# CLIENT HANDBOOK

## HARNESSING THE FULL POWER
## OF YOUR IT NETWORK

*Your Guide to Using and Getting Support for your Technology*

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# A NOTE FROM THE CEO

Hello and Welcome!

I wanted to personally thank you for joining our growing community of tech-savvy, forward thinking business owners! We are excited to start helping you implement state of the art IT solutions to power your enterprise.

As you'll come to learn, here at Kinzit Technologies, we are passionate about empowering each and every one of our clients with the best tools to grow, optimize and protect their businesses.

We love coming up with creative solutions to complex technical challenges and helping businesses increase their profitability and competitive edge by using the right tools to maximize efficiency and facilitate innovation.

This Client Handbook contains all the information you need to get the most out of your technology, along with our important policies that ensure that things are always on track and running smoothly.

Please take some time to familiarize yourself with the contents, sign all forms where indicated, and distribute copies of important policies to your team so we can provide you with fast, efficient and world-class support.

Again, we're excited to have you on board and looking forward to working with you!


Best Regards,

Ryan Kinsey

# WHAT CAN WE HELP WITH?

At Kinzit Technologies, We're not just Computer People – We can also help you with various other business technology needs, including:

⇒ IT Consulting, including budgeting, business automation and strategic planning
⇒ Disaster recovery and business continuity planning
⇒ Domain name procurement, hosting, and renewals
⇒ Web design and development
⇒ Custom software development
⇒ Project planning and management

In addition, we have a network of **Trusted Partners and Advisors** for services such as Accounting, Legal, Marketing and more – so if You're looking for a referral, don't hesitate to get in touch with Us via your **Account Manager** to find out whether we can help you or point you in the right direction!

# STANDARD TECHNOLOGY SUITE

There are countless options for small businesses looking to implement technology to support their operations. As IT professionals, it is our job to keep up with the developments in this rapidly evolving industry and ensure that our clients are using the best technology in terms of reliability, speed, security, integration, and fit for their business needs and objectives.

After many years of serving exclusively small and growing businesses, We have curated a list of technologies that work well together and enable us to create IT networks that suit the needs of any business – we call this Our **Standard Technology Suite** (or "**STS**").

Below is the list of the technologies that We currently use to create a well-integrated, reliable and secure IT infrastructures for each of Our clients:

## Hardware

- ✓ Dell Servers
- ✓ Dell, HP, Lenovo Desktops and Laptops
- ✓ Xerox and Brother Printers
- ✓ Ubiquiti Wireless Access Points
- ✓ Sonicwall, Fortigate, Cisco Meraki Routers & Firewalls
- ✓ Ringcentral Phone Systems
- ✓ Grandstream IP Phones
- ✓ Hostgator Wordpress Webhosting Platform

## Software

- ✓ Microsoft 365
- ✓ Microsoft Azure
- ✓ Microsoft Office 2019 and Above
- ✓ Microsoft Windows 10 and Above

We continue to educate Ourselves and train Our teams on the most up-to-date information on each component in Our STS, so that Our clients never miss out on the latest updates and developments such as new software solutions, upgraded functionality, and cybersecurity protections. Because the field of technology is constantly evolving, We often amend the list of hardware and software We use to provide you with the best IT infrastructure and the best security solutions to protect against the ever evolving cybersecurity risks threatening small businesses. Any time We make a change to Our STS, We will send you an e-mail and will post the new version to https://kinzit.com/it-policy-manual/.

While We are smart enough to troubleshoot almost any issue with any product, and We can most likely work with any hardware and software that are not listed above, any tasks involving the installation, setup, maintenance and support of those products is outside of the scope of any Managed Service Plan, and is billed hourly, at the rates outlined in Your Master Service Agreement.

# HOW CAN I GET SUPPORT?

All service requests must be initiated by one of the methods outlined below. When requesting a service, You must provide a detailed description of the issue and the specific services requested.

If you have an EMERGENCY or require after-hours support, you MUST either call us or use the web-

| | |
|---|---|
| | ## USE THE IT Icon on your computer<br><br>This is the fastest and easiest way to get help. Simply click the blue "IT" icon in the bottom right of your computer and open an IT Request from that icon. You will be taken to a form where you will be guided easily through the process. Just follow the steps, provide all the requested information, and hit "Submit" at the end of the form. |
| | ## SEND US AN EMAIL<br><br>If you prefer not to use the website, you may always shoot us an email to support@kinzit.com with the subject line "REQUEST FOR SERVICE" and provide a detailed description of the issue. Once you hit send, look for the automated reply to confirm that your request was received. |
| | ## CALL US<br><br>You can call us M-F 8am-5pm EST at 800-260-3980 whenever you need help. |
| | ## CHAT WITH US<br><br>If you prefer, you may also contact our customer service team via chat M-F 8am-5pm EST. Simply click on the "Chat" icon in the bottom right corner of our website, and one of our team members will assist you as soon as they are available! |

based portal. When using the web portal, don't forget to check the box next to "THIS IS AN EMERGENCY / AFTER-HOURS REQUEST"; otherwise the issue will be responded to during regular business hours.

IMPORTANT: If you send emails to our **Direct Email Addresses** or call us on our **Cell Phones**, this will result in slower response times. Using the above methods to contact us is the only way to ensure a quick and reliable response within our **Guaranteed Response Time Frames**.

# GUARANTEED RESPONSE TIMES

In order to ensure that the most pressing issues are responded to the quickest, We categorize and respond to each service request based on the severity/urgency (or "Priority") of the issue. This means that when we get a service request on an issue we deem Critical, we start working on it within an hour, while lower priority tasks will be responded to a bit slower (but still within the guaranteed response times).

Determining the priority of an issue is within Our sole discretion; however, to give an idea of what to expect, priorities are generally assigned as shown in the table below. Our Priority classifications correspond to Our Guaranteed Response Times (column 3), so that the highest priority issues are responded to in the quickest time frame.

| PRIORITY | ISSUE / IMPACT | EXAMPLES | GUARANTEED RESPONSE TIMES* | TARGET RESOLUTION TIMES** |
|---|---|---|---|---|
| **Urgent** | **Service not available (all or majority of users and functions unavailable)**. Entire office is shut down, unable to work, or experiencing severe inconvenience. Significant cybersecurity risk. | Your main server is inaccessible. / A VPN link is offline and the majority of users cannot work / Internet service is down / Complete hardware failure or failure of a key software affecting the majority of users / Ransomware attack or other serious cybersecurity breach | **1 Hour** | **1-4 Hours** |
| **High** | **Significant degradation of service (large number of users or critical functions affected)**. Major workflow impact for one or more users. | There is a suspected virus on a machine / Key personnel's computer has stopped working and they have an urgent task / Your main email, payroll, accounting or other software critical to operations has stopped working / Central printing not working | **2 Hours** | **2-8 Hours** |
| **Medium** | **Limited degradation of service.** Limited number of users or functions affected, business process can continue. | A single user's computer is not working / A single printer is not working, but other machines are available / Single user wireless connectivity issues, slow computers, software updates | **4 Hours** | **48 Hours** |

| Low | Small service degradation (business process can continue, one user affected). Requests relating to future planning; very low-impact requests; desired upgrades and improvements. | Internet, printing and other functions are slower than usual, but still working | 8 Hours | 5 Days |
| | | A new employee needs user access setup | | |
| | | A user needs a software update or new software installed | | |
| | | Planning network changes and improvements for future plans/growth | | |

**All issues must meet the above guidelines for each priority level to be classified as such.** For instance, if multiple users are having connectivity problems, that would be considered a High Priority ticket. If it is submitted as an Urgent request, we reserve the right to reassign it to High Priority and take care of any Urgent tickets in queue first. Similarly, if a desktop printer malfunction is submitted as a High Priority ticket, we will reassign it as a Medium Priority ticket and handle any higher priority issues first.

All examples above are provided solely as an illustration of the types of issues that fall under each priority level, and should only be used to gain an understanding of how we rank urgency, rather than an exhaustive list of issues under each priority.

**Our Response Time Guarantee.** Unless a service is excluded from Our Guaranteed Response Times, We will respond to your Service Requests within the Guaranteed Response Times outlined above. "Respond" in this context means that we will assign a technician and begin working on the issue within the applicable time frames, and should not be confused with *resolving* the issue, which is often unpredictable and subject to many factors outside of our knowledge and control until We actually begin work on the problem. We reserve the right to amend this list by providing You a revised set of Guaranteed Response Times via an amended Client Handbook or other similar policy document issued by Us.

Our Response Time Guarantee does not apply to Service Requests lodged outside of Business Hours.

We are serious about Our guarantees and want to do what we can do make it right should we fail to abide by them for any reason. If You reported an incident to Us via the appropriate channels and Our response time exceeds the Guaranteed Response Time for that issue, You may make a claim for credit within 7 days of the incident in writing to billing@kinzit.com. If We agree that Your claim is valid, You will be credited 5% of the amount of either a) the cost of the Service, if the task was billed according to Our hourly rates and charges; or b) 5% of Your Monthly Service Fee stated in Your MSA for the month of the incident, up to a maximum of 25% of the Monthly Service Fee per month.

## HOW DO I ESCALATE AN ISSUE?

If You wish to move a Service Request up to a higher priority than it would normally be assigned pursuant to the table above (for example, requesting that a printer malfunction be treated as an Urgent Priority ticket), You may request an "Emergency Upgrade" by:

- contacting Your Designated IT Contact
- checking the "Emergency Upgrade" box on the web-based portal
- Submitting a request for escalation of an existing Service Request by emailing escalation@kinzit.com
- contacting Us at email/phone

When You do any of the foregoing, We will treat Your Service Request as a Critical Priority Issue. Please note that all labor performed on services classified as Emergency Upgrades are billed at our emergency rate.

Additionally, if you ever feel that we're not handling your request as well as we could be, you can escalate that issue by giving Us a call at 800-260-3980 or sending an email to customercare@kinzit.com.

Our team is highly capable, efficient and professional, we do hope that you'll never need to use this process; however, in the unlikely event that we make a mistake or our response doesn't meet your expectations, you can count on us to own up to it and fix the issue ASAP!

# AFTER HOURS AND EMERGENCY SUPPORT FORM

**Would you like to implement restrictions on after hour support request?**

☐ Yes – continue filling out the rest of the form

☐ No- Sign bottom of the page

**Staff/Management who can approve after hour request:** If you would like a specific member of your staff or management to approve all emergency upgrades and after-hours requests, please list the best way to contact that person after hours. If you are listing multiple personnel, please list them in order of whom you would like for us to reach out to first. If you have different approvers per location, please use the location field.

| Name | Phone Number | Location |
|------|--------------|----------|
|      |              |          |
|      |              |          |
|      |              |          |
|      |              |          |
|      |              |          |

**If we are unable to reach management for approval, please document here how you would like for us to proceed:**

_____
_____
_____
_____

**Any other restrictions or approval process request**:

_____
_____
_____
_____

# SUPPORT TIERS

The following table describes our Support Tier levels and how issues are moved between tiers to ensure that each issue is handled by the appropriate technician:

| SUPPORT TIER | DESCRIPTION |
|---|---|
| Tier 1 Support | All support incidents begin in **Tier 1**, where the initial trouble ticket is created, and the issue is identified and clearly documented, and basic hardware/software troubleshooting is initiated. |
| Tier 2 Support | All support incidents that cannot be resolved with Tier 1 Support are escalated to **Tier 2**, where more complex support on hardware/software issues can be provided by more experienced Engineers. |
| Tier 3 Support | Support Incidents that cannot be resolved by Tier 2 Support are escalated to **Tier 3**, where support is provided by the most qualified and experienced Engineers who have the ability to collaborate with 3rd Party (Vendor) Support Engineers to resolve the most complex issues. |

# VENDOR AUTHORIZATION LETTER

Sometimes vendors require written authorization from You before they can discuss matters related to Your business with Us. To help obtain such authorization, feel free to customize and copy the letter below into an email to each vendor that needs authorization to work with Us while We provide the Services:

Dear <Vendor Name>,

I am writing to notify you that we have engaged Kinzit Technologies to oversee and handle our IT and Technology requirements.

In order to execute these responsibilities, it is essential that Kinzit Technologies has the authority to coordinate, manage and obtain support as needed from all of our technological vendors and resources.

Therefore, effective immediately, we grant full permission to any member of the team at Kinzit Technologies to access, modify, and manage all facets of our account, including all products and services we have obtained through your organization.

This authorization will remain in effect until we formally rescind it in writing. If additional information is needed, please do not hesitate to contact us.

Sincerely,

[Name]
[Title]

# OFFBOARDING ASSISTANCE REQUEST FORM

If You would like Kinzit Technologies ("We", "Us") to assist You in the orderly termination and/or transfer of Your Services to another designated provider ("Offboarding Assistance"), all outstanding invoices and any applicable Termination Payment required by your Master Service Agreement ("MSA") must be paid, and this form MUST be completed and returned via email to billing@kinzit.com by either:

a) fourteen (14) calendar days prior to the expiration of the applicable Termination Notice Period, as defined in the MSA, if the Services are being terminated under circumstances that require a Termination Notice Period; or

b) if the MSA is being terminated with immediate effect, then within seven (7) calendar days of the date of the notice of termination ("Offboarding Assistance Request Deadline").

**Offboarding Timeframe.** Offboarding assistance will only be available until the end of the applicable Termination Notice Period; or, if the MSA is being terminated with immediate effect, for fourteen (14) calendar days following the notice of termination ("Offboarding Completion Deadline"). Any offboarding assistance requested to be provided after the Offboarding Completion Deadline is subject to availability and approval by Us, and if approved, will be invoiced at our applicable hourly rates (Regular or After Hours, depending on Your request) and payable in advance of any labor being performed.

**Cooperation and Designation of New Service Provider.** You agree to fully cooperate with Us in every step of backing up and/or transferring Your accounts and data, including promptly responding to Our requests for information and access, and timely designating a new managed service provider.

**Failure to Cooperate.** Failure to complete and return this form by the Offboarding Assistance Request Deadline, failure to timely remit payment for all amounts due including any applicable Termination Payment, failure to cooperate with Us and promptly provide Us with all requested access/information, failure to timely designate a new managed service provider, and/or failure of Your new managed service provider to cooperate with Us in any respect during the offboarding process may result in:

a) offboarding assistance after the Offboarding Completion Deadline being unavailable;
b) any work performed being billed at Our After-Hours and Emergency Rates in effect at the time of termination; and
c) the final and permanent deletion, termination, and cancellation of any or all of Your services, accounts and all data, content, credentials and other information associated with same after the seventh (7th) day following the expiration of any applicable Termination Notice Period, or if the MSA is being terminated with immediate effect, after seven (7) days following receipt of the notice of termination.

**No Waiver.** This form relates only to the cancellation and transfer of the accounts, services and/or licenses ("Services") listed below, and **does not constitute a release or waiver** of any claim by Us for the payment of any sums owed by You under any MSA, Client Agreement, Service Agreement, Service Order or any other agreement between You and Us. Submitting this notice does not relieve You of the obligation to pay any Termination Payment due under the Managed Service Agreement, along with any additional sums due for goods delivered and Services rendered. We reserve the right to enforce Our right to compensation for all costs, fees and expenses which may be outstanding and/or due and payable through the end of any applicable notice period and/or the applicable Commitment Term.

**Acknowledgements.** By signing this form, You acknowledge that all of the following tasks will have to be completed in order for Your licenses, accounts and data to be saved, backed up, and/or remain active, as applicable. We will only assist with the following tasks if this Form is returned signed by the Offboarding Assistance Request Deadline; otherwise, completing these tasks by the date of the Termination of the MSA is the sole responsibility of You and Your new managed service provider, if any.

- **Your Server**: A copy of all data on the virtual server will have to be downloaded, or ownership of the account must be transferred to You or a new managed service provider designated by You in this Form, no later than the Offboarding Completion Deadline. You understand that if a transfer is not made, once data is removed from Our portal, We will not be able to restore anything, and You will be solely liable for retrieving an entire backup of the system or moving the account.
  **Initial: _____**

- **Office 365 Licenses and Subscriptions**: Your Office 365 Licenses and Subscriptions will have to be transferred into Your name/account no later than the Offboarding Completion Deadline. If this is not done, You acknowledge that We have the right to remove all of Your licenses in Our portal for your Office 365 subscriptions with no additional notice to You. You understand that any information, content and data contained in such accounts will be unrecoverable after this date unless properly backed up and transferred to You or Your new managed service provider.
  **Initial_____**

- **Password Management Program**: Your passwords must be transitioned to a new platform no later than the Offboarding Completion Deadline, after which We will remove all passwords stored in the shared space and You will no longer have access to same.  We can provide a printed or digital copy of these at Your request.
  **Initial_____**

- **Hardware and Equipment**: Unless ownership of any physical goods, hardware, tools and equipment supplied by Us to You ("Our Equipment") has been transferred to You pursuant to the terms of the MSA or other agreement between You and Us, You understand that Our Equipment is Our property and You must a) return all of Our Equipment by the Equipment Return Deadline stated in the MSA; or b) make all of Our Equipment available for pickup by the Equipment Return Deadline; or) pay Us the fair market value of same by the Equipment Return Deadline. If any hardware and/or equipment is retained by You, management of said equipment, as well as renewing and maintaining any associated licenses following the expiration of the current license on same, will be Your responsibility.

  Equipment which has not been transferred to You pursuant to the MSA, and which must therefore be returned or paid for as a condition of receiving Offboarding Assistance includes but is not limited to:

  - ⇒ Network Firewall
  - ⇒ **File Servers**
  - ⇒ WiFi Access Points
  - ⇒ Desktops
  - ⇒ Laptops
  - ⇒ Etc

  **Initial_____**

- **Anti-Virus / Security Programs**: You will no longer receive anti-virus or security services, and all anti-virus and cyber security protections used by Us will be turned off following the Termination Date.
  **Initial_____**

BY SIGNING THIS FORM, YOU UNDERSTAND THAT CANCELLATION OF THE ABOVE SERVICES MAY RESULT IN THE PERMANENT DELETION OF ALL CONTENT, DATA AND INFORMATION ASSOCIATED WITH THE ABOVE SERVICES AND YOUR ACCOUNT(S). UPON BEING PROVIDED WITH THE NECESSARY AUTHORIZATIONS AND RELEASES FROM US, IT WILL BE YOUR RESPONSIBILITY TO ENSURE THE PROPER BACKUP AND TRANSFER OF ACCOUNTS. UNDER NO EVENT SHALL WE BE LIABLE FOR ANY LOSS, DAMAGE, EXPENSE, OR INJURY (INCLUDING BUT NOT LIMITED TO BUSINESS INTERRUPTION, LOST PROFITS OR REVENUES, AND ECONOMIC INJURIES) RESULTING FROM LOSS OF ANY ACCOUNT AND/OR ANY DATA OR INFORMATION ASSOCIATED THEREWITH DURING THE TRANSFER PROCESS OR AT ANY TIME FOLLOWING THE SERVICE TERMINATION DATE.

**By signing below, You authorize Us to turn over all account access and information, passwords, private files, licenses, content, and data to the party listed below:**

| Name | Phone Number | Location | Email |
|------|-------------|----------|-------|
|      |             |          |       |

**SIGNATURE:**

_____
Printed Name:
Title:

_____
Date

# CONTACTS & COMMUNICATIONS

## YOUR DESIGNATED IT CONTACT(S)

As part of your Onboarding, we asked you to appoint one or more **Designated IT Contacts** from your business. Designated IT Contacts must be:

⇒ the person responsible for submitting Service Requests on behalf of Your organization, an office location or for an internal department or team;

⇒ authorized to request and make changes to Your IT Network and any associated account(s), including but not limited to adding or deleting users, deleting data, changing or terminating subscriptions and other Services, and ordering hardware/software;

⇒ the person whom We can contact in case We need more information about an issue or if We need to send important information about an issue We are working on.

This is a security policy that is in place for Your protection, as we do not want to expose any confidential data to any user who does not have authority to access same, or to bind your organization to user agreements and/or make changes to your account or IT network on the instruction of personnel who are not authorized to make such decisions.

## YOUR ACCOUNT MANAGER

During Onboarding You will be assigned an Account Manager who will be responsible for understanding Your business model, operations and objectives, and ensuring that in light of all of these factors, Your IT Network truly meet the needs of your organization at every stage.

Your Account Manager is the point of contact for all discussions relating to Your business as a whole, any upcoming projects, changes in Your operations, future plans, budgeting, and other high-level

issues, questions or concerns. Your Account Manager is also the team member that will be conducting your Quarterly Reviews.

IMPORTANT NOTE: Your Account Manager is not part of the Helpdesk Support Team. Never contact your **Account Manager** for Service Requests, which should always be submitted using the methods outlined in this Handbook to avoid delays!

## ACCOUNTING & BILLING CONTACT

Should you have any billing or accounting questions, simply send us an email to billing@kinzit.com and someone in our accounting department will be in touch.

# SECURITY POLICIES

As you probably know, every minute of every day, millions of computer networks experience security breaches that result in business interruption, data loss, and money damages. Ransomware attacks are on the rise, as well as misappropriation of personal and proprietary information from computer networks that result in end-user damages (such as account breaches, fraudulent purchases using stolen financial information, and identity theft), which in turn leads to lawsuits, claims and government fines levied against the business whose network the information was obtained from.

Hackers and other criminals actively target companies, because they know businesses have a lot to lose in the form of capital, clientele, and possible fines for inadequate security. They also know that as a result, businesses will more often than not find a way to come up with the money to pay any ransom to regain access to the data and networks they need to continue operations.

Due to the severity of this ongoing threat, it is important for Us to ensure that Your systems are as secure as possible – while at the same time keeping the network usable and efficient.

Though We do implement as many state-of-the-art cybersecurity solutions to run in the background as possible with the budgets You provide Us to work with, We also supplement these protections with policies for Your team to follow, which are designed to increase Your defense against the most common threats and attacks.

All of Our important security policies are contained in the IT Policy Manual, so they are easy to keep track of and reference when needed. Please take the time to read through this Manual, and ensure that all team leaders responsible for compliance and the drafting/implementation of internal policies attend all of Our Scheduled Security Trainings, where We go through each Policy in detail and answer any questions You may have.

Additionally, We are always available to explain and help You implement the Security Policies in Your business.

# HANDBOOK ACKNOWLEDGEMENT

*I acknowledge that I have received and read the Client Handbook, and that I understand and agree to follow the requirements set forth above, and as may be supplemented or modified via amendment from time to time.*

*I further acknowledge and agree that failure to follow the requirements and processes set forth in the Client Handbook absolves Kinzit Technologies from any liability whatsoever in connection with any delays, losses or damages which may occur as a result.*


_____
{Printed Name of Representative}
{Title}, {Name of Business}


_____
Date