



truecontext

FORMERLY **PRONTOFORMS**

TECHNICAL SUPPORT HANDBOOK

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BEFORE CONTACTING TRUECONTEXT SUPPORT

To resolve your service request in the most expedient way possible, it is important that you take the following steps before you contact TrueContext Support. You will need to gather information about the problem and have it on hand when discussing the situation with our Support specialists. The following steps are an example of what is required:

1 Search Existing Knowledge

If the severity level of your request is Normal or Low, you may be able to expedite resolution of your issue by referring to one of the following resources:

TrueContext Community: <https://community.truecontext.com/home>
(Open 24 x 7 x 365, ask anything, search previous questions.)

TrueContext Documentation Portal: <https://docs.truecontext.com/1374411/Content/Home.htm>
(All TrueContext Technical Product Documentation)

TrueContext University: <https://www.truecontext.com/resources/TrueContext-university>
(Training is the best way to learn the product. Free, online, self-paced TrueContext product training)

TrueContext Support Portal: <https://support.truecontext.com/hc/en-us>
(You can contact TrueContext Technical Support via the Support Portal, Email, Phone or Chat)

Note:

These are available via TrueContext.com & the TrueContext product web portal under 'Resources'.

2 Check our status page

Should TrueContext encounter any service affecting issues, we will post a status update to: <https://status.truecontext.com>. Please visit the status page to see the latest updates regarding the status of the platform. You may also use the "Subscribe" button in the top right of the page to be notified of any updates on the status in the future by email or SMS.

3. Define the problem and gather background information

If you have a description of the problem and symptoms ready before contacting TrueContext Support, you can help to expedite the problem-solving process. It is very important to be as specific as possible when explaining a problem or question to our Support specialists. We want to give you the right solution so the better our Support specialists understand your specific problem, the better they can resolve it.

To solve problems effectively, our TrueContext Support specialists will need to know all the relevant information about your problem. Your ability to answer the following questions will help us solve your request as quickly as possible:

- Problem definition

Describe the problem.

When did this start happening?

Have any recent configuration changes been made?

Can the problem be recreated? If so, list the exact steps to reproduce. Are there any error messages? If so, what are they?

- Usernames

What are one or more usernames of affected users?

- Device information (if applicable)

TrueContext app version? Device manufacturer?

Device operating system version?

- Data Record Number (if applicable)

What data record number(s) relate to this problem?

- Form / Data Destination / Data Source names (if applicable)

Include the form name, data destination name and/or data source name which relate to this problem.

4. Gather relevant diagnostic information

Our Support specialists often need to analyze specific diagnostic information such as relevant logs to resolve your problem. Gathering this information is often the most critical step in resolving the problem. Contact TrueContext Support for assistance in gathering the needed diagnostic information.

5. Determine the severity level

Together with our Support specialists, you will mutually determine the appropriate severity level based on the business impact of the problem. You may request a change to the severity level of a problem at any time if circumstances change from when it was first entered to match current business impact conditions.

TrueContext Support reserves the right to unilaterally change severity levels of submitted electronic requests based on the below definitions.

LEVEL	IMPACT DEFINITION	EXAMPLES
Severity 1	<p>Urgent (server down)</p> <p>A business-critical emergency condition related to TrueContext server availability which requires an immediate solution and impacts all users</p>	<p>Users cannot access and use https://live.truecontext.com</p>
Severity 2	<p>High (significant business impact)</p> <p>A software component is severely restricted in its use, or you are in jeopardy of missing business deadlines because of problems with an application which impacts a significant number of users</p>	<p>All or a significant number of users of an application receive an error when attempting to access a software component, severely affecting your business</p>
Severity 3	<p>Normal (some business impact) Indicates the program is usable with less significant features being unavailable which are not critical to operations</p>	<p>One or a few users are affected. Configuration questions or inquiries about an error or functional issue which has nominal business impact.</p> <p>Password reset requests should be made at https://live.truecontext.com by submitting your username using the Lost Password functionality, or using the TrueContext mobile app</p>
Severity 4	<p>Low (minimal business impact)</p> <p>A non-critical software component is malfunctioning causing minimal impact, you have questions about functionality, or want to make a non-technical request</p>	<p>Documentation is incorrect, configuration inquiries are made, non-business critical task is requested, etc.</p> <p>Refer to the section Submitting Product Feedback to suggest a new feature</p>

When communicating with our Support specialists, you should also mention the following items if they apply to your situation:

- You are under business deadline pressure.
- Your availability
- Alternate ways to reach you (more than one phone number, email address)
- State a knowledgeable alternate contact with whom we can speak.
- You have other open problems with TrueContext Support related to this service request.
- Your organization is currently receiving assistance from the TrueContext Professional Services team as part of an implementation or rollout project.
- You are participating in a TrueContext beta or pre-release program.
- You have researched this situation prior to contacting TrueContext Support and have detailed information or documentation to provide for the problem.

ACCESSING TRUECONTEXT SUPPORT

Methods to contact TrueContext Support are listed at How to Contact Technical Support:

<https://support.truecontext.com/hc/en-us/articles/4406631384340-How-To-Contact-Technical-Support>

RESPONSE OBJECTIVES

Please note that TrueContext will use commercially reasonable efforts to respond to service requests from your contacts within the criteria shown below. Our initial response may result in resolution of your request, or it will form the basis for determining what additional actions may be required to achieve technical resolution of your request. Depending on the complexity of your request, the next response may take considerable time. Be sure you and your Support specialist agree on what the next action is and when the next checkpoint will be.

Support Center hours

TrueContext Support business hours are:

DAY	TIME
Monday - Friday	8 am - 8 pm ET
Saturday	11 am - 7:00 pm ET

The Support Center is available with the exception of December 25th and January 1st. Any requests made during this time will be actioned over the following business days in accordance with the Severity Levels in this document.

Please keep the Support Center hours in mind if your business operations typically occur outside of these time frames.

Language support

TrueContext Support is currently offered in English with the option of being served in Spanish based on Support specialist availability. When possible, for Urgent (Severity 1) problems, to increase the likelihood of a timely resolution, please include a point of contact who can communicate effectively in English and is available to work with TrueContext regarding the issue.

Response goals by severity

When you contact TrueContext Support to report a problem or update/get status on a problem, your request will be routed to one of our Support specialists. Our goal is to respond to your service request within the following time frame*:

LEVEL	IMPACT	RESPONSE GOAL
Severity 1	Urgent (server down)	Within 4 business hours
Severity 2	High (significant business impact)	Within 8 business hours
Severity 3	Normal (some business impact)	Next business day
Severity 4	Low (minimal business impact)	Next business day

* Response goals by severity are shortened for some Service Plan purchasers or consumers

HOW WE HANDLE SERVICE REQUESTS

You may submit your request for assistance by using the TrueContext Support portal, email, or by telephone. Each request is logged into the TrueContext problem management system.

Once logged, a unique ticket number is created, and your request is routed to a specific group of Support specialists who will act as your resolution team. Please make note of your unique ticket number and use it in all future communications about the same problem with TrueContext Support.

Your request will be researched and either resolved or escalated as appropriate. In order to investigate the problem, the resolution team may need to (i) access information on your account relative to the failure and/or (ii) recreate the failure to get additional information. Should the problem be configuration related, you may need to recreate the problem to provide the required information. Our Support specialists may request that you send them the problem information, test cases, or they may request that you allow them to view such information with you electronically.

HOW WE HANDLE CODE DEFECTS

During the investigation process, the resolution team may determine that your reported problem is related to a code defect which falls into one of the following categories:

1 A known defect-related problem:

If the resolution team determines that the problem is the result of a software defect that has previously been reported, the following actions may be taken:

- An upgrade to a version containing the fix or a workaround to circumvent or correct the issue is provided
- If no workaround is available and it is determined that one is required, your Support specialist will work with you to find the best feasible workaround
- Your Support specialist will confirm when the defect is closed and will update your ticket

2 A new defect:

If the resolution team determines that the problem is the result of a TrueContext software defect that has not been reported before, we will work with you to create a record to track the resolution of the defect. Defects are immediately routed to the appropriate Development team(s) for further analysis concerning how they can best be addressed.

The following fix-related activities may result:

- The defect is determined to be of high impact for which a fix is created and an upgrade containing the fix is released.
- The defect is determined to be of lower impact which does not require an immediate resolution and is deferred for a future release.
- Because of the complexities of the environments supported, defects can often take several weeks, possibly months, to debug and to write, test, package then distribute.
- Fixes are created and tested on the latest application versions, so it is in your best interest to keep your software current.
- After you have received a fix in the form of an upgrade, we will follow up with you to confirm resolution of your problem. If you have verified the fix, please contact TrueContext Support so that the corresponding ticket may be placed in a resolved status. If for some reason the problem is not resolved, or you are dissatisfied with the solution, your ticket will remain open while TrueContext Support continue to work on the problem. The ticket will not be closed until the problem has been resolved to your satisfaction.

3 A problem that is not defect-related:

If the Support team determines that the problem is not a software defect in supported TrueContext code, refer to the section Submitting Product Feedback to suggest a new feature.

TECHNICAL QUESTIONS (HOW-TO)

Technical question support allows you to obtain assistance from TrueContext for product-specific, task-oriented questions regarding the installation and operation of currently supported TrueContext software. In the course of providing answers to your technical questions, we may refer you to product documentation, publications, the TrueContext Community, or we may be able to provide a direct answer to assist you in the following areas:

Short duration problems involving

- Installation
- Usage (How-to)
- Specific usage/installation questions for documented functions
- Product compatibility and interoperability questions
- Technical references to publications
- Assistance with interpretation of publications
- Providing available configuration samples

TrueContext Support is not structured to address every technical question that you may have. For example, TrueContext Support does not offer assistance related to the following areas:

- Analyzing performance
- Writing, troubleshooting or customizing code for a client
- Answering extensive configuration questions
- Data recovery
- Consulting
- Interpretation or triage of customer or third party generated defect scanning reports

Most of the above types of situations require some form of advanced Services offering. For further information about these services please contact your TrueContext Account Representative who can help direct you to resources who can discuss your needs.

PROBLEM HANDLING BEST PRACTICES

We have found that the following practices help us to ensure we can provide the timeliest resolution to your question or problem.

- Submitting problems via the TrueContext Support Portal (<https://support.truecontext.com>) as opposed to email enables the resolution team to better understand the problem and be more prepared with the right skill and guidance to respond to your concern.
- Submitting only one question/problem per ticket allows us to better track your concerns and provide better service.
- Selecting the appropriate problem Severity level and letting us know the business impact will help to get the right focus on your problem.
- Staying current on product releases.
- Providing timely feedback on recommendations and closing the ticket when the problem has been resolved. If the problem re-occurs within a few days after the ticket has been resolved you may reopen the original ticket, otherwise creating a new ticket referencing the previous problem will result in optimal service.

YOUR RESPONSIBILITIES

Unless otherwise stated, TrueContext Support allows an unlimited number of technical support cases (each a “case”). To maintain clear objectives and timelines, each case must be specific to a unique issue. Unless otherwise agreed by TrueContext, only designated TrueContext Support representatives are authorized to open a case. Cases will only be opened in relation to an existing issue or question that can be actively worked on by all parties involved.

TrueContext promises that the TrueContext Service will perform materially in accordance with our published documentation, under normal use and circumstance. Like other software vendors, we don’t promise that the TrueContext Service is issue-free; however, we take a great deal of pride in our ability to resolve reproducible issues that are brought to our attention in a timely manner. Note that you are responsible for (i) upgrading to new versions containing fixes in a timely manner and (ii) testing such fixes to ensure they meet your needs.

Please be aware of your responsibilities when working with TrueContext Support. If you do not have the required skill or are unwilling to do the work, you can engage our Professional Services team or a third party to assist you for an additional fee. If you are involved in a services engagement in which TrueContext Professional Services is designing and implementing an application or configuration for you, please ensure the statement of work clearly indicates whose responsibility it is to identify issues with the TrueContext Service, as well as the time limit applicable to the logging of any such issues (either by you or by TrueContext Support).

Generally, TrueContext Support will only ask you to provide information that is non-proprietary and “strictly necessary” to solve your issue. The steps required to grant TrueContext Support access to your account for the purpose of troubleshooting issues can be found here:

<https://support.truecontext.com/hc/en-us/articles/360024855652-Granting-ProntoForms-Support-access-to-your-account>

TrueContext Support may ask you to provide additional information (which may include screen sharing, test cases and/or other artifacts) to help troubleshoot your issue. It is your responsibility to provide this information in a manner that respects your organization’s privacy and disclosure policies. Once this information is received, TrueContext will use it only for the purpose for which it was provided - that is, to identify issues and/or resolve your case. Except for TrueContext authorized contractors (who may be used to help identify issues and/or resolve cases), TrueContext Support will not disclose any information that you disclose to a third party.

If access to proprietary information (such as Customer Data) is required by TrueContext Support, such access will: (i) be kept confidential; (ii) be handled in accordance with applicable laws and regulations; and (iii) not be shared with any unauthorized personnel or comingled with other data. If you need to share an artifact such as a data source or other information about your implementation or your business, we recommend you do so securely using the file upload interface of our support portal (<https://support.truecontext.com/>) rather than emailing it to TrueContext Support.

SUBMITTING PRODUCT FEEDBACK

Sometimes what appeared to be a defect turns out to be working as designed. In that case you may want to submit product feedback. **TrueContext Technical Support does NOT manage Product Feedback Requests.**

Guidelines to submit Product Feedback are listed here:

(<https://support.truecontext.com/hc/en-us/articles/360035606411-FAQ-How-to-create-a-feature-request>)

PROFESSIONAL SERVICE ENGAGEMENTS

To inquire about the possibility of a Services engagement to (i) improve your current implementation, (ii) create a new form or custom document, or (iii) request dedicated training, contact your TrueContext Account Representative regarding options. Your Account Representative can help direct you to the appropriate resources and can be reached by emailing sales@truecontext.com or calling +1.888.282.4184.

ESCALATION PROCEDURE

If at any point in our support process, you feel we are not meeting our commitments to you (as outlined in this handbook), you may call our attention to this by following these steps:

- Contact your Support Analyst and provide the context to the business impact of your problem
- Discuss with your Support Analyst the possibility of raising the Severity level associated with your ticket.
- Ask to speak to your Support Analyst's manager. Escalations to a TrueContext manager will receive prompt attention and management focus.

RECOMMENDATION FOR MID AND LARGE CLIENTS

TrueContext is proud of its team of highly skilled, customer-focused Support specialists. However, TrueContext Support can never take the place of your company's **TrueContext Admin** (<https://docs.truecontext.com/1374411/Content/Published/360028036072.html>) and/or internal Help Desk. The best way to interact with TrueContext Support is through a mix of highly skilled and trained employees who understand your company's environment and act in conjunction with your internal Help Desk and/or your assigned TrueContext Admin. Your senior staff members are best positioned to filter, sort, and prioritize your company's problems and direct them toward the best resource (TrueContext and non- TrueContext) for efficient resolution. Adopting such a structure will help us ensure the success of your TrueContext solutions.

SURVEY

After your problem has been resolved, you may receive an email asking you to participate in a short web survey to determine your satisfaction with the way your problem was handled. If your problem has not been resolved, please continue to communicate with the Support Center and follow up with your ticket so that your TrueContext Support specialist can action it accordingly.

24x7 SUPPORT

You are entitled to customer support on Severity 1 issues inside and outside of standard business hours. Severity levels are determined during a **mutual discussion** between yourself and the support analyst, based on the business impact of the issue. TrueContext support will assist you 7 days a week, 24 hours a day if you are available and willing to work on the issue. If you are not available to work on the issue, the support analyst will look to lower the severity level and continue during the next business day.