

# Customer Self-Service Portal



## CUSTOMER-CENTRIC

Experience our enhanced and optimized customer-first engagement model.



## CoreIQ – CUSTOMER PORTAL

CoreIQ is now your one-stop shop for connecting with all your **Coretelligent Teams, including Strategic Services, Customer Success, and Billing**, via the Self-Service Customer Portal.



## TECHNICAL SUPPORT

Your interaction with Technical Support will continue to remain the same, with the added benefit of the ability to escalate your active case using the **Escalation Request** form.



## DIRECT CONTACT

Requests are now routed to the correct service management team. Your Strategic Services Manager will provide proactive technical account management with help from the Customer Success Pod.



## CENTRALLY MANAGED

Moving forward, customers have a simplified approach to submitting requests, whether they are technical or business-related, using the CoreIQ Self-Service Customer Portal.



## Benefits

- Streamlined and more efficient process
- Improved communication
- Enhanced visibility and tracking of requests
- Easier access to Strategic Services
- Directly escalate technical requests
- Better IT and business alignment



*New*

## Business Requests

Select Business Requests for assistance with the following.

### CONTACT US FOR:

- Invoice or contract questions
- Schedule meetings with Strategic Services Manager
- General questions and feedback
- Request quarterly business reviews to ensure continued alignment of IT with your business needs and goals.



*New*

## Technical Escalation

Continue to access technical support just as you have been submitting cases.

### CONTACT US FOR:

- Escalate existing technical cases via the CoreIQ Self-Service Portal.
- Select the Escalation Request option in Technical Support.
- CoreIQ will alert the correct service team manager to resolve issues with the correct oversight.
- Still provide feedback via the Customer Satisfaction Survey.

## HOW IT WORKS

### Step 1

#### CoreIQ

Submit a request or report an issue in CoreIQ via the Self-service Portal by clicking the **I Need Help With Something** button.

### Step 2

#### TECHNICAL OR BUSINESS REQUEST

Choose **Technical Support** or **Business Request**, depending on the type of assistance you require. Follow the instructions to submit your request.

### Step 3

#### SUBMIT

Your request will immediately be routed to the appropriate service management team, reducing the time it takes for your request to be addressed.

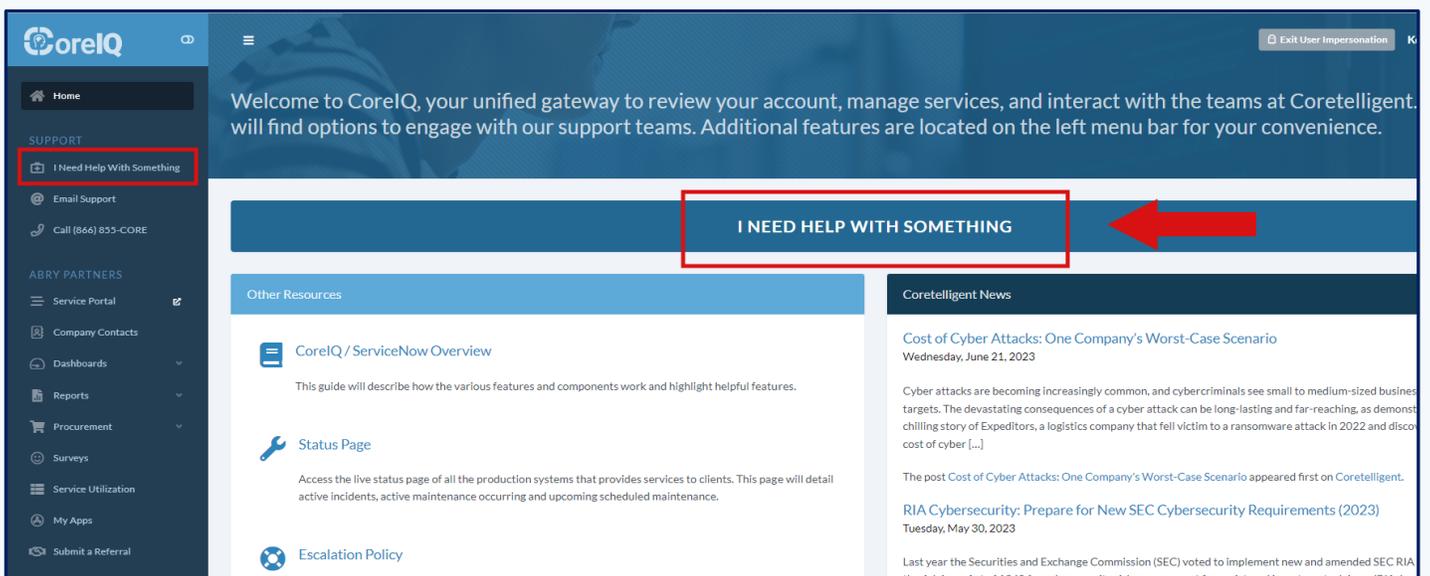
### Step 4

#### COMMUNICATION

Your request will be handled by the correct service management team. Answers or next steps will be communicated to you via email.

### Step 5

Follow-up based on the response to your request or close out your request.



The screenshot displays the CoreIQ Self-Service Portal. On the left sidebar, the 'I Need Help With Something' button is highlighted with a red box. In the main header area, the 'I NEED HELP WITH SOMETHING' button is also highlighted with a red box, and a red arrow points to it from the right. The main content area is divided into two sections: 'Other Resources' and 'Coretelligent News'. The 'Other Resources' section includes links for 'CoreIQ / ServiceNow Overview', 'Status Page', and 'Escalation Policy'. The 'Coretelligent News' section features articles such as 'Cost of Cyber Attacks: One Company's Worst-Case Scenario' and 'RIA Cybersecurity: Prepare for New SEC Cybersecurity Requirements (2023)'.

New Feature

## Easier Interaction with Strategic Services

### CoreIQ & Strategic Services

You can now contact **Strategic Services directly through the Self-Service Portal in CoreIQ.**

Your request will be routed directly to your Strategic Services Manager, who can assist you with the improved alignment of technology and business, any special technology initiatives you want to undertake, and more.

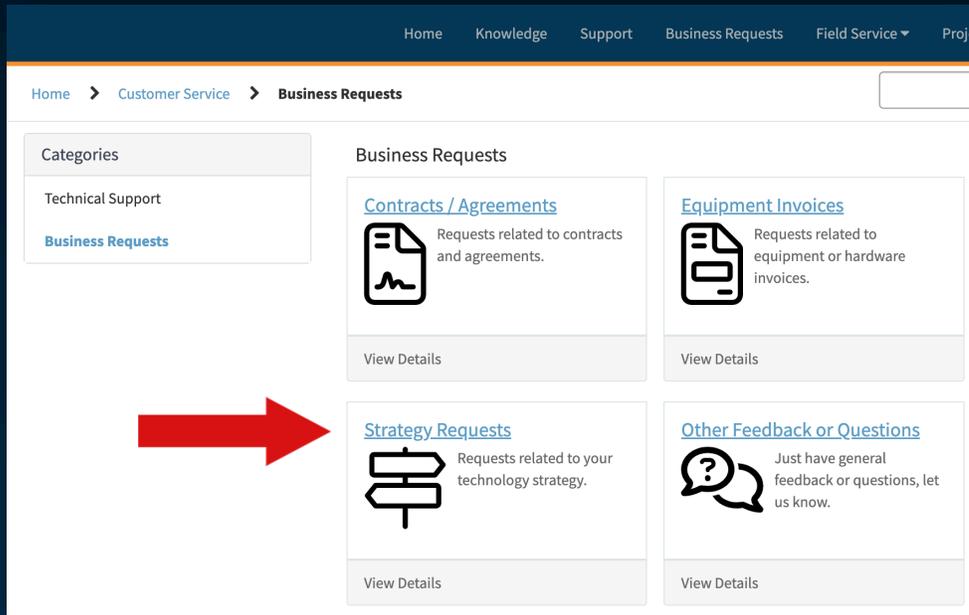
You can set up regular check-ins as well as quarterly business reviews with your Strategic Services Manager to make the most of your IT investment.

#### Contact Strategic Services for the following:

- Schedule monthly check-ins and quarterly business reviews.
- Guidance on ensuring continued alignment between technology and business.
- Technical account management
- Assessment of industry-specific regulations and best practices.
- Develop remediation plans for critical security and capability gaps.
- Experienced IT project delivery services.
- Scalability to keep pace with growth while minimizing TCO.

New Feature

## Contact Strategic Services



### Step 1

Under the Customer Service tab, select **Business Requests** and then select **Strategic Requests**.

### Step 2

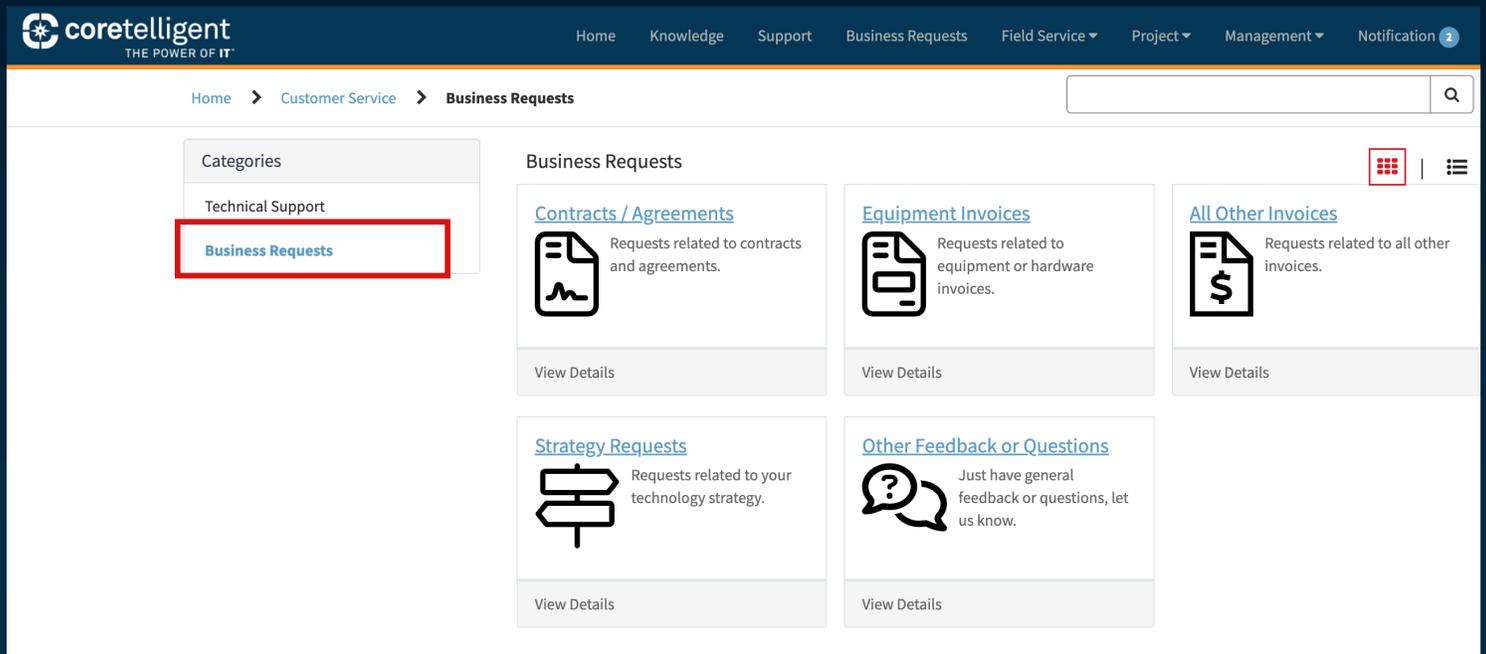
Fill in the required fields of the Strategy Request form. Click the **Submit** button to complete your request.

The screenshot shows the 'Strategy Requests' form. The breadcrumb trail is 'Home > Customer Service > Business Requests > Strategy Requests'. The form title is 'Strategy Requests' with the subtitle 'Requests related to your technology strategy.' Below the title is an icon of a signpost. The form contains two paragraphs of instructions: 'To expedite your request, please utilize this form to request needs from your Strategy Team. Our dedicated team member from the relevant group will promptly reach out to you for further discussion.' and 'To ensure a swift response, kindly provide as much detail as possible regarding your request. Additionally, feel free to attach any relevant reference materials that may assist us in addressing your inquiry effectively.' Below the instructions are two required text input fields: 'Short Description' and 'Description'. A legend indicates that an asterisk (\*) denotes required fields. At the bottom right, there is an 'Add attachments' button with a paperclip icon.

New Feature

## Business Requests

Please use the CoreIQ Self-Service Portal for help with billing and other non-technical requests.



The screenshot shows the CoreIQ Self-Service Portal interface. The top navigation bar includes the Coretelligent logo, the tagline "THE POWER OF IT™", and menu items: Home, Knowledge, Support, Business Requests, Field Service, Project, Management, and Notification. Below the navigation bar, the breadcrumb trail reads "Home > Customer Service > Business Requests". A search bar is located on the right. On the left, a "Categories" sidebar lists "Technical Support" and "Business Requests", with the latter highlighted by a red box. The main content area, titled "Business Requests", features five cards: "Contracts / Agreements" (Requests related to contracts and agreements), "Equipment Invoices" (Requests related to equipment or hardware invoices), "All Other Invoices" (Requests related to all other invoices), "Strategy Requests" (Requests related to your technology strategy), and "Other Feedback or Questions" (Just have general feedback or questions, let us know). Each card includes a "View Details" button.

### Step 1

#### BUSINESS REQUEST

Under the Customer Service tab, select the **Business Requests** option.

### Step 2

#### CHOOSE OPTION

Choose from the following:

- Contracts/Agreements
- Equipment Invoices
- All Other Invoices
- Strategy Requests
- Other Feedback or Questions

### Step 3

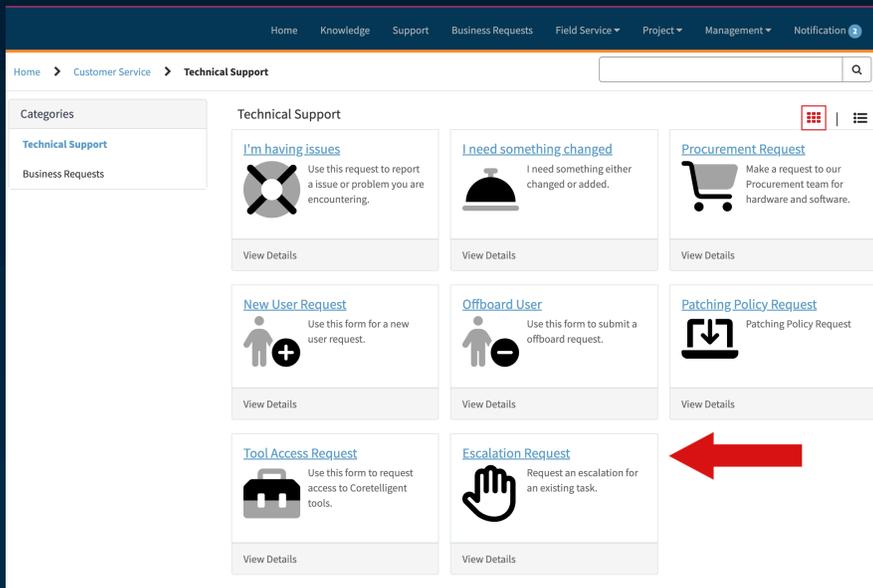
#### SUBMIT FORM

Complete the form and click the submit button.

New Feature

## Escalate Technical Requests

You can now use the Self-Service Portal to request escalation of existing technical cases.



### Step 1

## ESCALATION REQUEST

Under the Customer Service tab, select **Technical Support** and then choose **Escalation Request** from the options.

### Step 2

## SUBMIT FEEDBACK

Complete the escalation request form. Please add your case number if available to speed this up. Then click the Submit button.

Provide feedback via the Customer Satisfaction Survey.

