

Guidebook

CX Level of Service



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Overview

Esker CX Service Level Guide

CUSTOMER SERVICE LEVEL & FEATURES		STANDARD	SILVER	GOLD
Technical Support Via Portal	Esker Support Hub	✓	✓	✓
Customer Community	Esker All Access (EAA) Community Membership	✓	✓	✓
	EAA Conference & User Event Invitations	✓	✓	✓
	Free Passes (2) to EAA Conference			✓
Self-Service Resources	Online Documentation & FAQ's	✓	✓	✓
	Tutorials & Videos	✓	✓	✓
	In-App Interactive Guides	✓	✓	✓
	Esker University E-Learning Courses	✓	✓	✓
Onboarding	CX Engagement Post-Implementation	3 months	✓	✓
Personalized Support	Dedicated Customer Advocate		✓	✓
	Business Reviews		2 per year	4 per year
	Configuration, Reporting, View & Dashboard Assistance		✓	Custom
	Solution Expertise on Recognition		✓	Custom
System Performance Analysis	Automated Monitoring			✓
	Operational Metrics			✓
	Process Improvement Analysis			2 per year
	Customer Workshops*			1 per year
CX Fees		Included in the standard subscription fees	Additional subscription fee	Additional subscription fee



Standard level of service

Standard CX Level: Self-service tools and components available to all Esker customers and contains the following items:

[Esker support portal](#)

Our Support portal allows more autonomy and visibility on the support cases. Our highly trained Support team is committed to our customers success and resolving technical issues quickly and easily.

- Submit on-line the tickets through the Esker portal
- Follow up on real-time the status of the tickets
- Consult the knowledge base related to the raised topics

[Online documentation & FAQs](#)

- Resources organized by solution and by profile
- Available in four languages (English, French, Spanish and Japanese)
- Access to the FAQ (Frequent Asked Questions) database
- Search engine on entire knowledge base
- Access to the most recent features, by solution
- Download additional documents & user guides

[Esker University – E-learning courses](#)

- Access to Esker U (University) self-paced on-demand courses
- Esker badge certification by course and solution
- Courses available on global administration, Esker interface, collections management, configuration, accounts receivable, accountant tasks, customer service tasks, approver tasks, reporting & dashboards

[Tutorials & videos](#)

- Access to full library of videos by solution: how to enable the automatic processing of your orders and invoices, how to preview invoices and orders, understanding document recognition technologies, and more!
- Access to full library of interactive tutorials by solution: how to extract line items in the Order Management solution, how to handle invoices with available discounts for Accounts Payable, how to schedule payments and apply credits in our Collections Management solution, and more!



Onboarding – CX engagement – 90 days

After your implementation is complete with Professional Services, for the following 90 days you will work with a dedicated Customer Advocate who will act as a resource and provide you with their direct contact information to schedule an ongoing engagement cadence to keep you on the right trajectory during these important first three months.

- Post transition check-in calls
- Custom report assistance
- Custom view & dashboard assistance
- Provide additional Esker resources

FEEDBACK

Esker Customer Experience services have been developed and enhanced based on input from customers like you. Your satisfaction with Esker's case handling process, online support resources and overall, Esker Customer Experience services offerings is important to us. When your training, support case or reviews meeting is over, you will receive a link to a survey to collect your feedback on our support services.



Silver level of service

Take full advantage of Esker's solutions by having a dedicated Customer Advocate accompany you throughout the entire user journey. In addition to all options available with the Standard service level, your CX Advocate will support you with your automation goals.

The Silver level of service also contains the following items:

Business reviews

We'll meet twice a year to stay updated with each other and review topics, including:

- Productivity reports
- Key indicators
- Usage trends
- Performance analysis

Configuration, reporting, views & dashboard assistance

The CX Advocate will provide necessary tools to help achieve automation goals:

- Custom view creation
- Configuration setup
- Administration
- Custom report creation
- Dashboards

Expertise on recognition and best practices sharing

Best practices sharing and discussion on:

- Synergy
- Auto-learning
- Up to 10 teachings per year
- Tracking of recognition
- Related indicators & reports



Process improvement analysis

CX uses its expertise to study processes and use of the Esker solution. Based on our experience and benchmarks with other customers (similar size and/or similar activity), we are providing guidance on:

- Management of inbound flow
- Usage of different recognition methods
- Impact of business processes on Esker solution
- The improvement is based on shared KPIs & objectives

Gold level of service

The Gold level is the highest level of customer experience support. Maximize business value by taking advantage of personalized guidance from your customer advocate, custom built-in reporting of metrics, performance indicators and so much more!

The Gold level includes all the elements of the Standard and Silver offer, and adds the following:

Business reviews

We'll meet to stay updated with each other and review topics, includes all items in Silver level. Into the Gold level, the meetings will be done on a quarterly basis (4 times a year)

Operational metrics

In preparation for this call, we will analyze the data in your system to provide metrics and insights around productivity (reviewing KPIs pertinent to your business and industry) and performance (monitoring the progress of your team and identifying users that may need additional coaching).

- Anonymized key performance indicators
- Detailed analysis of recognition, timeline & traffic indicators
- Assist in understanding metrics
- Follow-up report & action plan

Solution expertise on document recognition

Best practices sharing, discussion and all items in Silver level, plus:

- Up to 50 teachings per year

Onsite customer workshops

Onsite workshops are provided to identify the ways to optimize the productivity and efficacy on the solution. With your collaboration, we are identifying the improvement key points and set up an action plan. Scope:

- Discussion with administrators & key users
- Over the shoulder observations of solution usage
- Best practices review
- Action plan & recommendations
- Additional training recommendations

*Travel expenses not included for onsite workshops

Esker All Access Conference

Our Esker All Access conference is full of new insights and best practice techniques with actionable takeaways, breakout sessions, panel discussions, and one-on-one consults. Attendees get to participate in collaborative discussions with Esker experts and users and hear inspiring keynotes delivered by leading business influencers and thought leaders.

- Two free event passes

Optional services

The following services are not included in the above-mentioned CX service levels and are offered separately upon request..

Teaching

Additional teaching performed by the PS/CX team can be provided. The rate is a fixed fee of \$2,500 for 25 teachings.

Change orders & additional user trainings

Any customizations to the Esker solution will require a Professional Services engagement which is on a time and material basis. Additional user trainings will be invoiced on a time and material basis.

New version deployment

Please contact your sales representative to discuss the advantages of deploying a current version of your solution.

Data Privacy

At Esker, we take data protection very seriously, in full compliance with GDPR regulations. We go to great lengths to ensure the highest level of security for your personal data. For more information, you can refer to our Privacy Policy available here: <https://www.esker.com/privacy-policy/> and the Esker Data Processing Addendum.

Known exclusions

Esker Customer Experience does not provide professional services such as:

- Move to QA environment
- Move to PROD environment
- Script modifications
- Workflows configuration



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