



Customer Care Guide

TABLE OF CONTENTS

- 3. Introduction
- 3. Hours of Operation
- 4. Incident Ticket Severity Level Definitions & Response Target
- 5. Using the Agreement Express Web Portal
- 6. Service Requests & Application Enhancements
- 6. When Agreement Express Will Contact You
- 7. Other Important Information
- 8. Customer Engagement
- 8. Computer and System Requirements
- 11. Contact Support

INTRODUCTION

Agreement Express appreciates how important your Agreement Express services are to your business. Your organization relies on your partnership with Agreement Express when there are questions, problems, or requests concerning these services.

This document describes how you can use the Agreement Express customer care organization to support your Agreement Express service.

Agreement Express will update and distribute new versions of this document from time to time. Please ensure your organization is using the most recent copy.

HOURS OF OPERATION

Agreement Express Support operates 24/7 so it's always open to accept your ticket, phone call, or email. This team is the primary point of contact for incidents, service requests, enhancements, and updates. Outside of general business hours, critical issues are always responded to within 15 minutes. Most minor issues are resolved within an hour from the time we are notified. Issues for our Development team are handled the next business day.

The Agreement Express Support Group tracks all incidents, problems and bugs using our Web Portal tool. Prior to the start of Agreement Express support management activities, you need to log the identified incident(s) there.

Agreement Express Support Web Portal URL: <https://support.agreementexpress.com/home>

Incident tickets opened via the Web Portal are automatically assigned a Severity 3 status.

Report Severity 1 incidents by phone to ensure immediate attention. Agreement Express may downgrade the severity of a ticket if it is determined that the severity of the issue has been reported incorrectly.

Agreement Express Support Team Toll Free Number: **1.877.247.3397 then press 1**

INCIDENT TICKET SEVERITY LEVEL DEFINITIONS & RESPONSE TARGET

Agreement Express will determine the severity level of your ticket as per the chart below. Technical support will aim to begin work on your incident ticket within the specified response time.

Severity Level	Nature of Impact	Response Target
1 Critical	Critical production issue affecting all or a majority of users, including system unavailable, service crashes or hangs continuously, or data integrity issues experienced. Customer business disruption with no workaround available.	15 minutes
2 Major	Major service functionality is impacted or significant performance degradation is experienced. Issue is persistent and affects many users and/or critical functionality is unusable. A temporary workaround may be available. Customer operations can continue in a restricted manner. Examples: <ul style="list-style-type: none"> • Service is operational but highly degraded performance to the point of major impact on usage. • Important features or access to integrated third party applications are unavailable with no acceptable workaround; however, operations can continue in a restricted fashion. 	2 hours
3 Minor	System performance issue or bug affecting some but not all users, or performance/bug affects all users but service is materially operational although with some degradation. Temporary workaround is available. Problem with non-critical feature or functionality. Examples: <ul style="list-style-type: none"> • An advisor cannot open a document that was submitted. • Search function is not providing the correct results. • A user cannot access the application and may require a password reset. <p>Note: Service requests and application enhancements will be regarded as Severity Level 3.</p>	3 days
4 Cosmetic	Minor issues that do not materially affect productive use of the system. Inquiry regarding a routine technical issue; information requested on application capabilities, navigation, installation or configuration; bug affecting a small number of users. Acceptable workaround available.	21 days

USING THE AGREEMENT EXPRESS WEB PORTAL

The Agreement Express Web Portal can be used for reporting incidents, initiating service requests, and introducing requirements to a new application enhancement.

In addition, this Web Portal stores a link to our knowledge base with information on incident resolutions, workarounds, tips, tricks, and frequently asked questions.

Agreement Express Web Portal URL: <https://support.agreementexpress.com/home>.

SUBMITTING INCIDENT TICKETS THROUGH THE AGREEMENT EXPRESS WEB PORTAL

When submitting an incident ticket via the Web Portal, you should supply certain information. Depending on the type of incident, this information may include:

- Your email contact information
- Alternate's phone and email contact information
- Brief description of incident, including screen shots or error messages
- Number of occurrences
- Any other information reasonable required by Agreement Express to diagnose and resolve the incident

The Agreement Express Support Team will acknowledge your ticket and respond to the ticket number within the response targets noted in sections above. Status updates on your incident will be communicated via email or during regular status meetings which will be setup with your company.

Please note that certain Agreement Express functionality may depend on systems that are outside of Agreement Express's scope. These include things such as your internet access or other systems not hosted by Agreement Express.

AGREEMENT EXPRESS KNOWLEDGE BASE

The Agreement Express knowledge base stores incident resolutions (including Release Notes), workarounds, tips, tricks, frequently asked questions and other information about using your Agreement Express service. The knowledge base evolves over time as new articles are added so Agreement Express suggests you review the site periodically for new ways to use your service.

Agreement Express searchable knowledge base:
<https://support.agreementexpress.com/hc/en-us>

SERVICE REQUESTS & APPLICATION ENHANCEMENTS

You will need to work with Agreement Express if you wish to make certain types of changes to your application, such as changes to templates, changes to reminder email frequency or content, or requests for additional functionality.

If you have a Service or Enhancement request, you can contact your Account Manager. Or, you can submit a ticket via the Agreement Express Web Portal.

When submitting a service request or enhancement ticket via the Web Portal, please supply certain information. Depending on the type of request, this information may include:

- Your phone and email contact information
- Brief description of request or enhancement
- Attachments of detailed requirements (if available)
- Name and information of the authorized contact

You can view all your request and enhancements through the Web Portal. If you want to change or cancel a request and/or enhancement, please work directly with the analyst who has been assigned to your company.

Please be aware that certain types of service requests may be billable or may require changes to your contract. Large or complex requests and/or enhancements may be treated as a project. A delivery team may be assigned and a change request (CR) or statement of work developed. Permission will be obtained from an authorized contact before any billable work is done.

WHEN AGREEMENT EXPRESS WILL CONTACT YOU

WE'LL NOTIFY YOU DURING HIGH-SEVERITY INCIDENTS

Agreement Express will notify you by email when we detect a significant, service disrupting incident on the Agreement Express system, generally defined as Severity Level 1 or 2.

While Agreement Express informs all customers of major incidents, only a subset of customers may be affected. You should allow your own company's policies to decide when to invoke any backup systems or disaster recovery plans.

WE'LL ALSO NOTIFY YOU OF PLANNED SERVICE-IMPACTING EVENTS

Agreement Express will notify you of any scheduled, service-affecting disruptions or changes by email. You will be given at least 24 hours' notice of any events.

Very rarely, Agreement Express may be required to perform emergency changes that will affect

service. Agreement Express will give as much notice as possible before such events.

ENSURING AGREEMENT EXPRESS SUPPORT CAN CONTACT YOU

To ensure Agreement Express able to notify you, ensure we have a contact email address. Agreement Express recommends this email address be a mailing list of your company's stakeholders, who would want to receive notifications, and who have the ability to take any action if required.

OTHER IMPORTANT INFORMATION

MANAGING ACCOUNTS

You are responsible for controlling Agreement Express accounts for your company, to ensure you won't be held responsible for misuse of the system by any current or former users.

Agreement Express strongly recommends that at the least, passwords are changed whenever a user no longer needs access to the system. This is especially true for administrators who have access to create accounts, change configurations and view agreements.

Agreement Express Support can also make changes for you if you open a Support ticket.

PASSWORD POLICIES

You should ensure your Agreement Express configuration and staff adhere to any password, security or other policies mandated by your company. Agreement Express password policy is completely configurable by your administrator. Agreement Express Support can also make changes for you if you open a Support ticket.

PRIVATE DATA

While Agreement Express treats all data on the system with due care, we recommend you contact Agreement Express if you will be using the system to store any information which would be considered private or sensitive, such as credit card numbers or SSNs/SINs. Agreement Express can work with you to determine if any changes are necessary to your configuration to ensure the information is adequately protected.

CUSTOMER ENGAGEMENT

PROCESS MANAGEMENT OVERVIEW

In order to provide enhanced services and full transparency, the Agreement Express Support team can schedule review meetings with your team as required. The objectives of these meetings will be to:

- Review and prioritise current Incidents / Requests / Enhancements
- Provide updates on the status of opened items
- Create CRs and develop detailed requirements for enhancements
- Communicate the expected deployment of incidents, requests, and enhancements
- Communicate application changes and/or upcoming deployments

Talk to your account manager if you are interested in knowing about additional Support services that may be available to you.

COMPUTER AND SYSTEM REQUIREMENTS

Agreement Express asks that customers comply with the basic computer and system requirements listed in this section. Running Agreement Express without meeting these requirements may impact your user experience and will limit our capacity to assist you.

SUPPORTED WEB BROWSERS

The following is a list of supported Web Browser:

- Internet Explorer
 - versions 9 and up for the Flash-based interface
 - version 10 and up for HTML5 interface
- Firefox (versions 10 and up)
- Chrome (versions 10 and up)
- Safari on Mac (versions 4 and up)

Web Browser Settings: Browsers must have Java and JavaScript enabled and Adobe Flash Player Plug-in version 11 (or higher) to sign agreements in web browsers.

SUPPORTED MOBILE BROWSERS

Note that Mobile Browsing is not available to users unless the feature is turned on by an Agreement Express System Admin. Customers interested in this feature should request it via the Agreement Express Support team's web portal.

- **On iOS versions 6.0+**
 - Safari
- **On other devices**
 - Firefox (versions 15+)
 - Chrome (versions 21+)
 - IE (versions 10+)

Mobile Browser Settings: Browsers must have JavaScript enabled.

ADDITIONAL SOFTWARE REQUIREMENTS

To open/view Agreement Express downloaded files, several software applications may require installation on the user's computer. They include, but may not be limited to:

Adobe Reader for Desktop

- Adobe Reader is required to view PDF files that have been download from the Agreement Express application. As of this writing the latest version of Adobe Reader is XI
- When installed, users should add Agreement Express as a trusted identity. Without that, your PDF reader may not be able to validate the signatures and create an error when attempting to open the file

Adobe Reader for Mobile: Adobe Reader for Mobile is support on the following mobile platforms:

- iOS 5 or later
- Android™ 2.2 or later
- Microsoft® Windows® 8 or later
- Windows Phone 7.5 or later
- BlackBerry® 10 or later (Reader® preinstalled)

Microsoft Excel

- Some features within Agreement Express allow users to export content to excel files. In order to open these exported files, Windows Microsoft Excel should be installed in the user's computer

In most cases, newer versions of applications are backwards compatible. However, older versions may not support the opening of files in newer versions. It is recommended that all software used with Agreement Express is, at minimum, the same version in all machines. Alternatively, ensure that these machines are all regularly updated to newer versions of applications that are backward compatible.

TEMPLATE BUILDING SOFTWARE REQUIREMENTS

Users in Agreement Express can create custom templates using the following files types:

- MS Word files
- PDF files
- Text files

When designing PDF files for the purpose of creating Agreement Express templates, we recommend using Adobe Acrobat and NOT Adobe LiveCycle.

OTHER CONSIDERATIONS

Please note that performance of the solution is not guaranteed due to

- the inherent nature of the user's devices,
- internet connections,
- time of day/concurrency,
- and/or file payload.

Running Agreement Express without meeting these requirements and/or recommendations may impact your user experience, and if so we (Agreement Express) are limited in our capacity to assist you. In this case, we will first suggest upgrading to these requirements to improve performance. We encourage your teams to log tickets so that we can efficiently track and address any issues related to performance.

CONTACT SUPPORT

BY WEB PORTAL

You can submit tickets via the Agreement Express support website at <https://support.agreementexpress.com/home>.

BY EMAIL

Email Agreement Express support at support@agreementexpress.com

BY PHONE

You can contact Agreement Express Support by phone at **1.877.247.3397** then press 1

LOGGING A SUPPORT TICKET CHECKLIST

* NOTE EACH ISSUE REQUIRES AN INDIVIDUAL TICKET.

- Environment (i.e. Production or UAT)
- Screenshot of the problem
- Username of user who reproduced the issue in the screenshot
- Template name (or Transaction ID) and page #
- Description of problem
- Exact steps used to reproduce problem
- Browser name and version