



ECI Customer Experience

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Support Overview Handbook

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## Customer Support Services Overview

Introduction from Deedra Wetherholt, Vice President, Global Customer Support

Providing an awesome customer support experience is a core value of ECI Software Solutions (ECI). Customers are our business and the Global Customer Experience Team is focused on delivering satisfaction in every interaction. ECI's solutions streamline your daily processes to increase efficiency and improve margins. Our software takes care of the "busy work" so you can fuel your ingenuity and grow your business. The Global Customer Support Team has this philosophy built into our culture and instilled into every employee to govern all customer interactions.

ECI seeks the following outcomes from every interaction:

### Customers for life

- ECI wants every customer experience to be outstanding
- Clear communication and expectations on both sides
- Ask for, and take action on, your feedback

### Promoters

- Promoters recommend ECI to others
- Promoters adopt features and get more value from ECI

### Engaged and happy employees

- Happy employees make happy customers
- Significant investment in employee development to grow their careers at ECI
- Award winning customer service culture

Thank you for choosing ECI as your trusted partner. We look forward to serving you.



**Deedra Wetherholt**

Vice President, Global Customer Experience  
ECI Software Solutions, Inc.

## Support

The purpose of this document is to provide an overview of ECI's Customer Support Team and how you can engage with us to resolve your business challenges. Our team is trained across ECI's solutions on functionality, usability, troubleshooting, problem solving, and providing technical resolution for reported issues.

As part of ECI's Customer Experience culture, standard Support offerings include:

- Resolve issues
  - ✦ Explanation of application-generated error messages
  - ✦ Identifying the source of an issue
  - ✦ Guidance with software capability and standard process flow questions
  - ✦ Assistance with using published ECI documentation
  - ✦ Researching/providing updates on software defects
- Explain configuration/settings and provide documentation on core functionality.
- Access to ECI's Customer Support Portal for knowledgebase content and information.

The ECI Global Customer Experience Team consists of the three integrated teams focused on delivering great experiences and outcomes for our customers.

**Customer Experience Specialist (CES)** – Your initial point of contact. CES is a globally-based team responsible for responding to incoming customer requests, gathering information to understand the impact to your business, resolving general issues, and routing issues to the most appropriate team to resolve. This team is based in our global ECI offices to better serve our customers across various time zones and regions.

**Product Support Specialist (PSS)** – Responsible for delivering application level support to our end users. PSS troubleshoots and provides guidance to customers on procedural issues, application errors, and common issues experienced by ECI users.

**Technical Support Specialist (TSS)** – Focused on customer issues that require more complex investigation often involving a data or environment component. TSS interfaces with Development, Engineering and Product Management teams when issues arise that need the involvement of teams outside of Support.

## Customer Responsibilities

- Function as main point of contact for the ECI Customer Support Center.
- Convey information about installed applications and system configuration to ECI as needed to troubleshoot issues. Provide examples, screenshots, as many details as possible.
- Maintain records of login/passwords for the operating system as well as ECI applications.
- Perform regularly scheduled system and database backups; confirm the integrity of the backup data.
- Organize access to all required software media, including operating system, ECI application software and system-specific driver files, as well as application licenses and software codes.
- Arrange access to all ECI-required hardware. Assist ECI in resolving problems that require the customer’s active participation, whether to grant access, send a log file, or perform other actions necessary to resolve the issue.
- Keep accurate documentation of any error messages or system notices.
- Plan and schedule all services not covered under the support contract.
- Engage professionally and productively with agents.

## Incident Prioritization and Response Time

Based on information you provide to our Customer Experience Specialists, a priority will be assigned to the case. This priority, number of impacted users, and the time the incident was recorded will determine how each case is managed. Below is the breakdown of business impact and priorities.

- **Critical:** Entire product or service is unavailable with no viable workaround possible.
- **Major:** Several key solution functions/modules are affected with no viable workarounds available. There is a significant service degradation.
- **Minor:** Small service degradation, however business processes can continue. There are also viable workarounds to avoid this issue.

ECI’s Customer Experience Team has the following targets for our initial response to each case. These targets can be impacted by the volume of incoming calls, business hour, severity of the issues experienced, and a variety of other factors.

Priority	Targeted initial response on cases
Critical	1 Hour
Major	2 Hour
Minor	4 hours

Measured in Business Hours

## Case Management and Resolution

Throughout the lifecycle of a case, updates from ECI will be provided as new information becomes available. Customers can expect periodic updates to explain current status and next steps. Your case may also be transferred between CES/PSS/TSS teams as we work your issue to resolution.

At times, new product questions or issues can be raised by customers. When this occurs, the specialist will create a separate case for each unique issue. This helps track and manage the case and ensure we solve all your issues.

Once the case has been marked “Resolved” you will receive an email notifying you of this change in status. If at any point you find the solution unsatisfactory, simply respond to the email to re-open the case. If a previously resolved case is responded to after 7 business days, it will automatically result in a new case being created.

## Remote Access

In certain cases, a specialist will request access to your ECI solution using a secure, online service (such as **GoToAssist Remote Support**) to check settings, configurations, fields, reports, or to replicate an issue. For cases that Support is unable to verify or validate using ECI “test” data, we may request copy of your data, delivered via secure methods, for further testing and validation.

## Customer Support Portal

ECI has expended a great amount of effort to provide customers with alternative methods to contact Support and self-serve functions. To assist customers with their support needs, ECI created its Customer Support Center with a host of online capabilities. In the Support Center, customers will find an extensive collection of Knowledgebase articles for self-help, create/manage their cases, and view current product documentation and other product resources. Learn more about the Customer Support Center with this [Quick Reference](#) or go to the [Customer Support Center](#) to request a login.

## Surveys

Improving the level of support is an ongoing priority for ECI. When each Support Case is resolved, a link is provided inviting you to take a survey. The survey contains questions regarding your satisfaction with the ECI product you're using, the agent who helped you, and about ECI as a whole (Net Promoter Score). We actively monitor all feedback and use this information to improve our processes and identify areas that need attention. We strongly encourage your participation by completing surveys on a regular basis.