



# Customer Welcome Guide 2021



Welcome and thank you for selecting ProActive Information Management (pim) as your IT service consultant and provider. We are delighted to have you as a customer and our team is very excited to have the opportunity to work with you and your team.

In this guide, you will find an overview on how to access and use the pim Customer Portal to manage your account. You will also find information on how our customer support services and billing processes work, as well as a variety of information that will help you make the most of your pim experience.

Our approach is to help you leverage the knowledge and expertise of our team to meet your business objectives through technology. It revolves around the concept that you are engaging a team of IT professionals, not just individuals. We take ownership in the outcome of your business success while also becoming an integral part of your business operations and management team. This approach helps us identify inefficiencies throughout your business IT system and together, as a team, work to clear those hurdles.

We understand that you need a business partner with expertise across multiple skill sets to help manage your business. Most clients' view IT as an expense.

Our goal is to help you view IT as a business investment that will help you efficiently and effectively transform your business. We provide variable and flexible IT and business system solutions with the ability to tap into a greater team of resources, all on an as-needed basis. This is what we call **“Leveraging the Knowledge and the Power of People, When You Need Them.”**

While all IT systems are different, our primary design, recommendations and considerations will always include the following:

1. Usability and Security of your IT systems
2. Security and Accessibility of your data
3. Accessibility of your IT systems
4. Scalability of your IT system to meet your business growth
5. Business efficiency and overall system effectiveness

If you have any questions or feedback for us, please don't hesitate to contact our Client Concierge Team, as the key to any good partnership is communication. Thank you for placing your trust in pim. We're here to partner with you in your success.

**The Team at ProActive Information Management**





## Dear Valued Client,

I am Tiffany Joy Greene, M.B.A., Chief Growth Officer and Co-founder of MPWRSource, LLC. Proactive Information Management (pim) has partnered with MPWRSource to help deliver an exceptional customer service experience, which includes transparent, ongoing communications.

Through the pim/MPWRSource partnership, you will receive the following:

- On-going client service and a point of contact through an appointed Client Concierge. The Client Concierge will check in with you routinely to see how you and your organization are doing, and how best to meet your information technology needs.
- Emails on pim updates, which may include technology, cyberthreat, service, and staff updates.
- Content, in the form of blogs, eBooks, videos, podcasts, and case studies that inform you about the latest trends in Managed Information Technology services, Small Business needs, Cybersecurity, and Microsoft Products.
- Information from our Outbound Growth Team on resources outside of pim that will help your business or practice grow and achieve peace of mind.

MPWRSource creates strategies, plans, and processes, as well as implements them with the right people, tools, and technologies, to grow your business and give you peace of mind. We work predominately with existing and start-up B2B small businesses in the healthcare, accounting and finance, and local government industries.

We help grow and sustain businesses, much like a spider web, by bringing together a wide variety of expertise in a multitude of disciplines and interconnecting them through a holistic approach. Small businesses are the backbone of communities, so by serving small businesses, we positively impact people's lives.

**Welcome to the MPWRSource Superhero Squad! Let's Evolve Together!**

Sincerely,

Tiffany Joy Greene, M.B.A.  
CGO and Co-founder



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# Mission, Vision and Values



At pim, we take pride in providing the highest level of service and support available. Our values reflect how we do business, but also our culture and how we treat our customers, partners and fellow employees.

## Our Core Values:

### 1. Inspired By Results, Motivated By Action.

These values and principles influence our actions and every decision we make. We use them as our moral guide and compass. We are the leaders and trusted advisors for our clients. Our core values are our Brand Promise.

### 2. Our Client is a Part of Our Family – Their Success is Our Success

### 3. We Are Professionals

- Clear and effective communication
- Highest Standards
- Punctuality and Time Management
- Earn Trust, Verify for Results
- Take Ownership and Leadership
- Be Frugal, Efficient, Productive, Predictive
- Disagree but Commit
- Be a Winner

### 4. Be the Center of Sphere – We Listen, Plan, Understand and Deliver

### 5. Think Dynamically, Think Globally, Dream Big

- Learn, Grow and Be Curious
- Invent, Simplify and Act



## Our mission is the engine that drives us

Our mission is to enhance your ability to deliver and achieve all your business goals and objectives expertly and efficiently through technology. We synchronize people, processes, and technology.



## Our vision is to help you soar.

Our vision is to enhance your growth, operational efficiency, sustainability, and profitability through predictive technology solutions.

# Transitioning to pim



As a valued customer of pim, we strive to make your engagement with us as effortless as possible. From project requests and equipment installation to invoicing and how to contact us, we want working with us to be an easy, enjoyable process. We take pride in providing you with only the very best customer service and support. Your satisfaction is our measure of success.

Below is an explanation of what you can expect from pim.

We will work closely with you and your team to minimize disruption and offer a smooth transition.

## The Plan — pim will:

- Determine when you wish to transition to pim
- Provide a list of network items and credentials we need to begin transition
- Overlap your current IT service for 30 – 45 days
- Schedule a full network assessment
- Schedule a meeting to present a network assessment report
- Provide client portal username and passwords
- Establish a backup plan for your database, files, and domain



## Client Responsibility

We may provide you with a basic network questionnaire requesting usernames, passwords, and important data regarding your most commonly used software packages and other vendor information. You may choose to complete this questionnaire yourself or you can have a pim teammate assist you for a fee. Our Client Concierge team may contact you to confirm financial information, such as billing emails and other account-related contact information. They may also request additional billing and ship-to information.



# pim Finance Department



General Payment Terms Policy: Due upon receipt

Five Ways to Pay:

- Make checks payable to: ProActive Information Management
- ACH: Email [finance@proactive-info.com](mailto:finance@proactive-info.com) for details
- Bill.com Payment Network I.D.: 0192131032656766
- PayPal available through our Customer Portal: <https://pim.myportallogin.com>
- Credit Card Payments – request a payment link or to setup recurring payments at [finance@proactive-info.com](mailto:finance@proactive-info.com)

General Invoicing Policy:

Invoices will be generated and emailed from within our customer portal per the following conditions:

PRODUCT	ONBOARDING	MONTHLY RECURRING CHARGES	LABOR	PROJECT
SMS	Billed as of date of execution	Billing begins on date of execution	Billed at ticket completion/weekly*	
FITS	Billed as of date of execution	Billing begins on date of execution	Billed at ticket completion/weekly*	
VM / COLO / ECHO / ENTERPRISE EMAIL	Billed as of date of execution	Billing begins month of project completion		Billing begins month of project completion
PRE-PURCHASED LABOR ONLY		Billing begins on date of execution		
NON-CONTRACT LABOR			Billed hourly at \$150/hr approximately two weeks after ticket completion	

All Monthly Recurring charges are billed 1 month in advance. Questions can be directed to your client concierge or by emailing [finance@proactive-info.com](mailto:finance@proactive-info.com)

\*Outside pre-purchased labor contract



# pim Service Department



The pim Service Team is ready to assist you and can be reached in the following ways:

**Hours of Service:** Onsite and remote service is available 8:00am-5:00pm Monday-Friday. Phone: (804) 897-8347, or through our client portal at <https://pim.myportallogin.com/>

**After Hours:** (PASS – ProActive Afterhours Support Services) After Hours support service is available by calling (804) 897-8347, option 2.

Brief Overview of Our Service Level Agreement:

PRIORITY LEVEL	PRIORITY STATUS	PRIORITY DEFINITION	CLIENT'S RESPONSIBILITY	PROACTIVE'S RESPONSIBILITY	PROACTIVE'S RESPONSE TIME	RESOLUTION GOALS
1	ASAP / Critical	Network or system down, severely degraded, more than 75% of staff or business operations are impacted	Assumes that client will remain available around the clock until the problem is resolved	ProActive will commit (24/7) as many resources, including third party resources, dedicated to the incident response until resolved	Remote Response time 1 to 60 minutes. Onsite Response time will be determined with client	Find the source of the problem, determine stakeholder to contact or work with third party vendor if problem resides with third party, provide back-up hardware resources if needed to reduce downtime
2	High	Network or system severely degraded, more than 50% of staff or business operations are impacted, heavily used computer severely degraded	Assumes that client will remain available around the clock until the problem is resolved or assumes that highly impacted affected user / computer will be available and accessible until problem is resolved	ProActive will commit a team of resources dedicated to the incident response until resolved (during contractual hours)	Remote Response time is 30 to 60 minutes. Onsite Response time will be determined with client on a case-by-case basis	Find the source of the problem, determine stakeholder to contact, work with third party vendor if problem resides with third party, provide back-up hardware resources if needed to reduce downtime
3	Medium User or Network Impaired Performance	User or network performance is impaired, while most business operations remain functional	User or point of contact is willing to commit time during contractual hours to restore service	ProActive will commit fulltime resources available during contractual hours to bring issue to resolution	Remote Response time is 30 to 60 minutes. Onsite Response time will be determined with client on a case-by-case basis	Find the source of the problem and determine if third party vendor is needed to resolve the problem
4	Low Information or General Assistance	User requires information or assistance, point of contact requires assistance on product features or configuration	User/point of contact will be available during contractual hours on a best effort basis to provide information or assistance	ProActive will commit resources during contractual hours to respond to requests for information or assistance	Initial Remote Responses time is 45 to 60 minutes. Onsite Response time will vary depending on location/ resource availability or subject matter availability	Provide assistance and resolve issues for clients as quickly as possible
5	Planned Scheduled User Assistance or Scheduled Maintenance	Planned assistance with user or planned scheduled maintenance: Patch, update, service release or other customer related maintenance procedures	Users available when scheduled in trouble-shoot, point of contact willing to provide resources as required to implement scheduled maintenance	ProActive to perform tasks as scheduled	As planned with customer and ProActive	Planned maintenance to be implemented as scheduled. Scheduled or unscheduled changes will be communicated between customer and ProActive





# Accessing the Customer Portal



## pim Customer Portal

To maximize the user experience, pim uses ConnectWise, a comprehensive online business management platform with a simple user-interface to help our clients increase productivity, efficiency, and profitability. It provides clear lines of communication, error-proof ticketing, and powerful documentation that allows information to flow easily between people, departments, and our customers.

ConnectWise platform integration helps streamline our communications to provide better technology support.

Within the ConnectWise portal, you will be able to:

- Create new support tickets
- Submit, review, manage and update existing tickets
- Assign security levels for employee access to all open tickets
- View contract and purchase agreements, invoices and reports

Below are a few simple pointers to make using the Customer Portal easy and convenient.

## Customer Portal Login:

ConnectWise is a convenient, easy-to-use ticketing system with access to account

details, invoices and agreements.

The ticketing portal is found on the pim website (far right side of the menu bar). There you will find a [Client Login button](#). By clicking on this button, you will be taken to the ConnectWise Login page where you can enter your email address and password to access the ticketing system.

We encourage you to bookmark the pim [website](#) or create a shortcut to it on your desktop.

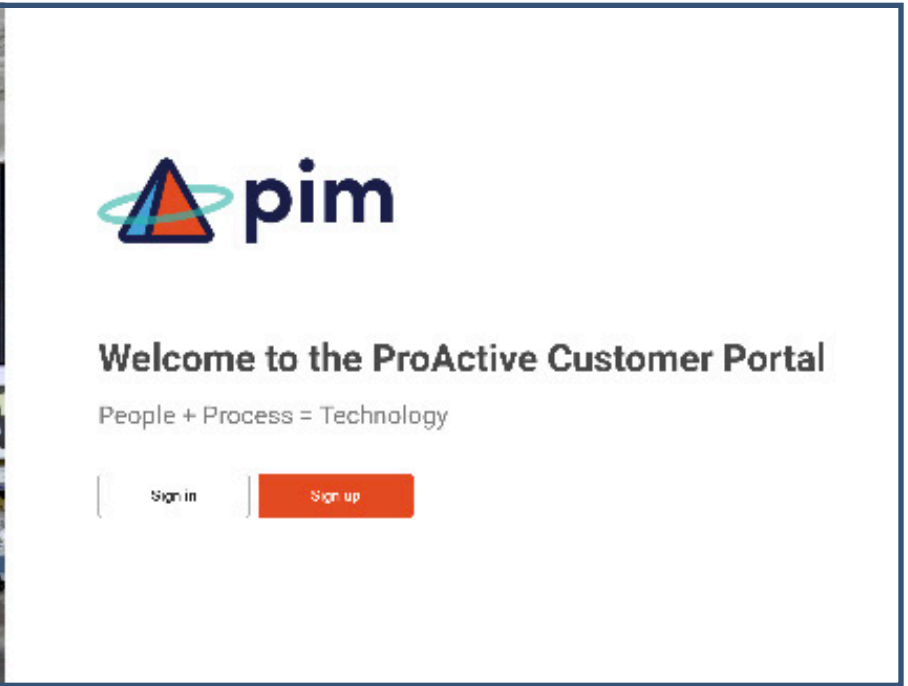
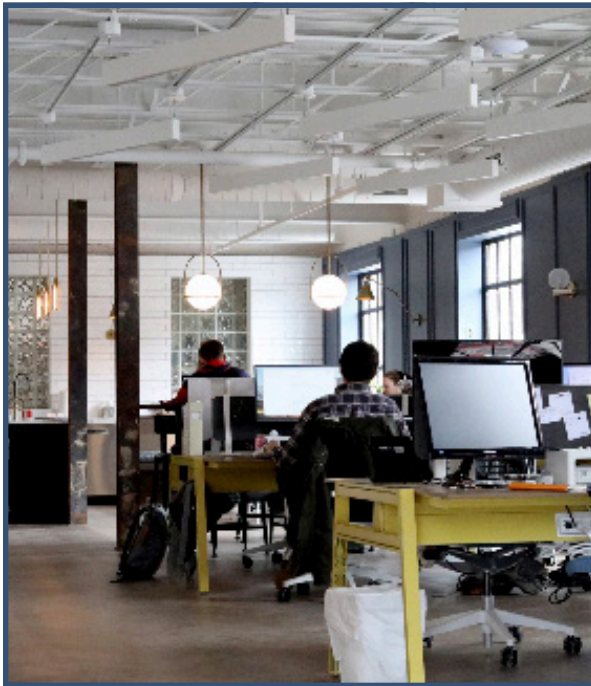
## How to use the pim Customer Portal

Download and save these instructions to your desktop for reference.

### Customer Welcome Guide

**NOTE:** pim will provide you with a temporary password to log in to the Customer Portal. After logging in, click on the Account Tab to change your temporary password to one you will remember.

# Navigating the Customer Portal



In the [Customer Portal](#), depending on your permission level, you can:

- Submit Tickets
- View Tickets
- View Invoices
- Update Company Contacts and Permissions
- Make Payments

As you move through the portal, you will be able to edit your account details, including users and their security levels, submit, search and monitor service request tickets, view invoices and make online payments. The pim Customer Portal provides you with everything you need to know about your account with convenient desktop shortcut access! If at any time you need assistance, please enter a ticket or call our Support Center at 804-897-8347 and select option 2.



## Key Company Links and Communications


We invite you to visit our website, follow our blog and social media and sign up for our emails. Doing so will get you information on the latest technology trends and product offerings that can help you manage your IT needs better, more efficiently and cost effectively. Click on the links provided below to learn more.

 Website: [www.proactive-info.com](http://www.proactive-info.com)

 Facebook: <https://www.facebook.com/ProactiveInfoMgt>

 LinkedIn: <https://www.linkedin.com/company/proactive-information-management/>

 Instagram: <https://www.instagram.com/proactiveinformationmanagement/>

 Email Signup: Get pim information delivered straight to your inbox  
<https://bit.ly/2P9BLQO>

 Follow Our Blog: Get the latest technology news, trends and information each time a blog is posted <https://www.proactive-info.com/blog>

 Referrals: Refer a connection, make cash!  
<https://www.proactive-info.com/referrals>

pim encourages open communication and feedback from our customers. From time-to-time, we'll ask for your feedback on our services and your willingness to recommend us to others. We do this in the form of customer surveys and referrals. This information will help us gauge your overall satisfaction with pim and uncover areas for improvement. To help us best communicate and serve you better, we use our sister company, MPWRSource, to provide our communication and client concierge services. MPWRSource enables us to synchronize people, processes, and technology.

## General Contact Information

Client Concierge: 804-399-7888 or [agdavis@mpwrsource.com](mailto:agdavis@mpwrsource.com)

Sales: 804-897-8347, option 1 or [sales@mpwrsource.com](mailto:sales@mpwrsource.com)

Support: 804-897-8347, or through our client portal at <https://pim.myportallogin.com/>

Finance: 804-897-8347, option 2 or [finance@proactive-info.com](mailto:finance@proactive-info.com)