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OpenText™ B2B Integration Essentials Customer Support Handbook

Standard Software Support
North America

opentext™

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1 OpenText B2B Integration Essentials support

1.1 Overview

As a software customer, you have access to OpenText B2B Integration Essentials support during office hours of Monday to Friday from 8:00 am to 8:00 pm EST.

Your designee(s) can call or email to report problems, request support, and make general inquiries.

Please note that support is provided in the English language.

Availability	Support definitions
Business day support Mon-Fri 8:00 am to 8:00 pm EST	• Customers are encouraged to email desktop@opentext.com to log tickets. • When reporting a severity level 1 or 2, follow-up should be made via the phone or to the first level escalation point. • OpenText B2B Integration Essentials support uses a telephone system that allows callers to wait for an operator. There is also an option to leave a voicemail. • A ticket will be generated on behalf of the customer in both cases.

2 Contact methods

2.1 Calling OpenText B2B Integration Essentials support

You can contact the OpenText B2B Integration Essentials support specialists using the following number. When calling, you will need your customer ID and company name.

North America +1-800-334-2255

All calls made to OpenText B2B Integration Essentials support are tracked and assigned a ticket number. Tickets remain open until there has been resolution and follow up with the customer. A ticket will not be closed until the customer is satisfied

with the resolution. Please be aware that the operator may not be the person who closes the ticket; the operator may need to take a backup of your system, log details, and then refer to other members of the team.

2.2 Sending emails to OpenText B2B Integration Essentials support

OpenText B2B Integration Essentials support e-mail address is *desktop@opentext.com*. The following procedure should be followed when sending emails to OpenText B2B Integration Essentials support.

- Provide all relevant information available so that the OpenText B2B Integration Essentials support specialists can take the appropriate action on your request. Incomplete requests may delay our ability to rapidly resolve the issues being reported.
- Please DO NOT forward emails from your partners without an accompanying request/explanation.
- The email subject line should contain your customer ID/account name and a brief description of the issue being reported.
- The email will be sent directly into the ticketing system and a ticket will be automatically generated. Once the ticket is created, the originator will receive an acknowledgment email including the ticket number in the subject line.
- **The ticket number, X-XXXXXXXXX, must be included in the subject line of all further communications so that the information is properly updated into the ticket**. The easiest way to do this is to reply to the acknowledgement message.

Severity level 1 or 2 issues submitted to OpenText by email must be reported to OpenText B2B Integration Essentials support by calling +1-800-334-2255.

Refer to Table 4.1 for severity level definitions.

3 Support requests

3.1 Examples of support requests

Examples of general inquiries supported by OpenText B2B Integration Essentials support include:

- I'm processing a document and an error occurred – here are the details.
- I'm sending/receiving documents and something is wrong – example screenshot attached.
- Do you have documentation to help me create an invoice?
- My live invoices to x have been rejected – I'm forwarding the details.

3.2 Examples of issues not supported by OpenText B2B Integration Essentials support

- Please help me onboard a trading partner.

    - *Your Sales Customer Manager can sometimes help with this – alternatively please speak with your trading partner.*

- Please tell me how to access my partner's portal.

    - *Contact your trading partner directly if you have questions about their portal.*

- Please contact my trading partner to discuss xxx.

    - *We cannot speak directly to your trading partner. If you need to forward questions from them, please log a ticket and explain why you are forwarding the email.*

- I need to add a new trading partner/arrange a reinstall/schedule some training/ talk about my contract.

    - *Please contact your Sales Customer Manager – and please be aware that implementations/installs normally need booking and there will be a lead-time. If you know you will be implementing a change, please allow plenty of notice.*

Note: Support requests submitted by trading partners or external IT will not be accepted by OpenText without prior approval from an authorized customer contact.

3.3 Ticket resolution

For each support request, OpenText B2B Integration Essentials support will open a ticket. All activity, including communications with your staff, will be recorded within that particular ticket. Activities will be created for each action taken to bring the ticket to resolution. In some instances – file traces, certificate changes, new requirements that need sales intervention, we may log issues with other teams. When we do this we may pass the ticket to them, or if they are outside support, simply hand over the issue and close the ticket.

Please note: After the resolution is provided to the ticket contact, the sub-status of that ticket will be changed to "Customer Verification Required". The ticket will then be automatically closed if that sub-status is not changed for three (3) business days. However, the ticket contact will receive an email notification 24 hours in advance of this auto-close action being taken.

3.4 CSAT survey invitations

Upon closure of a ticket, a survey invitation may go to the ticket contact requesting feedback on the experience you had *specifically with support.* The survey link email will come from customerexperience@opentext.com. Your feedback is very valuable to our team and helps us improve the quality of our support.

4 Service levels

4.1 OpenText B2B Integration Essentials support service level objective

Response Time Service Level is defined as the time when the first action is taken by OpenText after the request has been submitted. Tickets derived from phone inquiries will start when the technical support specialist enters the request into the OpenText ticket tracking system.

The OpenText standard response targets are summarized below in **Table 4.1**.

Service level target response time is reflected in working hours. For example, 24 business hours is equal to three (3) working days. This is a best endeavour guide only.

Table 4.1 Standard OpenText incident severity levels and service level guides

Severity	Definition	Service level target
1	**Urgency is high and impact is high** • Customer has many trading partners affected with extreme impact • No work around available or alternate method of transacting • Critical component outage without customer workaround • Customers are unable to transact	Immediately
2	**Urgency is high and impact is medium OR urgency is medium and impact is high** • Customer has many trading partners affected with extreme impact • Alternate method of transacting available • Critical component outage without customer workaround • Customer has one or a small amount of trading partners affected with extreme impact • No work around available or alternate method of transacting • Customer unable to transact	1 business hour
3	**Urgency medium and impact medium** • Customer has one or a small number of trading partners affected with medium impact	6 business hours

Severity	Definition	Service level target
	• Alternate method of transacting available • Impact to small non-critical trading partners or no trading partners • Customers or suppliers may or may not be aware of the issue • Functionality may be degraded • Important component outage	
4	**Urgency is low and impact is low** • Customers has one or a small number of trading partners affected with minimal impact • Not time sensitive • No impact to customer's customers or suppliers • Customer requires research relating to trading partner issues • Changes to trading partner relationships • Testing/onboarding new trading partners	24 business hours

4.2 Policy statement for OpenText B2B Integration Essentials support

The solution you have purchased includes installation, standard configuration, and basic initial training.

Prior to go-live, OpenText recommends that you undertake sufficient testing to mitigate any issues that might arise, aiming to catch problems before they impact your business.

OpenText B2B Integration Essentials support is available to provide ongoing support for day-to-day running of the solution including basic help on operation, advising on issues, and reporting fixes/enhancements. Support also makes availablestandard documentation and guides that may aid with day to day activities.

Support does not extend to undertaking acceptance testing, creating documents, importing data, updating databases, or talking directly with trading partners. The customer retains sole ownership of its data and operation of the solution.

If further assistance is required, the customer should contact their Sales Customer Manager to services or training.

5 Escalation guide

5.1 Escalation of production problems

When OpenText B2B Integration Essentials support is notified of a severity 1 or 2 issue, a determination is made if the issues are specific to the customer or a widespread interruption of service. If the issues are only impacting a single customer, the OpenText B2B Integration Essentials support specialists will attempt to resolve. If the issue impacts multiple customers, OpenText Incident Management Team is notified, and the Operations Team will work the incident to resolution. Customers will be notified as soon as the incident is discovered and updated on a regular basis until the issue is resolved.

Before escalating an issue, be sure to follow the standard support procedure for reporting a production issue by calling or emailing OpenText B2B Integration Essentials support as noted in Table 5.1 below. Once you have logged a ticket, if you do not receive a response within the timeframe appropriate for the severity of the request, you may begin the escalation process. The names and telephone numbers of OpenText B2B Integration Essentials support and its management team are defined in **Table 5.1**.

Table 5.1 OpenText B2B Integration Essentials customer escalation contacts

Escalation	Escalation point	Name	Phone number/email
Direct call or email OpenText Business Network Support Services to report a problem or request assistance.	Business Network Support Specialists	Pool of agents **Please call for severity 1 or 2 issues**	+1 800 334 2255 Press option 2 for technical support Press option 4 for software products Press option 6 for B2B Integration Essentials desktop@opentext.com
Level 1 – If you do not receive a timely response based on the severity level of the incident.	Business Network Support Lead	Business Network Support Services Lead on duty	Call +1 800 334 2255 and ask for Business Network Support Lead on duty. c.s.managementteam@opentext.com
Level 2 – If you do not receive a response from the Frontline	Technical Support Manager – Business	Michelle Paculob	US toll free number: +1 800 503 9190 option 1, ext. 8888790 (office) +63 999 2216580 (cell)

Escalation	Escalation point	Name	Phone number/email
Supervisor within 1 hour of the escalation.	Network – Software		mpaculob@opentext.com
Level 3 – If you do not receive a response from the Business Network Support Manager within 1 hour of the escalation.	Technical Support Manager – Business Network – Software	Marco Vistan	+63 999 8861781 (cell) mvistan@opentext.com
Level 4 – If you do not receive a response from Senior Manager within 1 hour of the escalation.	Business Network Support (BNS) Messaging PSG Senior Manager	Melissa Bass	+1(248) 483-2165 (office) bassm@opentext.com
Level 5 – If you do not receive a response from Technical Escalation Senior Manager within 1 hour of the escalation.	Sr. Director, Business Network Support	Steve Worthy	+1-404-467-3002 (office) +1-678-823-4449 (cell) sworthy@opentext.com

About OpenText

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