


GETTING THE MOST OUT OF YOUR TECHNOLOGY



*Your Essential Guide to Getting
Amazing Service & Support for
Your IT Infrastructure*

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A QUICK NOTE FROM THE PRESIDENT

Hello there!

My team and I are super excited to be working with you.

As you'll come to learn, here at Phantom Technology Solutions we **LOVE** Technology! (yup, we're geeks).

And, we **LOVE** helping people!

So, our mission is simple...

To help you and your team be highly profitable, innovative & efficient by implementing and learning how to use the latest and greatest technology to help power your business!

You might think it's weird, but we honestly wake up every day excited to help businesses like yours better use all the amazing technology that exists out there!

As part of that, this short guide will arm you with all the information you need to get the most out of working with us.

I encourage you to take 5-10 minutes to read through it now so that when you do need our help – you'll know how to best get it!

We're looking forward to working with you!

Cheers,








Henry L. Timm

Henry Longworth Timm

HOW CAN I GET FAST SUPPORT?

The first question you might have when working with us is.. **How do I Get Fast Support**, so here's our recommended ways

	<h3>BY CHATTING WITH US</h3> <p>This is the easiest and fastest way to request help</p> <p>Simply double click on our logo next to your clock (it looks like this: ) and a window will pop-up, guiding you easily through the process!</p>
	<h3>BY SENDING US AN EMAIL</h3> <p>If you'd prefer email, simply shoot us an email to support@phantomts.com</p> <p>This will automatically pop-up in our system and we'll work on it as soon as possible. You'll get an automated reply confirming we've got it!</p>
	<h3>BY CALLING US</h3> <p>You can call us 24 x 7 x 365 on 1-800-338-4474 whenever you need help.</p> <p>If you need help URGENTLY, make sure you call us rather than use any of the other methods.</p>
	<h3>USING THE PHANTOM GUARDIAN PORTAL</h3> <p>You can create service tickets with all the nitty gritty details directly into our system by visiting the Guardian Portal online at https://guardian.phantomts.com</p>

IMPORTANT NOTE



If you send emails to our **Direct Email Addresses** or call us on our **Cell Phones**, this will very likely slow our response times down because we've built our processes to be quickest & most reliable when you use the methods above.






HOW FAST WILL YOU RESPOND?

We are a **Shared Services** business model which means you're sharing our whole team with the rest of our clients.

Whilst this is good as you don't have to invest huge amounts of money & time to build out and manage your own internal IT team, it means that we can't offer immediate support for you 100% of the time (we wish we could, but we'd need to charge 10x the price). However, we know that one of the easiest ways to make you happy is to provide **FAST** and **RELIABLE** support when you need it most.

So to keep things fair, we categorize all issues into **Priorities** and work on them in order. This means that when you have a **Critical** issue – we can work on it SUPER quick (by taking a little longer to work on your lower priority tasks).

Here's the times we aim for in each **Priority**, along with some simple examples:

PRIORITY	EXAMPLES	REMOTE RESPONSE TIMES (Varies by your selected Guardian Help Desk Plan Level)	TARGET RESPONSE TIMES
 Critical	Your Main Server is offline and all users are unable to work.	Ex: 1 Hours	Ex: 15 Minutes
	One of your Network Switches has failed and stopped half the users from working.		
	A VPN link between 2 x offices is offline causing one office to be unable to work.		
 High	Your Internet Connection is offline, users can still work locally OK	Ex: 2 Hours	Ex: 1 Hour
	Your CEO's computer has stopped working and they have an urgent task		
	Your main Accounting Software has stopped working and is unavailable		
 Medium	A user's desktop is making a strange noise	Ex: 4 Hours	Ex: 2 Hours
	One of the main printers is not working, but users can print to another one		
	A user is having problems connecting to the Wireless network		
 Low	Printing is slower than normal	Ex: 8 Hours	Ex: 4 Hours
	A single user is unable to scan documents		
	A user needs a program installed on their Computer or Laptop		
 No Priority	Pro-Active Maintenance of systems, including Software Updates	N/A	N/A
	New User Setup and Configuration		
	New Computer or Laptop Installation and Configuration		

HOW DO I ESCALATE SOMETHING?

Whilst we strive to exceed your expectations all the time, we're not arrogant enough to think that it's possible to be 100% perfect 100% of the time.

We are humans after all

So, if you ever have a situation where you feel we're not handling your request as well as we could be, you can escalate that issue...



Right up to the “big boss” if you'd like!

Here's the order of escalation contacts and their direct contact details:

ESCALATION CONTACTS	
1. SERVICE MANAGER	Phone: 1-800-338-4474 x1113 Email: sm@phantomts.com
2. CEO	Phone: 1-800-338-4474 x1107 Email: htimmm@phantomts.com

As you'll come to notice (& love), our team is extremely professional, highly efficient and very capable, so hopefully you'll never need to use this process.

However, you now know that if the rare occasion pop-ups where we do miss your expectations, there's an easy way for you to let us know so we can fix it ASAP!

If we ever do make a mistake, you can count on us to 100% own up to it.

WHAT CAN WE HELP WITH?

We're not just Computer People

We can also help you out with most technology things related to your business.

Here's a list of some of the services we can help with:

- ✓ Office 365 / Microsoft 365
- ✓ Microsoft Azure & Cloud Hosting
- ✓ Hardware & Software Procurement
- ✓ Software Licensing
- ✓ Internet & Private Data Connections
- ✓ VoIP / SIP Trunking & Telephone
- ✓ Hosted Phone Systems
- ✓ On-Premise Phone Systems
- ✓ Website Hosting
- ✓ Penetration Testing
- ✓ Project Planning
- ✓ Procurement
- ✓ Cybersecurity
- ✓ IT Budgeting (create yours)
- ✓ IT Consulting
- ✓ IT Strategic Planning
- ✓ Disaster Recovery Planning
- ✓ Business Continuity Planning
- ✓ DNS / Domain Name Hosting
- ✓ Domain Name Renewals
- ✓ Surveillance Cameras
- ✓ Low Voltage Wiring

Plus, we have a network of **Trusted Partners** for services like Accounting, Legal Services, Marketing and much more, so if you're looking for something not on this list – get in touch with us via your **Account Manager** to find out whether we can help you or point you in the right direction!

BUSINESS IMPROVEMENT PROJECTS

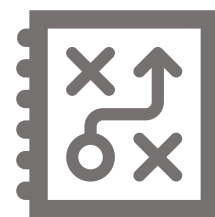
One of our areas of genius is working out how businesses like yours can better use **Technology** to solve **Business Problems**.

So, whenever you have a challenge in your business that you're struggling to find an answer for – simply pick up the phone and give your **Account Manager** a call.

There's a **VERY** good chance we'll be able to help you find a creative way to solve your challenge, often using a mixture of **Business Consulting** and **Technology**.

A perfect example of where we can usually find efficiencies and automated ways to do things is wherever you use Microsoft Excel. We can often find ways to automate this stuff and help you build out business dashboards to better manage your numbers.

We honestly **LOVE** solving challenges like this so we can help you be more profitable, more innovative and more efficient by using technology.

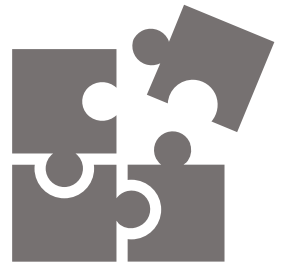


OUR RECOMMENDED TECHNOLOGY PLATFORM

There's a bazillion different types of technology out there in the world.

Which makes it **impossible** for anyone to keep up with it all.

So, to make sure we can deliver world-class, fast, amazing service – we constantly work towards helping all of our clients use the Technology we know and love the best (we call this our **Recommended Technology Platform** or **RTP** for short).



We aim for all of our clients to use as much of our **RTP** as possible and we make sure we maintain deep knowledge and training on everything in our **RTP** so we can keep your IT Infrastructure nicely integrated, fast to support and world-class!

Plus, we eat our own dog food by using everything on the **RTP** in our own business!

THE RECOMMENDED LIST

- 
- | | |
|-------------------------------------|-----------------------------------|
| ✓ Microsoft 365 | ✓ Sophos Routers & Firewalls |
| ✓ Microsoft Azure | ✓ Microsoft Office 2019 and Above |
| ✓ Microsoft Servers | ✓ Microsoft Windows 10 and Above |
| ✓ Microsoft Hyper-V | ✓ Cytracom Phone Systems |
| ✓ Dell Servers & Storage | ✓ Yealink IP Phones |
| ✓ Dell or Lenovo Desktops & Laptops | ✓ Fujitsu Scanners |
| ✓ NETGEAR Switches | ✓ DYMO Label Writers |
| ✓ Brother & HP Printers | ✓ LTS Security Cameras |
| ✓ Sophos Wireless Access Points | ✓ Samsung SSDs |
| | ✓ Samsung Monitors & TVs |

Since we can't automatically update this physical manual in your hands, if you want to see the 100% latest up-to-date version of our **Recommended Technology Platform**, simply head to: <https://phantomts.com/rtp>

THIRD PARTY VENDORS

Whilst we work hard to stay trained and up to date in all of the above technology, we know that from time to time, you'll need help with something that's not on the list.

When this happens, just bear in mind that it may take us some extra time to familiarize ourselves with supporting that product. But take solace that we are still world class at troubleshooting other products, so we'll be able to work it out!

Also, please keep in mind that whilst we may be able to purchase items from other vendors that we don't list above, any support may end up being **Out of Scope** for your **Fixed Fee Support Agreement** and incur some extra costs. We'll always let you know beforehand though.

YOUR CONTACTS

YOUR ACCOUNT MANAGER

When your business starts work with us, we assign you an Account Manager.

Your **Account Manager** is who you should call for any questions about your business and all account level discussions.

Whenever you need to talk to someone about your future plans, your budgeting, upcoming projects or anything else related to your IT Infrastructure, get in touch with your **Account Manager**.

Your **Account Manager** will also be the person who will be working with you on your Regular Technology Business Reviews (TBRs for short). More about them soon.



There's no need to get in touch with your **Account Manager** for Helpdesk Support or Service Requests as they'll simply tell you to get in touch with the Helpdesk team directly for the fastest help and quickest response!

YOUR PRIMARY IT CONTACT/S

As part of your Onboarding, we asked you to appoint a **Primary IT Contact** from your side (or sometimes a few).

Your **Primary IT Contact(s)** are the ones authorized to make changes to your account and are who we send important information to.

If you're not the Primary IT Contact in your business, then it's best to speak to them whenever you have a request that includes adding, editing, or deleting users or data as they'll need to authorize it first.

We have this security in place for your protection as we wouldn't want to give a new user your confidential data one day that didn't have authority to have access.

YOUR ACCOUNTING CONTACTS

If you ever need any help with any accounting issues (such as needing copies of Invoices etc), simply shoot an email to accounting@phantomts.com and our friendly accounting team will help you out.

You can also call them on 1-800-338-4474 x5– they're available business hours Mon - Fri.



HOW DO I ORDER HARDWARE OR SOFTWARE?

Whenever you need any new equipment or software, we've got you covered. We have a dedicated Procurement and Ordering system designed to take the hassle and pain out of the process whenever you need to order anything.

SMALLER ORDERS

If it's for a small order such as a few new computers or laptops – simply give us a call on 1-800-338-4474 x4 or shoot us an email to sales@phantomts.com and we'll send you back a Quote. We aim to get all quotes back to you within 8 business hours.

LARGER ORDERS

If your order is large or it's for a project (like a migration or an office move), then it's best to speak to your **Account Manager** so they can make sure they align everything up properly for you.

They'll work to get you an official Fixed Fee Proposal to cover everything you need!

APPROVING AND PAYING

Unless it's a complex project, we'll typically send your quotes & proposals using our web based quote delivery system.

You'll simply need to click on the link in the email and you'll be able to view the quote or proposal. You can simply click on the Approve button and Pay immediately.

We have a system in the back-end that alerts us as soon as a successful payment comes through so we can jump on to getting the goods ordered and ready for you!

WHAT ABOUT OUT OF STOCK ITEMS?

If something is in stock, we'll normally be able to get it delivered to you within 1-2 business days after successful payment.

If it's out of stock, our **Procurement Team** will keep you up to date with estimates on when it's due to arrive.

If our distributors tell us that it's going to be out of stock for a while, we'll work with you to find some alternatives (especially if it's something you need quickly).

CREDIT ACCOUNTS

Currently, we don't offer Credit Terms or Credit Accounts because quite frankly, we're not very good at being a bank. We're far better off at helping you with technology and we choose to focus on that instead.

If you are looking for credit, we're more than happy to work alongside your financial supplier to help you obtain credit on a project.

If you don't have a financial broker, we can put you in touch with one that a number of our clients use. Just give your **Account Manager** or our **Accounting Team** a call

SOME MORE IMPORTANT BITS

Here's a few more important bits of information to help you better understand and navigate the crazy technology world and some of the terminology we may use when we're talking to you!

SECURITY VS USABILITY

In the technology world, there's an ongoing battle between **Security** vs **Usability**.

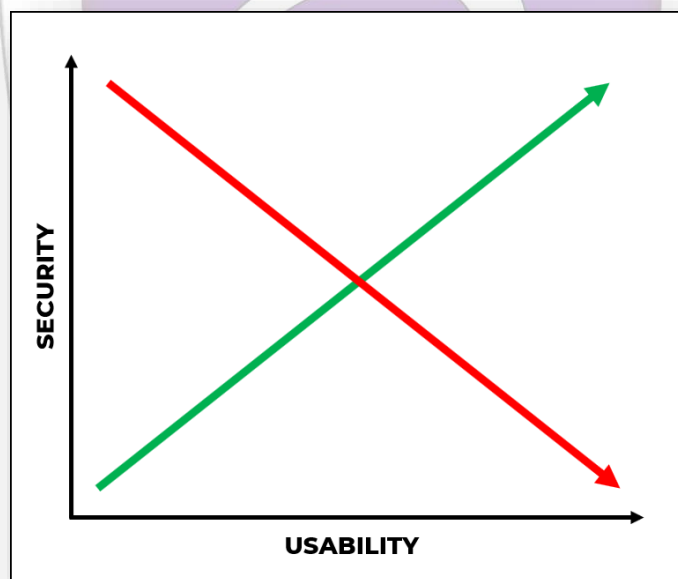
Every day, there are millions of hackers around the world, trying to break into networks like yours. There's literally high-rise buildings full of these hackers in countries like Russia.

And, the best way to defend against them is to **NOT** use technology at all.

But that wouldn't be fun, right?

The problem with technology though is that typically, the more **Secure** your systems, the harder they become to use!

On a graph, it looks a little like this:



So, please know that we do our very best to make your business as secure as we can with the budgets you give us to work with. At the same time we also try to make things as easy to use as possible while keeping security as high as we can.

You might notice this in things like our strong recommendation that every single user uses **2-Factor Authentication**.

We know it can be painful to use because we protect 100% of our systems with it.

However, turning it on, can help block LOTS of the most common hacking attempts that are happening on your network to help keep your data safe.

We err on the side of high security, but we also aim for easy usability.

IN SCOPE VS OUT-OF-SCOPE

If you've ever been to an All-You-Can-Eat Buffet, you'll know that you're able to eat as much of anything that's out on the buffet as possible.

However, if you'd like something that's NOT on the menu – then you have to ***pay for it separately***.

Our Guardian Agreements and Fixed Fee Projects work in the exact same way.

That means that you can have as MUCH as you like of anything that we cover in our **Inclusion List** for your Agreement or in the **Scope of Works** of a Project.

When you need something that's **not** on the list, we will simply quote you a separate **Fixed Fee Quote** so you can work out whether you want to go ahead with it or not.

We call this whole conversation **IN-SCOPE** and **OUT-OF-SCOPE**.

Whilst we have worked hard to build an offering where pretty much *everything* you will need in the day-to-day operation of your business will be included **IN-SCOPE** – you might find from time to time that there will be things that are **OUT-OF-SCOPE**.

If we were to include absolutely everything **IN-SCOPE** – we'd end up going out of business, just like a buffet restaurant would if they included everything possible.



If you're unsure if something's included or excluded, either check your **Inclusion List** on your **Agreement** or simply give us a call!