Tacton Product Support Handbook

Version 2.1

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1 SaaS Services Availability

This section describes the availability service levels applicable to Tacton SaaS Services. Availability credits described below are Customer's sole and exclusive remedy for any failure to meet the Availability commitment. Note that this does not apply to Early Access, beta, trial, or sandbox environments of the SaaS Services, or any Third Party Services.

1.1 Availability Commitment

Tacton will make the SaaS Services available 24 hours per day, 7 days per week, with a Monthly Availability of 99.9% ("Availability").

Availability is measured monthly and calculated as:

$$\frac{(Total\ minutes\ in\ month - Unplanned\ minutes\ of\ Downtime)}{Total\ minues\ in\ month} \times 100$$

1.1.1 Exclusions

Availability does not include downtime or performance issues caused by:

a) Customer systems, networks, or third-party software not provided by Tacton,
b) Internet connectivity or issues beyond the SaaS Services network boundary,
c) Customer misuse or breach of the Agreement,
d) Force Majeure events,
e) Scheduled maintenance, and
f) Emergency maintenance that is necessary to protect security or stability.

Scheduled maintenance will be communicated in advance and will not normally exceed three (3) hours per calendar month.

1.1.2 Measurement and Reporting

Availability is measured using Tacton's internal monitoring systems at the SaaS Services network boundary. Service status information is available via Tacton's public status page: https://status.tactoncpq.com/

1.2 Availability Credits

If Monthly Availability falls below 99.9%, Customer is eligible for an availability credit calculated as a percentage of the applicable monthly subscription fee for the SaaS Services:

Availability (%)	Price reduction (% of monthly fee)
≥ 99.9	0.0
99.0 – 99.8	2.5
98.5 – 98.9	5.0
< 98.5	10.0

Availability credits must be requested by Customer in writing within thirty (30) days following the applicable month in which the service level failure occurred. Approved availability credits will be applied to Customer's next invoice or, if no future invoices are due, refunded to Customer. Availability credits are capped at ten percent (10%) of the applicable monthly subscription fee and are not cumulative.

1.2.1 Exclusive Remedy

The availability credits described above constitute Customer's sole and exclusive remedy, and Tacton's sole liability, for any failure to meet the Availability commitment.

1.3 Data Retention

Inactive Customer data, as defined in the Product Description of the applicable SaaS service, available on the Tacton legal information page, is retained for an agreed period, depending on the chosen support plan, according to the table below.

Data	Retention Period		
	Priority	Advanced	Essential
Inactive Data	10 years	5 years	2 years

2 Tacton Product Support

Tacton delivers second-line support to direct customers and partners ("clients").

Product support entails access to the Tacton Product Support Team. The team is accessible through the support platform: Tacton Support System (TSS) at support.tacton.com, where one can ask questions, report incidents, or suggest enhancements to a standard product.

Product support is included with the license or subscription fee, depending on the specific product and agreement in place.

2.1 Support Plans

Tacton offers different levels of support. The support plans, listed from highest to lowest, are:

- Priority
- Advanced
- Essential

Throughout this document, differences between support plans are described where applicable. If nothing about different plans is mentioned, the section is relevant for all support plans. The default plan is the Essential one. If an agreement does not specify any support plan or any support details, the Essential plan applies.

2.2 Support Levels

For maintaining a solution built on Tacton software, first-line support is needed and expected on the client side. Typical tasks and responsibilities for the client's first-line support include, but are not limited to:

- Help and support the end-users with questions on how to use the system, as per the design of the system.
- Troubleshoot issues and incidents.
- Help with administrative tasks like user and permission management.
- Maintaining data related to models and prices.

If the end user has an issue, the first-line support will collect as much information as possible about the end user's problem and will then troubleshoot and try to solve the issue. If they are unable to solve the issue, then they can report a case in TSS to Product Support at Tacton.

The first-line support group should be trained in Tacton products, preferably by Tacton Academy, and work daily with Tacton products. The support members should have high technical knowledge about Tacton products and the solution used by their end-users.

The first-line support needs to stay educated and follow updates in the Tacton software. The purpose is to incorporate new functionalities and implement significant changes, ensuring that your solution operates at its optimal level.

2.3 Support Business Hours

Depending on the client's location under the SaaS frame agreement with Tacton, support hours vary as follows:

Region	Support Business Hours per Support Plan		
	Priority	**Advanced**	**Essential**
North America	See below	Monday – Friday From 8 am to 6 pm Americas/Chicago time Excluding US federal holidays	Monday – Friday From 9 am to 4 pm Americas/Chicago time Excluding US federal holidays
Outside of North America	See below	Monday – Friday From 8 am to 6 pm Europe/Sweden time Excluding Swedish national holidays	Monday – Friday From 9 am to 4 pm Europe/Sweden time Excluding Swedish national holidays

For clients with the Priority support plan, support is available during the North America support hours **and** during the support hours for locations outside North America, as defined above for the Advanced plan. The respective regional public holidays apply.

For all clients, regardless of location and support plan, priority 1 infrastructure incident cases will be handled 24/7.

2.4 Connect with Tacton Product Support

To get support and help regarding a standard product, the client connects with the Product Support team via the support platform: TSS (Tacton Support System) at support.tacton.com. TSS is a case-handling system, and all product support-related requests must be registered in the system.

To request access for the first time, please visit the support platform at support.tacton.com and fill in the request access form.

Each client is granted access to the support platform with named support users. These users should undergo training in Tacton's Software to effectively initiate support cases. The maximum number of TSS users depends on the support plan according to the table below.

Plan	Users
Priority	15
Advanced	5
Essential	1

The support platform is accessible 24/7, allowing support cases to be registered at any time.

Cases can also be registered via e-mail to product.support@tacton.com.

Please be aware that service level targets apply to incident cases reported in the support platform (TSS). Note that cases created via e-mail get registered as questions, for which service level targets do not apply.

The product support team serves as second-line support and acts as the single point of contact for all cases reported by the named support users of our clients.

2.5 Case Types

The following case-type categories are used in the support system:

Type	Description
Question	Technical questions regarding Tacton's products.
Incident	Events that are not part of the standard operation of a service and which cause, or may cause, an interruption to, or a reduction in the quality of that service.
Service request	Tasks that are not related to failure, such as getting an additional TSS user registered.
Problem	Underlying causes of one or more incidents.
Enhancement suggestion	Suggestion for enhancements to a Tacton standard product.

Incidents, questions, service requests, and enhancement suggestions can be reported by our clients, while problem cases are opened by the support team at need.

Please note that it is for the Incident case types that service level targets apply.

2.6 Access to Client Environments

Tacton Product Support does not by default have access to any Client SaaS Environments. This applies to all Tacton SaaS services. If access is needed to work on a case, access will be requested and must be provided by the client for the case to be processed further. Once access has been granted, Tacton Product Support is free to keep the provided user credentials in a secure manner with access limited to those working with resolving incidents. If login credentials for the customer's environment have already been provided in previous cases, stored credentials will be used to access the client environment for the purpose of handling support cases, without asking for additional approval. Note that it always remains in the client's control to remove the access to the client environment for Product Support. Stored credentials will be removed on request from the client.

2.7 Recommendations to Clients

Make sure that the named support users have access to TSS as soon as possible so that they are familiar with how to report cases when there is a need to do so.

The following are general recommendations when reporting a case:

- Report cases via TSS at support.tacton.com.
- Provide clear instructions on how to reproduce the incident. For Tacton CPQ, if possible, this should be in a simplified Tacton CPQ Ticket.
- Provide the necessary files, such as a Tacton CPQ Ticket, already when reporting the case.
- For Incidents for which finding a resolution is urgent, clarify the business impact so that priority can be set correctly.
- For Incidents on a SaaS service that are not reproducible, provide as detailed information as possible regarding when the incident occurred, so that log searches can be refined accordingly.
- Be as detailed as possible when describing the symptoms and any error messages, with special focus on discrepancies between expected and actual behavior.

2.8 Incident Management

2.8.1 Incident Priority Level Determination

When a client reports an Incident case in TSS, they are required to respond to a few selected questions that determine the case priority. Tacton will then validate the assigned priority level and communicate any changes, along with the justification, if necessary, to the case reporter.

2.8.2 Incident Priority Definition

Priority Level 1

- An Incident where the live system is completely inaccessible and unavailable.

Priority Level 2

- Functionality for major business processes is not available.
- Significant impact on business operations.
- No workaround is available, or no easy workaround is available.

Priority Level 3

- Time-critical issues, causing major loss of functionality.
- The available workaround may be a reasonable short-term solution but could be labor-intensive.

Priority Level 4

- Minor loss of functionality.
- Immediate attention is not required to ensure continued system functionality.
- A workaround is available.

Priority Level 5

- Cosmetic problems, like misspelled words or misaligned text.

2.8.3 Service Level Targets

Service level targets are applied to Incident cases. For other case types, Questions, Service Requests, and Enhancement Suggestions “best effort” is used. The service level target clock is stopped while a case is in Waiting for Customer or Requested Close (see section 2.12).

2.8.3.1 Response Targets

The table below shows the different response targets per Incident priority level.

Priority[1]	Response Target[2] per support plan		
	Priority	**Advanced**	**Essential**
1	60 work minutes	60 work minutes	2 working hours
2	60 work minutes	2 working hours	4 working hours
3	1 workday	1 workday	3 working days
4	2 working days	3 working days	No commitment
5	3 working days	5 working days	No commitment

[1] As described in section 2.8.2.

[2] Tacton will respond within the stated time. Note that response times are only applicable during Support Business Hours as described in section 2.3. For priority 1 and 2 Tacton shall remain accessible for troubleshooting from the time the incident is responded to until it is resolved.

2.8.3.2 Resolution Targets

For Priority 1 and 2 Incidents, Tacton will work to resolve the Incident until the Service returns to normal operation. Clients will be notified of status changes. For Incidents with lower priority, Tacton will add the incident resolution to its development queue for a future update. Clients will be notified of status changes.

2.8.4 How to report a priority 1 infrastructure incident

As it is only priority 1 infrastructure incidents that are handled 24/7, it is here clarified how such incidents are to be reported.

In TSS report an Incident in your Tacton Solution and select:

- the appropriate Tacton SaaS service
- that it is occurring in the **Production/Live environment**
- that it has an impact **now**
- that there is **no workaround**
- that **the system is completely down and inaccessible**

2.8.5 Incident Case Process

1. Tacton Product Support receives an Incident case in TSS.
2. Tacton Product Support checks that they understand the content of the case and that all the information needed is present. If needed, additional information is requested from the case reporter. The case is then set to Waiting for Customer (see section 2.12).
3. Tacton Product Support verifies the case priority according to this handbook and adjusts it if needed.
4. Tacton Product Support tries to reproduce the incident. The first-hand option is to replicate the incident by following step-by-step instructions in a sandbox environment with as few settings as possible. If this is not possible, replication is tried in a sandbox environment resembling the customer environment. Tacton Product Support asks the client for more information if the incident is not reproducible. The case is then set to Waiting for Customer (see section 2.12). If the client does not reply, the case is handled as described in section 2.12. If the client replies and it is still not reproducible, the case will be closed.
5. Tacton Product Support begins the investigation.
6. The client is regularly updated during the investigation.
7. If a workaround solution is found, it will be communicated to the client.
8. If the resolution requires a release of Tacton standard software, the client will be informed.
9. When the incident is resolved, Tacton Product Support tests it internally, if possible.
10. The resolution is sent to the client for verification. The client confirms the resolution.
11. Tacton Product Support requests the client to close the case. The case will then be automatically closed after two (2) weeks if not done by the client.

2.8.6 Incident Reports / Root Cause Analysis

Clients who have the Advanced support plan can request a report providing a root cause analysis for Incidents of Priority 1 or 2 that required a change to Tacton software or services. The report must be requested within a week after the case is closed in TSS. Clients who have the Priority support plan will always get an incident report for such Incidents. Incident reports are provided via the TSS case and are normally completed within 3 working weeks after the case is closed.

2.9 Non-Incident Case Processes

2.9.1 Question Case Process

1. The client reports a Question case in TSS.
2. The case categorization is verified by Tacton Product Support.

3. Tacton Product Support checks that the question is clear. If it is not, they will request the client for more information. The case is then set to Waiting for Customer (see section 2.12).
4. Tacton Product Support answers the question.
5. Tacton Product Support requests the client to close the case. The case will then be automatically closed after two (2) weeks if this is not done by the client.

2.9.2 Service Request Case Process

1. The client reports a Service Request case in TSS.
2. The case categorization is verified by Tacton Product Support.
3. Tacton Product Support checks that the Service Request is clear. If it is not, they will request the client for more information. The case is then set to Waiting for Customer (see section 2.12).
4. If the request is not within the scope of product support, the client is informed and requested to close the case.
5. When the Service Request is completed, Tacton Product Support informs the client.
6. Tacton Product Support requests the client to close the case. The case will then be automatically closed after two (2) weeks if this task is not completed by the client.

2.9.3 Enhancement Suggestion Case Process

1. The client reports an Enhancement Suggestion case in TSS. For evaluation of the suggestion, a discussion between the client and its dedicated Customer Success Manager at Tacton is required.
2. By default, Enhancement Suggestions will be kept open to potentially being considered for implementation in the future. Keeping the suggestion open does not imply any commitment.
3. If an Enhancement Suggestion is approved for implementation, the client will be informed, and progress updates will be provided until the functionality is released. Note that the functionality implemented may differ from the suggestion that was made. When the new feature is available and the case has been updated with this information, the status of the Case is changed to “Requested Close”. The Case will then be automatically closed after two (2) weeks if this is not done by the client.

Tacton Product Management can at any point in the case handling reject the enhancement suggestion and close the case.

2.10 Escalation Process

Tacton Product Support offers an escalation procedure for our clients.

Clients are welcome to escalate a case if they are dissatisfied with the support provided at any point in the process. All escalated cases get the priority re-evaluated, and a check is made that the case is handled according to the priority it has been given after the re-evaluation.

Examples of escalations:

- Insufficient progress is made on the case.
- The client is dissatisfied with the support provided for another reason.

Clients should always escalate the case via TSS to ensure a prompt response by Tacton. The result of the escalation is provided within the reported case. The client can always request to raise the

escalation level by commenting on the case. Escalations will be handled by the roles specified in the table below.

Escalation Level	Role Involved
First	Product Support Engineer
Second	Director Product Support
Third	Chief Technology Officer

Note that clients that have access to a Customer Success Manager can always contact the Customer Success Manager if Tacton Product Support is not living up to expectations.

2.11 Data Removal in Tacton Support System

All case attachments are automatically removed 180 days after case closure. The deleted attachments cannot be restored.

2.12 Waiting for Customer

When Tacton Product Support needs additional information from the client in order to proceed with a case, the case is set to Waiting for Customer. If the client has not replied within two (2) weeks, the case is automatically moved to Requested Close. If there is still no reply two (2) weeks after that, the case is automatically closed. If the client replies while the case is in Waiting for Customer or Requested Close, the case is reactivated. While a case is in one of these two states, the service level target clock is stopped.

3 Product Documentation

The SaaS product documentation for each Tacton SaaS service is accessible to its administrators inside the product. For Tacton CPQ, it can be found in the Help Center (https://<url to your tacton cpq>/help).

On-premise product documentation can be found in Knowledge (support.tacton.com), or in the product portal (products.tacton.com).

3.1 Product Release Announcements

Release announcements for the Tacton SaaS services are accessible to all administrators inside the respective product.

Release documentation regarding on-premise products is found in Knowledge (support.tacton.com), or in the product portal (products.tacton.com).

4 Security Breach

In the event of a security breach, Tacton shall, given the nature of the breach, notify affected clients within a reasonable timeframe using ordinary support communication channels.