

Customer Support
Overview

medius

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Purpose of this document

This document provides an overview of Medius Customer Support and describes key definitions, organization, processes, and procedures.

This document aims to describe Medius Customer Support Services and ways of working. It is a legally non-binding document and does not replace any terms stipulated in the contract between Medius and the Customer.

This document details the support provided for Medius Suite customers only.

Language

Unless otherwise stated in your support agreement, English is the default language for Support Tickets. Maintaining English in all written communication enables smooth routing and cross team collaboration which drives faster resolution times.



Medius Services

We design our products with you in mind. Our objective is to develop solutions that are easy to use and help you succeed in your job. We work hard to ensure that you have the resources needed so that you get the most value out of our products and that they are easy to use, easy to configure and easy to optimize.

As a Medius customer, you also have access to a host of different services, resources and support should a little extra help be needed.



Account Management

The majority of customers are assigned an Account Manager. Your Account Manager is overall responsible for your satisfaction and your strategic relationship with Medius.



Medius Elevate

Medius Elevate Advisory Services is a subscription service that pairs you with global expertise and subject matter experts who work as an extension of your team, consistently helping you increase adoption and compliance across your organization. Your Elevate Advisor provides hands-on assistance and expertise to help you reach your organization's goals.



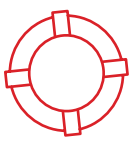
Professional Services

Hands-on support with configuration changes, need for an extra training, Change or Service Requests are examples of aid available to our customers through our Professional Services team. Access to these services is available on demand and can be arranged through your Account Manager or by submitting a Change Request ticket in Medius' Support Portal.



Customer Success

The Medius Customer Success team is committed to supporting clients driving their own success. The team provides best practices, guidance, tools and KPI benchmarks to empower customers to have everything they need to self-sufficiently drive maximum value from our products. Want to meet with Medius Customer Success? Reach out to your Account Manager.



Medius Technical Support

Medius Technical support is available in three levels. Content and processes pertaining to these levels are further detailed in this document.

Customer Resources

We recommend our customers to use and bookmark these resources as favorites in your web-browser.

Medius Support Portal

Submit a ticket to our support team in the portal. In the portal you can follow status on each ticket as they are updated regularly.

Medius Customer Center

The customer center is your one-stop-shop for all the information you need, whether it's accessing product details in the success portal, browsing our library of tool tips and tricks or staying updated on Spend Management trends and thought leadership through Webinars, Whitepapers and Reports.

Medius Success Portal

Access technical documentation, status of cloud performance and release notes in Medius Success Portal. The same content is also available from within your application.

ProductBoard

Roadmap voting will be replaced with ProductBoard. This feature will give the customer visibility into the roadmap progress.

Medius Analytics

A module designed to provide insights into your autonomous AP process KPIs and Cashflow. Including drill-down views into the individual supplier level.

Status Page

The Status Page is a tool available to the customers where they can see if there are any upgrade events, or incidents with the Medius Infrastructure that may affect their cloud.

Medius Master Cloud Subscription and Services Agreement

The terms and conditions governing a customer's subscription and use of Medius Products and Services. (MCSSA)

Medius Top Tips & Hacks and more

We recommend that you opt in or subscribe to emails from Medius. By accepting emails from Medius you will get access to Medius top tips, invitations to Customer Days, Webinars, Breakfast seminars, Newsletters etc.

LinkedIn

Consider following us on LinkedIn to ensure you are up to date on everything that is happening at Medius.

Medius Support Overview

The following section describes basic information about Medius Customer Support.

Organization

Medius Customer Support consists of a team of support professionals operating from seven major Support locations in Sweden, USA, United Kingdom, Poland and Tunisia.

Response times are based on local business hours

Business hours - support service hours

EMEA	08:00 AM - 06:00 PM CET
Tunisia	09:00 AM - 06:00 PM CET
Americas	08:00 AM - 08:00 PM EST
APAC	08:00 AM - 05:00 PM AEDT

1st Line Support

Medius 1st line support consists of technical support professionals with broad product and services knowledge. The 1st line solves approximately 85% of all Support Tickets without routing. The responsibility of 1st line support is to log, classify, prioritize and provide a response and/or resolution. If the 1st line can't find a prompt resolution, they will assign the Support Ticket to solution experts in the 2nd line.

2nd Line Support

Medius 2nd line support professionals have an in-depth knowledge of Medius products and services. The 2nd line analyzes the Support Ticket and if needed asks for more information from the customer to provide a resolution. If no solution can be found, 2nd line support escalates the Support Ticket to the 3rd line.

3rd Line Support

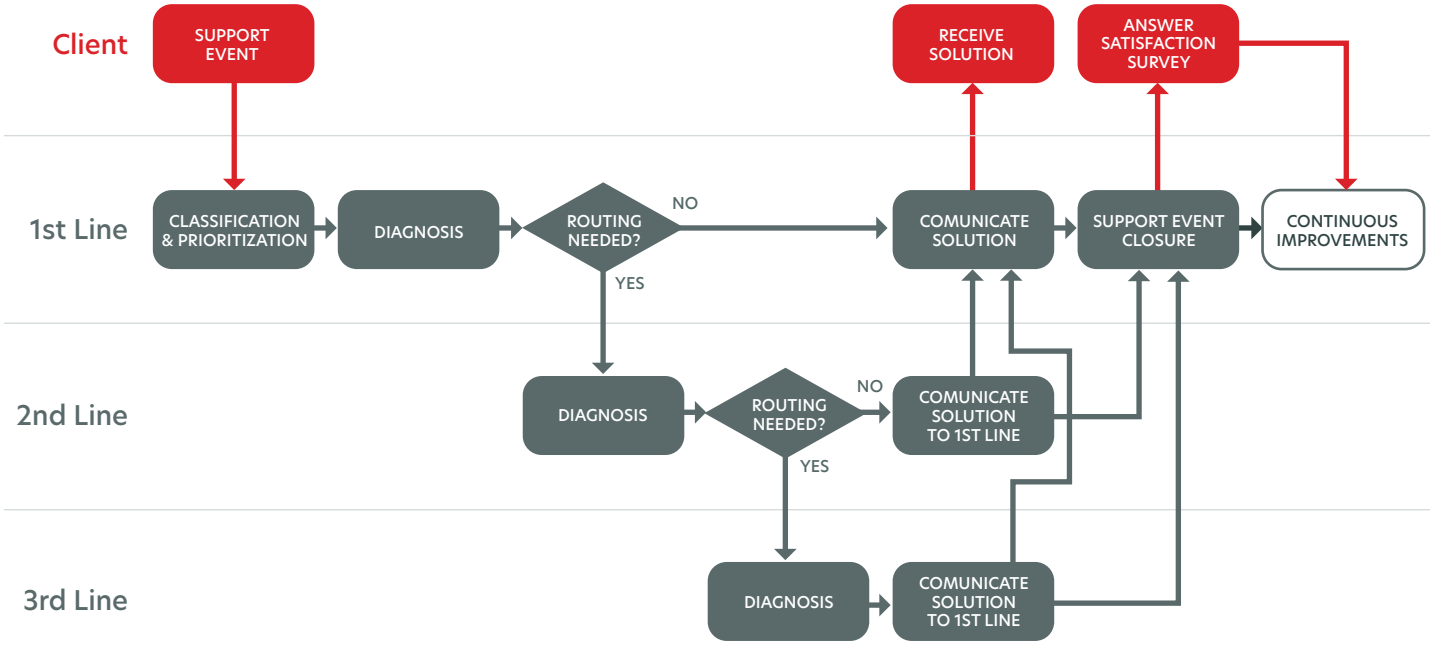
Medius 3rd line support professionals are organized according to their deep technical experience and consist of R&D resources and Product Owners. Support Tickets forwarded to 3rd line support are complex issues that require in-depth expertise to diagnose and resolve. To prevent recurrence, 3rd line support performs root cause analysis and initiates corrective actions when resolving the Support Ticket.

Support ticket resolution and continuous improvements

During the support process the customer receives automatic notifications about status, routing and reminders, including requests for more information related to the Support Ticket.

When a solution is found, the customer is notified through the support portal e-mail notification. The Ticket is set to status "closed" upon customer confirming the resolution works as expected, or within 5 working days of no reply.

Customer support flows for Medius



After a Support Ticket is closed the Customer receives a satisfaction survey to rate the experience with Medius Customer Support. Based on the feedback, each team in Medius Customer Support analyzes and identifies continuous improvement actions.



How to start using Medius Customer Support

At the closure of the implementation project, the Customer is introduced to Medius Customer Support in a handover meeting. To ensure quality and a smooth transition, the handover follows a strict procedure securing all customer specific information and documentation is made available to Medius Customer Support. The Customer will, from the hand-over date, collaborate with Medius Customer Support for any needs relating to the live Medius solutions.

To use Medius Customer Support the Customer needs to:

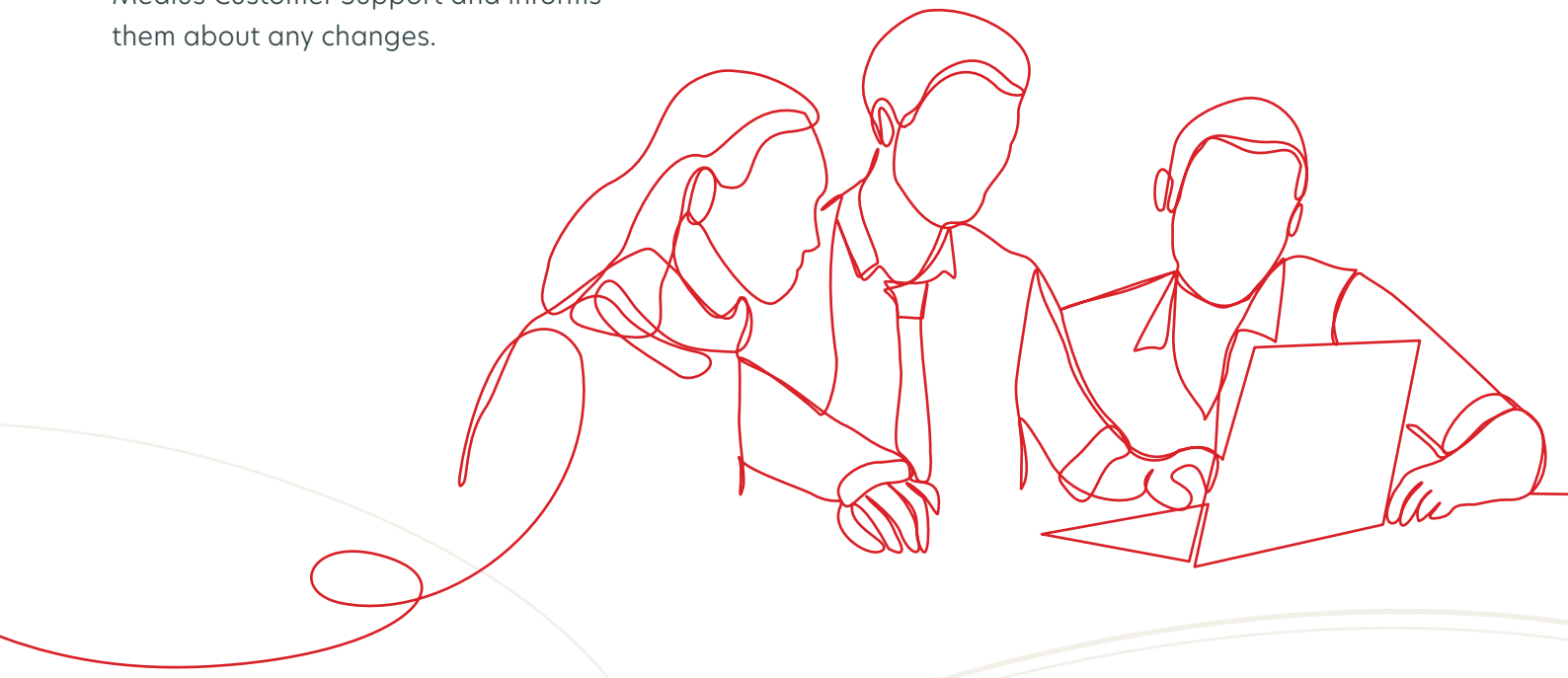
- Provide a Support Contact List
- Activate user accounts in Medius Support Portal

The Support Contact List

Our customers are most successful when making use of their own centralized team of Medius experts, as this drives a fast-learning curve and continuous learning within the customers' own business context.

A list of named Support Users is provided to Medius Customer Support in connection with the handover.

When this list changes, the Customer contacts Medius Customer Support and informs them about any changes.



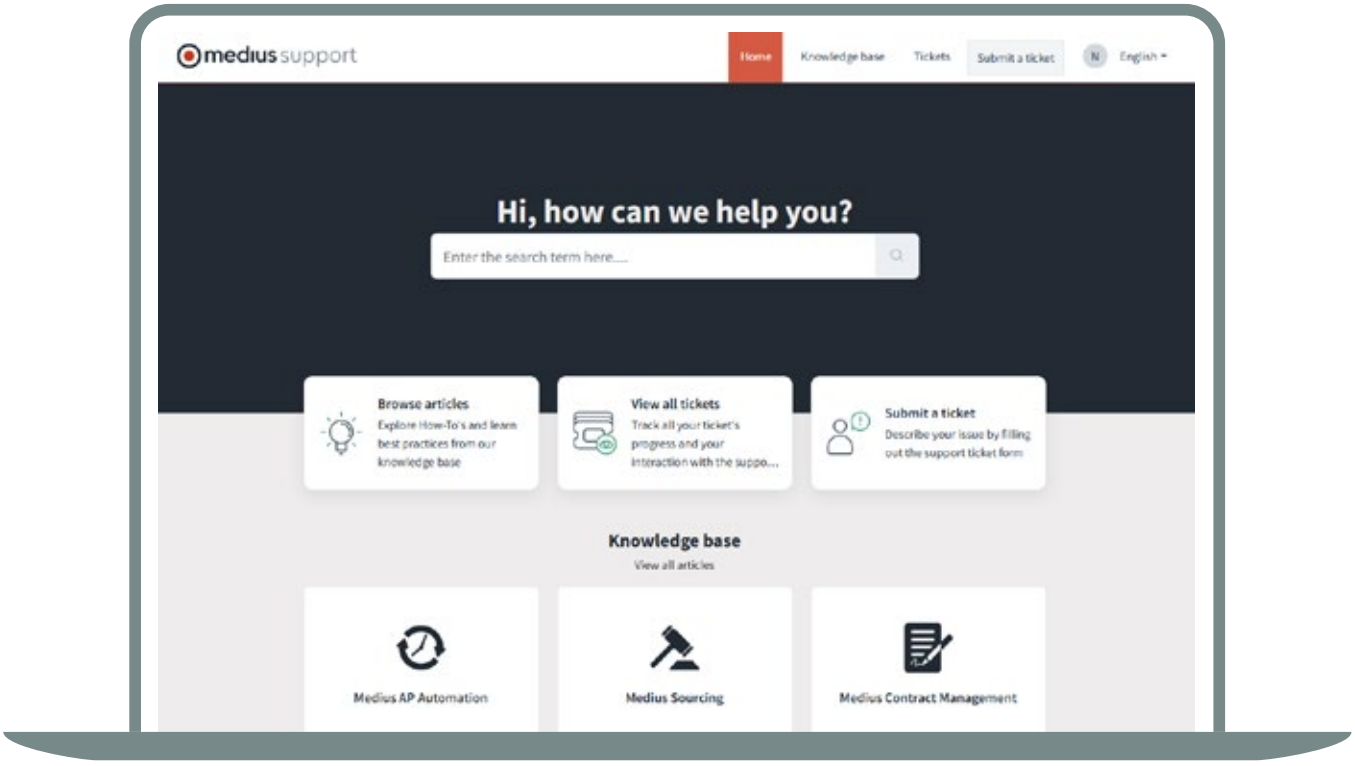
Medius Support Portal

The Medius Support Portal is the primary tool for support services. The portal provides customers with a quick and intuitive way of contacting Medius Customer Support from any place using a web browser.

Medius Support Portal can be accessed here: https://support.medius.com

The Medius Support Portal is used for:

- Submitting new Support Tickets
- Updating open Tickets
- Checking the status and history of any Ticket and export list of tickets to Excel if needed
- Browsing the knowledge base and answers to FAQs (document and videos)



Ticket types

Note: Incoming support tickets are classified by Medius Customer Support as an Incident, a Service Request, or a Change. If a bug is identified during the investigation, the ticket would be classified as a Problem later in the life cycle.

Ticket Type	Definition	Example
Incident	Any deviation from the standard operation of the Medius Suite or any Locally Installed Components which causes an interruption to, or a reduction in the quality of, Medius. These incidents are normally published via the systems status page. Specific client incidents are classified under a Problem ticket category.	- User did not receive notifications. - PO did not connect automatically.
Problem	A cause of one or more incidents. The cause is not usually known at the time the Support Ticket is created. A problem might be caused by a software bug or by the configuration of the application or related service.	- Despite configuration, an invoice did not route to the correct user. - Data was not captured correctly during verification.
Change Request	A request to make additions, modifications or for the removal of part of Medius or, if applicable, any Locally Installed Components.	- Customer would like to add a new entity to an existing setup. - ERP Upgrade requires new configuration to integration.
Service Request	A request to provide the Customer with information or advice about the Medius application and/or Locally Installed Components not considered an Incident or a Change Request.	- Customer would like to automate the application of labels to a specific vendor. - Customer report creation and advisement.

Billable and non-billable work

Support Ticket classified as Incidents and Problems are included in the subscription fee and never subject to charges. Service Requests and Change Requests could be subject to additional charges depending on the terms of agreement. If this is the case, you will be advised in advance of any actions taking place.

Ticket priority

The priority of a ticket refers to the immediate impact on a customer for a given issue or request. This can range from a low impacting request, such as request for logs or inquiry about services, to a system down outage of service.

The type of priority is determined by the extent of impact to the customer and nature of the issue or request. Please be advised the ticket priority remains at Medius Support's discretion and the ticket priority can be adjusted according to the MSSCA.

The following defines each priority:



Ticket description / information exchange

The right quality of initial information allows Medius Customer Support to handle a Support Ticket with the proper prioritization and a possibility to estimate whether any routing is necessary. Following the guidelines ensures fast resolution time and quality in the Support Ticket management process.

When creating a support request, please include as much of the following information as possible to aid in the investigation:

- A detailed description of the issue. Please list the steps taken leading up to the experienced issue.
- Is this an issue that has been reported before? If so, please provide us with the previous ticket number.
- List of documents affected by the issue with the invoice numbers including the affected company name.
- List of users affected by the problem, if applicable.
- Screenshots showing the issue including a full view of a web browser window with Medius APA or related application.
- URL to your tenant. Ex. https://cloud.mediusflow.com/companyname

Proactive support

This section outlines additional information on how Customers can receive proactive support regarding the application.

Medius Success Portal

Medius Success Portal is a compliment to Medius Support Portal and provides important system information such as:

- User and administrator guides
- Frequently Asked Questions & Answers (FAQs)
- Benchmarks for process improvement
- Release notes
- Cloud status
- Documentation for ERP Connectors and Integration API

Medius Success Portal can be accessed here: https://success.medius.com/

Updates to selected users

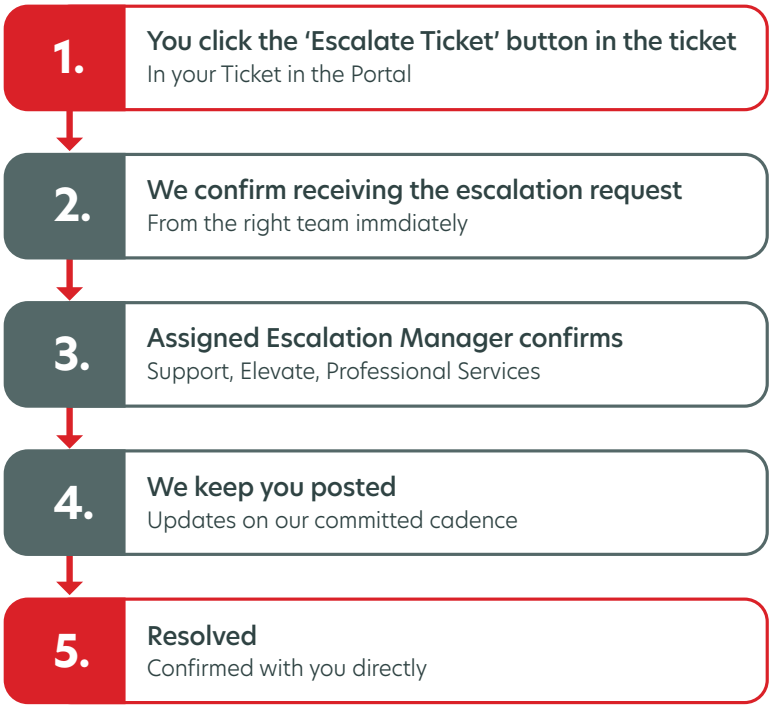
Medius APA Release notifications and other important updates are sent to recipients based on role configuration within Medius APA.

To enable information e-mails to be delivered to certain users, add the “Medius Info role” via the Medius administration menu. This role configuration is administered by the Customer’s admin user and allows customers to independently control the recipients of relevant information. Medius users associated with any admin role are also included in the distribution list of such emails.

Ticket escalation

There are times when the handling of a ticket does not meet your expectations. If a ticket reaches this point, you can escalate this ticket to Support Management.

At each stage of the escalation, there is a review of the ticket, past communications, and a check-in on the investigation in progress. As we are ever improving our support process, the feedback received from customers is appreciated and considered when performing our retrospective reviews.



For more details, please see the Medius Customer Support Escalation Process documentation

Get in touch

info@medius.com | www.medius.com

About Medius

Medius links invoice capture, processing, and payment to replace the worry and wondering of managing AP with calm and confidence. Medius goes far beyond basic automation by using artificial intelligence to do the work - so invoices get coded, approved and paid; you get to go home and rest easy; and your business can trust your budgets and forecasts.