



CUSTOMER ESSENTIALS

Please note: This document is updated regularly; please visit <https://www.oztera.com/essentials/> for the latest version



On behalf of the Oztera Team, we would like to take this opportunity to say Welcome! and to provide you with some essential and helpful information to get you started.

This Customer Essentials Package was created to help with your onboarding. We hope you and your team will find it beneficial as you begin working with us. It contains the following:

- Company and Support Contact Information
- How to create & submit a Support Request
- How to request new development or enhancements
- Helpful Tips
- Microsoft Information
- Additional Information and resources regarding Microsoft products and User Groups

If you need any further information, we welcome the chance to help you in any way that we can.

We appreciate this opportunity and look forward to providing you with incredible support. If at any time you have questions about our processes, concerns about how things are going, any service or product suggestions that could help us serve you better, or just want to check in, we want to hear from you, so please call or email us anytime.

Thank you and best regards,

Your Oztera Team & Solutions Partner

OZTERA, INC.

www.oztera.com

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COMPANY AND TEAM

Oztera has been a leading provider of business solutions to varying industries since 2001. From the beginning, we focused solely on the Microsoft Dynamics platform, becoming a premier player in the Business Solutions market. Our solution is utilized by both small organizations and larger conglomerates. We pride ourselves on applying best practices from our industry experience to companies that may have lacked sound processes.

Our team consists of many seasoned individuals who are passionate about their work. We are proud of these team members, whom we did not just hire but handpicked and recruited to deliver a winning experience for our clients. The size of our team allows us to be nimble and selectively choose the customers we can help the most.

We believe in forming trusting partnerships with our clients and care deeply about what is best for their business. It is because of this mindset that our clients welcome our team members as an extension of their own team.

INDUSTRIES, PRODUCTS, AND PARTNERS

You may visit our website to learn more about our Microsoft Certified Products:

- TeraVina and TeraVina for Distributors – For the Wine Industry
- AgTracker - For Agribusiness (Growers and Farm Labor Contractors)

Our expert team support companies in these industries, and more:

- Agribusiness
- Distribution
- Entertainment/Sports
- Manufacturing
- Wine

For a list of partners and solutions we have integrated with, you may visit our website:

www.oztera.com/integrations/

LOCATIONS

Oztera is headquartered in Las Vegas, Nevada, and provides remote and on-site services globally with presence in multiple areas across the U.S., including Northern and Southern California, Washington, Idaho, Texas, Ohio, Chicago, Pennsylvania, New York, and more.

Oztera's Mailing and Remittance Address:

Oztera, Inc.
3726 Las Vegas Blvd., S.
Suite 2104W
Las Vegas, NV. 89158



HELPFUL CONTACT INFORMATION

Oztera Accounting – for cases regarding invoices and payments

Email: accounting@oztera.com

Phone: (925) 820-2008 Ext. 3

Oztera Customer Service – for sales quotes, ordering, and licensing requests

Email: cs@oztera.com

Phone: (925) 820-2008 Ext. 0

Oztera Support – for projects, works orders, and support inquiries

Email: support@oztera.freshdesk.com

Phone: (925) 820-2008 Ext. 1

OZTERA MANAGEMENT

Our Management Team is committed to the complete satisfaction of our clients with all the services provided. Should you have any issues you would like to bring to their attention, please do not hesitate to contact them using the information below:

Minou Barabi

President

minou.Barabi@oztera.com

925.820.2008 Ext. 777

Mike Stallman

Director, Business & Product Development

mike.stallman@oztera.com

925.820.2008 Ext. 720

Donna Burke

Director, Operations & Finance

donna.burke@oztera.com

925.820.2008 Ext. 727

Helen Sassone

Director, Professional Services

helen.sassone@oztera.com

925.820.2008 Ext. 721

Vi Trinh

Manager, Accounting

vi.trinh@oztera.com

925.820.2008 Ext. 774

Alvin Diaz

Manager, Support

alvin.diaz@oztera.com

925.820.2008 Ext. 729

SUPPORT DEPARTMENT

HOURS (IN PACIFIC STANDARD TIME)

Monday – Friday

8:00 AM – 5:00 PM

5:00 PM – 7:00 PM

For Urgent level requests only (via phone call)

Saturday – Sunday

10:00 AM – 5:00 PM

For Urgent level requests only (via phone call)

CONTACT INFORMATION

Email: support@oztera.freshdesk.com

Phone Number: (925) 820-2008 Ext. 1

SUPPORT SERVICES

Oztera delivers technical and functional services per client's request to support Microsoft Dynamics-NAV/BC solutions, applicable add-ons, and integrations. These services may include:

- Resolve day-to-day application related issues
- Minor software customizations
- System and user error resolution
- Light remote user training
- Responding to software functionality inquiries (common How To's)
- Provide documentation to help with support inquiries as needed
- Monthly project/inquiry report as requested or needed

CLIENT REQUEST TYPES

Oztera will identify client's requests based on the descriptions below:

Support Requests

- Support Requests are error messages, how-to questions, urgent requests requiring immediate attention, simple software enhancements
- Typical Support Requests normally require 0.25-3.0 hours of work

Work Order Requests

- Work Order Requests are software enhancements, modifications, or additional features/functions
- Work Orders are created when 3+ hours of work is required to complete the request
- Client approval is required before work can begin

Project Requests

- Project Requests are large scale work requiring 50+ hours of work
- An estimate will be provided for approval before creating a plan and start of work

Code Errors

- Code Errors are issues generated because of Oztera's code and work, or issues caused by third-party's code or software
- All Code Errors generated by Oztera's work will be fixed at no cost to the client
- Code Errors from third-party code will be directed to the third-party. In cases where Oztera's involvement is necessary to resolve an issue caused by the third-party software provider, Oztera will perform tasks on behalf of the client and Oztera's time will be billable.

HOW TO SUBMIT SUPPORT REQUEST

1. Submit your request by logging into the [Oztera Helpdesk Portal](#), or by submitting an email to support@oztera.freshdesk.com, or by calling (925) 820-2008 Ext. 1.
 - o If urgent, send an email to support@oztera.freshdesk.com, which is monitored in real time, followed by a phone call to the above extension if no response has been received within 30 minutes.
 - o Calls to Support extension are routed to a Support Specialist, Manager, Director, and then to President in sequence to ensure accessibility.
 - o All requests must be initiated by an authorized user or administrator *within your organization*. Requests from external IT personnel or contractors will not be accepted by Oztera Support without prior written authorization.
2. Requests should include all relevant information that will aid the Oztera Support Team in resolving the issues efficiently and effectively. Here are some examples:
 - o What were you doing when the issue occurred? Include steps to recreate the issue.
 - o Data elements used (i.e., customer number, sales order number, etc.).
 - o Screenshot of the error message received (if applicable).
 - o What have you already tried to resolve the issue?
 - o When did the issue start?
3. Requestor should communicate urgency of the request as follows so that Oztera Support team is able to resolve issues in a timely matter:

Urgent: Requests requiring resolution within 1-4 business hours

High: Requests requiring resolution within 4-12 business hours

Medium: Requests requiring resolution within 1.5 - 4 business days

Low: Requests requiring resolution within 4 business days or more

Oztera Support Team will make their best efforts to comply with above timelines; however, there may be instances that will require more time due to various factors.

HELPFUL TIPS

1. Assign an internal primary point of contact who will be the power user of the system and the main liaison between your organization and the Oztera team.
2. Determine and document an internal support/development request process with an approval component that includes the primary point of contact. Communicate this process to your Oztera team.
3. Identify and communicate to your Oztera team a list of approved super users that have permission to submit requests.
4. If applicable, ensure proper internal project team members, super users, IT, and department managers are copied in case the request affects their business area.
5. Always reference the existing project number (PRJ-xxxxxx) on any follow-up communication.
6. Dedicate the proper time and resources for thorough testing and training before the solution is implemented into your live production system. Lack of proper testing and training are the most common reasons for excessive support requests being submitted.



7. Timely responses from the client is crucial to ensure completion of work efficiently and in a timely manner. Projects or work that is put on hold or not attended by customer in a timely manner (normally within a 2-week period of the original request date) may result in additional billable hours due to business process changes, personnel changes, and/or multiple review of requirements and previous work that was done.
8. Solutions requiring third-party software or integrations can extend the project line if third-party personnel are not responsive. Oztera will do its best to help expedite the process, but ultimately Oztera is not responsible for third-party solution providers' software or services.
9. To ensure the protection of confidential and sensitive information, please consider below steps for secure data transfer:
 - Password Protection: Password-protect all files containing confidential or sensitive information before sending them to us. You may consider using the relevant Project Number as the password. (Example: *PRJ-123456*)
 - Secure Transfer Methods: Clients are encouraged to use secure methods of file transfer, such as encrypted email services or secure file-sharing platforms, rather than standard email.
 - Verification: Clients should verify the recipient's identity and email address before sending any sensitive information.
 - Notification: Clients should notify us via a separate communication channel (e.g., phone call) when they have sent a password-protected file or used a secure transfer method.
 - Incident Reporting: In case of any suspected breach or unauthorized access, clients must report the incident to Oztera IT (it@oztera.com), their assigned Account Executive, and Project Manager immediately.

Standard email accounts are susceptible to hacking and unauthorized access. Implementing these security measures ensures the confidentiality and integrity of sensitive information, protecting both our clients and our company.

HOW TO CONTACT OZTERA SUPPORT

Below are quick guidelines and instructions to ensure you are getting the best service and support possible:

GETTING STARTED WITH THE OZTERA HELPDESK

Oztera's Helpdesk and ticketing system powered by FreshDesk is a tool designed for:

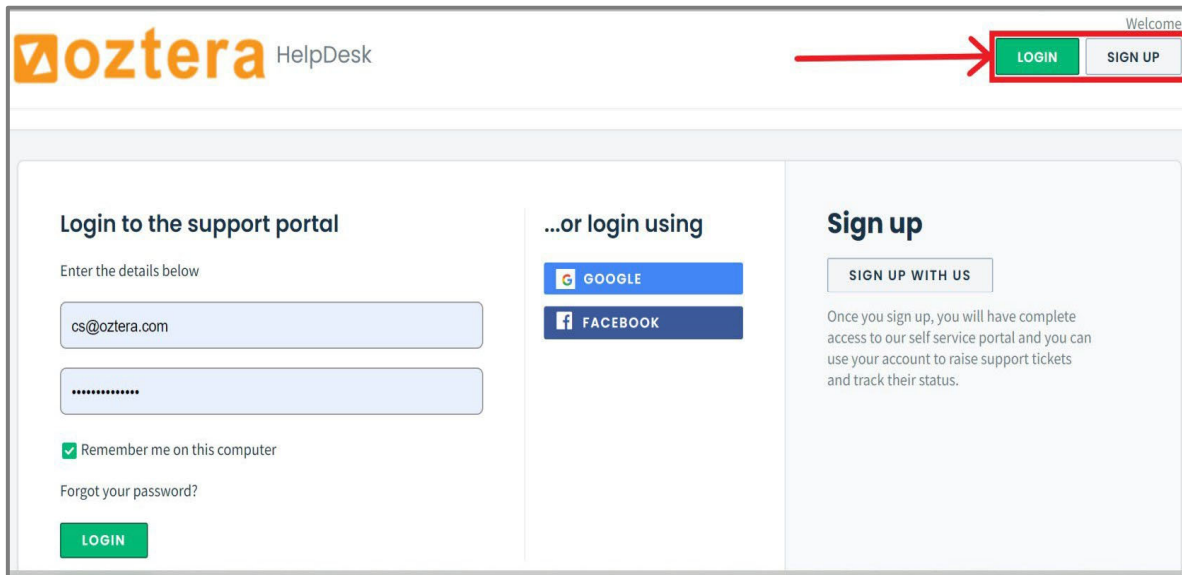
- Submitting support requests (tickets)
- Checking on existing tickets' status
- Knowledge Base articles

Authorized contacts will receive an activation email from Oztera Helpdesk. Following the instructions in the email will allow the user to setup their password for portal access.

Once you are on the website (<https://oztera.freshdesk.com/support/login>), you can opt to:

1. LOGIN with your credentials
- or

- Client team members that did not receive the initial activation email can SIGN UP on the website

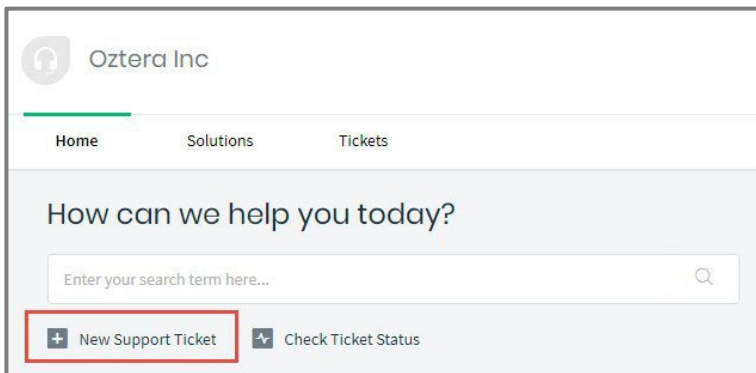


Authorized contacts in the Oztera Helpdesk system can enter new tickets in two ways:

- Via the portal (online or via the mobile app)
- Via email

ENTERING A TICKET VIA THE PORTAL:

- Log into the Oztera Helpdesk portal with your credentials
- Click on New Support Ticket



- Enter all relevant information on this screen
 - Asterisked fields are required fields
 - Screenshots can be added as attachments, or they can be copied and pasted into the *Description* field

Submit a ticket

Requester *

Subject *

Type

Priority *

Description *

B I U [List Icons] [Link Icon] [Image Icon] [Undo Icon]

Hello,
I am receiving this error message when trying to post the payment journal.
Can you please assist?

Microsoft Dynamics NAV

X Document No. CHECK NO-A is out of balance by -100. Please check that Posting Date, Document Type, Document No. and Amount are correct for each line.

[+ Attach a file](#)

- Once finished, click SUBMIT to submit the ticket to the Oztera Support Team
- An automatic email will be sent to the 'Requestor' advising of the Priority Status SLA Time

Hello,
We would like to acknowledge that we have received your request and a ticket has been created.
A support representative will review your request and send you a personal response.

As per Oztera's Customer Essentials documentation, please enter a priority level on your ticket:

Urgent: Requests requiring resolution within 1-3 Business Hours
High: Requests requiring resolution within 1-2 Business Days
Medium: Requests requiring resolution within 2-4 Business Days
Low: Requests requiring resolution within 4 Business days or more

Please note Oztera Support hours of operation:

Monday- Friday: 8:00 AM - 5:00 PM Pacific Standard Time
5:00 PM - 7:00 PM Pacific Standard Time (Urgent support requests by phone only)

Saturday-Sunday: 10:00 AM- 5:00 PM Pacific Standard Time (Urgent support requests by phone only)

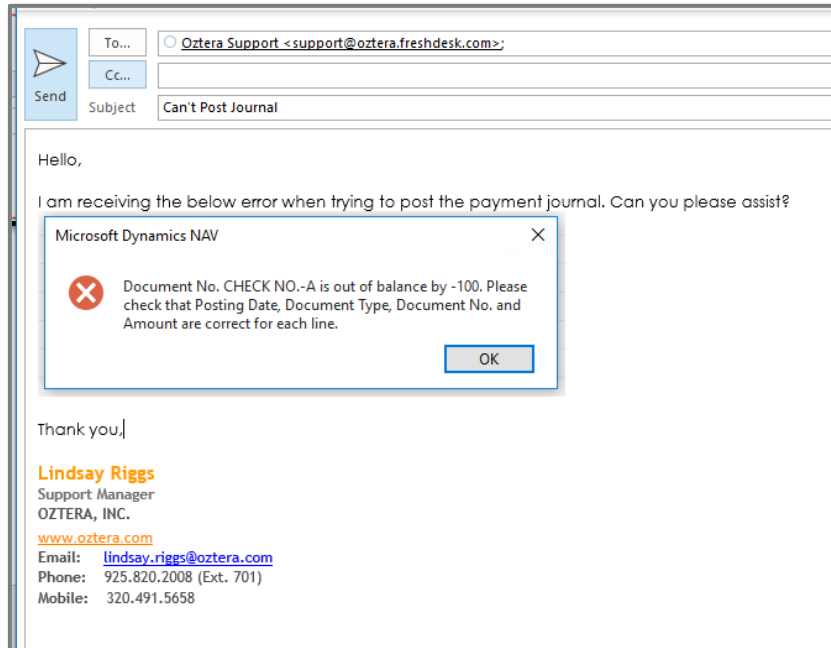
The Oztera Support Team will make best efforts to comply with the above timelines; however, there may be instances that may require more time.
Thank you for your patience.

Sincerely,
Oztera Support Team
OZTERA, INC.
www.oztera.com
Email: support@oztera.freshdesk.com
Phone: 925.820.2008 (Ext.1)

LA time

ENTERING A TICKET VIA EMAIL:

1. Start an email to support@oztera.freshdesk.com
2. Enter a subject that will identify your request. *Important*: This subject will appear on reports and invoices.
3. Include relevant information needed for the support agent to assist. Including files or images to better describe your request or inquiry.



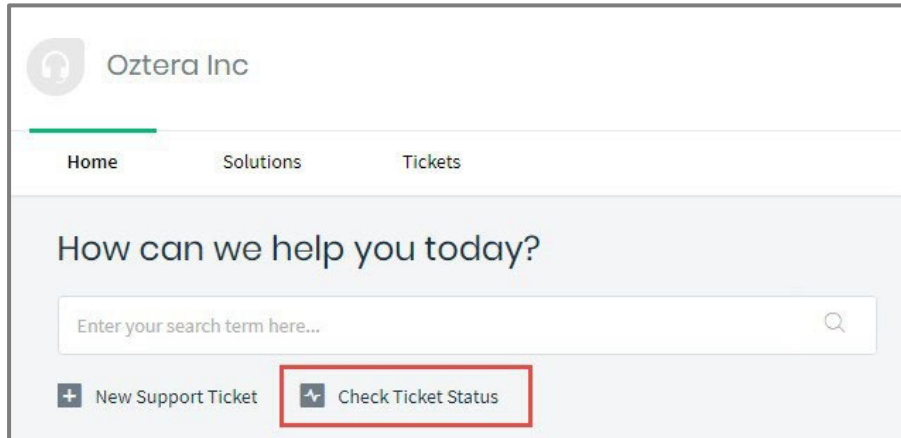
4. For a more timely resolution, please make sure to note the urgency level in the body of your email.
5. Send the email
6. An automatic email will be sent from Oztera Helpdesk, advising of the Priority SLA time

Urgent:	Requests requiring resolution within 1-3 Business Hours
High:	Requests requiring resolution within 1-2 Business Days
Medium:	Requests requiring resolution within 2-4 Business Days
Standard:	Requests requiring resolution within 4 Business days or more

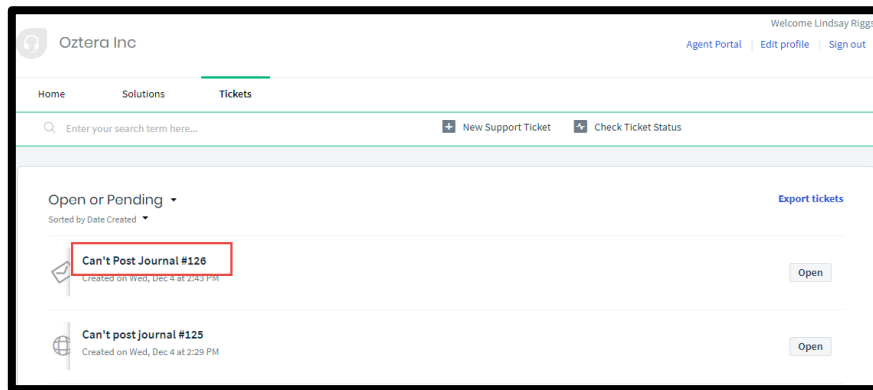
CHECKING THE STATUS OR UPDATING OF AN EXISTING SUPPORT TICKET

To check your requests' status, log into the Oztera Helpdesk portal. There are two ways you can access the status:

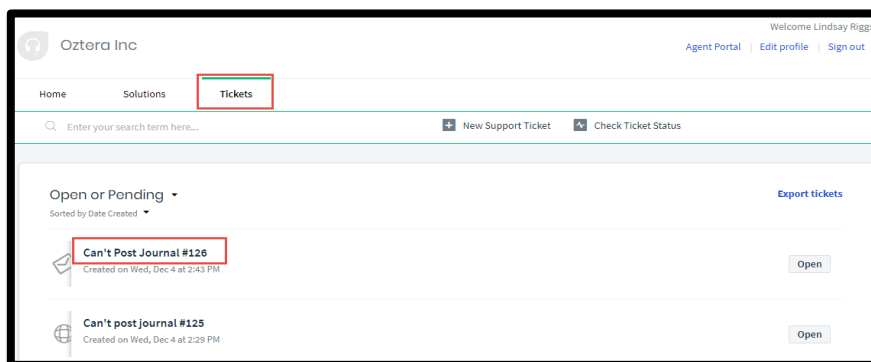
1. Check Ticket Status from Home Screen



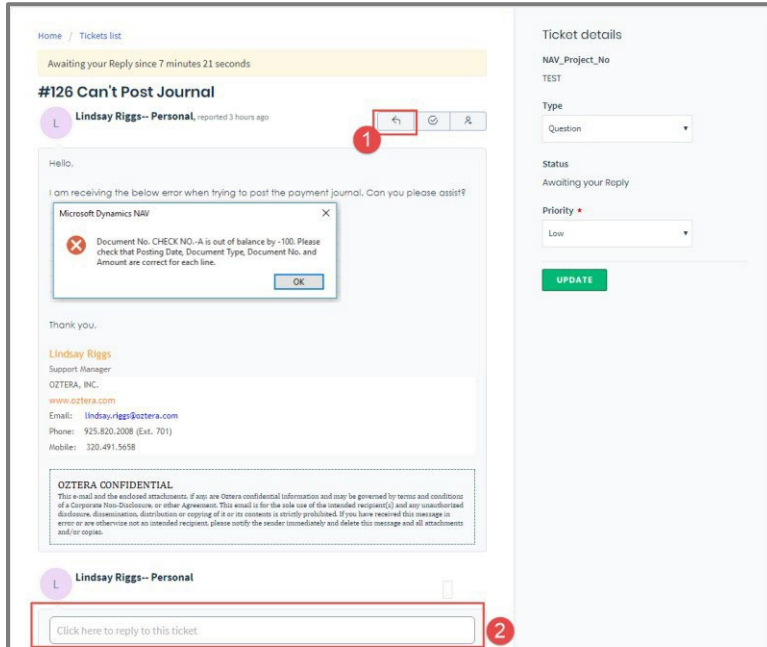
- a. This will open all Open or Pending tickets linked to your company's account, whether submitted by you or another contact of your company
- b. Click on the ticket subject to view information of the desired ticket



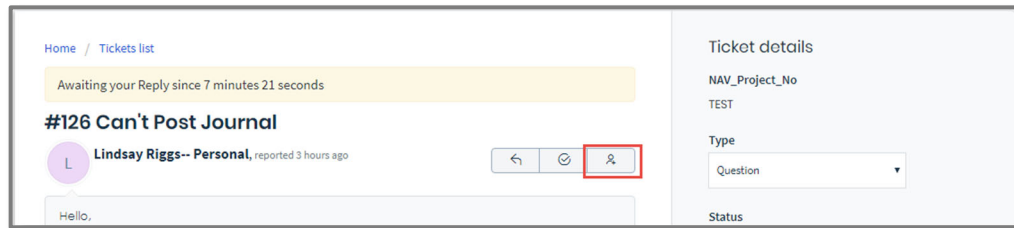
2. Or go directly to the Tickets tab and select the desired ticket



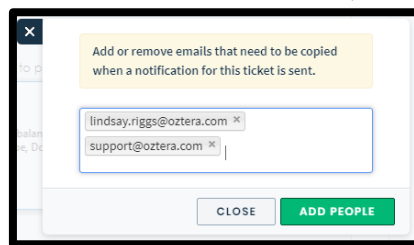
3. Tickets can be updated via the portal.
 - a. To REPLY to a ticket click the REPLY icon, or type in the Reply area.



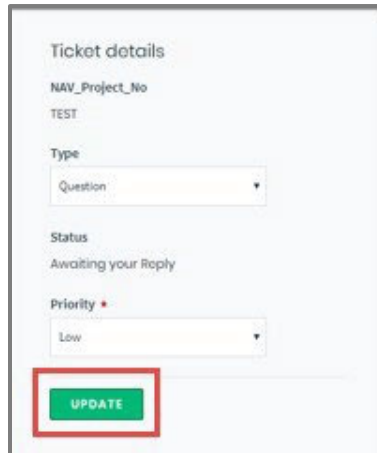
- b. To ADD recipients to a ticket click the icon that resembles a person.



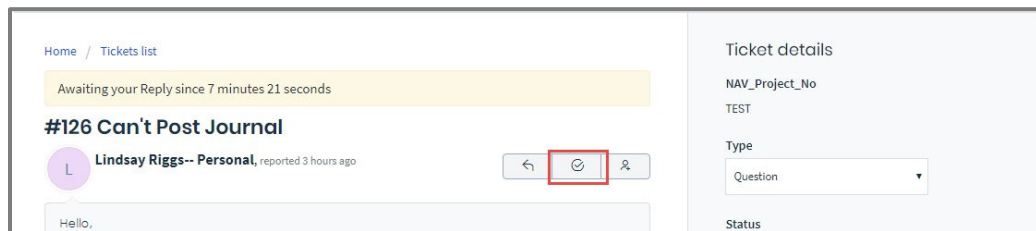
Add email addresses and click ADD PEOPLE (multiple addresses can be entered)



- c. To Change Information on a ticket select desired option from the appropriate dropdown, and then select UPDATE for changes to take place.



- d. To mark a ticket as CLOSED, click on the checkmark icon.

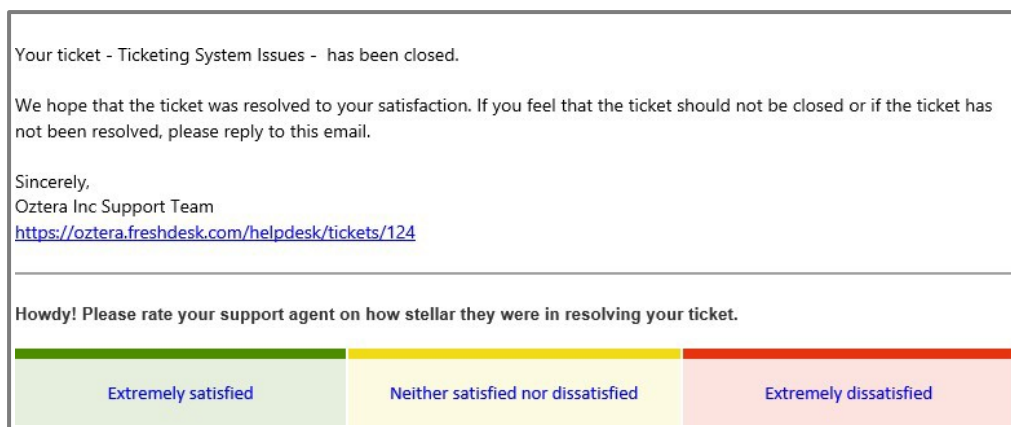


CUSTOMER SATISFACTION SURVEYS

We are always eager to make improvements in our processes, communications, and services. Your candid feedback will help us attend to areas that need our special attention. Receiving positive feedback is equally as important and will help in motivating our team to keep up their great work.

Once a ticket is marked as Closed a Customer Satisfaction Survey for that specific request will become available:

1. Email will auto-generate to the requester's email address allowing the user to rate the Support Agent.



2. If the user Closed the ticket via the portal, they would see the satisfaction options on their ticket
 - a. Choose one of the three rating options

Satisfaction Rating

Howdy! Please rate your support agent on how stellar they were in resolving your ticket.

- Extremely satisfied
- Neither satisfied nor dissatisfied
- Extremely dissatisfied

Ticket details

NAV_Project_No
TEST

Type

Status
This ticket has been Closed

Priority *

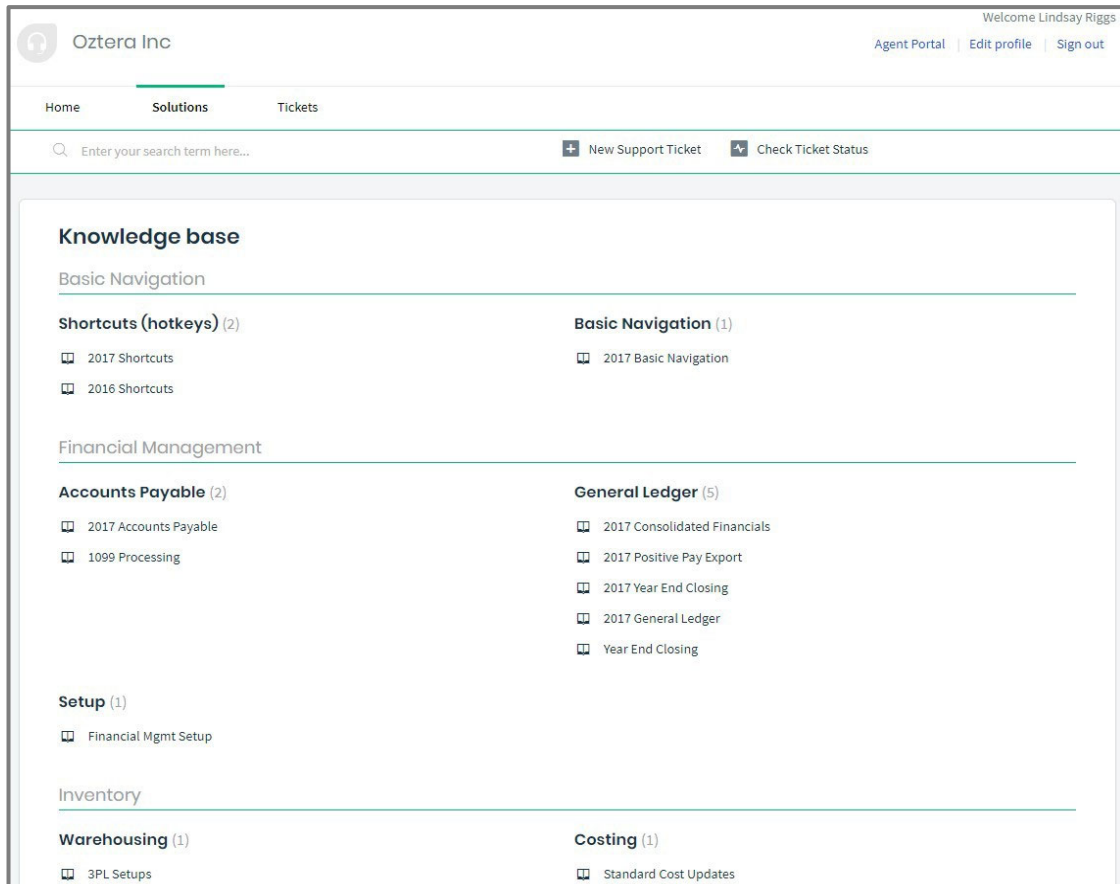
- b. A window will open allowing the user to enter comments, if desired, for their Support Agent

Thank you very much for your time to rate your support agent. You rock!

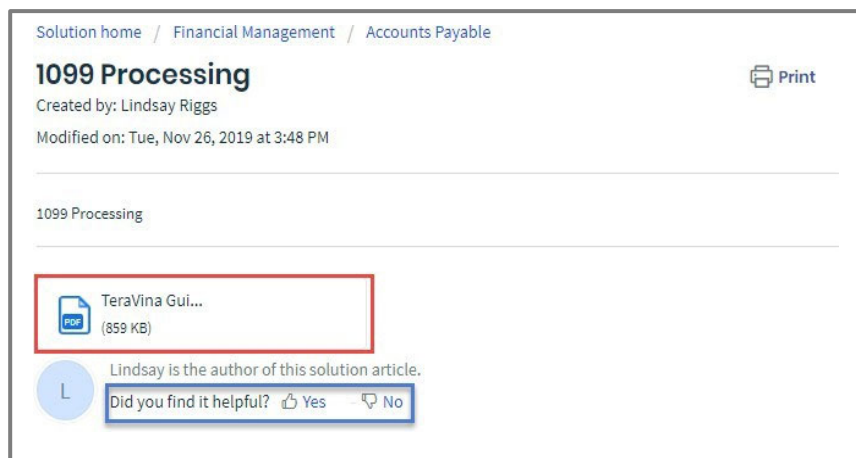
Feel free to add some extra comments below:

In addition to entering and tracking tickets by organization, Oztera Helpdesk also offers a built-in Knowledge Base solution hosting several documentations created by Oztera.

1. Articles are visible from the Home or Solutions tabs in the portal.

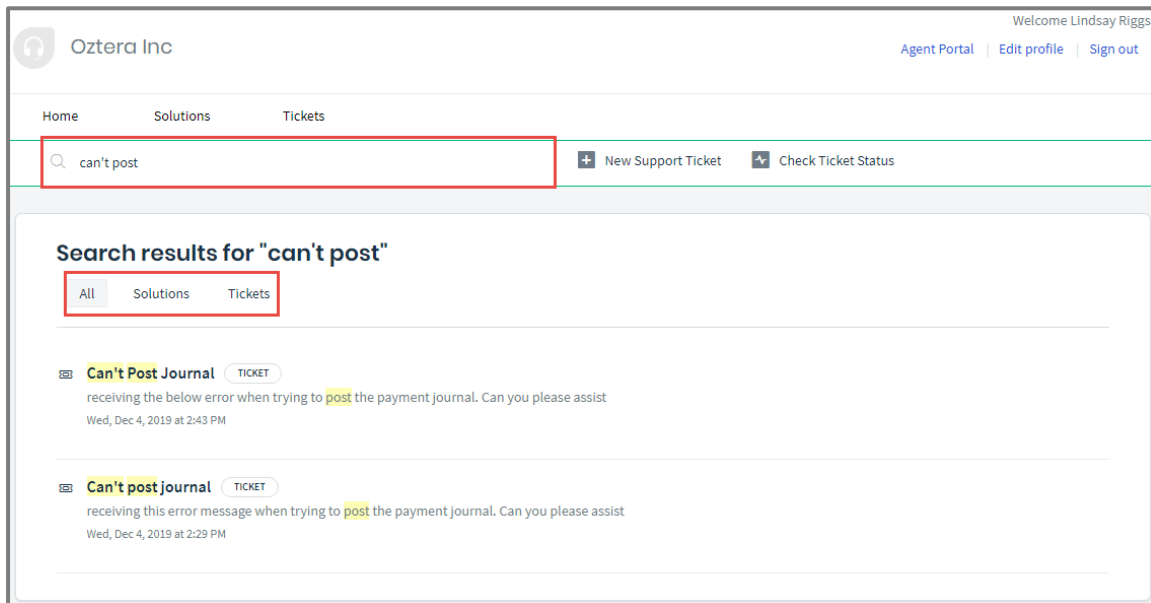


2. Click on the Topic or the individual article to download it.



Additionally, clicking Yes or No to let the Support department know if the article was helpful would be appreciated as well. This will help us analyze the most helpful articles and continue to add more solutions for our clients.

- Users can also choose to *Search* on the portal. Searching will look through their company's ticket in any status, as well as the Solutions area looking for the key words.



MICROSOFT ELECTRONIC SERVICES AGREEMENT (MESA)

The Microsoft Electronic Services Agreement (MESA) governs your use of Microsoft Dynamics Service Plans, and the Guide will help you understand the benefits and policies surrounding Microsoft Dynamics Service Plans. In addition, we have included the most asked questions customers have regarding their benefits.

You may find the Agreement in below link after logging in with your Microsoft Credentials. If you don't know your MS Credentials, you may contact your company's Microsoft Administrator. Use *Microsoft Edge* browser to open this link: [ECSTS Sign In \(microsoft.com\)](https://www.microsoft.com/edge/signin)

You may also review the information on this site: [Microsoft Electronic Services Agreement \(MESA\) and Microsoft Dynamics Customer Services Guide | Microsoft Learn](#)

You may also review [Microsoft Customer Agreement](#) for additional information.

MICROSOFT DYNAMICS NAV ENHANCEMENT PLAN (NOT FOR SUBSCRIPTIONS)

The Business Ready Enhancement Plan for Microsoft Dynamics is the maintenance plan for Microsoft Dynamics On-Premise customers around the globe. The plan includes:

- Upgrades, Updates, Service Packs, Fixes and Regulatory/Tax Updates
- Sustained Engineering
- Support Lifecycle Policy
 - 5-Year Support Lifecycle Policy for all products released in 2005 or later
 - 10-year support policy for all major releases of Microsoft Dynamics NAV, Microsoft Dynamics GP, Microsoft Dynamics SL, Microsoft Dynamics AX, Microsoft Dynamics RMS, Microsoft Dynamics CRM beginning with releases starting in December 2007
- Investment Protection when moving to the future converged Microsoft Dynamics solution
 - Transition Investment Credit
- Customer Source access including:



- o Unlimited Online Training
- o Knowledge Base
- o Downloads & Updates
- o Newsgroups
- Protected List Price
 - o Protected List Price is established by Microsoft by recording the recommended system list price at the time of your Microsoft Dynamics license purchase. This list price is protected and becomes the basis upon which your future Enhancement Plan renewals are calculated

MICROSOFT DYNAMICS NAV ENHANCEMENT PLAN FEES (*NOT FOR SUBSCRIPTIONS*)

- Existing On-Premise Microsoft Dynamics NAV customers pay 19% of the License Enhancement Value for their Enhancement Plan (plan length is 365 days (about 12 months)), regardless of the region. The Enhancement Plan is mandatory for the first year after the configuration of a new license. There is no grace period discount.

Example:

License Enhancement Value = 10,000 USD

Enhancement Plan rate = 19%

Duration = 365 days (= 1 year)

Enhancement Plan fee = 10,000 USD x 19% = 1,900 USD

- Lapsed customers will lose Protected List Price (PLP) and revert to System List Price (SLP)/ Current List Price (CLP) and lose their entitlement to Protected List Price (PLP). Lapsed Customers will need to re-enroll in the Enhancement Plan first and then renew the plan for 365 days (about 12 months) or a three-year Enhancement Plan going forward. The re-enrolment invoice will show the following rates:
 - o Current % for Enhancement Plan of the System List Price
 - o 3% re-enrolment fee
 - o Current % for future year of Enhancement Plan fee

Example for a customer on a 19% Enhancement Plan (e.g., Microsoft Dynamics NAV)

License Enhancement Value = 10,000 USD

Lapsed period = 420 days (about 1 year 2 months)

Re-enrolment rate = 19% + 3%

Re-enrolment fee = 10,000 USD x (19% + 3%) x 420/365 = 2,531.50 USD

Duration going forward = 365 days (= 1 year)

Enhancement Plan rate = 19 %

Enhancement Plan fee = 10,000 USD x 19% = 1,900 USD

Total Enhancement Plan fee = 2,531.50 USD + 1,900 USD = 4,431.50 USD

MICROSOFT, OZTERA, THIRD-PARTY LICENSE AGREEMENTS

When you purchase a software license the terms and conditions of each software product for how you can use the software are defined in the use rights document which resides within the software. By using the software at any capacity, you are agreeing to its Terms & Conditions. Please review the User License Agreement document that resides within the software or request a copy from cs@oztera.com for any Oztera products. For third-party solution providers' applications, you may contact the software creators directly, or contact cs@oztera.com to request such documents on your behalf.

MICROSOFT CUSTOMER SOURCE

Customer Source can help you boost productivity and reduce support costs by providing unlimited access to online training and certification information, technical support Knowledge Base, newsgroups, downloads, event details and more - anytime, from anywhere.

Access Microsoft Customer Source at [Microsoft Dynamics - CustomerSource \(Center\)](#) (Use *Edge* web browser)

You may visit this published Microsoft Ignite site for current information on global and product specific

Additional Resources: <https://docs.microsoft.com/en-us/dynamics/s-e/global/additionalresources>

ADDITIONAL LEARNING RESOURCES

Microsoft Dynamics 365 Documentation: <https://learn.microsoft.com/en-us/dynamics365/>

This official Microsoft documentation site offers comprehensive resources, including setup guides, tutorials, and best practice advice for Dynamics BC.

Business Central / NAV User Group: www.dynamicscommunities.com/community/groups/d365ugbc/

The BC/NAV UG is an association of companies sharing the common interest of optimizing their usage of Microsoft Dynamics NAV/BC. Membership and active participation in this user group can provide additional benefits in the effective use of your Microsoft Dynamics NAV/BC application.

Microsoft Dynamics User Group: www.dynamicsusergroup.com

This Dynamics User Group covering is the biggest user group in the world for Microsoft Dynamics products. You may enjoy or find value, and helpful resources with their discussion and knowledge forums, blogs, FAQs and downloads of demos, files, product documentation, or white papers.

Microsoft Learn: <https://learn.microsoft.com/en-us/training/dynamics365/>

This platform provides a wide range of learning modules and paths specifically tailored to Dynamics 365. It's great for training and certification purposes.

Dynamics 365 Community: <https://community.dynamics.com/>

This is a forum where users, developers, and professionals exchange knowledge, solve problems, and discuss the Dynamics 365 suite.

MS Dynamics World: <https://msdynamicsworld.com/>

This site is an independent news and information source for the Microsoft Dynamics community, offering articles, white papers, and case studies.

Mibuso (Microsoft Business Solutions): www.mibuso.com

Started by a Navision consultant in 1999, Mibuso is a platform for users and developers of products from the Microsoft Dynamics product family (NAV/BC, CRM, AX, GP, SL) to exchange ideas, tools, coding tips and to find business partners and products.



We hope that you have found this document helpful. If you have any input to help make this document more useful, please do not hesitate to let us know. You may send your comments to cs@oztera.com.

Thank you for choosing Oztera as your business solution partner!