

Coveo Global Customer Support & Success Guide

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About this Guide

This document provides details about the services we provide to customers with the purchase of a Coveo Customer Support and Success Plan or Coveo product subscription. It is intended to provide an explanation of the elements of Coveo Support, Customer Success and Training programs available; the benefits of each and how you can use them to maximize your Coveo investment.

An Introduction To Coveo Support And Customer Success

Coveo Customer Support and Success Teams are dedicated to providing world-class service by building trusted relationships with every customer; ensuring value based adoption and success, post-implementation.

We recognize that you have made a significant technology investment and how important Coveo solutions are to your business and bottom line.

Our teams are staffed with professionals from various industries with comprehensive background in Content Management, Search and Knowledge Management and our philosophy is simple; we are 'Customer Advocates'.

An Overview

	FREE PRODUCT	STANDARD PLAN	STANDARD PLUS PLAN	PREMIUM PLAN
Customer Success	N/A	Access to a team of Customer Success Specialists	Designated Customer Success Manager, 6 Hours/Month target*** 2 x SBR/Year with 1 onsite	Designated Customer Success Manager starting from 12 Hours/Month target*** 4 x SBR/Year with 1 onsite
Customer Support	Online Community only	12hrs/day (8am - 8pm ET) x 5/week S1* - 8 hrs S2 - 12 hrs S3 - 2 Business Days S4 - 3 Business Days	Standard Support - 12hrs/day (8am - 8pm ET) x 5/week S1 - 4hrs S2 - 8 hrs S3 - 2 Business Days S4 - 3 Business Days	Premium Support - 12hrs/day x 5/week + (24x7 for P1) S1 - 2 hours* S2 - 6 Business Hours S3 - 1 Business Day S4 - 2 Business Days
Cloud Operations Uptime SLA	99.5%	99.5%**	99.5%**	99.9%**

* S1 – recommend to phone for support.

** Excludes *Excused Downtime* for scheduled maintenance

***CSM hours are planned, not committed and unused hours do not roll over month to month.

Coveo Customer Support & Success Plans

Coveo offers three Global Customer Support and Success plans that are designed to meet your business needs and help you maximize your Coveo investment. The Customer Support and Success Plans provide access to trained Coveo Specialists that may include a dedicated Support Specialist, Customer Success Specialist or Manager as well as 24x7 access to our comprehensive self-service website for [online help](#).

Standard Support & Success Plan

The Standard Support and Success Plan is included with your purchase of a Coveo license. This plan is best for customers who have a single, simple use case of Coveo with a limited amount of connectors.

With a Standard Support and Success Plan, you will have comprehensive support from a team of Customer Success Specialists and our Support team during regular business hours (12hrs per day x 5 days per week). Customer Support Specialists will schedule monthly check-ins with your team and you will have access to a full catalogue of online resources including webinars, documentation and more through our self-service community.

Each feature of the Standard Support and Success Plan is carefully designed to provide value to your business so you can effectively:

- Drive adoption and understand best practices
- Access support and value-add resources

Standard Plus Support & Success Plan

The Standard Plus Support and Success Plan is available at an additional cost to your purchase of a Coveo license. This plan is best for customers who want to proactively extend their adoption and accelerate usage of Coveo.

With a Standard Plus Support and Success Plan, your team will connect with Coveo team members to ensure consistent alignment between your business goals and the usage of your Coveo solution. This plan also includes a dedicated Customer Success Manager who will provide up to six (6) hours of design and usage reviews per month and two (2) Executive Business Reviews per year. Access to our Support team is also expanded with increased case response time and an additional designated support contact from your organization.

Each feature of the Standard Plus Support and Success Plan is carefully designed to provide value to your business so you can effectively:

- Continuously align business objectives with usage metrics and analytics
- Correlate business outcomes with your Coveo investment
- Leverage Best Practice Sessions including: UX Design, Risk Management, Adoption and Advocacy as well as Functional Reviews

Premium Support And Success Plan

The Premium Support and Success Plan is available at an additional cost to your purchase of a Coveo license. This plan is best for customers who have Coveo deployed across their organization with multiple use cases including but not limited to website search, customer service agent search, portal or in-product search.

Customers who choose the Premium Support and Success Plan get the most personalized level of strategic guidance, support and application of best practices, faster response times and initial response time on support cases.

As a Premium Support and Success Plan customer you will realize all of the benefits of the Standard Plus plan but with an even deeper partnership with Coveo team members. Your dedicated Customer Support Manager will provide twelve (12) hours of design and usage reviews per month with up to five (5) Executive Business Reviews per year.

This Success and Support Plan includes all of the elements of Standard and Standard Plus Support, and adds additional services including:

- Increased access to experienced Product Specialists
- Faster response time for all cases - at every severity level. Please see 'Case Severity and Response Times' on page 4.
- Extended 24x7 support across all products; with critical weekend and holiday coverage for Severity Level 1 cases

Contacting Support

SUPPORT REGION	HOURS OF OPERATION LOCAL TIME	LANGUAGES SUPPORTED	PHONE NUMBER
North America	6am - 9pm EST Monday to Friday	English, French	+1.866.266.1583 or +1.418.266.1583
EMEA - Europe, Middle East, Africa	11am – 3am GMT/BST Monday to Friday	English, French	00800 5008 0900

Cases can be logged using the [Coveo Community](#).

Customer Success and Support Plan Coverage at a Glance

SUPPORT PLAN COMPONENTS	STANDARD	STANDARD PLUS	PREMIUM
Software Updates & Hotfixes	x	x	x
Product Documentation	x	x	x
Case Management - Online, Phone & Email	x	x	x
24x7 access to Online Help	x	x	x
Product Downloads & Documentation	x	x	x
Product Release Notifications	x	x	x
Online Video Tutorials	x	x	x
Extended Hours (24x7) for Severity 1 Cases			x
Best Practice Webinars	x	x	x
Open Office Hours	x	x	x
Proactive Outreach	x	x	x
Designated CSM		x	x

Support Contacts & Registration

With a Coveo Customer Support & Success Plan, your organization can pre-determine and identify a Primary Technical Contact on the Customer Support and Success Plan.

A Technical Contact is responsible for:

- Submitting changes/updates to contact information and license information.
- Managing all other contacts within your organization.

Adding Additional Contacts

In addition to the Primary contact; additional support contacts for your company can be added as per your plan. In order for additional contacts to receive Support, they must first register on our [Customer Community](#).

PLAN TYPE	NUMBER OF CONTACTS
Standard	2
Standard Plus	4
Premium	6

Coveo Version Support Lifecycle Policy

The “Version Support Lifecycle” describes the phases during which Coveo products are eligible for hotfixes and support.

It is our policy to provide support and fixes in current versions of our software to supported customers; fixes to older versions are at Coveos’ discretion. Coveo strives to put resources behind the most recent product updates in order to continually improve and enhance the value of our software.

We will attempt to answer questions on older versions of our products provided resources are available; however, we encourage customers using discontinued versions to upgrade to the current version of the software.

“Inactive Version” means all releases of any major version that have been succeeded by a more recent major version of the Software. All releases preceding the release of a following major version become inactive immediately upon such release.

Support and Maintenance services for a version of the Software that has been retired by Coveo is excluded from this Policy. Support and Maintenance services are provided for versions issued in the previous eighteen (18) months running unaltered on an appropriate hardware and operating system configuration as specified in the Documentation; provided however that the last release of an Inactive Version will be supported for three (3) years from the moment it becomes inactive.

Case Management Process

→ Coveo Support assigns unique case numbers to all customer requests for assistance. These case numbers allow Support to prioritize and track all cases through resolution, and allows the customer to get a status update of their case via the web based [Customer Community](#).

→ All cases are assigned a severity level, and are placed in a queue to be processed by the next available Product Specialist . Coveo Product Specialists take ownership of your case and see it through to successful resolution.

→ The Product Specialist will contact the customer and gather any additional information needed and will investigate to determine the proper course of action. This may require the Specialist to reproduce the issue, work with our Coveo Development Team, work with the customer on their configuration of the software, etc.

→ If the Product Specialist determines that the issue requires a fix to the software, the Specialist will notify the appropriate development team. When a fix is made available from the Development Team, the Product Specialist will notify the customer of its availability.

Prior to Logging a Case you may want to review these helpful tips.

- Check the product help included with your Coveo Product.
- Check release notes and self-service Knowledgebase solutions on [Online Help](#).
- Try to see if the problem is reproducible.
- Note any recent changes to your system and environment.

Contact Coveo Support To Log A Case

You can log your case using the Case Management on the [Coveo Community](#).

See the [Contacting Support Section](#) for hours of operation, locations and phone numbers.

Case Severity Levels And Response Times

All cases logged with Coveo Support are assigned a severity level from 1 to 4 based on the service impact on your business. The customer determines the initial severity level when placing a request for assistance. Severity levels may be changed after initial contact and assessment of the issue by a Coveo Product Specialist, providing the customer is in agreement.

The following table defines the severity levels and the targeted initial response time for Standard and Premier Support. It is helpful to clearly explain the business impact of your issue when you contact the Coveo Support.

Case Severity Levels

SEVERITY LEVEL	DESCRIPTION
<p style="text-align: center;">1</p> <p>Critical Service Impact</p>	<p>A critical service impact occurs when:</p> <ol style="list-style-type: none"> 1) there is a Downtime; 2) you discover an active Security Incident, a high-impact vulnerability or a medium or higher vulnerability (as defined under the Common Vulnerability Scoring System ("CVSS"); 3) the Usage Analytics services do not record any Search-Related Event.
<p style="text-align: center;">2</p> <p>Major Service Impact</p>	<p>A major service impact occurs when the Product is not operating as designed for most users and no reasonable workaround is available. The Product may be operating but is severely restricted. A Severity Level 2 issue could have the following characteristics:</p> <ol style="list-style-type: none"> 1) a Severity Level 1 issue is affecting non-production environments; 2) indexing service is not functional; 3) discrepancies between the search results and the content of the index; 4) Coveo administration interface is not functional; 5) Usage Analytics records Events but the data is inaccessible or incomplete; 6) performance degradation of the Search Response Time.
<p style="text-align: center;">3</p> <p>Minor Service Impact</p>	<p>A minor service impact occurs when Product features are unavailable, but a workaround exists and the majority of software functions are still usable. Minor function or feature failure that you can easily circumvent or avoid. A Severity Level 3 issue could have the following characteristics:</p> <ol style="list-style-type: none"> 1) Indexing service slowness; 2) Index browser not loading; 3) Changing sort options issues; <p style="text-align: center;">or</p> <ol style="list-style-type: none"> 4) any low impact vulnerability (as defined under the Common Vulnerability Scoring System ("CVSS")).
<p style="text-align: center;">4</p> <p>Requests</p>	<p>A minor problem or question that does not affect the Product function such as a request for information on how to use a particular feature, a general question or requests for documentation or enhancements. A Severity Level 4 issue could have the following characteristics:</p> <ol style="list-style-type: none"> 1) general requests for advice on product usage; 2) clarification on product documentation or release notes; or 3) A product enhancement request.

Case Response Times

SEVERITY LEVEL	INITIAL RESPONSE - STANDARD	INITIAL RESPONSE - STANDARD PLUS	INITIAL RESPONSE - PREMIUM
1	8 hours	4 hours	2 hours*
2	12 hours	8 hours	6 business hours
3	2 business days	2 business days	1 business day
4	3 business days	3 business days	2 business days

* Support requests for Severity Level 1 issues shall be followed by telephone to trigger the Initial Response Time commitment.

Closing a Case

Support cases remain open until the customer is satisfied that the case can be closed. When a support case requires a new product update before it can be closed, the case will remain open with Coveo, and the customer will be contacted when the update is available.

Coveo will close support cases when customers fail to respond to further requests for information. Typically, two follow up emails or phone calls will be made over four business days and if no response is received, the support case will be automatically closed..

Escalation Guidelines

While we strive to meet all your needs and resolve your issues in a timely manner, we recognize that at times a critical issue may arise that requires special attention. If you are not satisfied with the progress of your case you can request that the issue be escalated. To escalate an issue, you can update your case using [Case Management](#) and request escalation or contact us via phone and request to speak with a Support Manager.

The Support Manager will investigate the issue, contact you to discuss the situation and coordinate any additional resources necessary to resolve the case.

Product Enhancements

Customers interested in submitting product enhancement requests can do so by creating a case with Coveo Support or by logging their “Idea” on our [Customer Community](#).

Once documented, the request will be submitted into the enhancement review system and the identification number will be provided to the submitter and the Support case will be closed.

Product Management will review the open enhancement requests on a periodic basis and consider them for inclusion in a future product update. Product enhancements will not be considered or implemented in current or prior product updates. There is no guarantee that a specific enhancement request will be implemented in a future version of Coveo’s products. Coveo, at its discretion, may determine that certain enhancements to functionality in the product may be offered for an additional charge or as a chargeable option.

Product Defects

If your issue is determined to be a defect in a Coveo product, it is recorded in our defect tracking system and escalated to Coveo Research & Research & Development. You will be notified when an update that resolves your reported defect is available and a link will be provided to that update/Hotfix from the [Coveo Product Updates](#) page.

Product Licensing

Coveo products have license keys generated for their use. Some products require a new license key when upgrading Coveo to a new update and/or Hotfix.

If you have Questions regarding licensing of a Coveo Product please email the Coveo Licensing team: activation@coveo.com. A Coveo Licensing Representative will respond to your query within 48-hours.

Support for Custom Applications

While Coveo Support does provide assistance with the types of issues noted below, we do not support custom code, nor do we support the final application or functionality at the user level.

Coveo Support for custom developed applications extends to:

- Determining if the problem is with the core product or the custom code. If the issue is with the custom code, we try to offer some direction, but ultimately you may be referred to the Coveo Professional Services Organization (PS) for further assistance.
- Providing clarification and explanation around the specific functionality of software components being used in the application development. For example, we will answer specific questions regarding documented properties, methods, and parameters.

This policy extends to customizations developed for a customer by consultants in the Coveo Professional Services Organization (PS), a Systems Integrator or by the customer. If Coveo Support determines that an issue stems from such customizations, you will need to engage the Professional Services Organization for further assistance.

Voice of the Customer Program

Commitment To Customer Satisfaction

Coveo is committed to delivering value to our customers with every interaction. Information gathered from surveys has a direct impact on our Support and Success plans and the services we provide. This information is used to make changes that will directly enhance our ability to continue to deliver world-class support.

Transactional Email Based Survey

Coveo strives to continually improve our service to you; therefore every time a case is closed, we provide customers with the opportunity to give us feedback on the quality of assistance received. The survey asks you to assess the Specialist's performance as well as your overall satisfaction with how your case was managed. The Coveo Support Management team reviews the responses to ensure that all customer feedback is heard and addressed, as needed.

Relationship Survey

Each quarter, we survey our customers about their experience with their Coveo solution and use that feedback to make updates to Coveo programs that reflect our customers current needs.

Self-service Online Feedback

Our customers are welcome to share their feedback anytime. Customers can quickly access our 'Site Feedback' survey on the [Customer Community](#) or by [clicking here](#).

Contact Us About Your Plan

SUPPORT REGION	EMAIL	PHONE NUMBER
North America	cesorders@Coveo.com	+1.800.635.5476 +1.418.263.1111
EMEA - Europe, Middle East, Africa	cesorders@Coveo.com	00800 2673 7642

Upgrading Your Customer Support & Success Plan

Our goal is to meet your specific business requirements. As your business needs change we may have the flexibility to modify your Support & Success Plans to better align with those needs. If you would like to discuss your support contract with Coveo, please contact your Support Renewal Representative. See the Contact Support Renewal section.

Renewing Your Plan

A Coveo Support Renewal Representative will send you a renewal notice prior to the end of your current support contract. To avoid unnecessary interruptions of Support services please contact your Coveo Support Renewal Representative if you have any Questions about the status of your current support contract or pending renewal. See the Contact Support Renewal section.

Lapsed Plan

Without a current support contract, or valid subscription customers will not be able to contact Coveo for technical assistance or access many services on online services. Coveo cannot guarantee immediate assistance to customers who allow their support contract to lapse or to those customers who choose not to purchase support until a support issue arises. See the Contact Support Renewal section.

Free Edition

Without a current support contract, customers will not be able to contact Coveo for technical assistance or access many services on many online services. Coveo cannot guarantee immediate assistance to customers who allow their support contract to lapse or to those customers who choose not to purchase support until a support issue arises. See the [Coveo for Sitecore](#) page.

Additional Services from Coveo

There may be times when additional resources are required to solve a customer's case. Coveo Support can work with the Coveo Professional Services Organization to ensure a reliable hand off of your issue.

Coveo Professional Services

Our knowledgeable, experienced, Professional Services team is committed to providing high-quality service to our customers. Whether you need assistance with installation, configuration, best practices, migration, or customization you can trust Coveo Professional Services to deliver powerful results. For more information about our Professional Services visit <http://www.coveo.com/en/services/professional-services>.

Coveo Training Services

Our trainers have a wide variety of experience and training options available to you. Whether you need us to facilitate on-site training at a location of your choosing and exclusively to your employees, or you want a Public Course provided at a Coveo training facility, we have the Plans to meet your needs. For more details visit <http://www.coveo.com/en/services/training>.

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Changes To Success Plans(S).

Coveo may change its Success Plan(s) from time to time in its sole discretion.

Warranty

The information contained in this document is subject to change without notice. Coveo makes no warranty of any kind with respect to this information. COVEO SPECIFICALLY DISCLAIMS THE IMPLIED WARRANTY OF THE MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. Coveo shall not be liable for any direct, indirect, incidental, consequential, or other damage alleged in connection with the furnishing or use of this information.

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Coveo Solutions Inc.
200-3175, chemin des Quatre-Bourgeois
Quebec City (Quebec), G1W 2K7
www.coveo.com
e-mail: info@Coveo.com

Please refer to our website for regional and international office information.

Coveo complies with U.S. Export Control laws. Consequently, Coveo will not ship products to or provide support to anyone in prohibited destinations as defined by the U.S. Department of Commerce. For a copy of the current export administration regulations, please visit their website at: <http://www.access.gpo.gov/bis/index.html>.

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