



Scope of Services By Call Type

Technical support offered by Swiftpage as part of an active Subscription or Support plan covers the use of our products in line with System Requirements and recommended platforms.

In summary, the scope of technical support is:

- guidance on installation
- an overview of application features
- troubleshooting of any errors within the application

Should you require any further training or advice on a consultative level, please contact one of our Act! Certified Consultants.

To compare the differences for our Support Services, please see the table below:

Category	Swiftpage Support Service Coverage	Outside Swiftpage Support Service Coverage
Welcome Call (Book through your Account Executive or available on request)	<p>Check your database upload and setup</p> <p>Browser configuration</p> <p>Check and explain offline usage requirements</p> <p>Configure Microsoft Outlook® integration</p>	<p>Preparing data for Import</p> <p>Internal Browser and Internet restrictions</p> <p>Internal networking and file sharing</p>
Hardware, operating systems (OS), database platforms, Internet information server (IIS), browsers, etc.	<p>Explain system requirements</p> <p>Guidance on any specific configuration settings required by your Act! product.</p> <p>Adding Act! and SQL exceptions to the Windows firewall only</p>	<p>System Recommendations</p> <p>Installation of 3rd party applications and hardware</p> <p>Troubleshooting stability, performance or other problems</p> <p>Troubleshooting operating system issues – firewall, antivirus, permissions, etc.</p> <p>Create or delete Windows user accounts</p>
Installation & Upgrades	<p>Explain installation or upgrade procedure</p> <p>Guide through installation and setup</p> <p>Guide through database upgrade process (version 7 and above)</p> <p>Troubleshoot problems encountered during an installation or upgrade.</p> <p>Act! integration to supported 3rd party software.</p>	<p>Local (on-site) installation services</p> <p>Consulting services to install or resolve non-Act! installation issues specific to your organization's technical environment</p> <p>Hands-on Deployment and installation.</p> <p>Database conversions from early versions of Act!</p>



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<p>Remote Synchronization</p>	<p>Troubleshooting connectivity issues within your Act! product when your supported network infrastructure is otherwise working</p> <p>Troubleshoot problems when configuring or using synchronization within Act!</p> <p>Synchronization wizards</p>	<p>Understand and explain requirements for creating sync sets & remote database deployments.</p> <p>Assistance with setting up your network</p> <p>Understand requirements for creating a sync set & remote database as well as deploying and restoring a remote database.</p>
<p>Database Customization</p>	<p>Troubleshoot problems encountered during database customization in Act!</p> <p>Explain how to customize an Act! layout.</p>	<p>Changes to your layout, including creating and adding fields, customizing columns, adding menus and toolbars</p> <p>For complete layout design service, contact your Act! Certified Consultant</p>
<p>Creating & Editing Reports & Templates</p>	<p>Explain how to edit a report or template.</p> <p>Troubleshoot issues encountered using existing Reports & Templates in Act!</p>	<p>Understand requirements and make recommendations for running, creating or editing Reports & Templates.</p> <p>Microsoft Word support</p> <p>Assistance connecting your Act! data to third party reporting tools</p>
<p>Custom Tables</p>	<p>Explain how Table Management, Field Management and Layout Customization features work</p> <p>Explain how to import data to Custom Tables</p> <p>Explain how to load a template from the Industry Template Library</p> <p>Troubleshoot issues encountered using Custom Tables in Act!</p>	<p>Understand requirements and make recommendations for, creating or editing Custom Table Templates</p> <p>Create or design custom templates on your behalf</p> <p>Editing Scripts</p> <p>Edit source data such as excel or CSV</p>
<p>Importing and Exporting Data</p>	<p>Explain how to import or export data from Act!</p> <p>Troubleshoot import problems in Act!</p>	<p>Understand requirements and make recommendations for importing and exporting data.</p> <p>Edit source data such as excel or CSV</p> <p>Exporting data from third party software or validating/formatting it for you, so that it can be imported into your Act! product</p> <p>Creating your data definition files or mappings for data import</p>



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<p>Network Connectivity</p>	<p>Troubleshooting connectivity issues within your Act! product when your supported network infrastructure is otherwise working</p> <p>Troubleshooting connectivity to an Act! hosting center when Internet connectivity is working</p>	<p>Troubleshooting internet connectivity</p> <p>Troubleshooting other connectivity issues that exist outside of your Act! product</p> <p>Assistance with unsupported networks</p> <p>Installation, troubleshooting or configuration of network (WAN/LAN) security/cards/cabling/hardware/software</p>
<p>Act! emarketing and Swiftpage Connect Support</p>	<p>Explain how to edit templates using the in-built template editor</p> <p>Account access and billing issues</p> <p>Problems accessing the Service</p>	<p>Advise on template and campaign design</p> <p>Training on the design interface</p>
<p>Act! Premium Cloud</p>	<p>Managed Server IT Infrastructure</p> <p>Website and database provisioning</p> <p>Initial import/upload of existing data for setup</p> <p>Automatic back-ups</p> <p>Troubleshooting issues using the Web Interface when your supported network infrastructure is otherwise working</p> <p>Explain how the features in the Web interface work</p>	<p>Troubleshoot internet connectivity</p> <p>Resolve local PC errors</p> <p>Preparing data for import</p>
<p>Act! API and Connections</p>	<p>Act! Web API Installation: Confirm installation and troubleshoot errors encountered during API install</p> <p>Web API Configuration: Help completing the Web site administration panel.</p> <p>Testing your connection: Support will test your connection to the web API.</p>	<p>Securing your Webserver: Integrations and Services require a secure web server (SSL), if you are unsure about configuring this, please consult one of our Partners</p> <p>Creating and personalizing integrations using the Web API</p> <p>Configuring external (outside your network) access to the API</p>



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Act! Companion	<p>Logging in and initial configuration: Help with set up.</p> <p>Using Act! Companion: We will explain the features of Act! Companion and how to use them.</p>	<p>Download and Install: Problems with App store consult provider</p> <p>Android or iOS errors: Errors unrelated to Act! Companion</p> <p>Network access: For internet access on your mobile device, contact your provider.</p>
3 rd Party Hosting providers	<p>Troubleshooting issues using the Web Interface when your supported network infrastructure is otherwise working</p> <p>Explain how the features in the Web interface work</p> <p>Guide through installation and setup of offline clients</p> <p>Troubleshoot problems encountered during an installation or upgrade</p> <p>Swiftpage will provide support and assistance with issues relating to Act! as outlined in this document.</p>	<p>Managed Server IT Infrastructure</p> <p>Website and database provisioning</p> <p>Initial import/upload of existing data for setup if standard import fails</p> <p>Server-side Back-ups</p> <p>Setup and troubleshooting connectivity and sync of offline client and Cloud server</p> <p>Troubleshoot internet connectivity</p> <p>Resolve local PC errors</p> <p>Preparing data for import</p>