

Customer Support

Customer Guide



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1. Introduction

Our top priority is your continued success. We know that the products and services TEOCO provides are critical to your business, and we are committed to providing you with the best available support. To make working with us easier, we have implemented a Customer Support Process that embodies industry best practices. Following the guidelines provided in this document will allow us to serve you more effectively.

1.1. Purpose

The purpose of this document is to provide a reference guide for your interactions with TEOCO's Customer Support Process for all of our products and services. This document is intended to serve as a companion to the Welcome Guide you received when implementing a TEOCO product. The Customer Support Customer Guide is intended for:

- Business Users
- Supervisors
- System Administrators

1.2. Organization

This document is organized as follows:

- Introduction – Describes the purpose and organization of this document and identifies relevant related documentation.
- Customer Support Key Concepts – Introduces and explains a number of key concepts in our Customer Support Process, as well as specifies availability and roles and responsibilities.
- Customer Support Process Overview – Provides a descriptive overview of the four phases of our Customer Support Process.

1.3. Related Documentation

In addition to the Customer Support Customer Guide, TEOCO provides additional customer support information in the FAQs on the TEOCO Customer Support Portal:

<https://support.teocosolutions.com>

A username and password is required to access the TEOCO Customer Support Portal. If you have not been provided with a username and password, please work with another member of your team to request one (via the submission of support request), or contact your account manager to request that you be given access.

Additional documentation related to TEOCO's products and services (including user and system administration guides) is available on the TEOCO website:

<http://www.teoco.com/customer-support-and-documentation>

A separate user id and password are needed to access information in this area of our website. If you do not remember your user id and password, you can request them to be resent to you by submitting a support request through the TEOCO Customer Support Portal.

2. Customer Support Key Concepts

The success of our customer support is predicated on accurately and effectively tracking and resolving your reported incidents and inquiries. Quality of service is the heart of our Customer Support Process. To ensure that we reach the high goals you have come to expect from TEOCO, it is essential that you understand the object around which this process is constructed – a customer support request. It is also important for you to understand when support is available and to recognize that both you and TEOCO contribute to the success of this process.

2.1. What Is a Customer Support Request?

At the center of our Customer Support Process is a customer support request. A customer support request is used to capture the essential specifics of your incident or inquiry, and to facilitate the mutual sharing of the detailed information necessary to provide a resolution for you. The customer support request is the object that moves through our Customer Support Process. Using customer support requests provides you and TEOCO with visibility into the details and status of your incident or inquiry, as well as joint accountability for its resolution.

Whenever you need to report an incident or place an inquiry that will require the involvement of TEOCO staff in resolving an issue related to a TEOCO product or service, you should submit a customer support request. Some examples of items for which support requests should be submitted are:

- Questions about TEOCO products
- Questions related to the installation of or environments in which TEOCO products run
- Issues or errors encountered while using TEOCO products
- Issues relating to data management tasks performed by TEOCO (missing invoices, data interfaces, etc.)
- Requests for new features or functions to TEOCO products
- Requests for changes to scheduled tasks or processes (for SaaS customers)
- Issues related to access or connectivity (for SaaS customers)

An exception to the above is any issue caused by an external cause, specifically those caused by:

- Failure to continually provide a suitable operational environment prescribed by the applicable manual including, but not limited to, the failure to provide, or the failure of, adequate electrical power, air conditioning, or humidity control;
- The use of the Software System in a manner not in accordance with its specifications, operating instruction or license-to-use;
- Accident; disaster, which shall include, but not be limited to, fire, flood, earthquake, water, wind and lightning; transportation; neglect or misuse;
- Modifications, maintenance, or repair performed by any party other than TEOCO;
- The failure of the customer to apply applicable Software Upgrades offered by TEOCO

Nothing noted above eliminates the customer's ability to work with TEOCO to resolve the issue. However, TEOCO retains the right to charge commercially reasonable fees for issue resolution in those cases.

2.2. What Is a Customer Support Request's Priority and Severity?

Each customer support request has a priority and a severity. The values of these properties are used in the Customer Support Process to determine the criticality of the issue being reported and to evaluate how best to resolve a customer support request, that is how customer support requests are ordered and the pace at which they are resolved.

The priority of a customer support request is specified by the reporting customer. It represents your assessment of the business impact of the issue being reported. A customer support request's priority can be:

- **High:** Issue has significant business impact
- **Medium:** Issue has moderate business impact
- **Low:** Issue has limited or no business impact

Please be frank and accurate in assessing the priority of a customer support request. TEOCO uses a customer support request's priority to determine the order in which support requests move through the Customer Support Process. If all customer support requests are deemed to be of high priority, then the only means of ordering their processing is their time of submission. To allow TEOCO to make an informed assessment of the urgency and severity of a support request, it is essential that all high priority customer support requests include sufficient detailing of the business impact in the support request description.

The severity of a customer support request is specified by TEOCO. The severity level of a customer support request is assigned according to the definitions set forth in your contract. Please see the FAQs on the TEOCO Customer Support Portal for standard severity definitions and response times for your TEOCO products. .

It should be noted that only customer support requests that identify issues with a Production environment will be assigned a severity of 1 or 2. All support requests that identify issues with a Test environment will be assigned a severity of 3, as they do not affect your ability to conduct business processes and activities.

2.3. Availability of Support

Customer support, as specified in your contract, is available during standard support business hours, Monday – Friday, from 8:00 am to 8:00 pm Eastern Time.

For routing management customers only, 24x7 support may be provided based on priority and severity. Such provision will be explicitly specified in your contract.

For more information about support availability, including TEOCO holidays on which support may not be available, please see the FAQs on the TEOCO Customer Support Portal.

2.4. Roles & Responsibilities

Our Customer Support Process specifies roles and responsibilities for you as well as TEOCO. The delivery of quality support is dependent upon all parties being aware of and fulfilling their responsibilities. A brief description of these roles and responsibilities are provided in the following sections.

TEOCO

TEOCO is responsible for administering our Customer Support Process and for providing you with product and technical support. Our Customer Support Team provides you with first-level support for product issues and acts as the clearinghouse for all customer support requests. The Customer Support Team is responsible for the coordination between you and TEOCO to ensure a timely and appropriate resolution to all customer support requests.

TEOCO's responsibilities include the following:

- Assess the issue being reported and assign a severity based on the information provided
- Communicate severity and status updates to the reporting customer
- Analyze and research the issued being reported to identify a resolution
- Request additional information and data from the reporting customer as needed
- Coordinate with third party vendors for issues pertaining to their software
- Provide timely response and resolution to the issue being reported

CUSTOMER

You play a vital role in facilitating the process of resolving customer support requests. Your role in our Customer Support Process is to provide the information necessary for TEOCO to assess and resolve your product issues.

Your responsibilities include the following:

- Provide a detailed description of the issue being reported, including the steps to reproduce
- Provide an accurate assessment of the business impact (i.e., priority) of the issue being reported
- Provide the necessary supporting documentation for the issue being reported (e.g., screenshots, error messages, invoice files, log files)
- Provide a prompt response to requests for additional information from TEOCO
- Provide a business case for new features and functions requested
- Review and distribute all release and product documentation to users

3. Customer Support Process Overview

Our Customer Support Process consists of the four phases shown in Figure 1. All customer support

requests submitted to TEOCO move through the phases in the order depicted. That is each customer support request is first submitted by a customer. It is then reviewed by TEOCO to assess the nature of the issue being reported. The customer support request is then researched further by TEOCO to determine the appropriate response. Finally a resolution is provided for each customer support request. The following sections describe in more detail each phase of the Customer Support Process.



Figure 1: Customer Support Process Phases

3.1. Support Request Submission

Customer support requests are submitted to TEOCO using the TEOCO Customer Support Portal. This action is the initiating step in the Customer Support Process. All customer communication with TEOCO regarding a customer support request occurs through the Customer Support Portal. You can access this system from the TEOCO website by selecting the Customer Support and Documentation link on the Contact Us page or by using the direct link <https://support.teocosolutions.com>. You will need a Support Portal account to access the Customer Support Portal. To learn more about the Customer Support Portal, please visit the Customer Support and Documentation page on the TEOCO website (<http://www.teoco.com/customer-support-and-documentation>). There you will find training materials for the Customer Support Portal, as well as instructions for requesting an account if you have not already been provided account credentials.

When submitting a customer support request, it is essential that you provide as much information as possible. Please complete all required fields. Three pieces of critical information are required before TEOCO can begin processing your customer support request:

1. Category – Select from the drop-down list the value that best represents the product or service to which your issue is associated.
2. Issue Description - It is in your best interest to provide as much information as possible, as we cannot begin troubleshooting your issue until we have gathered all of the necessary input.
 - For invoice issues, please provide the BAN, Bill Date, and the raw file (for license customers).
 - For error messages or unexpected behavior, please provide screen shots, exact steps taken which produced the error, specific data that we can use to reproduce the issue.
 - For issues with back-end systems and processes, please provide the relevant server logs or detailed system messages.
3. Priority – Your frank and accurate assessment of the business impact of the reported issue is used by TEOCO to order the processing of customer support requests. If all customer support requests are deemed to be of high priority, then the only means of ordering their processing is their time of submission.

Once you have entered the customer support request, the Customer Support Portal will assign it a support request number, and you will be able to view the Support Request from the Customer

Support Portal. You will be able to use the Support Portal to track all history and correspondence related to the Support Request.

ALTERNATE SUBMISSION OPTIONS

If the Customer Support Portal is unavailable, there are two alternate options through which you may report issues. When using either of the alternates below, please provide the same level of information that you would provide through the Online Support Request System.

- **Via Email:** You may send an email to the customer support team. The email address is customersupport@teoco.com.
- **Via Phone:** If the Customer Support Portal and email are unavailable, you may call the Support Line. If a TEOCO staff member is not currently available to answer your call, you will be asked to leave a voicemail message.
 - For issues related to Routing Management products and services, or to report a Severity 1 issue anytime, please dial 866-884-8324.
 - For issues related to Cost and Revenue Management products and services, please dial 703-259-4472 or 888-TO-TEOCO (888-868-3626), extension 4472.

Please refrain from emailing or calling to report an issue unless the Customer Support Portal is unavailable. Customers who choose to report issues in this fashion when the Customer Support Portal is available will be advised to open a customer support request prior to the initiation of any troubleshooting. The creation of a customer support request ensures that we are able to provide you with the best support possible.

3.2. Support Request Review

Upon receipt of a customer support request, TEOCO performs an initial review of the support request and the issue being reported. During support request review, we will ensure that all required information has been provided. If there is information missing from the customer support request, you will be asked to provide the required information before the Customer Support Process moves further. Based on the information provided, a severity level is assigned based on the definitions documented in Section 2.2. You will receive an e-mail correspondence informing you of your support request's severity determination.

3.3. Support Request Research

After support request classification and severity determinations are made during support request review, a customer support request transitions to the support request research phase of the Customer Support Process. During support request research an in-depth and thorough analysis is performed on the issue reported in the customer support request. This deep dive into the issue is targeted at identifying its underlying cause. Once the cause is identified, the analysis is focused on finding a resolution to the issue.

During the support request research phase, TEOCO staff will be researching and troubleshooting the issue reported in the customer support request. As we begin our analysis, we will be looking to answer the following questions:

Does the support request contain all of the necessary information? - Additional information may be required from you to successfully determine the cause and/or resolution to the issue reported in your customer support request. Examples of information that we may need you to provide are as follows:

- Clarification of the steps required to reproduce the issue
- Screenshots of error messages
- Log files or data files

Please respond promptly to these inquiries from TEOCO staff via the Customer Support Portal so that we can move forward on resolving your support request. When we request additional information, we will provide a requested timeframe for response. If a response is not received within that timeframe (generally this is within five (5) business days), we will assume the issue is resolved and the customer support request will be closed.

Does the support request indicate an issue that has been previously reported? - TEOCO maintains only one open support request per issue per customer. If there is an open customer support request for a given customer and another customer support request is opened by that customer for the same issue, the duplicate support request will be closed and any pertinent notes will be added to the original support request. If there is an open customer support request for another customer, the newly-entered customer support request will be tracked alongside the original support request to ensure all affected customers are informed of the issue's resolution.

Does the support request indicate an issue with third-party software? - In the course of support request research, it may be determined that the reported issue is caused by third-party software that TEOCO has integrated into our product. In these cases, TEOCO will coordinate with the third-party software vendor to develop a resolution to the customer support request. Once a resolution has been determined by the vendor, we will document it in the relevant customer support request.

Does the support request indicate a defect in TEOCO-provided software? - A defect is an anomaly or flaw in a software product. Defect means a design or programmatic mistake exists in the software that causes the product to fail to perform in substantial conformance with the product's documented requirements. A defect customer support request communicates the details of the issue to the TEOCO product team, enabling corrective action, resolution and tracking to occur.

Does the support request represent a change request to an existing TEOCO product or service? - A Change Request is an alteration or augmentation of the existing design of a software product. It is a request for a new product feature or function. It is a new requirement against the software product. All Change Requests must be evaluated by the TEOCO Product team to determine if they are in alignment with the needs of the customer base and the product strategy. You will be informed via email if your support request has been classified as a Change Request and sent to the Product team for evaluation.

Does the support request require custom work or professional services? – In some cases, support requests will require the development of custom software (database scripts, reports, etc.) or consultation from TEOCO's Professional Services team.

CUSTOMER SUPPORT REQUEST STATUS & ESCALATION

While a customer support request is being researched, TEOCO will be communicating progress and status to you on a regular basis. Status updates for a customer support request will be provided based on the severity level assigned to the support request. Standard response times for each severity level are outlined in more detail in the FAQs on the Customer Support Portal.

If at any point you feel the need to escalate your support request, we ask that you escalate first to the Customer Support Manager, and then to your account manager. Contact information for escalations is found in the FAQs on the Customer Support Portal.

3.4. Support Request Resolution

With the completion of support request research, a cause and a resolution will have been identified for the issue reported in the customer support request. At this time, the customer support request transitions to the support request resolution phase of the Customer Support Process. During support request resolution, the Customer Support team will document the resolution of the customer support request. After the completion of all Customer Support team tasks on the support request, the Customer Support team will close the support request, and the resolution will be sent via email.

In most cases, a support request will be resolved by the Customer Support team with no additional work required by TEOCO staff. In the case of defects, change requests, and professional services requests, there is additional work to be completed by other TEOCO teams. This work will be tracked outside of the Customer Support Portal, as there is no further work to be done by the Customer Support team, and all future customer communication on these items will be issued by Account Management and/or the TEOCO Product or Professional Services teams.

Note that in all cases, a closed support request may be reopened based on a request by the customer submitting the support request.

3.5. Disposition of Defects, Change Requests and Professional Services Requests

DEFECTS

With defect support requests, the initial resolution provided to you may be a workaround or a fix. A workaround involves a procedure (i.e., a set of instructions) prepared by TEOCO that when executed by you will alleviate or avoid the reported defect. A fix involves a software update to a TEOCO product that is released to correct a defect in the product. The type of product release that is used to provide the software update is dependent upon the severity level of the customer support request. For customer support requests that are designated Severity 1 or 2, TEOCO will provide a Priority Update. For Severity 3 customer support requests, the defect will be addressed in a Service Pack or a Feature Release in alignment with our planned product roadmap. The following is a brief description of these product release types.

- **Priority Update:** Priority Updates are software releases designed to address one or more specific high-priority support requests. Only those software components being modified are released with a Priority Update. Documentation describing the problem(s) being addressed accompanies the Priority Update.
- **Service Pack:** Service Packs are software upgrades that generally affect multiple components of the product suite. All outstanding customer defects are considered for inclusion when scoping Service Pack releases. Candidate defects included in the initial scope are not guaranteed to be addressed in each Service Pack. Detailed release notes will be provided to document all defects addressed. Service Pack releases will include all Priority Updates released since the most recent Service Pack or Feature Release.
- **Feature Release:** Feature Releases are software upgrades that provide substantive enhancements to features and functionality based on our product roadmap. Customer defects relating to areas being modified will be considered for inclusion in a Feature Release. Detailed release notes will be provided to document all defects addressed. A Feature Release will include all Priority Updates and Service Packs released since the previous Feature Release.

When a defect has been addressed, you will be notified as part of the release documentation. If it is determined that the original issue was not fully addressed by the product release, you may request that your original defect support request be re-opened in the Customer Support Portal.

If you have any questions or concerns related to defects where you did not originate the customer support request, those issues should be addressed to your Account Manager. Support Requests requesting support for testing or additional information on these defects will be closed and you will be directed to your Account Manager.

CHANGE REQUESTS

With change requests, TEOCO's Customer Support staff will inform you that your customer support request has been deemed a change request. Upon completion of the evaluation of the change request, the decision of the Product team will be communicated to you, and your customer support request will be closed. Customer support requests that have been determined to be candidate change requests will be tracked internally and will be considered, along with all other requirements, when future product releases are scoped. Customer support requests that have been determined to be client-specific change requests would be replaced by a negotiated statement of work (SOW) should you decide to pursue the requirement as custom work.

PROFESSIONAL SERVICES REQUESTS

With professional services support requests, TEOCO's Professional Services staff will communicate directly with you to ensure that the requested software/assistance is delivered according to the expectations agreed upon at the start of the work.