



# *Descartes Customer Support & Client Services Portfolio*

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## How can we help?

For Descartes' customer support organization ("Customer Support"), customer satisfaction is the primary measure of success. In view of achieving the highest level of customer satisfaction, we strive daily to give our clients prompt and accurate responses, delivered in a friendly and courteous manner, while also identifying how they may improve their business practices through additional training and Descartes services.

## Roles & Responsibilities

Under the broad umbrella of Customer Support are focused teams of people. There are centralized teams servicing all product types and regionalized teams dedicated to specific product areas. We strive to share a common set of tools, policies and procedures across all of the constituent teams.



Network availability

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Stability with new technology

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Operational efficiency

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Service continuity

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Functional support



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## Expertise Centers

Expertise centers are the core component of Customer Support. Customer Support representatives in each expertise center are not only subject matter experts for the products associated to their center, but are also cross-trained in other product areas in view of enabling us to provide 'Follow the Sun' service and redundancy when possible. When an opportunity arises, or a customer has a question about the products they use, the applicable expertise center is the first stop for the right answer.

Expertise centers' responsibilities include:

- Coordinating with the Professional Services team to develop a consistent handover process and documentation for when a new customer or service goes live
- Liaising with the Product Management and R&D teams to facilitate user and support friendliness of the solutions
- Providing ticket and incident details to Service Desk to facilitate RCAs, QBR's, CAB meeting, Knowledge Articles
- Meeting regularly with Product Management and R&D teams to identify opportunities
- Escalation, when required, of tickets to Product Management and R&D and Descartes Incident Management Center ("IMC") via Descartes customer portal
- Monitor incidents to identify trends and opportunities, including product enhancements and best practices
- Inform customers about maintenance, outages and other information of common use
- Establish and nurture a strong customer relationship

### Descartes Customer Support & Client Services Portfolio



## Centralized Services

Global Logistics Network Services

Service Desk

Client Services

For a full breakdown of the products and services covered by each expertise center

[Visit our online Resource Center](#)

## Global Logistics Network (GLN)

The GLN support team is responsible for the Value Added Networks (“VANs”) within Descartes Global Logistics Network™

These internal VANs connect our clients to:

- Their partners, either directly or via another VAN
- Government agencies
- Descartes applications

The GLN support team checks and corrects the issues on these platforms whether the issues are reported by our monitoring system or by the different parties connected to these platforms. They also maintain these platforms and when required implement a number of changes to connect our clients to their partners.

The GLN support team interacts with other DSG teams such as Product Management and Research & Development (R&D) to support customers on functionality issues and manage customer expectations, and they interact with the activation team to facilitate getting our clients connected to their trading partners as quickly and efficiently as possible. Since the GLN support team acts as a gatekeeper to the rest of the world, the team assists the various Descartes expertise centers with any connectivity issues they encounter.

### VALUE ADDED NETWORKS



Business Partners



Government Agencies



Descartes Applications



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## Client Services

Descartes' offers additional client services to our client base to proactively conduct regular calls/meetings to review performance, and identify areas for service improvements.

These services also include interfacing with other Descartes teams, including Sales, Product Management and R&D to discuss improvements, expedite issue resolution and product enhancements, as well as play a supporting role in the delivery of new projects to our clients.

Additional client services include:

- Data analysis to identify ways Descartes may improve services
- Production and distribution of management and performance reports, including KPI reports
- Implementation/migrations support
- Training



## Service Desk

The Service Desk provides 24/7/365 support to all Expertise Centers globally.

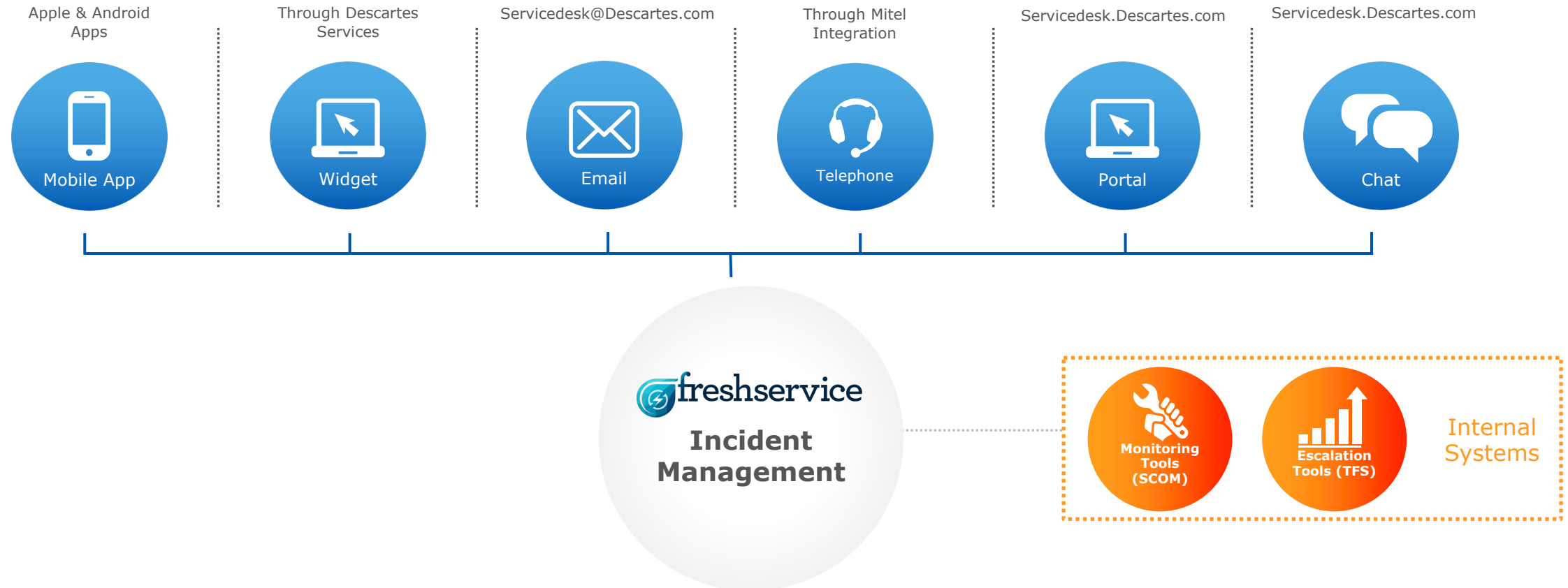
Tasks of the Service Desk include:

- Handling call overflow from the expertise centers
- Rogue incidents
- Global support related communications (outages, change, bulletins, RCAs)
- RCA management and distribution
- CAB approvals
- Knowledge base management



# Contacting Customer Support

There are several ways for a customer to raise an incident to Customer Support.





## Customer Portal

[HTTPS://SERVICEDESK.DESCARTES.COM](https://serviceDesk.Descartes.com)

The Customer Support portal is the first stop for all customers seeking answers to their questions about Descartes products and services. From this single point, 24 hours a day, 7 days a week, customers may open a new ticket and check the status of an existing ticket. Tickets opened via the portal will be answered by the appropriate expertise center in accordance with the service level targets for the product referenced.

Additionally, customers seeking a Do-It-Yourself solution may also turn to the portal. Common reference guides and Frequently Asked Questions pages will also be hosted within the portal for those times when a user is seeking out a quick answer to a problem.



## Chat

[HTTPS://SERVICEDESK.DESCARTES.COM](https://serviceDesk.Descartes.com)

Available via the Customer Portal is the option to Chat directly with your Expertise Center. Once your chat is finished a ticket will be created with a script of your chat. If all support representatives are busy you will be able to leave a message which will also generate a ticket.

How can we help you?

Enter your search term here...

Discover the range of support options and resources available to you.

**Notice:** eCustoms/NetFreight Server Maintenance 10/03/2019 28 Feb. 2019 | Evolution 2019: Register Now for Early Bird Pricing! 13 Sep. 2018 | Welcome Announcement 17 Sep. 2017 [View all notices](#)

NEW TICKET	TICKETS	SOLUTIONS	REQUEST
Submit a <b>new ticket</b> to the Descartes Support team.	Review <b>support tickets</b> and check status updates.	Browse a <b>broad library</b> of manuals, training material, articles and more.	Raise a <b>request</b> for a new device or service.

[Chat now](#)



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## Email

[SERVICEDESK@DESCARTES.COM](mailto:SERVICEDESK@DESCARTES.COM)

Messages delivered to the Customer Support Mailbox will be recorded by the Customer Support portal, acknowledged to the customer with a ticket number and then distributed to the appropriate Expertise Center for resolution. Customers can check on the progress of these tickets any time in the portal. Customers will be notified of ticket resolution status by email or phone.



## Mobile

Precious time can be saved and non-desk productivity can be improved significantly if customers and agents can easily manage tickets 'on the go'. Through the Freshservice app you raise tickets, get instant information about a ticket and receive announcements. Download your app via your iOS (7 and higher) and Android (4.4 and higher) stores.



## Telephone (Mitel)

Customers can call Customer Support at (North America: [\(877\) 786-9339](tel:8777869339), Outside North America: [\(+800\) 7866-3390](tel:+80078663390)) and select the appropriate option of the phone tree to gain access to the applicable expertise center. Additionally, we maintain localized numbers for direct access.

Each expertise center has a 'hunt group' enabling any assigned support member to respond to the call in any of the regions, helping us leverage a 'Follow-the-Sun' policy. In the event that a call cannot be taken immediately by the applicable expertise center, there are the options to leave a voice message or speak to a member of the Service Desk.

For a full list of telephone numbers

[Visit our online Resource Center](#)



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## Customer Support Hours

Incidents can be raised via the Support Portal <https://servicedesk.descartes.com>, email [servicedesk@descartes.com](mailto:servicedesk@descartes.com), or for critical incidents via phone. These incidents will be addressed based on your level of support as outlined below:

### Business Hours Support

The default support option for most Descartes solutions is known as Business Hours Support. This means that a customer has access to support personnel during business hours. Active response and resolution efforts by support and related personnel will also take place only during business hours.

Excluding local statutory or civic holidays, First Level Support will be offered from Monday to Friday between the hours of 8:00 AM and 6:00 PM for the specified regions in accordance with the specified time zones: (i) North America – Eastern Standard Time; (ii) EMEA – Central European Time; and (iii) APAC – Hong Kong Time.

### 24x7 Support

A customer may elect in their contract to have 24x7 support for an extra fee. This provision expands the support staff accessibility and response hours to 24 hours a day, 7 days a week inclusive of holidays for Severity Level 1 critical incidents.

Regardless of which support plan a customer chooses, the Incident Management process and Target Resolution Times remain the same.



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# What a customer should know before they contact support...

To enable a timely and complete diagnosis of the problem, Customers should come armed with some key pieces of information when they contact Customer Support. It is also very helpful to wherever possible save error messages and screenshots to a file or document and email them to Customer Support in connection with the ticket.

This information will enable Customer's question to be delivered to the appropriate expertise center and will help the Customer Support Representative address the issue at hand. Being able to provide answers to the questions below in connection with each inquiry enables our Customer Support to better serve our customers.

- [What is your contact information?](#)
- [What Descartes product are you using, including its version?](#)
- [What URL and user name you are using if logging onto a Descartes hosted site?](#)
- [What is the exact nature of the problem? Is it repeatable or random?](#)
- [What is the relevant reference data \(House Bill, Master Bill, Vessel, and Voyage Number\) associated with the problem?](#)
- [What is the exact wording of the error message?](#)
- [What steps are taken to encounter the problem?](#)
- [What steps have been taken already to resolve the problem?](#)
- [What other information may be helpful? Have any changes been made to your environment \(system maintenance, new software, software or OS upgrades\)?](#)



## Target Response & Resolution Times

The following target response and resolution times are based on the standard Descartes form of agreement with the customer. This may differ for some clients/services depending on form of agreement and/or severity level.

### Target Response Times:

All portal entries and emails will be responded to within 30 minutes during Business Hours, or 24x7 for Severity Level 1 critical incidents based on the customer's support entitlement.

All Severity Level 1 critical incidents should be made via the support hotline to ensure the timeliest response possible.

The nature of the response may include notification that the call has been resolved and closed or a notification indicating the status of the incident determination and resolution process and/or the time when it is being actively worked upon. In the event that the call cannot be closed, Customer Support will provide a status update to the customer and log the report within Descartes Incident Tracking System.

## Severity Levels

SEVERITY LEVEL	DEFINITION
Level 1 – Urgent	The complete or partial failure of the system or part of the system resulting in service unavailability or mission-critical business processes with no immediately available workaround
Level 2 – High	The partial failure of the system or part of the system resulting in reduced overall service availability (performance degradation) for users.
Level 3 – Medium	A system requires an intervention but the operation can continue without the change being implemented.
Level 4 – Low	All questions or requests of information on the use of the service.

		URGENCY			
		High	Medium	Low	
IMPACT	High	Urgent	High	Medium	
	Medium	High	Medium	Low	
	Low	Medium	Low	Low	



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## Target Resolution Times:

The commitment for incident management resolution is determined from the time of the initial notification to Descartes through system alerts, telephone, email or entry into the portal and based on the Severity Level attributed to the incident by Customer Support. Descartes will target to resolve a reported incident within the following time frames where 'resolve' means that the reported incident has been rectified or that the cause of the incident has been identified, a workaround has been put in place and a change request has been escalated to Second Level support to fix the problem, if appropriate.

The following statuses within the Customer Support portal will be considered 'Resolved' for KPI reporting purposes:

- Awaiting Your Reply
- Pending 3rd Party
- Pending Change Request
- Pending Professional Services
- Pending R&D
- Resolved
- Closed - Assigned to Sales
- Closed

SEVERITY LEVEL	RESOLUTION TIME
Level 1 – Urgent	12 Hours
Level 2 – High	48 Hours
Level 3 – Medium	5 Days
Level 4 – Low	Future Release



## Reporting

Customer Support is equipped with tools for generating reports regarding internal and external KPIs. Such reports enable us to know if we are meeting our target service levels and to strive for further excellence.

## Escalation

In all cases, Descartes makes every attempt to be responsive and efficient in resolving issues and processing requests. However, in some cases, a customer may feel Descartes has not performed the service to their expectation. In such cases, and only after attempting to resolve the issue with the expertise center staff member with whom they are working, the customer may escalate.

In general, an escalation is justified when one or more of the following occur:

- Descartes has not responded/resolved an incident twice within the published response/resolution times and has not provided reasonable justification for the delays;
- The customer believes the appropriate severity levels have not been applied

In the event the customer feels an escalation is justified according to any of the above criteria, the customer may take the steps outlined in the subsequent section.

1. Communicate with the Expertise Center Director
2. Communicate with the Service Delivery Manager (if applicable)
3. Communicate with the Key Account Manager (if applicable)
4. Communicate with the Vice President of Customer Support & Client Services

For specific contact details

[Visit our online Resource Center](#)



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# Outage Procedures

## Scheduled Maintenance:

Descartes reserves certain times for the performance of preventative system and hardware maintenance. During the service window, certain services may not be available in part or in whole. Descartes will use commercially reasonable efforts to advise the customer prior to any scheduled maintenance period in the event that the services will not be available during such service window.

Although Descartes' operates and designs its services to avoid emergencies, in unusual circumstances emergency maintenance may be required where less or no notice needs to be provided and the maintenance needs to be performed at a time other than a reserved maintenance window. In these unusual circumstances, Descartes will use commercially reasonable efforts to provide as much advance notice of the outage as practicable. Emergency maintenance includes maintenance required to ensure the continuous and safe delivery of the services to customer. Examples include the application of a security patch to remedy a newly discovered critical security patch or the failing of critical hardware components.

The overall performance of the Descartes GLN™ utilized to deliver the services to customer is largely dependent upon the performance of non-Descartes information technology and communication networks, including customer's own systems, dedicated networks, associated networks, business document exchange networks and the connections between these networks (collectively: "Third Party Networks"). Descartes assumes no responsibility for downtime or performance latency associated with Third Party Networks.



# Outage Procedures

## Un-scheduled Outage & Irregularities:

As part of Descartes' proactive approach to inform its customers, when an irregularity is detected (either through internal monitoring or through our customer base) a communication is sent out to inform all potentially impacted customers. Should the irregularity result in a service disturbance, a notification is also sent out to counter a potential wave of customer notifications and/or questions.

If there has been a service interruption with customer impact, outside of the scheduled maintenance window and not attributable to emergency maintenance, an internal investigation may start with one of the included objectives: a Root Cause Analysis (RCA) document for the impacted customers that will be sent out by our Service Desk to the impacted customer(s).

In case of an 'event' (mostly detected by our automated monitoring) which indicates an irregularity, a proactive communication is also sent out and followed by an internal investigation. Dependent on the impact (#customers, #messages; duration) and the severity of the findings of the internal investigation, an RCA document may be prepared and sent out by the Service Desk to the impacted customer(s).

It is not always the case that every customer communication related to an irregularity or unplanned outage is followed by an RCA document for customers. We strive for meaningful customer communication without jeopardizing our operational efficiency.





# Outage Procedures

## Critical Incidents Process

To meet our targeted resolution times, Descartes follows a robust Critical Incident Process Procedure. Clients are asked to contact the Expertise Center via phone in the event of a critical incident. Following verification, a critical incident is raised to our Incident Management Center who will trigger communications to all key parties, open a conference line and provide regular updates to key parties where practical and commercially reasonable. The Expertise Center will manage communications with Customer's designated representatives for that incident. Whilst we have an overall resolution time of 12 hours, every reasonable effort is made to resolve the incident with utmost urgency and within target resolution times.

Customers will also be provided summary updates on the status of the incident at a regular interval, either by phone, email, or other common support channels.



## For Complete Product & Contact Information

Please visit our Online Resource Center