

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.

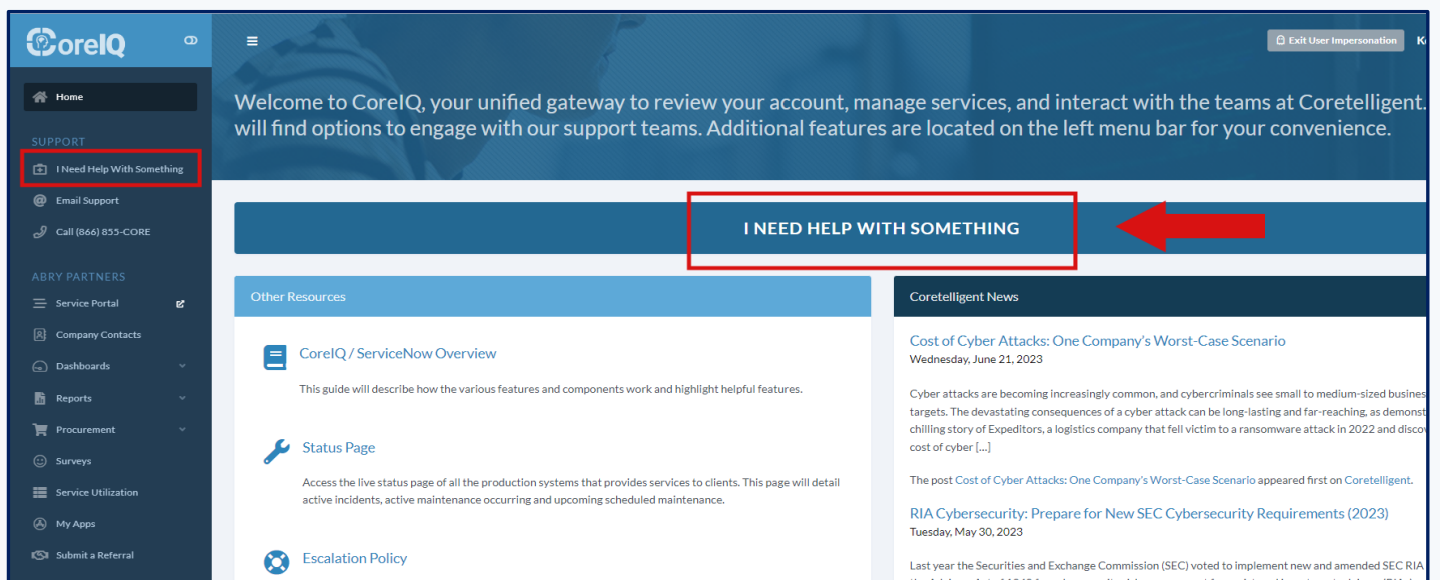
Step 4

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, under the 'SUPPORT' section, the 'I Need Help With Something' button is highlighted with a red box. The main content area features a welcome message: 'Welcome to CoreIQ, your unified gateway to review your account, manage services, and interact with the teams at Coretelligent. will find options to engage with our support teams. Additional features are located on the left menu bar for your convenience.' Below this, a large blue button labeled 'I NEED HELP WITH SOMETHING' is highlighted with a red box and a red arrow pointing to it. The page also includes sections for 'Other Resources' (CoreIQ / ServiceNow Overview, Status Page, Escalation Policy) and 'Coretelligent News' (Cost of Cyber Attacks: One Company's Worst-Case Scenario, 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.

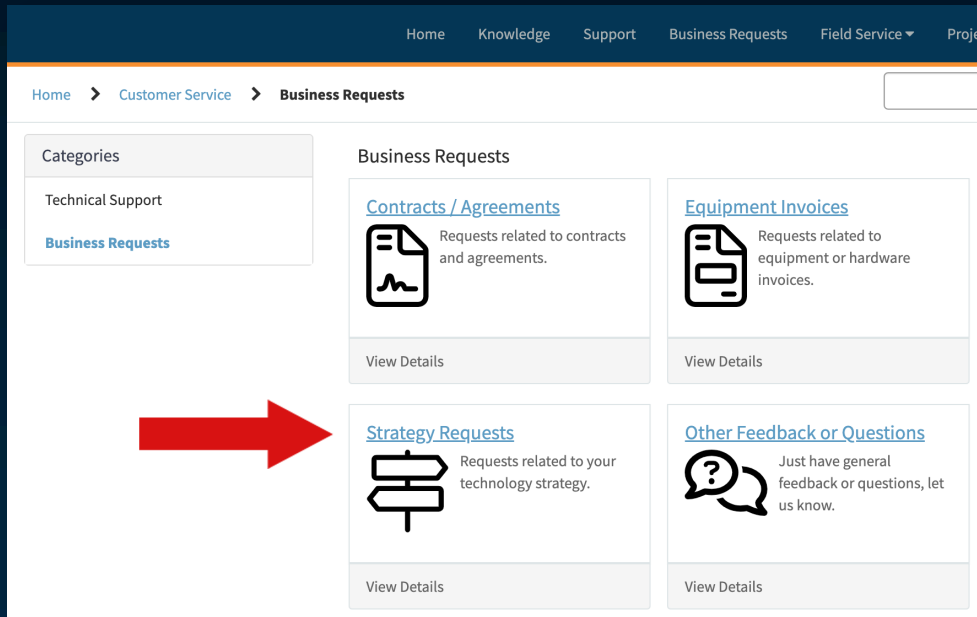
You can set up regular check-ins as well as quarterly business reviews with your Strategic Services Manager to make the most of your IT investment.

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

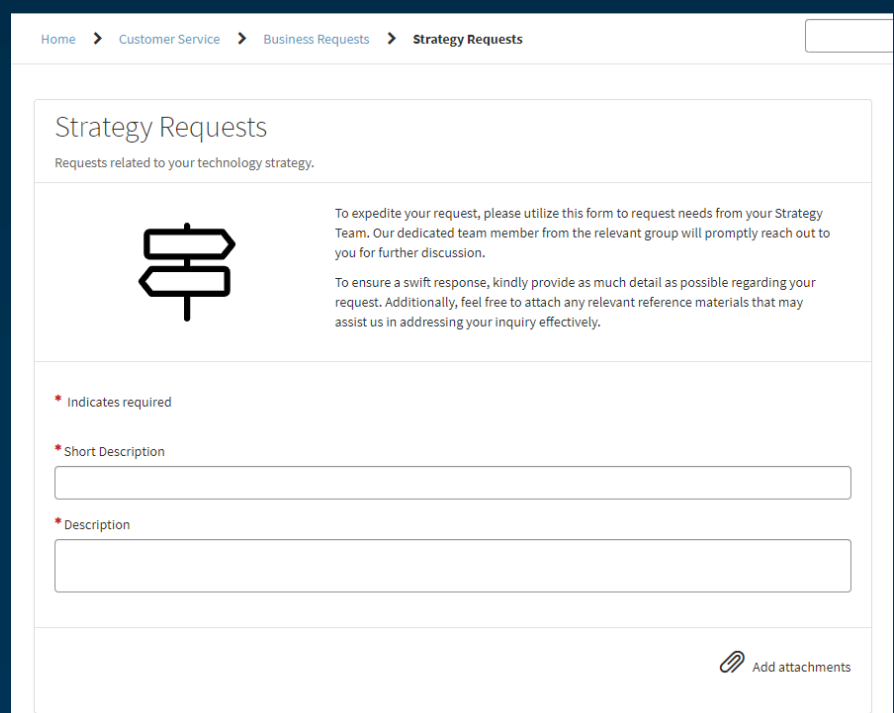


Step 1

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.

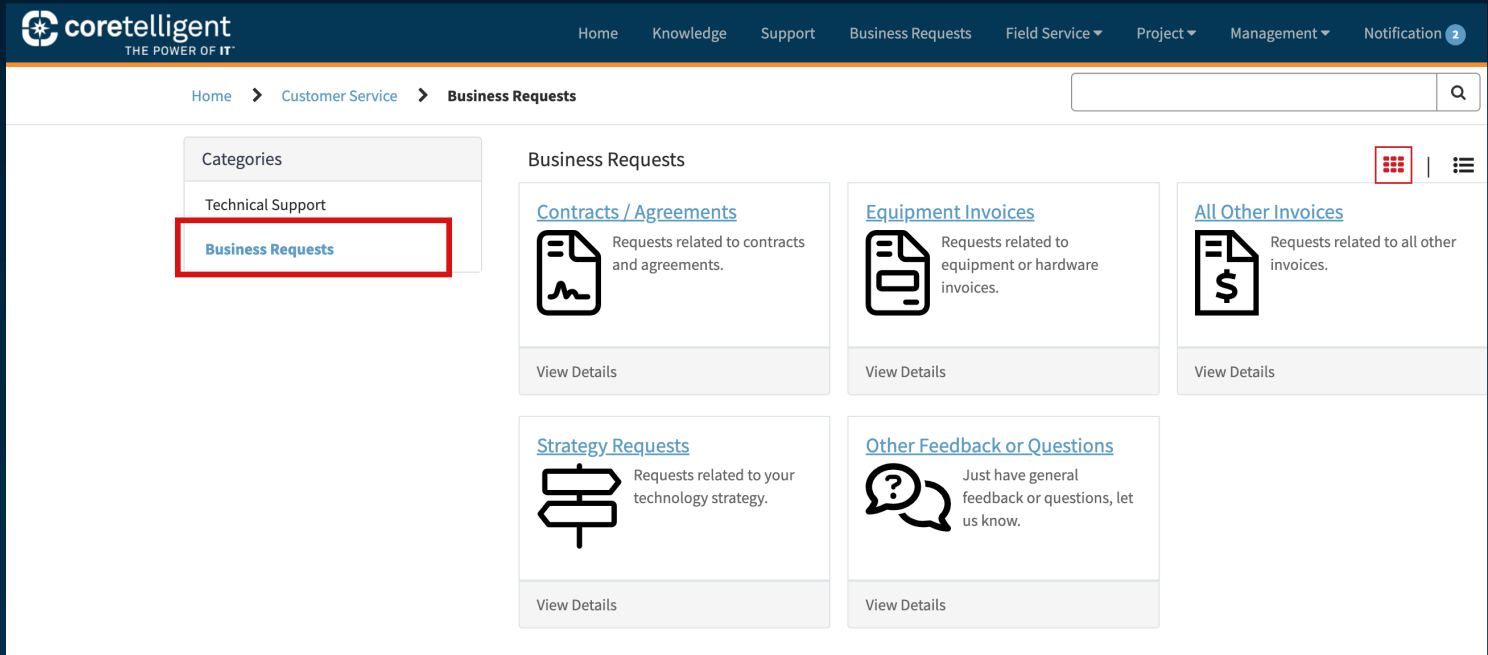


The screenshot shows the 'Strategy Requests' form. The breadcrumb trail is 'Home > Customer Service > Business Requests > Strategy Requests'. The form title is 'Strategy Requests' with the subtitle 'Requests related to your technology strategy.' Below the title is a large icon of a signpost. To the right of the icon, there is explanatory text: '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 this text are two required fields: 'Short Description' and 'Description', each with a red asterisk indicating it is required. At the bottom right, there is a link icon and the text 'Add attachments'.

New Feature

Business Requests

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



The screenshot shows the Coretelligent Self-Service Portal interface. The top navigation bar includes links for Home, Knowledge, Support, Business Requests, Field Service, Project, Management, and Notification. The main content area is titled "Business Requests" and features a sidebar with "Categories" including Technical Support and Business Requests (highlighted with a red box). The main content area displays five request categories: Contracts / Agreements, Equipment Invoices, All Other Invoices, Strategy Requests, and Other Feedback or Questions. Each category includes a brief description and 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

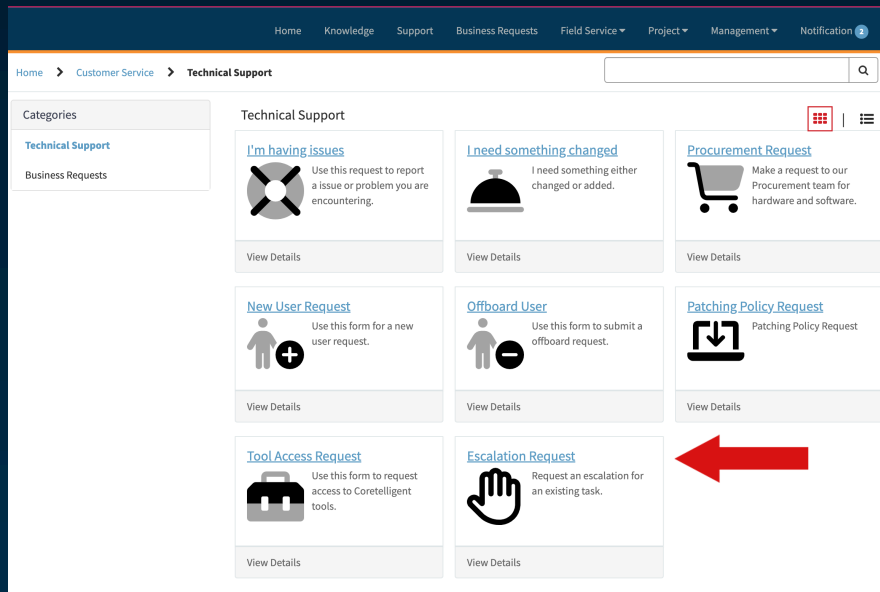
SUBMIT FORM

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

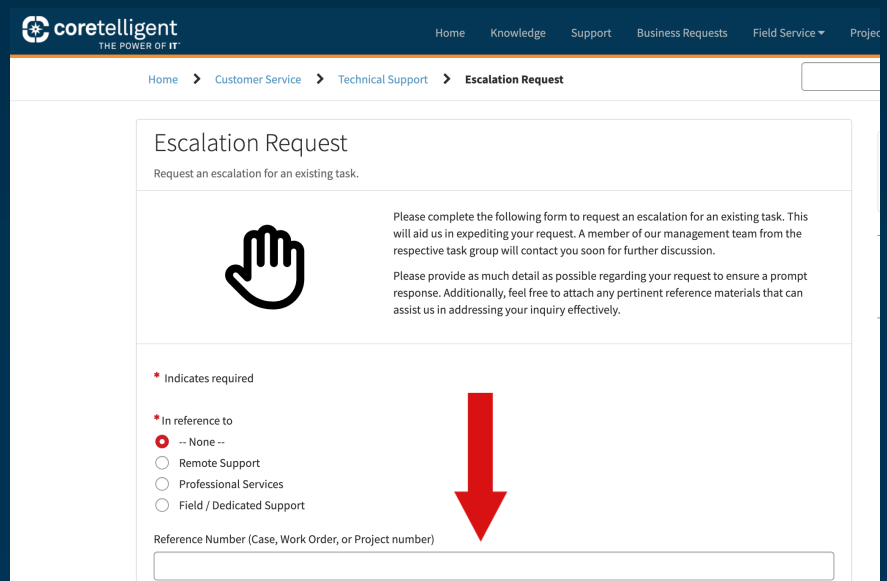
Under the Customer Service tab, select **Technical Support** and then choose **Escalation Request** from the options.

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.

A screenshot of the 'Escalation Request' form in the Self-Service Portal. The form title is 'Escalation Request' with the subtitle 'Request an escalation for an existing task.' Below the title is a hand icon. The form contains instructions: 'Please complete the following form to request an escalation for an existing task. This will aid us in expediting your request. A member of our management team from the respective task group will contact you soon for further discussion. Please provide as much detail as possible regarding your request to ensure a prompt response. Additionally, feel free to attach any pertinent reference materials that can assist us in addressing your inquiry effectively.' There is a section for 'In reference to' with radio button options: 'None', 'Remote Support', 'Professional Services', and 'Field / Dedicated Support'. A red arrow points to the 'Field / Dedicated Support' option. At the bottom, there is a field for 'Reference Number (Case, Work Order, or Project number)'.