

Aptean Verdiem

Customer Success Handbook



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Revised Month Day Year

www.aptean.com

**About this Handbook**

This document provides customers with comprehensive information to assist them in utilizing all aspects of our Customer Success resources. Consult this Handbook for Customer Success contact information, resources and processes, and descriptions of Support offerings.

***Note:*** *Please refer to the most current online version of this handbook on our Customer Portal for the most up-to-date information. The services described within are subject to a customer having a current maintenance or subscription agreement with Aptean. Aptean reserves the right to change the terms and conditions of their support services for its product lines, including the Verdiem product suite.*

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TABLE OF CONTENTS

[Overview 1](#_Toc515878135)

[Support Coverage 1](#_Toc515878136)

[Maintenance & Subscription Support 2](#_Toc515878137)

[Support 2](#_Toc515878138)

[Hours of Operation 2](#_Toc515878139)

[Premium Support Offerings (This section should be optional per product, as some do not have premium customers) 2](#_Toc515878140)

[Severity Level & Initial Response Times 3](#_Toc515878141)

[High-Level Support Process 4](#_Toc515878142)

[Opening a New Service Ticket 6](#_Toc515878143)

[Ticket Types 6](#_Toc515878144)

[Closing a Service Ticket 7](#_Toc515878145)

[Customer Satisfaction 8](#_Toc515878146)

[Ticket Escalations 8](#_Toc515878147)

[Outside of Support 8](#_Toc515878148)

[Compliance 11](#_Toc515878149)

[Maintenance & Subscription Renewals 12](#_Toc515878150)

[An Investment in your Success 12](#_Toc515878151)

[Research & Development working for you 12](#_Toc515878152)

[World-Class Customer Support 12](#_Toc515878153)

[Education 12](#_Toc515878154)

[Knowledge Base 13](#_Toc515878155)

[Customer Events 13](#_Toc515878156)

[Aptean Contact 14](#_Toc515878157)

[Ensure Ongoing Success 14](#_Toc515878158)

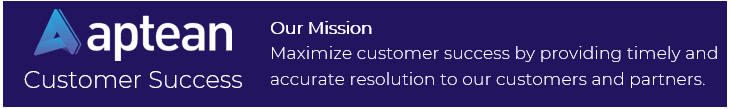
[Feedback 14](#_Toc515878159)

[Aptean Customer Success Portal 14](#_Toc515878160)

[Contacting Us 14](#_Toc515878161)

[Aptean Headquarters 15](#_Toc515878162)

# Overview



This handbook outlines our support policy and process, and how you can obtain the most benefit from our resources. We aim to provide you with the highest level of service to help you get the most from using our products.

We understand how critical our software is to your business. Our Customer Success team consistently responds to the business needs of our customers, providing industry-leading levels of support.

Our Customer Success management team uses your input to continuously improve the delivery of technical application and systems support. After we have closed a service ticket we will ask you to rate the quality of our support through a satisfaction survey. We use the survey results to gauge support quality and to drive changes within our department.

Our online Customer Success Portal, Aptean Knowledge, (<https://support.aptean.com/selfservice/>) provides direct access to a wealth of information, including:

* Company Profile and Contact maintenance
* Knowledge Base
* Ticket submission, management, and reporting
* Product releases – service packs, hot fixes, release notes
* Documentation downloads
* Aptean Learning Center - educational training videos and resources (Product-specific, remove if not applicable)
* Updating your profile via Account Administration option available on Home Page
* Customer Forums
* Product-related information such as datasheets, webinars, etc.

## Support Coverage

Aptean provides coverage for Verdiem Support from these main locations: Northampton in the UK, Atlanta? in the US and Bangalore, India. Professional Services are available through our numerous office locations and our extensive international network of Partners and distributors.

# Maintenance & Subscription Support

## Support Offerings

The following services are available as part of the standard Verdiem maintenance or subscription agreement:

* 24x7 access to our Customer Success Portal resources
* Access to Customer Support Telephone Hotlines
* Access to maintenance updates and new product versions
* Newsletters, bulletins, technical alerts and webinars
* Invitations to annual Customer Conferences and User Group events
* Access to Aptean Learning Center, including training resources and videos (Product-specific)

## Hours of Operation

Our Customer Success Team is available to assist you during the following hours:

|  |  |  |
| --- | --- | --- |
| **Region** | **Hours of Operation** | **Exclusions** |
| EMEA | 08:00 am – 08:00 pm Eastern Time | UK Statutory Holidays |
| North America | 08:00 am – 08:00 pm Eastern Time | All Federal Holidays |

## Severity Level & Initial Response Times

**Initial Response Time**

The initial response time refers to the time between you submitting a new service ticket and the first contact from the Customer Success Team. It is also referred to as the Service Level Agreement or SLA. Our target response times fall within our operational business hours which are detailed within our Hours of Operation.

**Select the Appropriate Severity**

When logging a support ticket, you will need to select the severity level of a ticket when you submit it. We request that you use your best judgment when selecting the severity level for an issue as we use it to prioritize work fairly and appropriately for the situation.

The four severity levels are:

|  |  |  |
| --- | --- | --- |
| **Severity** | **Severity Definition** | **Standard** |
|  |
| 1 - Critical | System down, cannot access system, or critical business processes affected\* | 1 hr. |
| 2 - Urgent | Production functionality not working; critical business processes affected\* | 2 hrs. |
| 3 - Standard | Business moderately impacted, users can work; efficiency is hampered | 8 hrs. |
| 4 - Low | Business not impacted significantly; issue is annoying or an enhancement | 24 hrs. |

\*We request that you provide a brief description of the impact and rationale for urgent and critical severity levels.

## High-Level Support Process

We aim to keep the Support Process consistent and easy to understand, regardless of the type of ticket, its severity or when it is raised. It is important to note that your Customer Success Team is your key point of contact and in most cases, will be able to resolve the ticket directly. There will be times when support and R&D will work together to assist with the triage and resolution.

Below are the key process stages with additional information to help progress and resolve tickets as quickly and efficiently as possible:

**Report**

To improve resolution time and your Customer Success experience, you should take the following steps before reporting your issue:

* Explore the problem to ensure that it is related to the Verdiem software:
  + - Eliminate the possibility of a setup issue by verifying configuration, system settings, file locations, directories, paths and access
    - Analyze recent changes to the system or to your environment
    - Review release notes, manuals and online help
    - Search the online Knowledge Base for information that could resolve the problem
    - Access the Customer Forum as a possible solution source
    - Attempt to recreate the issue, isolate variables and understand the business scenario
    - Document replication conditions and steps, collect screenshots of error messages and obtain relevant logs
* Please note that hardware, network issues, or certain third-party applications may be out of maintenance scope.

**Provide Relevant Details**

When logging a ticket, you will need to provide the following details:

* Verdiem application exhibiting the issue
* The module/component in which the problem was observed
* The actions being performed when the problem occurred
* The exact wording of displayed error messages
* Steps required to duplicate the problem
* Any recent changes to the system prior to the issue arising
* Investigation and troubleshooting steps taken prior to contacting us
* Associated third party products
* Any supporting detail, such as screen shots and logs
* If an urgent or critical severity, explain the impact of the issue ([see Setting Severity Level above](#_Select_the_Appropriate))

**Investigate**

* Having received the information above, the Customer Success team will investigate the request.
* The nature of the query will determine the subsequent investigation steps.
* If the Customer Success team cannot resolve the issue, they may need to escalate the ticket internally.
  + - Please refer section [Ticket Escalations](#_Ticket_Escalations_1) for additional information.
* The Customer Success team will keep you informed throughout the process to ensure all parties are up to date regarding the status of the ticket.
* Please refer section [Ticket Types](#_Ticket_Types) to help illustrate the typical contact categorizations.

**Resolve, Verify, and Close**

* Resolution may take one of several forms:
  + - Identify and recommend a work around in order to enable the business to progress
    - Identify and implement a full solution which resolves the issue at source
    - Providing knowledge/advice to you (and therefore no changes to your solution)
* If applicable, the Customer Success team will document and validate the steps in a test environment to resolve the Support Ticket, ensuring a successful resolution before handing the resolution steps over to you to implement.
* The Customer Success team will work with you to identify the quickest (and most appropriate) way to resolve a ticket, and ensure the resolution steps are implemented successfully.
* The Customer Success team may ask for your input to create a knowledgebase article for the resolution.
* Please refer to the [Closing a Service Ticket](#_CLOSING_A_SERVICE) section for more information on when the ticket is closed.

## Opening a New Service Ticket

**Service Ticket Number**

When you submit a service ticket we will notify you of the ticket number. Please reference this number in all communications with us.

Please refer to [Aptean Connect User Guide](https://connect.aptean.com/Aptean_Connect_User_Guide.pdf#page=32) for the steps to log a ticket.

## Ticket Types

The ticket type denotes the nature of an incident and the area of the company that it is related to.

|  |  |
| --- | --- |
| **Ticket Type** | **Definition** |
| Aptean Support Center | Related to an issue with the Aptean Support Center portal. |
| Beta | Used by beta customers to report issues with an Aptean beta product. |
| Bundles | Used for Upgrade Bundle Packages. Ticket used for tracking by the Project Manager. |
| Cloud | Related to an issue in the Aptean cloud hosting environment. Handled by the Cloud team. |
| Customization | Related to a customization. |
| Documentation | Related to product documentation. |
| EDI | Used to report issues with or requests for new EDI functionality. |
| Education | Related to education and/or training services. |
| Enhancement Request | Enhancement request for an Aptean product. |
| Environment | Related to the customer’s environment. |
| General Inquiry | Related to a question about an Aptean product, or about Aptean. |
| Hardware | Related to a hardware issue for the customer. |
| Installation | Related to an installation issue. |
| License Request | Request for a new license for an Aptean product. |
| Knowledgebase Suggestion | A suggestion for an addition to the Knowledgebase. |
| Product Issue (Default) | Related to a problem or issue with use of an Aptean product. |
| Services | Related a problem or issue with, or a request for, Aptean professional services. |

## Closing a Service Ticket

We keep service tickets open until you confirm that the issue has been resolved by the information your Customer Success team provided. If you do not respond to the information provided, we will send you a follow up email. If we don’t receive confirmation from you in a timely manner after the follow up email we will close the ticket. If more information comes to light, customer can enter a new ticket to resume the investigation.

These ticket statuses will automatically close after a period of time, based on the following criteria:

|  |  |  |
| --- | --- | --- |
| **Status** | **Definition** | **Time before Auto-close** |
| Waiting Customer | Customer Success is waiting for customer to provide more information on the ticket | 10 days without a response from the customer |
| Close Pending | Customer Success believes they have resolved the issue, and waiting for customer confirmation | 5 days without a response from the customer |
| Request to Close | Customer has marked the ticket as “Resolved” through the portal | 5 days without a response from the customer |

## Customer Satisfaction

When we close a ticket, we automatically email a customer satisfaction survey form to the customer contact. We urge customers to complete these surveys as they are used to measure the quality of the support and the actions and expertise of the Customer Success team.

Customer Success Team Leads and Managers review all surveys and follow up where appropriate. Your input is a key driver of changes in our systems, resources and processes.

## Ticket Escalations

Our Customer Success team works to ensure that support tickets are assigned and progressed as quickly as possible.

You may request to escalate a support ticket at any time, based on the impact an issue has on your business if:

* A ticket is not resolved in a timely manner.
* A decision is made to not fix a functionality issue.
* You are concerned about how the ticket is being handled.
* The Customer Success Manager responsible will be notified immediately if a Critical severity ticket is logged.

Below is a summary of the escalation path available:

|  |  |
| --- | --- |
| **Level of Escalation** | **Aptean** |
| Level 1 | Manager, Customer Success |
| Level 2 | Senior Manager, Customer Success |
| Level 3 | Business Leader, Verdiem Product Line |
| Level 4 | General Manager, Vertical Solutions |

## Outside of Support

**Non-Supported Services**

Aptean reserves the right to charge our standard billable rates for investigating any reported problem that is found to be caused by factors not covered by support and maintenance.

Aptean does not provide support for the following, however a billable services engagement could be requested:

* Changes in the customer operating environment which adversely affect the software
* Use of the software in a manner not specified in the documentation
* Assistance in troubleshooting or writing customizations created by someone other than Aptean
* 3rd Party Software Report writing
* Business process consulting, configuration, and over the phone implementation services
* Integration – Including general support, how to’s, changes
* Impact assessment of any configuration, environment or system growth changes
* Networking or system administration assistance
* Involvement of any customer project or change management process
* Matters beyond Aptean’s control

**Professional Services**

If your desired additional services are not covered under maintenance or subscription you can order additional (paid for) services as defined in the appropriate section of the maintenance / subscription agreement.

In general, the following professional services are available at Aptean’s standard billable rates. Contact your Account Manager for more information:

* Assistance in writing Aptean software custom reports
* Assistance with the design, creation and support of bespoke customizations and Integrations
* On-site training
* Business process consultation and Implementation services
* Client installation, data conversion, project management
* Maintaining industry compliance
* Impact assessments, Support of User Acceptance Testing of configuration of environmental changes
* Other professional services as mutually agreed

# Compliance

Aptean Customer Success provides oversight to ensure that teams are in compliance with established processes and procedures. Aptean’s governance model is as follows:

**Process:** Standardized processes are developed to ensure that Aptean customer success personnel operate in a unified and consistent manner. Training is conducted on an on-going basis to ensure that personnel are well-versed in processes and tools.

**Analytics:** Standardized metrics are used to monitor the activity of the customer success teams. Dashboards are used to provide metrics to leadership and executive management, and compared against company and industry benchmarks, to ensure the highest levels of customer satisfaction.

**Quality Assurance:** Audits of ticket activity are performed at specific points during the ticket lifecycle, to assess whether the analysts have followed defined processes, and to ensure that customer service levels are meeting established targets. Samples of open and closed tickets received within a month are audited, and phone calls are periodically monitored. Process controls are also in place to ensure security and safety of customer data both in-house at Aptean as well as when accessed remotely.

**Continuous Improvement:** Industry best practices are continuously reviewed and adopted to ensure the customer success teams are up-to-date in process and tools. Industry benchmarking is performed on a regular basis to ensure that metrics are on-par with or exceeding the industry.

# Maintenance & Subscription Renewals

An Investment in your Success

Aptean solutions are an investment in flexible technology that can help your company create and maintain a competitive advantage. Renewing your annual maintenance or subscription provides extra resources to optimally sustain and enhance the value derived from Aptean applications.

Enjoy full access to all the benefits of annual subscription:

### Research & Development working for you

Our Research & Development teams are continually at work, exploring new technologies and new ways to enhance our applications.

### World-Class Customer Support

* **Exceptional service:** We’re proud of our Customer Success Team’s overall customer satisfaction rating of 97% - well above the industry average. If you are not satisfied and you let us know through a service ticket survey, we’ll be in touch to find out why and make sure we learn and improve.
* **Expertise:** Access to a global team of product experts with proven investigative and troubleshooting skills.
* **Easy access:** Through our Customer Portal or the hotlines, our Customer Success team is available to you. Once you’ve contacted us, we use remote support tools and industry best practices on troubleshooting and effective ticket queue management to get to the root of your issue and find a resolution.

### Education

The following education services are available as part of the standard Verdiem maintenance or subscription agreement:

**Aptean Learning Center**

Aptean Learning Center is an essential resource to help you hit the ground running with Verdiem. Whether you want to review what’s new in the latest version, or configure a report, this is the place to start.

We have catered for all Verdiem users, from the end user to the system administrator, so visit the Customer Portal to find your answers.

**Getting Started**

Aptean Learning Center contains a list of bite size easy to follow recordings, giving you chance to learn about our products at your own pace, during your own time.

We’re always adding new content to make sure we’re helping our customers get the most value out of their subscription.   
  
Our current recordings include (not limited to):

* What's New in Verdiem
* Working with Security
* Configuring Verdiem
* Entities and Fields
* Working with Reports
* Working with Searches

**Product Documentation**

Product Documentation is available through the Aptean Customer Support portal, and is available with annual maintenance or subscription.

### Knowledge Base

We have a large knowledge base of tips & tricks, and answers to numerous questions. This is the place to go if your subject isn’t covered in a recording, or you have an error you don’t understand. Start your search [here.](https://support.aptean.com/selfservice/microsites/ksearch.do)

### Customer Events

We offer free Webinars introducing you to new products and services and presenting ideas on optimal use of the applications for your industry.

### Aptean Contact

Your Aptean Contact (Customer Success Manager / Account Manager) is responsible for ensuring your success and satisfaction with our products. They can help you stay up-to-date with new products, services, and opportunities, as well as help you plan upgrades, migrations, and other projects.

## Ensure Ongoing Success

Your annual maintenance payments deliver continuous value from multiple resources and ongoing enhancements to your Aptean solutions. Ensure your team has the support and resources they need, when they need them.

To learn more about the services and resources offered to you with Aptean Verdiem maintenance ask our Customer Success team to put you in touch with your Account Manager.

## Feedback

Our Customer Success team wants you to be satisfied with your Verdiem solutions and your experiences with us. Please do not hesitate to contact us with any questions, comments, suggestions or concerns.

## Aptean Customer Success Portal

Login at: <https://support.aptean.com/selfservice/>

## Contacting Us

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Verdiem Customer Support** | | | | | |
| **Region** | **Number** | **Hours of Operation** | **Location** | **Email** | **Holidays Observed** |
| North America | +1 317 249 1228 | 08:00 am – 08:00 pm Eastern Time | N/A | support@verdiem.com | All US Federal Holidays |
| EMEA | +1 317 249 1228 | 08:00 am – 08:00 pm Eastern Time | N/A | support@verdiem.com |

Please refer to our website for the most current details at <http://www.aptean.com/en/Support>

## Aptean Headquarters

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