

HOW DO I SUBMIT A SUPPORT TICKET?

QUICK TIPS FOR SUBMITTING A SUPPORT TICKET TO NLP CUSTOMER SUPPORT

1. Send an email to help@thenlp.com with the summary of the issue as the email subject line and a description of the issue in the body of the email to create a support ticket.
 1. Attachments sent in the email will automatically be attached to the ticket.
 2. All users CC'd on the email will be added to the ticket and will receive the same email updates as you.
2. If you are a first-time user, wait for an activation email to setup your user account. This is required in order to receive email updates. Once done, you will receive an email each time an NLP employee comments on your issue. If you have any problems setting up your user, contact NLP directly.
3. Reply to any subsequent email from NLP regarding the reported support issue directly from the message received. Click reply, leave the subject line as is, and respond to any questions or updates, click send, and NLP will have visibility to your response as a comment on the support ticket.
4. You will be updated once your ticket has been resolved. If the issue ever occurs again, send a *new* email to help@thenlp.com. Do not reply to the previous issue's emails as the issue is now closed and no longer visible in NLP's queue of open support.

DETAILED TIPS FOR SUBMITTING A SUPPORT TICKET TO NLP CUSTOMER SUPPORT

Support Structure

The primary channel for Customer Support is the NLP Support Ticket system. The NLP Support Ticket system contains the archive of support tickets from all Users and is provided by NLP to all Customers current with Annual Maintenance. Users may access the NLP Support Ticket system by having the parent company complete the self-registration form to create a new account.

Standard Support

Available for every NLP Support Ticket system user, Standard Support provides the user with the following:

- Access to NorthScope Help and User Guide online content
- Online case submission via the NLP Support Ticket system
- 9x5 availability (Pacific-Standard Time)
- Severity-based response times

Support Hours

NLP's Standard Support Services are available during our normal business hours of 7am-4pm Monday-Friday PST, excluding NLP's observed holidays or other related closures.

Off-hours support (nights, weekends, or holidays) is charged at a premium and arrangements must be made at least one week in advance to guarantee coverage will be available.

Response Times

SEVERITY LEVEL	DESCRIPTION OF ISSUE	TARGET RESPONSE	NLP ACTION
Emergency	<p>Critical issues affecting all users, including system unavailability, data integrity issues, or bugs having a significant impact where no workaround is available.</p> <p>This severity level requires maximum effort of support until an emergency fix or bypass is developed.</p> <p>Critical situations may require Customer and NLP personnel to be at their respective work locations or available on an around-the-clock basis.</p> <p>Emergency support requests should be called in to NLP directly and not sent via email.</p>	ASAP	<p>NLP will prioritize Emergency-level support above all else.</p> <p>The primary objective is to solve the issue but in some cases the solution may be a workaround in order to allow the user to continue work as quickly as possible.</p>
Urgent	<p>Major functionality is impacted or significant performance degradation is experienced.</p>	Response within three (3) business hours & solution within	<p>The primary objective is to solve the issue but in some cases the solution may be a workaround in order to allow the user to</p>

	<p>Issue is persistent and affects many users and/or major functionality and no reasonable workaround is available.</p> <p>A fix is required as soon as possible.</p> <p>Urgent support requests should be emailed to Help@TheNLP.com.</p>	<p>one (1) business day</p>	<p>continue work as quickly as possible.</p>
Other	<p>System performance issue or bug affecting some but not all users.</p> <p>Short-term workaround is available, but not scalable.</p> <p>This may include items such as requests for new features or additional licenses and inquiries regarding a routine question; information requested on application capabilities, navigation, installation or configuration. (This is the default level for most requests.)</p> <p>Other support requests should be emailed to Help@TheNLP.com.</p>	<p>Response within 24 hours & solution within 3 business days</p>	<p>The issue will be prioritized based on the level of severity and volume of open support tickets, which will determine the processing time of solving the issue.</p>

Support Request Types

The following list identifies the types of support issues that should be sent through the support email or entered via the Customer Portal. This list is not meant to be exhaustive but is instead meant to provide examples.

- **General Support:** Used for any general question, clarification, or general help.
- **New Feature Request:** Requests for new NorthScope features desired in a future release.
- **Report Request:** Requests for new reports or inquiries desired in a future release.
- **Software Bug:** Report of anything that is not working as it should in the software.
- **User Licenses:** Requests for more users.

- **Other:** Requests for data fixes, training, configuration, etc.

Excluded Services

The following services are beyond the scope of NLP's Support Services:

- Telephone support;
- Assistance in developing user-specific customizations;
- Assistance with non-NLP products, services or technologies, including implementation, administration or use of third-party enabling technologies such as databases, computer networks or communications systems; or
- Assistance with installation or configuration of hardware, including computers, hard drives, networks or printers.

METHODS OF SUBMITTING A SUPPORT TICKET

All requests for support, other than emergencies, must go through the support email at Help@TheNLP.com or be created through the customer portal.

Northlake Partners employees will not work on support sent directly to personal email accounts but will reply back with instructions to send them to the support ticket system. Emails sent to the support account (Help@TheNLP.com) will automatically create a support ticket. All support tickets will come to us with a status of 'Submitted' and will be visible to the user immediately.

Via Email

The first time an email address that does not belong to an existing user sends a support ticket to help@thenlp.com the sender will receive an email prompting the user to activate his or her account. The sender must activate his or her account in order to receive email updates.

To activate your account, click the 'Activate my account' button in the email and follow the instructions to create a new user.

Once the user has been created, all future emails sent to help@thenlp.com will create new support tickets without any additional effort needed from the user. The user will also receive an email each time a comment is added to his or her item(s) by another user. If the user wishes to add a comment to an item, the user can send subsequent emails to help@thenlp.com with the same subject line as the original email.

Note: If a past issue reoccurs once the original issue has been closed, do not respond to the original issue's email, as this will send a comment to the original issue that has been closed and is therefore no

longer visible in NLP's open ticket queue. In order to verify the issue gets the proper attention, send a new email to help@thenlp.com detailing the issue. Feel free to reference the original ticket in the body of the email.

Guidelines for Sending Support Issues Via Email

The following guidelines are to help ensure issues can be closed as quickly as possible:

- Include a short summary of the issue in the subject of the email.
 - Do not try to include the entire issue in the email subject line – use the body of the email for that.
- Be as descriptive as possible.
 - Emails without adequate information cannot be assigned and will result in requests for additional information. In order to ensure the issue gets assigned as quickly as possible, include as much detail as possible.
 - **Bad Example:** "I don't see the right information when I run the fisherman report"
 - **Better Example:** "I was running the Fisherman Statement for Joe Smith and it's missing a Fisherman Sale Transaction # SAL2500. The date range I set was 4/1/15 – 4/30/15 and the transaction date was 4/12/15 so I'm not sure why it is missing. I have attached a screen shot of the transaction, the report, and my report selection criteria."
- Identify the timeframe you need a resolution.
 - Knowing this is required in order for us to prioritize your issues correctly.
 - For example, is the solution needed by tomorrow, before next week, in the next release, or before next season?
- Attach screen shots and ensure the screen shots include all relevant information.
 - Emails with screen shots are much easier to troubleshoot.
- Identify the steps that will allow NLP to reproduce the issue.
 - There are many factors that can impact our ability to reproduce the issue so always list the steps that allow you to reproduce the issue.
- Only send emails to Help@TheNLP.com.

- We will only be responding to the sender for each issue that comes in regardless of who else may be CC'd. If you want other people updated on the outcome of support items then they can be added as 'Watchers' in the NLP Support Ticket System, which means they will receive the same emails as the reporter of the issue, or they may participate in the weekly support meeting.

Via Customer Portal

Users can also submit tickets via the customer portal, which can be accessed here:

<https://northlake.atlassian.net/servicedesk/customer/portals>. This interface can only be accessed by current users and there are four important components to this interface:

- Ticket Creation
- Requests
- Documentation Search
- User Profile

Ticket Creation

The Ticket Creation page allows users to submit a support ticket if they choose not to email help@thenlp.com. If created through this interface, users will *still* receive email notifications when an NLP employee responds to their ticket, they will not have to check their created tickets for responses.

To create a ticket from the Ticket Creation page, a product (NorthScope or Dynamics GP) must first be chosen, and then an issue type can be selected.

Once a user chooses an issue type, the user will be taken to a screen where the user can describe the issue/request. From this screen the user will summarize the problem/request, select the severity of the issue to determine the time frame required for resolution, provide a description of the issue, and be prompted with documents that could help solve the issue. Once the user 'creates' the issue, a support ticket is created with the entered summary, severity, and description.

Once a ticket has been submitted, the user can view the ticket's status, respond to NLP questions or solutions, and add attachments.

Requests

The Requests page is a page for the user to look through open and closed issues for which he or she has requested help or on which he or she is a participant. From the Requests page, the user can also open the tickets to which he or she has visibility in order to view the activity, make comments, add attachments, etc.

Documentation Search

The Help Desk home page allows users to search NorthScope documentation for solutions to issues. This is particularly helpful for users who need clarification on NorthScope functionality or how it integrates with GP. When a user enters search terms in the search bar, a list of help documentation related to the search terms appears, allowing the user to click on an article to view the article.

User Profile

By clicking the avatar toolbar icon users can access the user profile or log out. The user profile screen allows the user to change his or her password, name, time zone, or avatar.

SUPPORT TICKET PROGRESSION

Support Ticket Status

Support tickets will advance through a set of pre-defined statuses. The most common workflow will contain the following sequence of status changes:

1. Submitted
2. To Do
3. In Progress
4. Customer Approval
5. Resolved

Occasionally, it may be necessary to move a support ticket outside the normal workflow. To accommodate this, additional statuses have been added that include:

- Waiting for Customer
- Closed

Open

Our first step will be to qualify 'Open' support issues. In order to qualify an issue we must understand the severity and have enough information to effectively troubleshoot and subsequently solve it. New support issues will either be moved to:

- **To Do:** If we believe we have enough information to begin working on the issue, then we will assign it to someone on our team.
- **Waiting for Customer:** If we do not have enough information, then the sender will receive an email indicating that the issue has been updated to 'Waiting for Customer' along with an indication of the additional information needed.

To Do

Once 'To Do' support tickets have been reviewed, they will be updated to one of the following statuses:

- **In Progress:** If we are beginning work on a support issue and the solution has been determined to go past the current day, then we will update the issue to 'In Progress.'
- **Customer Approval:** In some instances, we may solve a support ticket in the current day. If this happens, then we will fix the issue and update the status directly to 'Customer Approval.'
- **Waiting for Customer:** As we begin work on a support ticket we may need additional information. If this happens, then we will update the status to 'Waiting for Customer.'
- **Closed:** In some situations, a support request may never be resolved. If this happens, then it will be moved to 'Closed,' indicating that it is no longer in consideration although it was not resolved.

In Progress

Once 'In Progress' issues have been reviewed, they will be updated to one of the following statuses:

- **Customer Approval:** When we fix an issue we will update the status to 'Customer Approval,' at which time the sender will receive an email indicating the solution to the issue and a request for confirmation from the reporter on whether the change was effective or needs more work.
- **Waiting for Customer:** As we begin work on a support ticket we may need additional information. If this happens, then we will update the status to 'Waiting for Customer,' at which time the sender will receive an email indicating the change along with the request for the additional information we need.
- **Closed:** In some situations, a support request may never be resolved. If this happens it will be updated to 'Closed,' indicating that it is no longer in consideration although it was not resolved. When this happens, the sender will receive an email indicating the change.

Customer Approval

Once we believe we have done everything to solve the support ticket, it will be updated to 'Customer Approval' and the sender will receive an email indicating the solution. This will ensure the sender agrees the issue has been resolved. We will allow up to 5 days for the sender to approve the issue before we automatically update it to 'Resolved.'

Resolved

Once an issue has been approved by the sender it will be updated to 'Resolved.'

Waiting for Customer

Issues that 'Waiting for Customer' are on a soft hold because they cannot be advanced without additional information from the sender. Issues 'Waiting for Customer' will automatically be changed to 'Closed' if there has not been any progress for 60 days.

Closed

In some situations, a support request may never be resolved. If this happens it will be updated to 'Closed,' indicating that it is no longer in consideration even though it was not resolved. When this happens, the sender will receive an email indicating the change.

When a ticket is not scheduled for resolution within 3 business days:

Occasionally, support tickets are submitted that span beyond the scope of completion in three business days. When these tickets are submitted, the following will occur:

1. NLP will assign an identical 'task' to the reported support ticket in NLP's consulting JIRA project titled 'NLP Tasks.' It will outline the user's issue exactly as the support ticket and indicate any necessary tasks to complete it;
2. The submitted support ticket will then be updated to a status of 'Closed' as it is being handled in a different project;
3. An NLP user will comment on the submitted support ticket, notifying the user of the submitted support ticket's corresponding consulting project item number. This comment will notify the reporter via email.

Note: Users will be able to view the status of NLP Tasks items that they have reported by logging in using their company's <https://northlake.atlassian.net/login> and password.