

Guide to Customer Support

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Products covered by this guide include:

- Field Service Edge
- Service Optimization
- Customer Engagement Module

To view the most current version of this guide, visit
<https://www.salesforce.com/company/legal/clicksoftware/>

Table of Contents:

- [Introduction](#)
- [Support Offerings](#)
 - [Support Offering Tiers](#)
 - [Customizations / Add-on Support](#)
 - [ClickSoftware Certified Implementers](#)
 - [Coverage](#)
 - [Initial Response time by severity](#)
 - [Problem Severity definition categories](#)
- [Contacting Click Support](#)
 - [Click Customer Community](#)
 - [Phone Support](#)
 - [Escalations](#)
 - [Case Priority Guidelines](#)
- [Legacy Value Added Service Offerings](#)
 - [Designated Support Engineer \(DSE\)](#)
 - [Activities and Deliverables](#)
 - [Technical Account Manager \(TAM\)](#)
 - [Activities and Deliverables](#)
- [Field Service Edge Cloud Services](#)
 - [Environments](#)
 - [Service Edge Licensing Policy](#)
 - [Monitoring & Notifications](#)
 - [Service Updates](#)
 - [Scheduled Maintenance Windows](#)
 - [Service Level Agreement \(SLA\)](#)
- [Service Optimization - OnPrem & Cloud](#)
 - [Versions 8.3 and below](#)
 - [Software Updates & End-of-Life Policies](#)

Introduction

This Guide to Customer Support describes the specific support service policies provided by ClickSoftware to our customers. ClickSoftware provides a full range of global support services to meet your organization's unique needs and requirements, including self-service and value-added support options. Our products and services are integral to your success, this guide will help you understand how to maximize the benefits you will receive from support and your solution. For more details on what you can expect when signing up for our [Cloud Services](#) subscriptions please refer to the [Cloud Services](#) section below. The policies detailed are for the duration of the subscription term set forth in an applicable order form and subject to payment of the applicable subscription fees. ClickSoftware will update this guide from time-to-time to reflect enhancements to our service and policy.

Support Offerings

Support Offering Tiers

ClickSoftware offers two levels of support & maintenance for all ClickSoftware products and services. To simplify and improve our offerings, we have aligned our legacy Silver & Gold on-prem support offerings with all other ClickSoftware product and services into the following two levels:

Standard (Silver): Included in the base subscription for all our Cloud offerings (eg. SO V8 Cloud & FSE) and available for purchase for our OnPrem or perpetual licensed products.

Advanced (Gold): Available for customers looking for around the clock coverage and faster response times. Please consult your ClickSoftware account representative for details on availability and pricing.

Customizations / Add-on Support

These Support Offerings are only for ClickSoftware's core Products. Integration of any specific add-on developments created specifically for your environment is not included in the perpetual or subscription fees and these Support offerings. In the event the interface to the Service in your environment has been changed, work performed related to the integration of any specific add on developments (eg. customization) created specifically for your environment are not included in the maintenance & support license and/or subscription fees.

ClickSoftware Certified Implementers

ClickSoftware requires that all implementations of Field Service Edge be performed by a ClickSoftware Certified Implementer. ClickSoftware will not provide support for implementation queries, immaterial defects or defects due to modifications of the Subscription Service made by any person who is not a Certified implementer. To view a list of Certified Partners click [here](#).

Coverage

Support Level	Availability
Standard (Silver)	8am-5pm local business time*
Advanced (Gold)	24 x 7 support

* Standard Support for Cloud Services (e.g. SO V8 Cloud & FSE) includes 24x7 coverage for Sev 1 issues

Initial Response time by severity

Support Level	Severity	Initial Response	Work Effort	Communication Frequency**
Standard (Silver)	1	1 hour (9x5)*	Continuous until relief identified	Every 3-4 hours, local business hours
	2	4 hours (9x5)	Daily during clients business hours only	Once per day, local business hours
	3	24 hours (9x5)	Weekly during clients business hours only	Once a week
	4	48 hours (9x5)	Weekly during clients business hours only	Once a week
Advanced (Gold)	1	30 minutes (24x7)	Continuous until relief identified	Every 3-4 hours, 7 day/week
	2	2 hours (24x7)	Daily during clients business hours or continuous upon request	Once per day, local business hours
	3	24 hours (9x5)	Weekly during clients business hours only	Once every 3 days, local business hours
	4	48 hours (9x5)	Weekly during clients business hours only	Once a week

* Standard Support for Cloud Services (e.g. SO V8 Cloud & FSE) includes 24x7 coverage for Sev 1 issues

** More frequent updates as agreed upon by both parties

Problem Severity definition categories

Case Severity	Definition	Examples
Severity 1	Critical: Severe problem preventing the customer from performing critical business functions.	<ul style="list-style-type: none">• Production system crash or hang• Users cannot access the service• No tasks are being scheduled
Severity 2	High Impact: An essential part of the Service is unusable due to a defect. Essential parts or functions are those that majority of the users need to use.	<ul style="list-style-type: none">• Production system adversely impacted• Real or perceived data loss or corruption• Errors which prevents users from completing and forwarding requested information• Non-Production system critical issues
Severity 3	Medium Impact: Client's use of the Services is somewhat compromised, but all essential parts can be used	<ul style="list-style-type: none">• Production or development system has encountered a non-critical problem or defect• Question on product use• Inability to edit business objects details• Inaccurate Travel Time display on Gantt.
Severity 4	Low Impact / Request: Any other material deviation from the documentation that affects Client's use of the Services.	<ul style="list-style-type: none">• Inability to delete optimization profiles.• Slow performance of the Zip Code Import Wizard• No customer business impact• Request for enhancements

Contacting Click Support

Click Customer Community

ClickSoftware provides all customers and partners with access to our Customer Community portal called Click Access. On the Community you will find:

- Answers in the ClickSoftware Support Knowledge Base
- Submit, update, or review [Support Cases](#)
- Engage with the ClickSoftware Community
- Download software updates
- Stay informed with our Support Newsletter
- Tap into ClickSoftware Documentation & Training

Go to community.clicksoftware.com/support to log-in. If you do not already have a login, click here to [Request Access](#). Active support maintenance subscription with ClickSoftware is required for access.

For detailed instructions click on [How to open a case with Customer Support](#).

Phone Support

ClickSoftware provides a 24x7 support hotline. Calls to the hotline might not be answered immediately, but the menu will offer to call you back. If you choose to hold, our next available Customer Service Representative will open a case for you and a Tech Support Engineer will contact you. It is recommended to [open a case with Customer Support](#) through our customer community portal, [ClickAccess](#). You can reach our Support Hotline through the following phone numbers:

North America	EMEA	APJ
+1 781-203-3600	+44 2031 167400	+61 (0) 3 9010 1982 , or +61 (0) 3 9946 6400 (Option 2)

Additional [country-specific numbers can be found here](#).

Escalations

If you are concerned about an open issue with Customer Support, you may escalate your case at any time. Customers may decide to escalate the handling of a support case due to several reasons:

- Excessive handling time
- Severe business implication
- Unacceptable resolution for a problem
- Personal issues with any of the support staff

Your options for escalating include:

- Raising the **priority** of your support case within our [Customer Community portal](#).
- Call the [ClickSoftware Support Center hotline](#) and requesting to speak with a Support Manager.

Please be prepared to provide your case number & ask to speak to a manager so your request is directed to the appropriate resources for prompt resolution. Once you make a case escalation request, the Technical Support Manager will evaluate your case and situation to determine the appropriate resources to assign.

Case Priority Guidelines

Urgency	Problem Description	Example
1	Immediate: No useful work can be done.	<ul style="list-style-type: none">• Production server crash. Usually goes together with Severity 1• No Task is being scheduled.
2	High: A relatively quick resolution is required.	<ul style="list-style-type: none">• A manual workaround exists for a problem in a crucial automatic process.• Intermittent failures of a crucial module, with a workaround/recovery.
3	Medium: Resolution is not required within days.	<ul style="list-style-type: none">• Usage/performance consultation.• Report on an issue that slightly hinders the usability of the system.
4	Low: The full resolution can be supplied in the following month.	<ul style="list-style-type: none">• Inquiry about future version / Fix Planned.• Report of a minor issue.

Legacy Value Added Service Offerings

The following legacy value added service offerings are no longer available for new purchases.

Designated Support Engineer (DSE)

The DSE Program guarantees a named technical support engineer to work on your support cases or answer questions related to the solution. Your DSE is your trusted advisor for technical support issues and keeps you informed of ongoing support activity through knowledge-sharing, regularly scheduled review meetings and routine written/verbal communication. In addition to your Advanced Support, the DSE service will provide:

- Designated senior ClickSoftware technical support resource
- Improved resolution times thanks to detailed knowledge of your solution deployment
- Useful recommendations for improved maintenance and best practices
- Regular case/issue status review meetings
- Updates on relevant hot fixes/patches for your product

Activities and Deliverables

The DSE offering brings detailed expertise to the solution and will help to meet your company's product use cases through several actions, including:

- Regular review of all current open and closed support cases for the period
- Oversight of support activity to identify potential trends and specific problem areas
- Best practice support recommendations as you expand the use of the solution
- Regular case/issue status review meetings
- Communication of identified knowledge gaps or training opportunities
- Communicates your product feedback to ClickSoftware product teams to help improve the solution roadmap

Technical Account Manager (TAM)

The named TAM program assures a technical advocate who is working behind the scenes at ClickSoftware. Your TAM is a trusted advisor for product-specific technical support issues who keeps you informed of ongoing support activity through knowledge-sharing, regularly scheduled review meetings and routine written/ verbal communication. The TAM support option adds the following services, in addition to Extended Support:

- An internal advocate who works with primary contacts at your organization
- A designated point of contact for escalations and support account management needs

- Frequent and focused communications and weekly reporting
- On-site account reviews and personalized support to help develop a deeper understanding of your ClickSoftware business needs and strategy
- Priority support: access to subject matter experts and high-priority case handling
- Ability to influence future product direction: RFE visibility, input into product roadmap and beta/early access programs.

Activities and Deliverables

Your TAM will continuously monitor your solution and share reports to keep you up to date over the course of the contract period. This includes:

- A weekly dashboard of all current open and closed support cases for the period
 - Reviews support activity for trends and potential problem areas
 - Provides best practice recommendations on support engagements
 - Identifies knowledge gaps for additional training opportunities
 - Communicates your feedback to ClickSoftware technical experts regarding your specific support requirements
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Field Service Edge Cloud Services

By subscribing to ClickSoftware Field Service Edge cloud services, you will operate your business knowing that the underlying technical infrastructure is being competently managed and maintained on your behalf with seamless availability, by an organization with strong financial viability that presents no risk to your future business continuity. This section covers specific policies related to your Field Service Edge cloud services subscription.

Environments

Based on the level of service you subscribe to you will have access to the following environments for development/testing:

Standard - included in with the purchase of Field Service Edge

- 3 development sandboxes
- 1 partial sandbox

Advanced - requires an additional subscription, please contact your ClickSoftware Account Representative for more details on pricing and availability.

- 5 development sandboxes
- 1 partial sandbox for development/testing

Customers can acquire additional non-production environments separately, based on the following pricing:

- Development
- Partial Sandbox
- Full Sandbox

Please talk with your Click Account Manager for pricing details.

Service Edge Licensing Policy

1. All users with a unique ID and password require a Named User License. Licensing is required for any resource who logs into the application, who is managed and/or scheduled in the application, or who creates or manages work for the application. Examples for named users:
 1. Field resources
 2. Dispatchers
 3. Administrators
 4. Supervisors
 5. Managers
 6. Contractors
2. All unique non-human assets (i.e. equipment/assets) managed and/or scheduled in the application require an Equipment Resource License. Examples of equipment resources:
 1. Construction Equipment
 2. Power Generators
 3. Utility Pumps

4. Special Tools
3. License quantities for all Service Edge Editions and modules must match. For example, if a customer acquires 1,000 Service Edge Ultimate licenses and you wish to add Service Edge Mobile, you must purchase 1,000 Service Edge Mobile licenses.

Monitoring & Notifications

FSE uses intelligent Visibility Infrastructure to monitor availability and performance of the various services. The monitoring is based on SLI and SLO to adhere to the [SLA committed to the customers](#).

The visibility Infrastructure is able to alert when pre-configured thresholds are exceeded, and then will notify the relevant team/person to take care of the incident.

Once incident is triggered Salesforce processes are implemented for incident management and customer notification are sent out from our Trust website: status.clicksoftware.com

Service Updates

Updates to the services are considered part of the changes to Cloud Service for the purpose of the Cloud Service Agreement. All maintenance updates are not disruptive to the service unless Click notifies otherwise, see the section on [Scheduled Maintenance Windows](#) for more detail. Given Field Service Edge is a multi-tenant cloud service, all update types are applied to an entire region at the same time and not to an individual tenant. Click breaks out the service updates into the following 2 types:

Maintenance Release

Click plans monthly Maintenance Releases (MR) where we implement minor updates that include feature enhancements, bug fixes, security patches, and general service improvements. Please refer to [Planned Content for Next Release](#) page for details on upcoming content. You can find a list of [Known Issues here](#) that have been fixed and/or are still open.

- Maintenance releases (MRs) have a development cycle of 4 months and are deployed three times a year - in May-June, September-October and January-February.
- The [planned release content](#) is shared with customers 90 days prior to the date of availability on Production. Customers are also informed before and after the upgrade of their environments.
- MRs include feature enhancements, bug fixes, security patches, and infrastructure improvements.
- Maintenance releases go through a tight QA process, including two weeks of regression testing, and have around 1 month between Sandbox availability and Production availability, to allow for additional testing by customers.
- Customers are informed before and after the upgrade of their environments.
- Code deployment, without making the new features available:

- This is a one-day activity, done once for all Sandbox environments, and a month later to all Production environments
 - Code deployment is usually scheduled on Sundays
- Features availability (also known as Feature-Toggle), exposing switches via which customers can activate and use the new features:
 - This is a five-day activity, done gradually for all Sandbox environments, and a month later for all Production environments

Hot Fixes

If an issue is identified as a Sev 1 defect and an emergency fix is required, Click will produce a Hot Fix. Hot Fixes are:

- Initiated for urgent bug fixes (Severity 1, and sometimes Severity 2, pending their Priority) that are required in the sandbox and/or production.
- Hotfixes (HFs) have deployment cycle of 1-2 days, depending on the content, and can be initiated anytime, pending the need.
- Decisions, as to release of a Hotfix, depends on the urgency of the specific bug fix to the customer, and on ClickSoftware's consideration. These decisions are taken jointly by R&D, Customer Support and/or Professional Services, whichever department is the main customer contact at the time.
- If you are impacted by specific issues addressed in a Hot Fix, you will be notified through your support case ticket.

Scheduled Maintenance Windows

The following table outlines the scheduled maintenance windows for all ClickSoftware cloud service offerings. All other maintenance windows for cloud services are on an as-needed basis for urgent updates to the ClickSoftware cloud platform. Our maintenance windows, both scheduled and unscheduled, are designed to be non-service impacting. In the event where services may be impacted, Customers will be notified. See [Click's Service Level Agreement](#) for more details on Schedule Downtime notifications.

Americas	Sunday 1:00am EST to Sunday 5:00am EST
EMEA	Saturday 10:00pm to Sunday 2:00am UTC
APAC	Saturday 10:00pm to Sunday 2:00am AEST

Service Level Agreement (SLA)

For more details on the Field Service Edge Service Level Agreement please refer to: [Service Level Agreement \(SLA\) for ClickSoftware Field Service Edge & CEM Services](#).

Service Optimization - OnPrem & Cloud

Versions 8.3 and below

This section covers specific policies for ClickSoftware Service Optimization versions 8.3 and below for both On-Prem (perpetual license) and V8 Cloud Services.

Service Optimization 8.3 includes both V8 Cloud as well as V8 on-prem, and is comprised of all V8 products and add-ons:

- ClickSchedule
- ClickMobile Touch (including all its apps)
- ClickRoster
- ClickForecast
- ClickPlan
- ClickDashboard
- ClickAnalyze Reporting
- Capacity Planning
- SLR
- CEM for V8
- ClickLocate
- ClickContact
- ESRI GIS Adapter
- SAP Adapter

Software Updates & End-of-Life Policies

ClickSoftware provides software maintenance releases and updates as they are available without additional charge for customers with active maintenance and support contracts. The contents of maintenance releases and updates are determined by ClickSoftware. An active Maintenance and Support contract is required for the sale or renewal of all V8 products and add-ons (eg. SLR, ClickDashboard). Please refer to our [Product Life Cycle Policy](#) for end-of-life and extended support details for our on-premise (perpetual licensed) products. Please contact your ClickSoftware Account Representative for details on pricing & availability.