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.

CoreIQ

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 Self-Service Features

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.

Using the New Self-Service Portal

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.

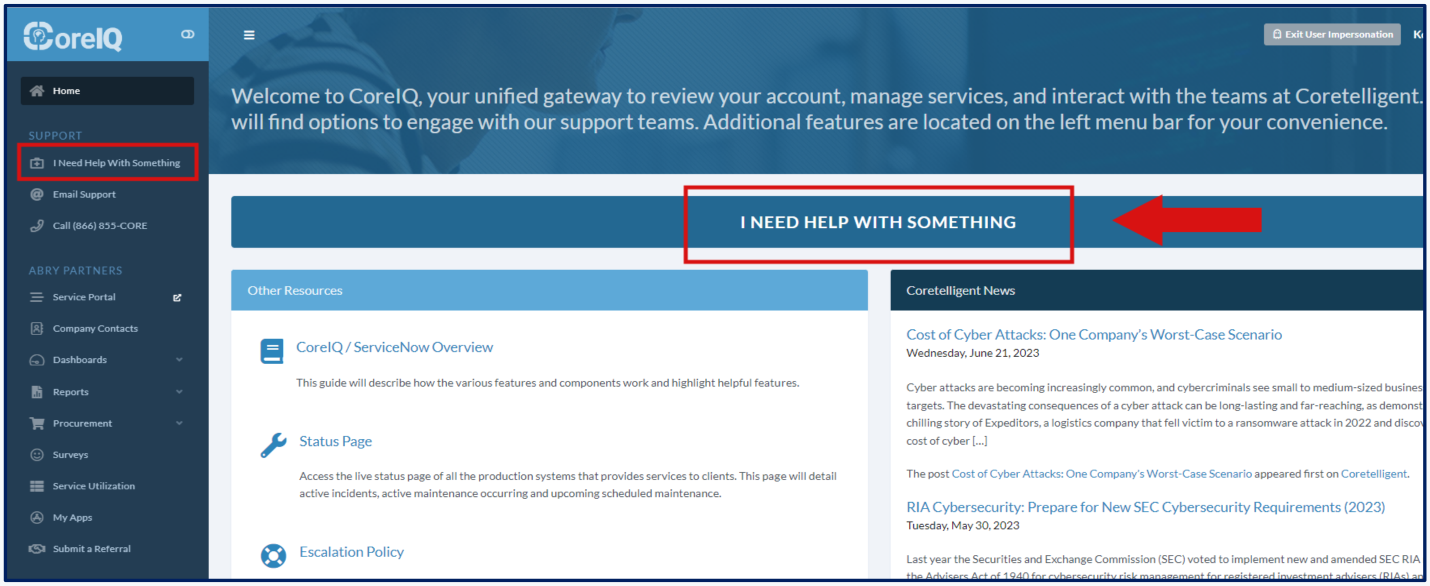
Step 3 **SUBMIT**

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.



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.

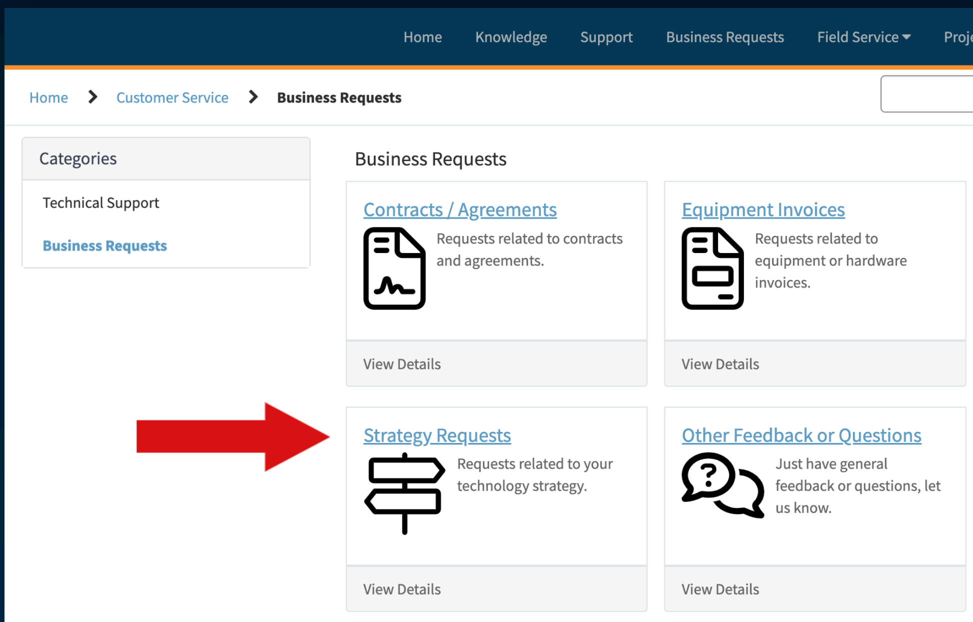
You can set up regular check-ins as well as quarterly business reviews with your Strategic Services Manager to make the most of your IT investment.

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

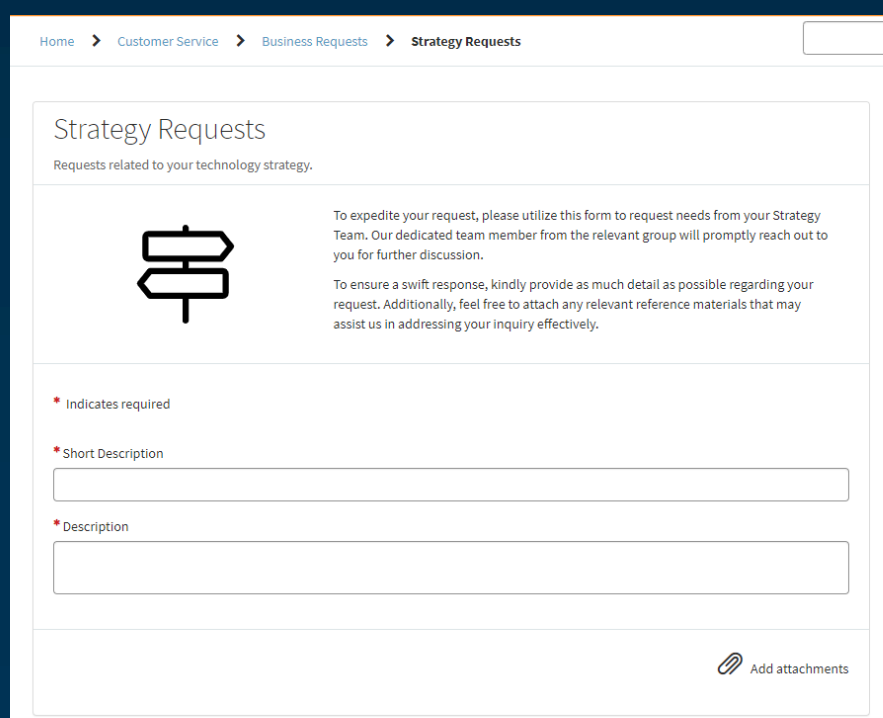


Step 1

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

Step 2

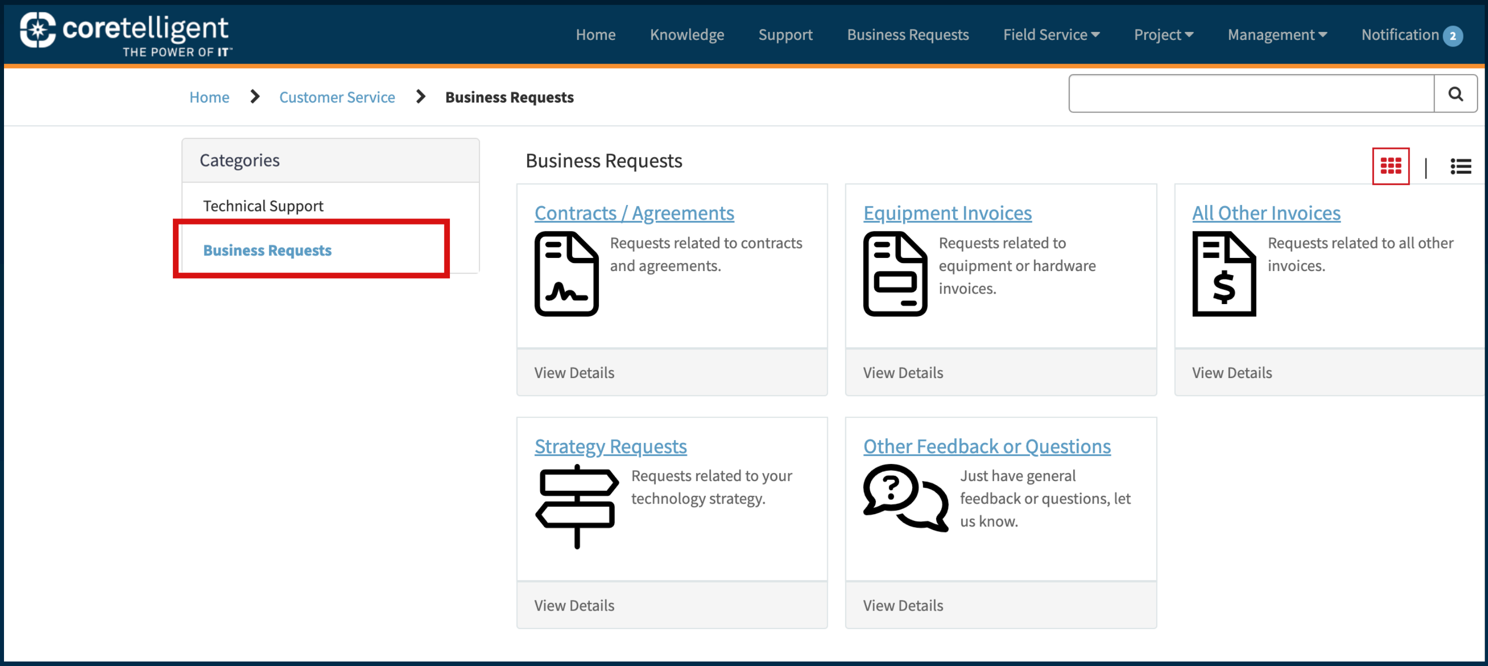
Fill in the required fields of the Strategy Request form. Click the **Submit** button to complete your request.



New Feature

Business Requests

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



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

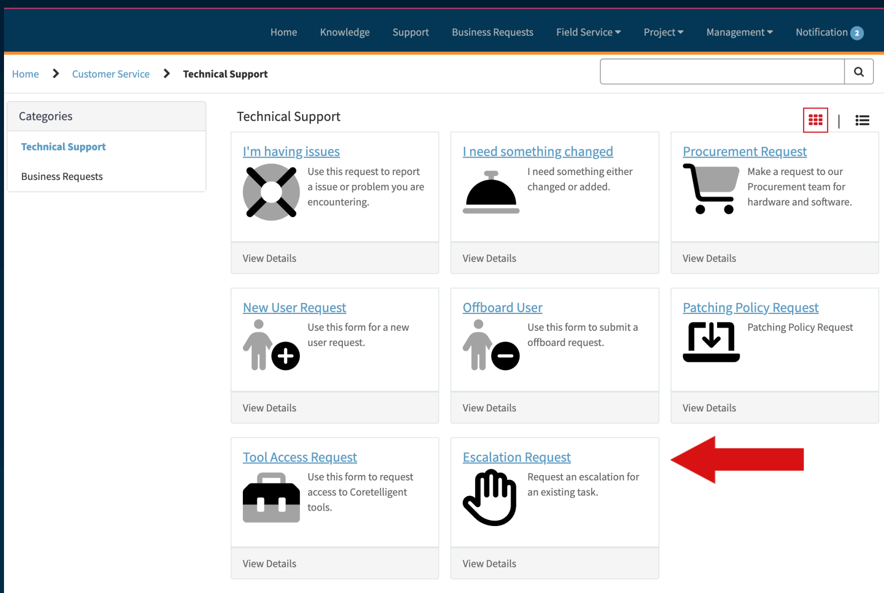
SUBMIT FORM

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

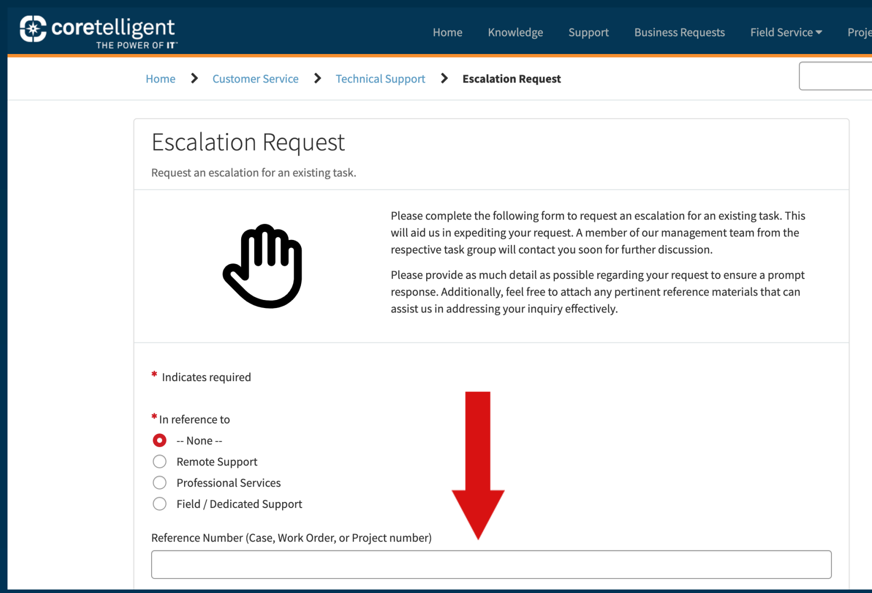
Under the Customer Service tab, select **Technical Support** and then choose **Escalation Request** from the options.

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.



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