

Forecast Customer Support Guide

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1.1 Document Overview

This document covers Forecast's approach in providing customer support. This document does not reference any specific customer or support agreements that may be in place.

This document remains valid until Forecast publishes an updated version, at which time the updated version will apply.

1.2 Purpose & Objectives

The purpose of this document is to describe the services provided by Forecast Customer Support.

Our goal is to help you navigate the Support services available, set clear expectations and maximize your experience when contacting Customer Support.

1.3 Stakeholders

The following are the primary stakeholders:

- Service Provider: Forecast Customer Support
- Customer: Customer with a current *active* subscription to the Forecast platform.

1.4 Periodic Review

This document is valid from the Effective Date outlined within the title page on page 1 and is valid until further notice.

This document is maintained by Forecast Support and the most current version can be found in the Forecast website.

1.5 Joint Commitments

In order to have a successful collaborative partnership, clear commitments are required from both Forecast and our Customers.

1.5.1 Forecast Commitments

Forecast Customer Support commits to:

- Troubleshoot your product issues when experiencing unexpected results.
- Using commercially reasonable endeavors to meet response times associated with service-related incidents.
- Provide guidance and offer tips for using your Forecast application.

- Reproduce potential software issues, provide alternative solutions or workarounds and log your potential issues for evaluation and potential correction.

If your case requires advanced assistance, such as detailed guidance on how to use the product or guidance on custom reporting, custom implementation or integrations, you will be referred to Forecast Professional Services.

1.5.2 Customer Commitment – Administrator

Each customer must have a designated administrator, whose name and email address must be provided during, or prior to signing your Subscription Agreement.

The administrator is responsible for managing your implementation and support in any ongoing service requests with Forecast, where an administrator is required to make any amendments to the account. The account administrator(s) is responsible for managing the implementation of Forecast for their own organization and for the maintenance of their account configuration.

1.6 Support Services

1.6.1 Getting Support

Forecast Customer Support Analysts are located in different relevant geographic locations around the globe to provide timely support. Customer Support is provided during business hours Monday to Friday, excluding public holidays. Critical Support is available outside of regular business hours for Severity 1 level cases.

Forecast Support is only available to customers with an active subscription agreement. You have an unlimited number of contacts that are able to use our support site and our support services, however from time to time we may request your users to reach out to the administrators of the Forecast account for further assistance.

1.6.2 Contacting Support

Web Support

The best way to initiate a support request is online using our [Forecast Customer Center](#). New cases can be submitted 24x7 from our online platform. This allows us to collect all the necessary information, including severity levels and can appropriately route your case to the available Support Analyst. Use this method to request Critical Support **during weekends or public holidays**.

In-app widget

With the in-app widget users can message directly with Forecast Support Analysts. The in-app widget is available to administrators only and it is based on your Forecast permission profile.

Email Support

All users can email support@forecast.app to request assistance, however please note that cases submitted via email do not have a Severity level associated with them, and therefore emails are only monitored within regular business hours*.

1.6.5 Support Services Scope

The Forecast Support team is available to solve product issues and answer your users' questions. It does not include onsite assistance, creation or support of custom code and custom reporting, system administration or training. We treat data security with the utmost importance and because of this, Forecast Support does not handle manipulation of customer data. While resolving a Support case, Forecast Support may recommend changes to account or data, which should be performed by one of your System Administrators.

What Forecast Customer Support Services cover:

- Forecast software related questions not addressed in our Help Center
- Troubleshooting Forecast product software error messages
- Software defect troubleshooting and support
- Access to online self-service tools (Knowledge Base and FAQs)

What is not covered by Forecast Customer Support Services:

- Product training or assistance that would be covered in PS training sessions online or on-demand.
- Account amendments (e.g changes that would normally be made by an administrator).
- Customizations (creating or troubleshooting custom reports, custom code development).
- Third party product support or troubleshooting of conflicts caused by third party applications (e.g integration providers).
- In-depth data analysis or system administration duties.
- Troubleshooting computer/network or performance issues not directly related to Forecast software.
- Guidance or recommendation on unique processes or configurations.
- Writing/editing or importing/exporting data into/from the database.

1.7 Support Cases

1.7.1 Case Definition

Each reported issue or request is handled as an individual 'case'. Cases can be logged via the [Forecast Customer Center](#) or email to support@forecast.app. In the Customer Center, cases can be logged, tracked, closed and reopened.

We assign case IDs to each unique issue to document and track the progress. Case IDs are automatically assigned when you submit a new case to Forecast Support.

1.7.2 Opening a new Support Case

Customers can log a new Support case through any of the available channels, depending on their individual permission profile in Forecast. We recommend that all customers open new cases online through the [Forecast Customer Center](#) when requesting assistance from Forecast Customer Support, so that we can collect all the necessary details to action the case as soon as possible, and for the Service Level agreements to be applied.

When contacting Forecast Customer Support for assistance, we document the request for your organization. We track each unique case separately, which has its own unique case ID.

Additionally, we recommend creating a new case for any new issues through the Customer Center, instead of contacting a Support Analyst directly. This will help us ensure your request is correctly routed and actioned as soon as possible. Updating an existing case with a new issue may result in unnecessary delays.

1.7.3 Checking the status of your Case

We log every contact about the request in the case and any update can be reviewed within the [Forecast Customer Center](#). The case ID will be referenced in your portal and in the email notifications received from Forecast Customer Support. You can access the 'My activities' page from the Customer Center and review the status for the cases submitted. Forecast Support assigns a particular status to each case and reviews it regularly. Please refer to the Case Statuses table below for more information.

1.7.4 Reopening a Case

It is possible to reopen a case up to seven days after the case has been marked as Solved by either replying via email to the case email updates or using the [Forecast Customer Center](#).

1.7.5 Case Statuses

Status	Definition
Open	The case has been assigned to a Support Analyst who is working to resolve it.
Awaiting a Reply	The case has been assigned to a Support Analyst, but the agent is waiting for more information from you before resolving the Case.
Solved	The case has been marked as resolved.

1.7.6 Case Resolution

We strive to provide a clear resolution for all cases raised by our Customers, as we understand you are looking for your issue to be resolved as soon as possible. We aim to provide the highest quality solution, and look for direct confirmation from you that the issue has been resolved.

In some instances, an issue may be deemed resolved without your direct input:

- The issue is not due to any error in the Forecast platform.
- A workaround or instructions are provided and accepted by the customer contact.
- Customer is notified of a scheduled product release that contains a correction for the issue in question.
- The issue is classified as an enhancement request in product functionality.
- The issue is related to a severity 3 or 4 defect which will be considered for a future release.
- The issue is determined to be a third-party vendor issue and you agree to transfer the problem to the third party provider for resolution.
- It is determined that Forecast Professional Services are required to assess customization that might be causing or contributing to the issue.
- The issue is outside the scope of support.
- The customer contact is unresponsive.

To ensure timely resolution, the customer contact who logged the case must be readily available throughout the time the case is being worked on.

1.8 Service Level Guidelines

1.8.1 Service Level Guideline Overview

The Customer selects the case severity when they create a case from the [Forecast Customer Center](#), based on the definitions listed below. Based on the nature of the request, the Customer shall reasonably self-diagnose each issue and suggest an appropriate Severity, whenever submitting a case to Forecast Support through the Customer Center.

The severity level is determined when the case is initially created through the [Forecast Customer Center](#) and cannot be changed by the customer after submission.

Forecast, in partnership with the Customer, shall validate the severity level of the request or notify of a proposed change in severity where deemed necessary, based on the framework below. The Support Analyst works with the customer to understand the business impact, if the issue does not comply with our severity definitions. If necessary, Forecast Support reserves the right to downgrade the severity of the case, following the severity specifications and upon notifying the requester of the said case. The severity may be raised or lowered at any time by Forecast Support.

In the event the customer response commitments (detailed below) cannot be met, the support case severity may be downgraded.

1.8.2 Service Level Definitions

Severity 1 - Critical

Definition: The Service is unavailable. No workaround exists.

Commitment: Forecast dedicates a Support Analyst full-time to provide support until the case is either resolved or downgraded.

Resolution: Forecast will work to resolve the problem until the service is returned to normal operation and will notify Customer of status changes. A Severity 1 case will be downgraded when a reasonable work-around, a solution or fix has been provided.

Customer Response Commitment: Customer shall respond within 1 hour and remain accessible for troubleshooting from the time a Severity 1 issue is received until it is resolved.

Severity 2 - Major

Definition: An issue with a major function or feature not operating or seriously impaired, where a temporary workaround exists or operations can continue in a restricted fashion. Issue prevents customers from completing one of more critical business processes with a significant impact on business operations.

Commitment: Forecast dedicates a Support Analyst to investigate the reported issue during business support hours.

Resolution: Forecast will work to resolve the problem until the service is returned to normal operation and will notify Customer of status changes.

Customer Response Commitment: Customer shall respond within 4 hours and remain accessible for troubleshooting during normal business hours.

Severity 3 - Minor

Definition: Partial, non-critical loss of use of service with a moderate impact on business processes. Product or service is operational, but does not provide a function in the most convenient or expeditious manner, or results in cosmetic or isolated errors.

Commitment: A Support Analyst will investigate the reported case and escalate as necessary to ensure expeditious resolution.

Resolution: If resolution requires an issue fix, Forecast will add the issue fix to its development queue for future system updates and may suggest potential workarounds until the problem is resolved in a future product release. Forecast will notify Customer of status changes.

Customer Response Commitment: Customer will respond to Forecast requests for additional information within 24 hours and will implement recommended solutions in a timely manner.

Severity 4 - General

Definition: A low or no business impact issue, where there is no critical time constraint or no loss of service, including errors in the self-service documentation. This is also the severity level for non-system issues and general usage questions, such as product configuration and functionality, account changes, general service inquiries.

Commitment: Cases are assigned through our normal channel and procedures. Questions about product setup and functionality can also be addressed by the Forecast Help Center.

Resolution: Forecast will respond to the request and will notify Customer of status changes.

Customer Response Commitment: Customer will respond to Forecast requests for additional information within 3 days.

1.8.3 Service Level Response Times

Our target '**First Response**' times are based on the initial Severity level of the case. While we aim to resolve all requests within a timely manner, we use severity levels to differentiate critical issues from general product questions, in order to respond appropriately to each request. Below an overview of Forecast First Response targets based on the severity of the case.

Severity	First Response Time
Severity 1 (Critical)	< 30 minutes
Severity 2 (Major)	< 1 hour
Severity 3 (Minor)	< 4 hours
Severity 4 (General)	< 24 hours

1.9 Support availability

1.9.1 Business hours Support

Business hours Support is for non-critical cases and is generally available during regular business hours, eight hours a day five days a week (9:00 A.M. to 5:00 P.M. Monday – Friday in GMT and MST time zone), excluding public holidays. Cases submitted via email or through the [Forecast Customer Center](#) with Severity 2 or lower will be collected and a response will be guaranteed by the next working day.

1.9.2 Critical Support

Critical support is available 24x7x365 and it is limited to Severity 1 (critical) cases that affect production software. To access, submit your case through the [Forecast Customer Center](#) by selecting Severity 1 and providing a justification to request Critical Support.

1.10 Customer Satisfaction

1.10.1 Customer Support Surveys



At Forecast we're committed to providing the best possible service to our customers. We use transactional customer support surveys to gauge the satisfaction of our customers for every single interaction with Forecast Customer Support. With your feedback provided through Customer Support Surveys we drive continuous improvement to our service offering, help center and the product.

Additionally, we also base our Support Analysts performance evaluations on the feedback you provided, after your case has been resolved.