

Level 1 and Level 2 Support Definitions

Support Categories	Level 1	Level 2
Your Partner Portal		
Questions concerning controls from your partner portal and how to access or setup new accounts with Mindmatrix	✓	
Dashboard overview, portal features available to Partners	✓	
Sales related questions about default features accessible to Partners in (opening up new features to Dealers upon request)	✓	
CONTACTS		
Direction on importing contacts and setting up smart lists	✓	
Explaining contact sharing via opportunities	✓	
Creating smart lists for contact sharing for Partners	✓	
Setting up new specialized lists and notifications for users based on interest level, contact record data or collateral activity		✓
Assistance with tracking code installation for Partners		✓
Adding/creating new custom fields	✓	
OPPORTUNITIES		
Opportunity process and requirements to register opportunities	✓	
ASSETS		
Adding additional documents to the Document or Images Gallery and sharing documents or images	✓	
Sending emails and adding attachments to emails	✓	
SOCIAL MEDIA		
Activating social media accounts in Mindmatrix	✓	
Posting to social media using Mindmatrix	✓	
MAINTENANCE & SETUP		

Permission controls on assets for sharing and editing access (Site Admin & Super Admin)	✓	
Asset Configuration changes for Advanced Search and Opportunities	✓	
Task Manager issues		✓
<i>Any advanced issues not mentioned in the above list that require troubleshooting or additional assistance*</i>		✓

Communication

Mindmatrix support will escalate any questions to a point person on your staff as defined in the table below for any issues that are outside of software usage and standard offering.

You should define point persons for the following types of support issues (please complete the table below):

Support Category	Point of Contact at your company (First Name, Last Name, Title, Email Address & Phone)
Sales	
Marketing	
Your Products	
Technical Support for your PRM	

If a POC (primary point of contact) on your staff changes, you should notify Mindmatrix by emailing support@mindmatrix.net with the details of your new POC.