Genesys Cloud Echopass Solution Support Guide

Introduction

The Service is a Contact Center Solution offering designed, built, tested, and maintained by Genesys.   Genesys provides the operations, software, applications, Professional Services, and Support for the Service in accordance with the following terms and conditions, and the Genesys Cloud Master Subscription Agreement (including defined terms therein, unless hereunder otherwise defined or commonly recognized in the technology industry) ('Agreement") you have executed.

As a recognized leader in the contact center and customer experience markets, Genesys is uniquely positioned as a service provider with methodologies and tools that can enable Customers to utilize the numerous tools of the Service.   Genesys has a worldwide network of skilled "Customer Support Analysts" and "Customer Experience Managers" (CEM) (as each such term is below defined) dedicated to delivering a beneficial customer service experience and helping Customers achieve their business objectives.   A "Customer Support Analyst" is part of a team of Support personnel that is available on a round-the-clock basis to engage with Customer in issue resolution and other maintenance and Service events.   The Customer Experience Manager, as further below defined, is Customer's point of contact on life cycle management events associated with the Service, including change management and other business planning activities.

This Support Guide provides guidelines for interacting with Genesys to quickly address Support requirements. Note that this Support Guide does not define terms that are deemed to be in common usage in a technology service support context.   Examples of such terms include Help Desk, Tier 2, Engineering, and Maintenance Windows, among others.

Genesys Support

As part of the Service, Genesys will provide Support as set forth in the Agreement, and as further indicated below.

The Help Desk will be staffed 24 hours per day, every day of the year
The Help Desk will receive, track, classify and coordinate contacts made by Customers, noting the Customer Responsibilities detailed below.
Genesys will provide diagnosis of issues and continuous monitoring of the Service
Genesys will provide Customer access to report Service impairment via the channels further described in this Support Guide
Genesys will report the resolution of issues to Customer in a timely manner via the channels described in this Support Guide

The Service Maintenance and Change Window Policy is documented below. Maintenance activities may impact Customers' ability to use the Service. Inconvenience and malfunctions may occur during planned maintenance, including during the introduction of new versions or features. Genesys will make reasonable efforts to prevent disturbances and/or resolve timely such malfunctions.   To this end, Customer may ask Genesys to reschedule such planned maintenance to avoid business disruption, and Genesys will make commercially reasonable efforts to reschedule such planned maintenance.

Genesys reserves the right to perform Urgent Maintenance. Urgent Maintenance may impact Customer's ability to use the Service at any time, including suspension of the Service in an event of emergency, to safeguard the integrity and security of its network and/or repair or enhance the performance of its network. Genesys will make commercially reasonable efforts to attempt to notify Customer of unplanned maintenance, within a reasonable time before it takes place.

Customer is responsible for upgrading its own Equipment and Third Party Applications, and other Third Party Products and Services,that it supplies, as set forth in the User Guide.

Maintenance & Change Window Policy

General

The Maintenance and Change Window policy has been implemented to minimize customer disruption while affecting the necessary modifications to the Service.

Maintenance Change Windows

Table 1 - Maintenance Change Windows

Type	Frequency	Typical Activity	Targeted Notification to Customer	Notification Type
Emergency	Any Time	Restoration	Prompt	• Verbal (NOC), • Email from Customer Support or CEM (all per Incident Management Process)
Weekly	Tue, Thur,Sat 11pm MT to 4am MT	May include: Incident Resolution, Provision-ing, weekly testing, Service Equipment maintenance and other general maintenance	7 days	• Email from Customer Support or CEM
Quarterly	Quarterly	General maintenance	30 days	• Email from Customer Support or CEM
Annual	Once Per Year	May include: general maintenance and an-nual testing	90 days	• Email from Customer Support or CEM • Joint Meetings

Blackout Periods:

Only emergency (as described in Table 1 above) work occurs on the Service during these periods as identified below.   Additional Blackout Periods must be established no less than 30 days and no more than 90 days before the start date of the blackout period.

Pre-Set Blackout periods
- The last week of the month following the last Tuesday of the month;
- Holiday weekends commencing the Tuesday prior to a Genesys, Customer, or national holiday, and in-cluding Cyber Monday and any Monday holiday
- Special circumstances as mutually and reasonably agreed between the parties

Genesys Customer Support strongly encourages Customers to notify Customer Support or the CEM prior to all Customer performed activities (e. g. application changes, Customer provided maintenance) which may impact the Service.

Non-Genesys Provided 3ʳᵈ Party Applications and Equipment Maintenance

The Agreement details the extent to which Equipment Third Party Applications, and/or other Third Party Products and Services ("Equipment and Third Party Applications")_ may be used with the Service. In general, if Customer uses any Equipment and Third Party Applications not provided by Genesys, or not specified by Genesys in writing to be compatible with the Service ("Non-Supported Items"), Customer will be responsible for all risk and liability associated with the addition of the Non-Supported Items. Unless agreed otherwise by Genesys in writing, Non-Supported Items are outside the scope of Genesys' obligation under the Agreement (including this Support Guide), and Genesys shall have no liability in respect thereof. To the extent any Equipment or Third Party Applications are specified by Genesys, in writing, to be compatible with the Service, Genesys will provide Support of such items but only as part of the Service as a whole.

When to Contact Genesys Customer Support

Before you contact the Support organization for the Service ("Customer Support"), please thoroughly review this Support Guide. Also, please be sure you have reviewed your responsibilities (see "Customer Responsibilities" below). Customer Support can assist you with the following types of contacts:

- You have an issue with the availability or the operation of the Service.

- You have post-Provisioning technical questions about the operation of the Service.

- You have a Service change or enhancement requests, generally provided via a Support Request or a Service Order or a "Feature Request" as described below.

- You are notifying us of important Provisioning project milestones or change management events so that appropriate Support organization personnel can be made aware of your plans.

Genesys Customer Support Program

As part of its commitment to customer service excellence, Genesys has assembled an experienced team of Customer Support representatives, technical staff, and subcontractors to assist Customer in the operation and maintenance of its Genesys Echopass Solution.   Customer Support includes answering industry-related questions or investigating new or emerging contact center technologies on behalf of Customer.

Customer Experience Manager

The Customer Experience Manager (CEM) is one of the Customer's primary contacts within Genesys Customer Support.   The CEM has overall responsibility for interfacing with Customer for both Service and Support issues. It is the job of the CEM to understand the Customer's business and reflect Customer's needs in the Provisioning of the Service.   Customer should contact the CEM with general non-Support or Service use-related questions (Support-related and Service-use questions/issues are reported via Customer Support).   The CEM can arrange for Professional Services consultation, including: specific presentations, Training, or general Contact Center consultation.

The CEM's primary function is to provide the proper level of focus within Genesys to address Customer's needs. Other assistance may include:

- Contact Center planning

- Industry consultation and best practice analysis

- Service changes, major upgrades, or other changes

- Billing inquiries and issues.

Table 2 - Customer Experience Management Team

CEM Level	Name/Title
Level 1	Assigned CEM
Level 2	Director CEM
Level 3	VP, Client Services

Genesys may change the information provided in the above table at any time. Genesys will notify Customer of any such change.

The following list provides suggested contact information for issues that are not part of Genesys' Customer Support or the CEM's responsibilities. If you are concerned with any of these issues, please contact the suggested representative.

- Issues with support of products or applications not provided by Genesys as part of the Service.   Please contact the appropriate product vendor. If an issue crosses multiple vendors, Customer Support can be available to work with the other vendors, but you will need to facilitate this process.

- Issues with Third Party Applications supplied by Customer, please contact the third party that developed the application.

Customer Responsibilities

The following are Customer responsibilities. To ensure that your issue is resolved as quickly as possible, please review the following list and be sure that you have fulfilled these responsibilities before contacting Customer Support. Failure to fulfill these requirements will result in delays in achieving or inability to provide problem resolution.

- Customer must have a signed Genesys Cloud Master Subscription Agreement and Services Order.
- Customer's Support personnel must be on the list of "Designated Contacts" (defined below) maintained by the Support organization to report a new Case (also defined below) or to update an existing Case. Your Customer Engagement Manager will help you keep this list current.
- Customer personnel must complete Training, in accordance with the Agreement.
- If you have requested critical priority ("P1", defined below) for your issue, a trained (per the Agreement) Customer contact must be available at all times to work with Customer Support in the handling of your Ticket.
- Customer will provide Genesys or its subcontractor reasonable access to Users' locations to conduct a site assessment and troubleshoot any Support related issues (including access to routers and PCs utilizing the Service, and the ability to ping all IP phones), either remotely or on-site to enable efficient problem diagnosis and maintain quality Support.

Before Opening a Ticket

The following checklists identify tasks that you should complete prior to opening a ticket with Customer Support:

If your Ticket is a question...

- Have you checked the Service help aids built into the Genesys provided applications?
- Have you checked the User Guide and/or Support Guide?
- Have you clearly defined the issue?
- Have you checked to see who should receive your request (see "Other Contact Information" in this Support Guide)?

If your Case is for a problem, add the following information to the checklist above:

- Have you been able to reproduce the issue, and if so, have you documented how you've done so?
- Have you identified a clear business impact?
- Have you described what actions you have taken so far in attempting to solve the issue?

How to Initiate a Ticket

Only Designated Contacts will be allowed to report a new Ticket or update an existing Ticket.   All new Tickets must be submitted by contacting Genesys Customer Support by phone/email/web. Customer Support will also accept e-mail regarding existing Tickets.

Designated Contacts

A Designated Contact is a Customer personnel who has been trained per the following. At all times under the Agreement, Customer shall ensure that no less than two Customer personnel have completed the introductory Genesys Cloud training. The trained Customer personnel shall serve as the primary point-of-contact for Customer with Genesys. At least one Designated Contact must be available during normal business hours to handle non-Critical Support requests. A Designated Contact must be available for contact on a 7x24 basis for tickets that have been prioritized as Critical. Genesys shall advise Customer when there are significant updates to such training or the Services that require Designated Contacts to be retrained, and at least two Customer Support personnel shall complete the Genesys Cloud Training; within 30 days after Genesys has notice has provided notice of updated training availability.   Customer shall purchase any additional training through submission of a Statement of Work and a Services Order. If training is to be conducted at a Customer's facility, Customer must provide all necessary infrastructure (including access to Customer's platform, adequate facilities, overhead projector, Internet access and computers for all students) for such programs and Customer will be responsible for reimbursement of any reasonable travel and other expenses for Genesys education consultants in accordance with Genesys Travel Policy.

Contacting Customer Support

Below is the information you need to contact the Customer Support.

The Customer Support Center is located in Salt Lake City, UT, USA.   It is staffed 24x7x365.   The following channels can be used to contact the Help Desk:

*   **Telephone:**   +1 (800) 247-1517 (US and Canada)
*   **E-Mail/Web:**   help@echopass.com   /   http://support.echopass.com
*   **Mail:**   6415 South 3000 East, Suite 300, Salt Lake City, UT 84121

Genesys strives to provide Ticket status updates on a regular basis. Customers can request additional Ticket status and request ticket Escalation (as below described) at their convenience. The process for this is documented below.

Incident Management Process

RemedyForce Ticket Numbers

A Ticket number will be provided for tracking purposes.   Please keep the ticket number handy, and provide it during all correspondence or communication with Customer Support. During the fault isolation and resolution process, the Genesys Customer Support Analyst may be in contact with you as necessary.

Business Impact

"Business Impact" helps us understand how the issue you are experiencing affects your business. Details about the impact on your business are necessary when the problem is to be assigned a Critical or High Priority (see below). Regardless of the medium of communication (phone, email, portal, or chat), please provide the following information:

- Account Name / Department or Area
- Type of Service being affected
- Number of Users affected
- Frequency of occurrence
- Business Impact Description
- Any first level problem isolation steps that have been taken.
- Any additional information regarding the time and nature of the trouble.
- Applicable detail such as CONNID, data and time(s), and ANI if available
- The Support Analyst may ask additional product specific questions to assist in isolation.
- Routing Error Descriptions or errors in the application of the strategy
- Local Contact Information
- Access hours at the site

Ticket Management

You will receive an e-mail notification assigning your ticket number and listing the case details that you submitted.   When a Service-affecting event is detected, whether reported by Customer or identified through the Service's proactive monitoring, a RemedyForce ticket is opened.   This RemedyForce ticket contains a complete description of the Service issue and is used to transfer information between the respective Genesys organizations responsible for repair and testing. Such information includes:

- Description of the issue
- Diagnostic test results
- Resolution information

During the resolution process, Customer Support retains ownership of the Case.   Its responsibilities are listed below:

- Ticket notification to Customer and Account Team as required
- Direction of resolution progression
- Performance of escalations as needed
- Manage resolution progress
- Offer regular status updates to Customer
- Ticket closure with Customer upon resolution

Incident Severity

RemedyForce tickets are assigned Severity levels based on established criteria to help lessen the potential impact on Customer's business.   Those problems likely to cause the greatest interference receive Critical status and are handled accordingly.

Definitions of Severity Levels

Table 3 - Severity Level

Priority	Severity	Examples
Critical (**P1)**	High	• Impacts a production/live environment. • Causes a severe impact on business operations of end customer (e.g. calls cannot be completed or critical business processes are disabled). • Continuous or near continuous interruption of service. • No workaround available.
Major (**P2)**	High	• Impacts production/live environment or Development environment. • In Development environment, causes a serious impact on development activity. • In production/live environment causes a serious impact on business operations of end customer (e.g. call processing altered in such a way as to degrade service quality or handling of business data). • Intermittent disruption of service. • Is running in a redundancy mode • No stable workaround available.
Minor **(P3)**	Low-Med	• Impacts production/live environment or Development environment. • In Development environment, causes a minor impact on development. • In production/live environment, causes a minor impact on business operations of end customer (e.g. minimal degradation of call processing or handling of call data). • Provisioning issues
Low (**P4)**	Low	• Impacts production/live environment or Development environment. • In Development environment, causes little or no impact on development activity. • In production/live environment causes little or no impact on business operations of Customer.

Notification Types: Customer is required to notify Genesys in accordance with the chart below for all support related issues:

	Phone	Email	Web Portal	Chat
Critical / P1	x			
Major/ P2	x*	x	x	x
Minor / P3	x	x	x	x
Low / P4	x	x	x	x

*Preferred

Note: The timeframe for Targeted Response may be extended in the case of Genesys Supplier Products.

Genesys will use commercially reasonable efforts to advise Customers, within the applicable "Response Target" that Customer Support has received notification of an issue. Customer Support will use commercially reasonable efforts to repair/restore the Service or provide a temporary workaround solution within the Response Target.

Case Resolution Targets

Incident Resolution and Incident Repair Targets in the below chart, come into effect after Customer Support acknowledges and receives of all relevant information that Customer is required to provide as described in the Business Impact (above).   The assigned Impact Level for a ticket may be mutually re-determined by both parties during the resolution process, but Genesys shall have the final authority as to the Case's impact designation.

Table 4 - Issue Resolution Targets

Severity	Acknowledgement Target	Incident Resolution Target	Incident Repair Goal*
Critical (P1)	<15 minutes, phone and Immediate via email	For 95% of related issues, either: return to service or an effective workaround within 4 hours	15 Business Days
Major (P2)	<15 minutes phone or Immediate via email	For 95% of related issues, either: Return to service or an effective work around within 8 hours.	15 Business Days
Minor (P3)	Immediate via email	For 95% of related issues, either: return to service or an effective work around within 48 hours for 90% of related issues.	15 Business Days
Low (P4)	Immediate via email	Commercially reasonable efforts	N/A

Genesys is responsible only for matters that are managed by and within Genesys' control. Among the matters that are outside of Genesys' control include but are not limited to power at Customer's facility, failure of Customer's Equipment, failure of Customer's LAN or WAN and/or failure of the external network.

Genesys Cloud Professional Service Change Requests

All changes to a Statement of Work follow the Change Request process described in that Statement of Work. All other aspects of Professional Services are handled pursuant to the Professional Services terms of the Agreement and are managed outside of Customer Support.

Genesys Cloud Upgrade Process

From time to time, Genesys may upgrade and perform additional modifications to the Service as described in the Agreement. Customer may use all the commercially released upgraded and modified versions of the Services, to which you are subscribed, without extra payment during the then-current Subscription Term. Inconvenience and issues may occur during this upgrade process and Genesys will make reasonable efforts to prevent them and/or resolve such issues following the processes described in this Support Guide.   Customer will be provided notification of any planned upgrade as set forth in the above Maintenance & Change Window Policy.

Genesys Cloud Customer Service Portal (GCSP)

For your convenience Genesys provides Customer with access to the GCSP.

In order to access the GCSP a User will need to obtain a login in advance.   Please contact Customer Support to obtain the login and for login information.

The GCSP provides access to:

- The Service's online Knowledge Base
- Submit Support tickets to Customer Support
- Submit Change Requests
- Follow all open tickets as well as add additional information, notes, and attachments to open tickets

Genesys Cloud Change Request Process

Submitting Provisioning Requests for MAC Support

The Customer Support team facilitates all Provisioning and Change Requests (also referred to as Moves/Adds/Changes (MAC)). It is the job of Provisioning service team to understand how Customer utilizes the Service and to endeavour to ensure that all implementations meet Customer's expectations.

Specific responsibilities of the Provisioning services team are:

- Receive all Provisioning requests
- Provide Provisioning Fee quotes and timelines
- Track and control all Change Requests

The Change Request (CR) will be considered complete upon the e-mail notification of completion to the CR's originator.

Service Requests

Genesys offers the following optional services to Customer.

Table 5 – Standard Service Request Descriptions and PS Implementation Targets

Services	Description	Estimated Imple-mentation Time*
Extra toll-free numbers	US domestic toll free numbers set aside for Client use (>5)	Carrier dependent - typically 7 business days.
Extra DNIS numbers	Client requested DNIS numbers (>5)	7 business days
Email Alias	Email alias creation to send "on behalf of" another domain (>3)	7 business days
Template Media Flow / Changes	Any strategy change not considered an advanced strategy change after initial installation	7 business days
Create outbound calling campaign	Create the outbound calling campaign	7 business days
IVR Announcements	Any change in recorded prompts after initial installation	7 business days
Extra Echoinsite pages (> 1:50 agent seats)	One-time PS Implementation Fee, Monthly service and mainte-nance Fee	7 business days
Standard Report Creation	Create standard reports	tbd
Load Calling list of out-bound calling leads	Load list of new leads for new or existing outbound calling cam-paign	7 business days
Custom Reports	Any report where sub-queries are required, direct links do not exist between tables or special formatting or reference table creation is required	Depends on scope
IVR Programming	Any advanced programming required within the IVR application that falls outside normal IVR options provided	Depends on scope
Professional Services	Negotiated on a case-by case basis, including CRM integration, database dips, database integration, etc.	tbd
Work Flow	Changes to the EP product or service to allowing it to function outside normal standard	tbd
Advanced Media Flow/ Changes	All strategy changes or creation requiring multiple skill tiers, da-tabase lookup, custom server connection or non-standard strategy flow	Depends on scope
Customer Network Sup-port	Supporting/Troubleshoot local customer network issues	tbd
Call Center Consult-ing/Training	Call Center Consulting or remote training	tbd
Scripting Development	Creating/Modifying Scripts in Echoscripting	tbd
Voicemail	PS Implementation of voicemail services	7 business days
E-mail	PS Implementation email services	7 business days

Other Related Change Requests

Genesys also offers the following optional services to Customer:

Table 6 – Additional Service Request Descriptions

Service	Description
Custom Reports	Any report where sub-queries are required, direct links do not exist between tables or special formatting or reference table creation is required
IVR Programming	Any advanced programming required within the IVR application that falls outside normal IVR options provided
Database Administration	Any change in data business rules, validation or database configuration
Web design and development	Negotiated on a case-by-case basis, includes design, content, links, custom graphics, etc.
Work Flow	Changes to the Echopass Solution to allowing it to function outside normal standard
Advanced Media Flow/ Changes	All strategy changes or creation requiring multiple skill tiers, database lookup, custom server connection or non-standard strategy flow
New Sub Account (Outsourcer)	Outsourcer bringing on a new client
Customer Network Support	Supporting/Troubleshoot local customer network issues
Call Center Consulting/Training	Call Center Consulting or remote training
Scripting Development	Creating/Modifying Scripts in Echoscripting

Service Feature Request Process

Submitting Feature Requests

To submit a request for a new feature for the Service, you need to complete the Feature Request Template, which is available from the Customer Experience Manager. Please fill out the Feature Request Template template, supplying as many details as possible for the new feature, including business need and use cases. All Feature Requests Templates, the information therein

contained, and any resultant are the sole, Confidential and exclusive Information/Property of Genesys. Customer use of any such resultant feature is subject to the applicable Agreement, including a Services Order therefor.

Customer Support Evaluation

When Customer Support receives your completed Feature Request Template they will perform an initial evaluation:

- If the feature already exists in the current version or in an upcoming version of the Service you will be provided documentation for the version that provides the feature.

- If Customer Support determines that the request can be solved by a Provisioning Services change, is the result of a User error, or is caused by a Service issue, a Case will be created and resolved using the normal Case management process described above.

- If Customer Support agrees it is a new feature, a Feature Request (FR) will be created utilizing the information from your completed Feature Request Template and will be submitted to the Product Management team for evaluation.

Product Management Evaluation

Product Management will use commercially reasonable efforts to evaluate the FR and determine if it fits the current Service roadmap and could potentially be included in a future release.

After thoroughly reviewing the FR and all related information, Genesys will decide how to handle the FR:

- If the FR is valid but cannot be implemented within a reasonable period of time or does not fit the Service roadmap, the FR will be declined.   The CEM will notify you if the FR is declined and will work with you to find alternative solutions if possible.

- If the FR is determined to be a Support issue, the FR will be declined, and Customer Support will work with you through to create a ticket to resolve the Service issue through the Support processes described above.

- If the FR is valid and fits the Service roadmap, Product Management will include it in the queue for potential future implementation. The CEM will notify you that the FR has been accepted and provide a projected date for planned availability.

Feature Request Escalation

Please use the regular Customer Support escalation process if there is a need to escalate while the FR is under consideration. See Escalating Your Issue (below).

Escalating Your Issue

The first point of escalation is the Customer Support Analyst who has been your point of contact for the ticket since its assignment. The next step would be to escalate to the Level 2 contact, as

listed in Table 7 **Error! Reference source not found.**(below). If the Level 2 Contact cannot close the ticket in consultation with the Customer Support Analyst, you can then engage the Level 3 contact as listed. If you feel your trouble ticket still needs additional focus, please feel free to engage your Customer Experience Manager. Genesys may change the information provided in the below table at any time. Genesys will notify Customer of any such change.

Echopass Solution Customer Support Escalation Contacts

Table 7 - Customer Support Escalation

Support Level	Title	Phone	Mobile	Email
Level 1	Customer Care Center	800-247-1517	n/a	help@echopass.com
Level 2	Customer Care Manager	800-247-1517 (request to speak with Manager on call)	n/a	help@echopass.com
Level 3	Customer Care Sr. Manager	801-559-9486	801-879-7257	dennis.williams@genesys.com
Level 4	Director, Customer Care	506-637-3968	506-650-9178	chris.doyle@genesys.com