REthink Product Support Pledge

“By providing clear REthink Product Support, caring Account Services & expert Product Services, we will ensure and deliver exceptional customer care experiences!” – Vijay Mehra, REthink CEO

Introduction

At REthink CRM, we are committed to our customer’s success using our product. All current subscribers have product support for any program bug event. This document describes our Pledge to our customers, and will help guide customers regarding how to effectively use our product support and product services to receive the best resolutions to your support and adoption requests.

New customer REthink training resources, free & paid options

When you become a REthink customer, most customers option to receive training and onboarding from REthink or one of our partner integrators from the REthink partner community. REthink Product Support has also created a series of video training to supplement training and onboarding. We encourage all REthink customers to designate and maintain a REthink product technical administrator (whom we refer to as the REthink Administrator) inside their brokerage. Often the REthink Administrator is a member of your support staff, your IT team, or an outside consultant you engage with, but we recommend they be a person who can champion REthink into your organization, can deploy training throughout the firm, and is a key first contact around user support issues.

As part of our Best Business Practices, we require all new REthink customers to engage in our REthink Administrative setup program. Our training is designed for REthink Administrators using a Train-the-Trainer method and we keep a permanent library of documentation and video training aids available for all currently subscribed customers. For customers who option to not purchase any additional training, the library provides their primary avenue of product training. In many cases our Product Support team can assist with explaining our product. Larger training projects or training around customized work will be provided via our Product Services team as paid engagements and discussed further below. We typically use a ‘Train-the-Trainer’ support model to deliver training to an organization with ongoing remedial training in the form of topic video training in our Knowledge Base. This style of training delivers support and training to your designated REthink product technical administrator, or the primary contact you designate in your organization.

We encourage all customers to maintain an active log or live document around changes and training for their REthink product. This can aid customers during periods of transition such as when training new users or onboarding a new product administrator. *While REthink is highly customizable, we recommend customers adopt a robust change management strategy*

Some attributes of a robust policy would include process around:

- problem and goal identification - what are we looking to achieve with this change?
- proposed change to address problems are documented in steps to be carried out
- identifying a set of records to be used for testing
- review of testing results / updating change logs or live journal of changes to REthink org
- customizing and making changes, then testing in the sandbox first (vs customizing directly in your production REthink)
- more best practices can be found here: https://developer.salesforce.com/docs/atlas.en-us.dev_lifecycle.meta/dev_lifecycle/plan_change.htm

Product Support is here to guide and assist you with issues around how to use our Product. Our support team member will do their best to help you resolve your issues through our training resources and guidance using the support materials we have available.

Support and Training Resources

Active REthink customers and trial users of REthink have anytime access to our online Knowledge Base. This can be found at the Product Knowledge Base (KB). REthink Support can be accessed by emailing **support@rethinkcrm.com** or by logging into our Product Support KB portal (**https://REthinkCRM.Zendesk.com**).

Clarifying the REthink Product Support Scope

While we have seen much value and success from our customers in using third party applications to further enhance the functionality of the REthink CRM, it is very important to understand that training and support for third party tools and products are out of scope for REthink Product Support. The scope or coverage area for REthink CRM Product Support includes our product only. Product Support is intended to assist you with understanding our product and for limited training or config guidance for your staff Administrator. Product Support is available to receive your feature requests and product bug issues. We encourage all customers to identify their staff REthink Administrator and encourage all support cases to work through your Admin. In Product Support we use a “Train-the-Trainer” method of training, which is designed to hand off training knowledge to the person on your staff providing and support training inside your teams.

It is important to understand that while REthink CRM is a highly configurable platform, supporting literally thousands of potential third-party Salesforce.com AppExchange applications. These applications may be integrated within your REthink environment and extend its functionality, however, these third party applications are external to REthink CRM from a Product

Support context. Should you have support requests related to third party applications integrated with REthink, our Product Support team can aid you on a Best Effort Basis, or may recommend your REthink system administrator should engage and work directly with the third party vendor support routes to address your individual requirements for their product support, training, and/or configuration of their product. As such, it is important to consider support, configuration, integration testing, and responsibility scopes when considering to expand your REthink product solution, even if recommended by REthink as potentially helpful options. When requested, REthink Product Services team or Product Support may be able to assist you in third party product support situations, although additional fees may apply. Please reach out to our Product Support in individual cases to explore how we can assist.

While we encourage our customers to leverage the robust, expandable capabilities of REthink, however, our Product Support team will not support any changes or customizations made by a third party developer, consultant or consultancy. It is the responsibility of the customer and their third party to test their customizations and provide support, including before and after a REthink product upgrade.

Reaching the Product Services team to schedule training projects

The Product Services team is available for training work which is typically delivering Train-the-Trainer style training projects. To reach the Product Services team, please email support@rethinkcrm.com with a Title to include "**Product Services**". This will provide you with an open case reference number, and a member of our Product Services team will reach out to you to discuss your project, understand scope and provide estimates around expected costs.

How do I file a Support ticket?

Tickets should be created by your REthink Administrator. REthink Product Support is only intended to support customer REthink Administrators. REthink Product Support is optimized to work with your REthink Administrator on your staff. REthink User to Product Support interactions can be limited due to the technical nature of CRM products, customizations that may have occurred, and the complexities of the underlying technology. We strongly recommend all REthink customers provide a designated REthink Administrator for their organization. If your REthink Administrator is unavailable, Product Support will provide every attempt to assist per normal. We have found that the best support results occur by having your REthink Administrator generate product support cases, or be included on cases by cc method. Following this practice also permits your REthink Administrator to spot trends or identify training issues relative to your organization. To file a support ticket for the REthink CRM product, please Email support@rethinkcrm.com and provide a Title, explanation of the situation, and attach any documents. Alternately, you can login to the REthink Help Center and mouse over your name (top-right area) and click submit a request.

We are implementing a new severity level coding system to help classify incoming support requests so our Support team can properly triage. We're asking customers to apply the appropriate level using the below descriptions when submitting their ticket.

Based on the level of severity, please choose the appropriate category:

RED – this indicates a full outage with REthink CRM or a REthink CRM product issue impacting all users in the organization. We will make every attempt to help you resolve these types of issues within 1 business day*. **Please Note: If you are having a support issue that you consider RED which is related to a third party application (not REthink directly), we recommend your REthink Administrator interact directly with the other application vendor.**

YELLOW – this indicates that the REthink product is running and functioning correctly, but an issue exists that you would like Product Support's help with. We will make every attempt to resolve these types of issues within 1-3 days*. Because some problems are more difficult to resolve than others, sometimes they take longer to research and resolve.

BLUE – This indicates product users are not experiencing an issue with the current product, but are asking for help using our product. Where applicable, all third party application related topics should be set to BLUE relative to REthink CRM Product Support.

* Our goal of "1-3 Business days to resolve your issue" does not take into account the following:

- Issues that are determined to be Product bugs or Product defects that require work from our Development team.
- Issues that are determined to be related to Salesforce.com platform changes.
- Issues that are determined to be related to third party applications integrating with the REthink software.
- Issues that are determined to be related to third party salesforce consultants, customer modifications, and system integrators.
- Delays caused by the communication between parties.
- Periods of peak ticket activity, such as around product release and product upgrade periods.
- Delays caused by your REthink technical administrator not being included in a support case.
- Delays caused when there is no REthink customer technical administrator managing your product.

What happens if a defect is found?

If a defect is suspected or determined inside the core REthink product, we will submit it to our Development team for further evaluation and resolution. Where no workaround is available, we will change the case to **On-Hold** and seek to escalate the defect to high priority and notify you as soon as possible. If a workaround is available, it will be provided.

What are support response times?

Support response times are not the same as support resolution times. We commit to responding to all support requests during normal business hours (not including holidays) as quickly as possible. Generally, if you submit a support request before 3PM CST, we will make every effort to respond the same day. If your support requests arrives after 3PM CST, we will make every effort to respond same day, but will definitely respond by the next business morning when we reopen.

Do you provide phone support?

We do not provide phone support for the REthink CRM product. Customer REthink Administrators and customers, when required, are encouraged to open a support ticket by email, which allows us to track all support engagements. Since we employ a Train-the-Trainer approach to product training, we encourage all product Admins and users to review our video library of self-paced training materials, along with our Knowledge Base of topics, and we often will provide links to this material during email exchanges via product support. We have found at times, the most effective method of supporting our customers is by requesting a phone call. In this situation our Product Support team member will request a call or request a screen share session along with a phone call.

How are support cases prioritized?

1 Severity Color

2 Date/time the support case was received

What do the different case statuses mean?

- **New** – New Cases, not yet responded to.
- **Open** – Cases where the response focus is currently with Product Support and the Customer is waiting for the response.
- **Pending** – Cases responded to where Product Support is awaiting an update from the Customer.
- **On-Hold** – Cases paused or waiting for another party, such as an external service desk, or a different REthink department such as Product Services or Account Services, etc.
- **Solved** – Cases that have been successfully completed. You can reopen a Resolved ticket.
- **Closed** – Cases that have been closed and cannot be reopened.

What is Product Support here to assist you with?

A good understanding of our role in support will aid you in a good interaction with our support team. Product Support is available to help your REthink Administrator use our product and solve problems related to using our product. Examples include:

- Requests for our Product Services team, such as a training request.
- Explaining the product features

- Assisting you with finding content in our Knowledge Base and Video training areas
- Strategies to troubleshoot errors
- Receive bug alerts
- Reports & Dashboards assistance

What is Product support not here to assist you with?

Our goal in Product Support is to assist you in using and adopting the REthink CRM product. Product Support does not provide the following services which should be considered outside the scope of Product Support, but may be “in scope” for our Product Services team to assist active customers using our REthink REmote service.

- Assistance creating a new field
- Adjusting a page layout
- Creating, Adding or removing users
- Data hygiene or data migration/extraction services
- Workflow, Process Builders, Email Triggers
- Custom objects, Record Types
- Third-party applications
- Custom integrations
- Support for custom development (new configuration, process automation, development, etc.)

The above list is not exhaustive such as Product customization could be many types of topics, and more involved training assignments should properly be handled via our Product Services team. Our goal remains for you to customize REthink to your needs as needed, and adjust REthink as your needs change. If you require REthink or Salesforce.com changes or related services, you have several options to consider:

- Adjusting your workflows or processes to align with REthink CRM native functionality, whenever possible.
- Request an engagement with a REthink 3rd party System Implementation (SI) Partner by opening a request with Product Support to setup an introduction.
- Consider and evaluate a third party Salesforce Professional or consultancy (we recommend using only Certified Salesforce professionals)
- Consider any in-house technical leadership with Salesforce configuration/admin expertise (we recommend using only Certified Salesforce professionals)
- If your change request or project is of a small scope or has a limited impact, possibly our Product Support team can assist you as a Courtesy via our email based Product Support channel. You can explore this with Product Support by opening a case directly.

If you wish to engage with our our Product Services (PS) team, they can be reached by sending a request to support@rethinkcrm.com and note PS Training request in the subject line. Our Product Services team will reach out to discuss our customized training programs. Generally, our Product Services team will scope the expected level of effort and provide customers with an estimate. Our Product Services team work via pre-paid time tiers. Tiers are available starting at 10 hrs, then 20 and 30 hrs, respectively known as our **Silver, Gold or Platinum PS Training Tier packages** with increasing discounting available to align with your requirements, or in the case of ongoing training, time can be drawn down from the Tier over the year. For customers with ongoing training projects, we recommend replenishing Tier packages when their balance falls below 20% to avoid delays.

Courtesy services delivered by Product Support

While our preference is for all customers to lean into our Product Services team and follow a formal change process, including robust testing, documentation, and training, we know that for some customers, they would still prefer our team in Product Support assist them as a courtesy. When this occurs and subject to availability with the volume in our Support area, our Product Support team may be able to accommodate your request directly. This is performed for you as a Courtesy service. Courtesy work is performed entirely at our discretion, usually on a one-time basis, and typically has the following characteristics:

- Courtesy work may result in limited or no documentation around the configuration or change for your account file. This can impact the case history should a larger issue develop from the change.
- Courtesy work is often limited in scope and task length, typically under 30 minutes from start to finish.
- Courtesy work or configuration changes often occur in your Production org (vs Sandbox org).
- Courtesy work limited followup and testing; typically relying on the customer with limited instructions to handle testing of the task. Limited or no UAT formal acceptance process.
- Since Courtesy work is delivered on a Best Effort Basis, it is often limited in workflow and process understanding or advance exploration to fully understand your complete needs. When providing a courtesy via Product Support, sufficient time may not be provided to understand your larger workflows and goals. This may be acceptable for customers but can lead to unexpected outcomes.
- Courtesy work often has limited QA testing involved, or customer supplied testing.
- **Customers should understand that Courtesy work performed by Product Support carries a Best Effort Basis warranty for our work efforts.** Since a formal project is not occurring, and possible other shortcuts or quick-change steps may be utilized, the results should be considered AS-IS and limited to our best efforts to assist the customer.
- Courtesy work project assistance is typically without additional cost to the customer, and avoids the minimum charges required when engaging our Product Services team in a full project engagement.

With these Courtesy limitations, customers may still prefer this approach over a formal Product Services change order process, so this can be explored with your Product Support team member by opening a ticket on the topic and your goals.

Vijay Mehra, CEO

Think Tech Labs, makers of REthink CRM