



Support Handbook

Version 2023 R2

Abstract

This document describes the Latitude Support policies and serves as a guide for Latitude Support and Latitude Customers.

Support revises this handbook periodically as processes improve and to address Customer needs. For the latest version of this document, see our Product Information site.

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Purpose of this Handbook

The Latitude by Genesys Support Handbook sets expectations between Customers and Support, acquaints new Customers with Support policies, and serves as a guide for how Customers and Support work together.

Mission statement

We aim to provide Customers with world-class support by providing the information, tools, assistance, and mentoring necessary to enable their success.

Philosophy

Latitude Support is dedicated to enabling our Customers to succeed. We are here to assist you to implement and support your organization on an ongoing basis.

Our common goal is to create an environment that is as successful as possible. Together, we can ensure the prevention of potential issues and the quick resolution of those issues we cannot prevent. We can continue to enable our Customers to succeed by deploying the most exciting ARM (Accounts Receivable Management) solution available in the market today.

Personas

For the purposes of this Handbook, we use the following personas:

- **Customer** - Any Latitude by Genesys Customer organization
- **Employee** - Any Latitude by Genesys Support employee
- **Support** - The Latitude by Genesys Support organization
- **User** - Any Latitude by Genesys Customer organization employee or consumer
- **Vendor** - Any vendor of third-party products, whether integrated to Latitude or not

Feedback and surveys

Genesys surveys our Customers regarding their interactions with Support which is made available via a link in the closed incident notification. With your input, we can further develop our support organization to meet your needs and enable your success.

Reference information

Support maintains a [Latitude Documentation site](#). To access, login then select “More Services”, “Latitude by Genesis” and then your version of Latitude (Latitude 10.0 or Liquid Latitude).

- **Documentation Updates** - Organizes official release information, documentation, release notes, Service updates, technical references and recommendations for each Latitude by Genesys product.
- **Vendor Interfaces** - Supplies documentation on customer interfaces, Fusion Wizard help, and Credit Bureau Reporting. This can be found by clicking on “Technical References”.

Latitude Community Group

The Latitude Community Group is an excellent place to interact with other Latitude users and to get important announcements and tips. Monthly patch release announcements and included SCR's (System Change Requests) are also posted to this group.

1. Go to [Latitude Community site](#) and click the **Sign In** button on the upper right.
2. If you have My Support access already with Genesys (the care portal where you open Support tickets), you will need to sign in using your existing company email address and password.
3. If you do not have My Support access already with Genesys, you will be asked to register with your company email address and return when your registration is complete.

Service Levels and Targets

Support has four (4) levels of support, from highest to lowest: Priority 1, Priority 2, Priority 3, and Priority 4.

Priority 1

Priority 1 indicates critical business impact on production or operations with no workaround.

Submitting a P1 after normal business hours - Support provided outside normal hours are for emergency issues only. Call Support at **1-866-396-2599**.

IMPORTANT - Do not email or call a specific individual as they may not be available.

Examples

- The issue has crippled the Customer's business
- SQL Server instance in production is down, affecting business operability
- 3rd party Dialer not functioning
- Custodian stopped running or presents an error(s)
- Customer cannot process payments
- Application timeouts that impact all Users
- Customer cannot invoice or remit
- End of day - cannot queue or schedule accounts
- Repeated production outages

Key deliverables

- Priority 1 support involves reacting to emergency situations by assigning a suitable resource immediately
- Unless otherwise agreed upon with the Customer, Support services Priority 1 incidents on a continual effort basis until resolution
- Resolution of a Priority 1 condition can occur in various forms, including temporary relief which enables the Customer's business to operate normally until Support can provide a comprehensive solution

Delivery requirements

- Both the product and the Customer are eligible for Support assistance
- Customer is available 24x7 to collaborate actively with an Employee
- System access or system information is available 24x7

Target response objective

During the hours of 8:00 am to 7:00 pm US Eastern Monday through Friday, initial response by way of the Support line is 70 percent of calls answered within 15 minutes.

Ongoing responses must be continuous (every 30 minutes) until the incident case lowers to a Priority 2 or is resolved.

Unless otherwise agreed, a break in continual effort by the Customer can result in the case no longer being classified as critical and can result in a lowering of priority.

NOTE - The Customer must communicate all Priority 1 incidents using the Support line during normal business hours. If the Customer uses self-help via email or the online portal, Support cannot guarantee initial target response times.

Priority 2

Priority 2 indicates significant business impact where the program is usable but severely limited, resulting in a serious impact on production operations and there is no workaround.

Examples

- Critical application returning error
- Poor performance having serious negative impact on business
- A database/application error has occurred, severely hampering business operability
- Time sensitive business processes (loading, creating, and exploration of data files)
- Unable to load new business
- Letter processing is not functioning

Key deliverables

- Support services Priority 2 issues as critical during normal business hours unless an alternative customer agreement exists and until the Priority 2 condition resolves
- Support provides rapid resolution using best effort

Delivery requirements

- Both the product and the Customer are eligible for Support assistance
- Customer, unless otherwise agreed to, is available during normal business hours
- System access or system information is, unless otherwise agreed to, available during normal business hours

Target response objective

During the hours of 8:00 am to 7:00 pm US Eastern Monday through Friday, initial response by way of the Support line is 80 percent of calls answered within 30 minutes or less.

Ongoing responses are continuous (every 1 hour) until the incident case lowers to a Priority 3 or resolves.

Unless otherwise agreed, a break in continual effort by the Customer can result in the case no longer being classified as critical and can result in a lowering of priority.

NOTE - The Customer must communicate all Priority 2 incidents using the Support line during normal business hours. If the Customer uses self-help via email or the online portal, Support cannot guarantee initial target response times.

Priority 3

Priority 3 indicates some business impact where the program is usable but non-critical features may be unavailable and/or a suitable workaround exists.

Examples

- Issue affects the Customer's ability to meet near term deadlines
- Workstation installation issues
- Non-critical application errors
- Poor performance having negative impact
- Acceptable workarounds may exist

Key deliverables

- Support services Priority 3 incidents as having medium importance to both the Customer and Customer Services
- Issues progress during normal business hours until the Priority 3 condition resolves

Delivery requirements

- Both the product and the Customer are eligible for Support assistance

Target response objective

During the hours of 8:00 am to 7:00 pm US Eastern Monday through Friday, Support must respond initially within 12 hours of receiving a Priority 3 incident.

Ongoing response updates are every 72 hours until the incident resolves.

Unless otherwise agreed, a break in continual effort by the Customer can result in a lowering of priority.

Priority 4

Priority 4 indicates minimal impact to business, operations, or the Customer implemented a reasonable workaround.

Examples

- General question such as how-to
- Issue with little or no impact
- Documentation issues
- Software feature requests
- Issue is resolved but remains open for Customer confirmation. Intermittent wait status with little or no customer interaction required

Key deliverables

- Support services Priority 4 incidents as general issues during normal business hours until the Priority 4 condition resolves
- Priority 4 service delivery requires eligibility of both the product and the Customer for Support assistance

Target response objective

During the hours of 8:00 am to 7:00 pm US Eastern Monday through Friday, Support must respond initially within 16 hours of receiving a Priority 4 incident.

Ongoing response updates are every 72 hours until the incident resolves.

Unless otherwise agreed, a break in continual effort by the Customer can result in a case closure.

Report an Issue

Create a support case

For all but Priority 1 incidents, Support asks that you submit a case here before contacting us by phone.

IMPORTANT - For Priority 1 incidents, immediately contact Support at **1-866-396-2599** and indicate this is a Priority 1 incident.

Report issues by logging into the [online issue tracking system](#) [login required] to submit a case.

If you do not have access to online issue tracking, contact Genesys Customer Care at customercare@genesys.com.

NOTE - You must be a Designated Contact to submit cases. Each Customer can have up to five (5) Designated Contacts. Designated Contacts must have advanced knowledge of and access to the Customer environment and be able to assist Product Support in troubleshooting.

Call Support

When calling Support at **1-866-396-2599**, use your personalized PIN when the IVR prompts you. Your PIN helps us to identify you and your company.

NOTE - If you do not know your PIN, contact Customer Care at customercare@genesys.com.

Hours of operation

8:00 am to 7:00 pm US Eastern, Monday through Friday.

After-hours emergency

Support and maintenance provided after normal hours of operation are for emergency issues only. In an after-hours emergency, call Support at **1-866-396-2599**. See **Priority 1** section for more information.

IMPORTANT - Do not email or call a specific individual as they may not be available.

Issue Management

Preparation work

Understand your environment and understand the issue. It is not easy to know what questions to ask or how to interpret given information. Use the following examples of questions you should prepare to answer before reporting your issue.

- What is or is not happening?
- Has the behavior changed?
- Does it work some of the time, all of the time, or none of the time?
- How many people are impacted?
- Is the same issue happening regardless of device?
- Can we get a full account of all recent changes?
- Was the system under excessive load at the time of the occurrence?
- Are you presented with an error(s)?

Issue tracking

You can report issues and track progress using our [online issue tracking system](#) [login required].

Issue resolution

An exchange of phone calls and work notes occurs to accomplish the following:

1. Establish an understanding of the issue.
2. Perform troubleshooting to narrow down the problem area.
3. Gather logs or information to determine why the system is behaving in a certain way.
4. Determine the need for education, configuration change, enhancement request, bug report, fix, workaround, or other resolution.

Support reports established defects or bugs to Development in the form of a Systems Change Request (SCR). Development may or may not fix the defect in a subsequent release. While Support is not in control of what gets fixed and when, we may request the release of an untested Engineering Special (ES) in the event of severe system instability.

IMPORTANT - Unless otherwise agreed upon with Support, it is the Customer's responsibility to complete all information gathering, troubleshooting tests, log and configuration gathering, configuration changes, and to fix applications. If we are unable to progress on the issue because of lack of contact or lack of cooperation, we flag the case (at least temporarily) as Resolved.

Remote access

For troubleshooting, Support may employ remote control technology. Customers can choose to allow Support limited remote control access into their system. The Customer must provide and maintain this access. This process can speed up retrieval of logs and other information after turning on tracing. Support understands and respects the Customer's right to maintain the security of their system and uses this technology only in pre-approved circumstances.

NOTE - The use of remote-control technology does not remove the Customer responsibility to gather necessary data. Without remote access, the ability of Support to troubleshoot a system is limited to the technical level of Customer staff.

Issue states and statuses

An issue goes through three (3) states: Open, Resolved, and Closed.

The **Open** state has some important sub-statuses, broken down here:

- **Waiting Feedback from Customer** - Support is actively waiting on a response from the Customer
- **Monitoring** - Waiting for Customer
- **Researching** - Waiting for Support
- **Waiting Engineer** - Waiting for Support

What We Support

Supported products

Support services Latitude by Genesys products only. If the Customer purchased products from another Vendor, they must contact that Vendor for support of those products.

Support will assist the Customer and the Vendor with isolating issues with third-party products, provided the issue appears to be related to Latitude by Genesys products and provided the Customer is actively working with the Vendor to troubleshoot.

End of life products

For information regarding end of life or end of support for Latitude by Genesys products, contact Support during normal business hours by submitting a support case online. EOL versions are posted in the Latitude Community Group Library.

Customizations

Support does not provide support for customizations. Genesys' Professional Services Organization oversees customization projects and could be billable. Submit a case through the My Support portal and your case will route to the appropriate team.

Customer Expectations

Proactive system maintenance

Proactive steps can reduce system issues and ensure that changes your organization makes are evaluated fully and are more likely to be successful.

For Premises-based Customers, we recommend your internal support team complete normal server maintenance, including periodic rebooting. Also, implement reliable database maintenance jobs (indexing, re-indexing, defragmentation) to assist with performance and scalability on the server to extend the life of the server and database.

For other maintenance recommendations, such as Microsoft service updates or patches, work with your internal support teams.

Professionalism

Customers can expect professional behavior during any interactions with employees of Latitude by Genesys. Report any concerns or incidents of unprofessional behavior to Latitude by Genesys management so that we can review and address the issue.

Conversely, Genesys expects Customers to maintain professional behavior during any interactions with Employees.

Reasons for Latitude by Genesys to refuse support to individuals include, but are not limited to:

- Use of abusive, intimidating, or obscene language
- Deliberate misrepresentation of facts to Employees
- Customer deliberately hanging up on Employees

Customers must provide level one support

Customers are bound contractually to provide the first level of support. Customer responsibilities include:

1. Be the interface for all communication with Users.
2. Establish and communicate a phone number where Users can reach you for support both during and after business hours.
3. Provide sufficient staffing to manage the volume of support issues in a timely manner.
4. Premise Customers must provide support for all hardware and third-party software.
5. Attempt to reproduce all issues in a comparable test environment.
6. Keep Customer system up to date with new fixes.
7. Migrate to new versions as they become available.
8. Work with network technicians to ensure a high level of service.
9. Ensure that third-party software applications that interface with Latitude by Genesys products are working and available.
10. Complete all troubleshooting tests that Support requests.
11. Gather and deliver all logs and files that Support requests.

NOTE - If an unauthorized User contacts Support directly, they will be referred to your certified resources.

Use of a development or test environment

Customers must evaluate new features and/or system modifications thoroughly in a development or test environment prior to migrating those new features and/or system modifications in production.

Customers must install new versions of software and new Service Updates in their development or test environment before attempting to install them in a production environment.

A development or test environment does not require a high-end server but must allow an application engineer to verify new functionality before pushing it to a production environment.

The development or test environment must match the production environment as closely as possible.

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