## OVERVIEW

The FinanceControls BlackLine Support Portal is an easy and efficient way to receive help from the BlackLine Support Team via a monitored web-based application. Resolution is based on individual customer agreements and case priorities defined in Service Level Agreement (SLAs) Definitions.

You must be an authorized user to access the portal. Authorization is granted by the System Administrator (SA) of your company. The SA must send the name and email address request on behalf of a new user to: BLsupport@financecontrols.com.
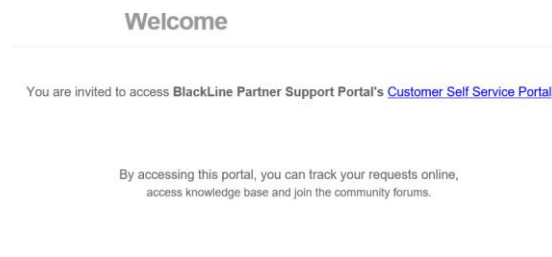
Use the portal to seek assistance with an issue and to communicate with the BL Support Team

SIGN IN – SIGN UP

1. Access **www.financecontrols.com** from your preferred browser.
2. Click **Support** to access the Portal **Sign Up/Sign In** page. (If you have already accessed the portal in the past use the **Sign In** portion of the page.)
3. Navigate to **New User?** Click **Sign Up**
4. Complete the Sign-Up process with your Name, and email address (Name: First Name and Last Name. Ex. Chris Smith)
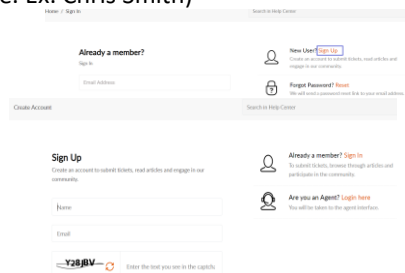
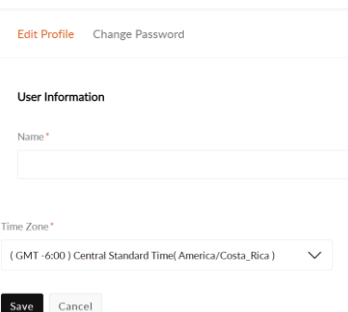**You will receive an email invitation that needs to be accepted by you to activate your user ID and password creation.**

Welcome

You are invited to access **BlackLine Partner Support Portal's** Customer Self Service Portal

By accessing this portal, you can track your requests online, access knowledge base and join the community forums.

ACCEPT THE INVITATION

5. Proceed with the password creation:

Email Address

Password

Confirm Password

Register

Your password,

Password cannot be the same as your User Name.
Be a minimum of eight (8) characters in length.
Password length must not exceed 250 characters.

6. Click **Register**

7. Proceed with the profile confirmation:

Edit Profile   Change Password

User Information

Name *

Time Zone *

(GMT -6:00) Central Standard Time(America/Costa_Rica)

Save   Cancel

8. Click **Save**

CREATE A NEW CASE

1. Click one of the two **Tickets options** from the home page:

BlackLine Partner Support Portal   Tickets

Welcome to BlackLine Partner Support Portal

Tickets

View your previous tickets; know their statuses and solutions.

BlackLine Partner Support Portal   Home

Tickets   Search tickets

Status : Open (2)   Closed (9)   On Hold   Add ticket
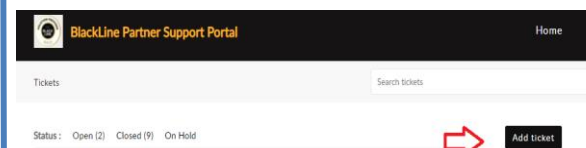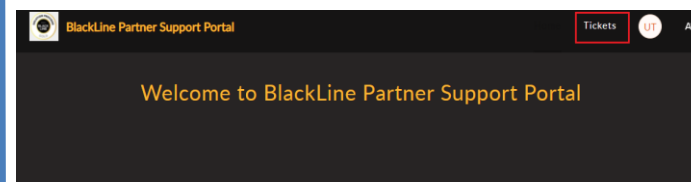
2. Click the Add Ticket button
3. Note:
   - Red asterisks designate required fields.
   - The Product Line defaults to *BlackLine.*
4. Enter a brief **Subject** description to identify your concern.
5. Enter a full **Description. Describe your steps and associated details.**

BlackLine Partner Support Portal

Tickets / Submit a Ticket   Search tickets

Submit a ticket

Ticket Information

Subject *

Description *

B I U ... 12 ▾ ... Insert ▾   Plain text
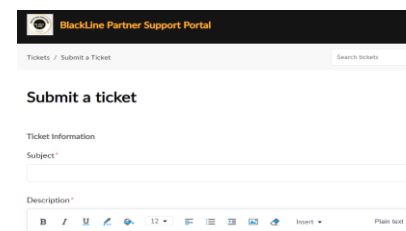
6. Select the respective BlackLine:
   - **Function/Module**
   - **Environment**

Product

BlackLine

Function/Module

Account Reconciliations

Environment

Production

Additional Information

Priority *

P4 - General Question

Attach a file (Up to 20 MB)

Submit   Discard

7. Click **Attach a file. Be sure to include all details ex. error messages and/or screen shots if available.**
8. Click **Submit**

A pop-up menu will appear indicating that a new ticket has been added along with the ticket Id.

UPDATE A CASE

Add New Comments:

1. Click **Open** from the Status selection to review your open cases.

Status :   Open (3)   Closed (9)   On Hold

2. Select the case and click **Comment** or **Reply** (Comment option recommended)
3. Enter your message.
4. Click **Add Comments**

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19 Nov 2021 03:44 PM   Reply   Comment

UT   Add Comment

Attach a file (Up to 20 MB)

Add Comment   Cancel

VIEW CASES

1. Click **Tickets** and the Statuses will be displayed.
2. Choose the status and select the case you want to view.
   Ex. **Closed**

Status :   Open (3)   Closed (9)   On Hold

LOGOUT

Click **Logout** to leave the Portal

Home   UT   A·

UT   User Test
vbuchanan@smartsi.com
Change Password

Add ticket

View Profile   Logout

QUESTIONS

Email FinanceControls.com Support, BLsupport@financecontrols.com, for additional information or assistance.
You can always access this quick reference guide from the Home Page:

Quick Guide

Support Portal Quick Reference

CASE SUPPORT

The FinanceControls.com Support Team will update your case within a prescribed timeframe based on the case priority level. (See Page 3).

You will receive an email notifying you when your case is updated. Open the case (see Open Cases) to see the comments or questions that the support team posted.

Respond to the case by adding a comment, attaching a document, or by reviewing and applying a suggested solution and describing your results.

FORGOT PASSWORD

1. Click **Reset** within the Forgot Password selection

2. Complete the form and instructions will be sent to your email address.

Already a member?   New User? Sign Up
Sign In   Create an account to submit tickets, read articles and
                         engage in our community.

Email Address

                         Forgot Password? Reset
                         We will send a password reset link to your email address.

Password

                         Are you an Agent? Login here
                         You will be taken to the agent interface.

☐ Remember me   Sign In

Forgot Password

Complete the form below, and we will e-mail instructions for setting a new password.

Enter User Name or Email address

Enter the word seen in the below image

PM19EP

Submit

Service Level Agreement (SLA) Definitions

Customer Support Plans

Your organization chose a support plan when BlackLine was licensed. Determining which plan your organization selected will help you understand the support process. There are two plans:

Standard Plan

▪ Support for Priority 2, 3, & 4 cases is Monday-Friday, 9:00am – 6:00 pm (EST / USA)
▪ Support for Priority 1 cases is Mon-Fri, 24 hours, including all holidays.

Premium Plan

▪ Provides standard plan features
▪ Coverage for Priority 1 cases is extended to include 7 x 24 coverage, including all holidays.

Case Priority Definitions

	Definition of Issues within the Service	Initial Response	Updates	Resolution Target
Priority 1: *Production Down*	▪ Production environment for the Service is unavailable ▪ Full disruption of use ▪ Critical functionalities are unavailable or not working	Within sixty (60) minutes	Every eight (8) hours from time of submission *(Note: Customer Support Plan may influence response terms)*	Provide timely and continuing efforts to correct the problem *(Note: Customer Support Plan may influence response terms)*
Priority 2: *Business Impact - High*	▪ Non-critical function(s) are impeded due to a failure within the Service	Within four (4) hours	As appropriate, the target would be daily *(Business hours, M-F)*	Shall use best practical efforts to provide a temporary fix or workaround for the problem within five (5) business days
Priority 3: *Business Impact – Low*	▪ Specific function(s) are not performing in accordance with documentation ▪ The usability of the Service is not significantly impacted	Within eight (8) hours	As appropriate *(Business hours, M-F)*	As soon as practical
Priority 4: **General Question**	▪ Inquiries about functionality, navigation, configuration, or routine technical questions	Within twelve (12) hours	As appropriate *(Business hours, M-F)*	As soon as practical

Support Escalation

Priority 1 cases will be escalated if a solution or plan of resolution cannot be achieved as described above (60 mins / 8 hrs.).

Priority 2 cases will be escalated if a solution or plan of resolution cannot be achieved as described above (4 hrs. / 5 days).

Priority 3 cases will not be escalated, without a mutual agreement to change the priority.

Priority 4 cases will not be escalated, without a mutual agreement to change the priority.

Priority 1 Escalation:

Hours 0- 4:	Support Team is notified and will be actively working the case
Hour 5:	Support Team will involve additional resources to work on problem resolution.
Hour 6:	The Director of Support is notified
Hour 8:	Executive Team is notified and involved in the problem resolution.

Priority 2 Escalation:

If the resolution has not occurred within the timeline as described above, the case may be escalated to Priority 1 based on a mutual understanding between the customer and the Support Team. A request by the customer to escalate their case must be submitted within the existing case dialogue. However, if this occurs outside of business hours, the Support Team recommends that a NEW P1 case be created so that the Support Team receives an alert.

BlackLine Support Responsibilities

General: BlackLine Support is available for all BlackLine-owned Component Systems. Licensees may only access and enjoy the benefits of BlackLine Support for those licensed Component Systems for which they have purchased BlackLine Support for the Support Period.

For all BlackLine Support plans, FinanceControls.com primary responsibilities are:

• Providing guidance and offering tips and techniques regarding supported BlackLine Component Systems.

• Troubleshooting issues with BlackLine Component Systems when Licensee experiences unexpected results.

• Reproducing discrepancies and assisting in providing alternative methods to help maintain stability until the discrepancy is corrected.

For issues related to custom reports, and/or Licensee specific requirements, BlackLine will initially attempt to provide suggestions and direction but will not debug reports or develop customer-specific modifications. In order to help serve all of our customers efficiently, BlackLine Support will refer Licensee to the Professional Services Organization (PSO) to assist with implementation, training and/or custom reports or issues related to customer-specific modifications. In the event the Licensee wishes to engage PSO, BlackLine Support will arrange a hand-over to the PSO organization to help transition the findings of the analysis.

Pursuant to a separately executed consulting services contract and associated statement of work, PSO can also assist and provide guidance on how to use and deploy BlackLine Component Systems, provide additional assistance on implementations, or assist in designing and developing external customizations to work in conjunction with the BlackLine Component Systems.

Non-Production Server Support (Sand Box): For details regarding BlackLine support plans purchased specifically for non-production servers, (e.g. non production / testing) please reference the applicable Order Form (or other ordering document) and/or license and Support agreement between Licensee and BlackLine evidencing such BlackLine Support plan.

Support Inquiries Best Practices: Below are some tips to help you reach the quickest resolution:

• Search all available resources before contacting support. Be sure to carefully examine the content in Community and BlackLine University (BLU).
• Be specific and provide any necessary details and context. For example, it's helpful to know the specific account reconciliation you are having trouble with.
• In chronological order describe the steps taken and provide screen shots of each step.
• Describe what you expect to see, your expectation or goal of the steps you are taking
• Use meaningful and specific case descriptions.

BlackLine Support Coverage Limits: BlackLine Support is committed to helping with inquiries as can be reasonably expected of BlackLine Support. There are times when issues are encountered where the source of the error is difficult to identify as a database issue, network issue, operating system issue, or something else. BlackLine support analysts will provide initial assistance to help work through the issue, but there may be times when the Licensee is asked to engage with the BlackLine Consulting Services (PSO) organization, as the services that must be provided to assist Licensee are beyond the scope of BlackLine Support. BlackLine will respond to all BlackLine Support incidents, however, BlackLine, at its sole discretion, will only spend up to fifteen (15) minutes on any incident that is outside the scope of BlackLine Support. Without limitation, this applies to the following areas:

• Implementation setup – any implementation issue such as business flow processes, configurations, or installation of 3rd party components such as databases and operating system (OS), benchmarking, training of users, etc.
• Data correction – incidents related to data corrections or corruptions that are not caused by the malfunction of the unmodified standard Component System.
• Test or Development Server (Sandbox) – troubleshooting issues regarding Component System functionality when conducting a test on a test server or development server.
• Training – training and education are provided through the Professional Services Organization.

If Licensee is unsure whether the issue is a BlackLine Support incident or whether it requires consulting or training services, please follow the incident submission process within the BlackLine Portal. A support analyst will work with the Licensee to determine the appropriate course of action.