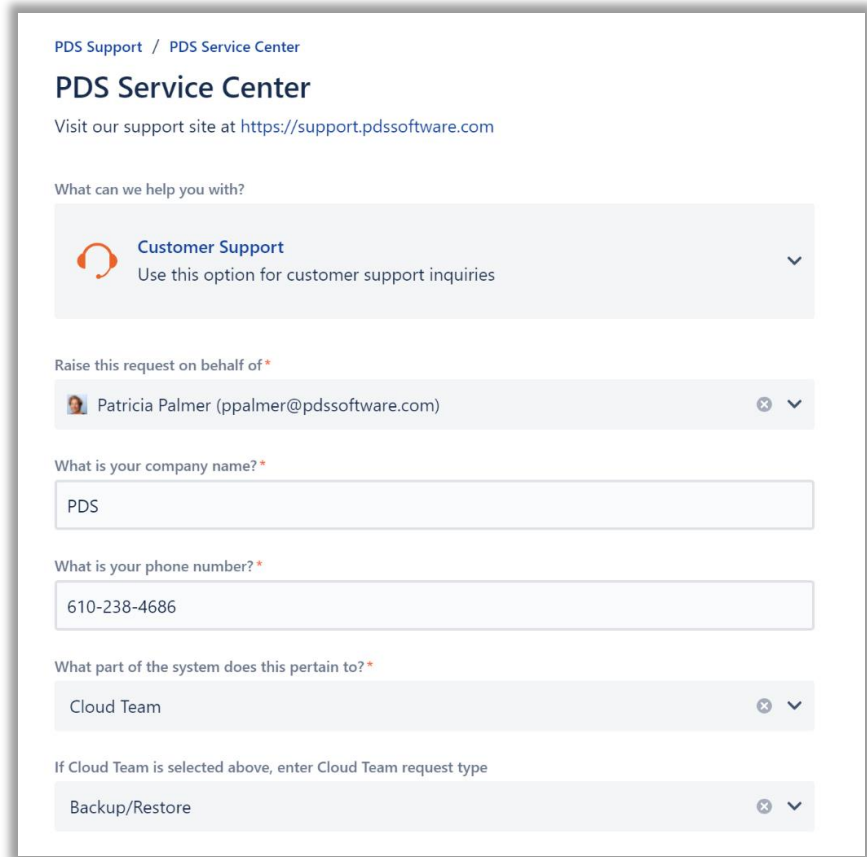
If you are a PDS Cloud customer hosted by PDS and have a managed service request, select “Cloud Team” in the field marked “What part of the system does this pertain to?”

Then, select the appropriate Cloud team service request type. These requests will get submitted directly to the PDS Cloud team.

## Customer View

### Establishing an Account / Logging in

To establish an account, please call the support department at 800-243-8737 (800-2GETPDS) and choose Option 3 from the menu. They will send you an invite. You will receive an email asking you to set your password.



The screenshot shows the PDS Service Center support form. At the top, it says "PDS Support / PDS Service Center" and "PDS Service Center". Below that, it says "Visit our support site at <https://support.pdssoftware.com>". The form has several sections:

- What can we help you with?**: A dropdown menu with "Customer Support" selected. The description says "Use this option for customer support inquiries".
- Raise this request on behalf of\***: A dropdown menu with "Patricia Palmer (ppalmer@pdssoftware.com)" selected.
- What is your company name?\***: A text input field with "PDS" entered.
- What is your phone number?\***: A text input field with "610-238-4686" entered.
- What part of the system does this pertain to?\***: A dropdown menu with "Cloud Team" selected.
- If Cloud Team is selected above, enter Cloud Team request type**: A dropdown menu with "Backup/Restore" selected.

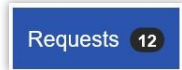


## Recovering Forgotten Passwords

While in the PDS Service Center, click the *Forgotten your password?* link to recover your password.

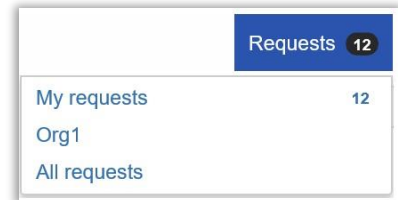
## Submitting and Viewing Help Items

Customers view their items from the following screen by clicking the Requests link on the top-right of the screen. This will present a few options.






These options allow the customer to view either:

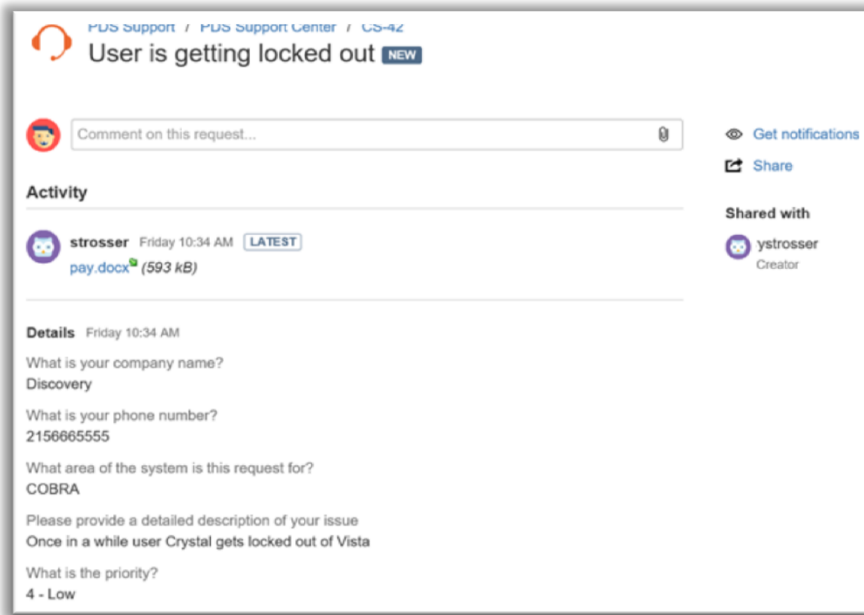
- Their own help requests submitted
- Any requests submitted from members of their organization
- Both of the above



The requests list allows the customer to view and search for requests submitted by themselves or someone else in your organization.

Type	Reference	Summary	Service desk	Status	Requester
	CS-32	<a href="#">I would like a demo of PDS Analytics</a>	PDS Support Center	NEW	Zach Strosser
	CS-39	<a href="#">User is getting locked out</a>	PDS Support Center	OPEN	Adam Bonanni
	CS-53	<a href="#">My payroll never finished</a>	PDS Support Center	OPEN	Adam Bonanni

Clicking on the “Reference” number or “Summary” description will take you into the request detail.



Users can comment within the request, share it, disable notifications, and view activity as the request is worked within PDS.

### Issue Statuses and Workflows

Every request has a status which indicates what state the issue is currently. These statuses are quite simple. Requests come in with a status of New. They are accepted by the support representative and transitioned to a status of Open. There are two options once the issue is in an Open status. It can be Closed or set to Waiting For Customer (which means the request is not closed, but is open, and waiting on the customer).

Once a request has been designated Waiting For Customer, the status is set back to Open. If after a request is Closed it needs to be reopened, the status will be set back to Open from Closed. Here is a visual representation of the statuses and the workflow:



## How is the Support Request Routed?

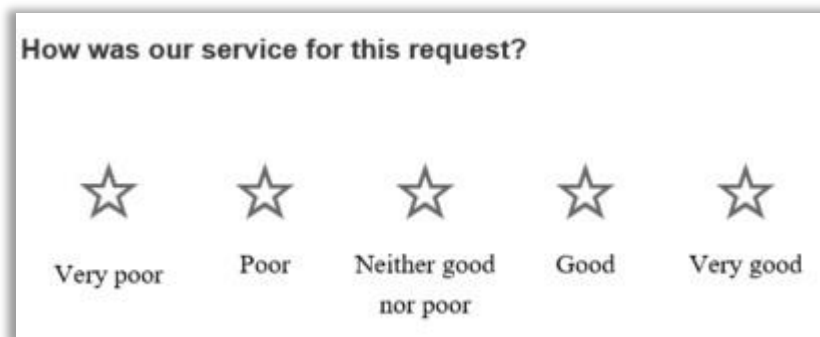
Once the request is submitted through the PDS Support portal, a PDS support representative will take the issue and begin to work on it. They may route the request to a more appropriate person if deemed necessary.

## Notifications

The submitter of the request will receive emails when certain events occur such as when a request is submitted, edited, commented on or has a status change. The emails also allow the customer to access the request directly by clicking on the link within the email.

## Satisfaction Survey

When a request is closed, the submitter will receive an email with a satisfaction survey. This presents the following screen where the submitter can respond with their level of satisfaction and put in a comment.



How was our service for this request?

☆      ☆      ☆      ☆      ☆

Very poor      Poor      Neither good  
nor poor      Good      Very good

Vista® Support Overview  
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