



Product Support Handbook

Making the most out of your Support subscription



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*For any information regarding product maintenance and support please contact **support@backbase.com**.*

Product support teams

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The Backbase Product Support Team is a dedicated unit within the Backbase R&D department, which is distributed among six global locations including **Atlanta, New York, Amsterdam, Kiev, Mumbai** and **Kuala Lumpur**.

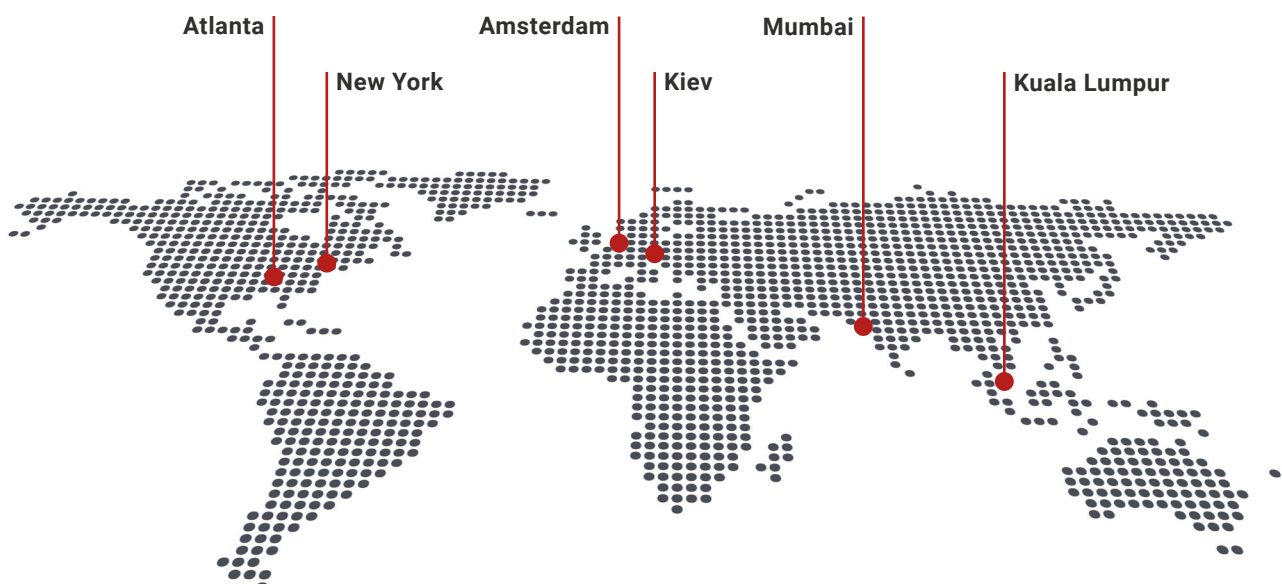
Each member of the Backbase Product Support team is a subject matter expert, specialized in either Back-end or Front-end technologies of the Backbase product.

Uniquely, the Product Support team operations model is tierless, meaning you deal with an experienced developer from the moment you log an issue to when it is resolved. This means time is not wasted on transitioning issues internally, as is usually experienced in a tier-based setup.

Support services

Backbase Product Support is specifically designed to ensure we continuously support your business, it includes:

- **Incident management:** Restoration of services in as short a time as possible. Assist troubleshooting with the Backbase product in the event of an unplanned interruption of a customer-facing production service.
- **Problem management:** Troubleshooting a specific Backbase product problem during a development phase.
- **Delivery of resolution:** In the form of workarounds, hotfixes and maintenance releases.
- **Facilitate** forwarding new product feature requests and provide product feedback to the Development Team.
- **Generic how-to guidance** on how to startup and make use of the products.



Product Support Levels

A direct line to our experts is available any time of the day, online or via the phone. Select the package most suited to your needs.

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Standard Support

9x5 Standard Support delivers quick response times via services such as online issue tracking. Standard Product Support is based on a fixed annual fee and offers unlimited use.

Premium Support

24x5 Premium Support delivers quick response times via services like online issue tracking and the ability to request Hotfixes on Backbase products should blocking issues occur. Premium Product Support is based on a fixed annual fee and offers unlimited use.

Platinum Support

24x7 Platinum Support delivers the fastest response times. It offers all the benefits of the Premium package and additional tailor-made services.

Comparing the Backbase support options

Support package	Standard	Premium	Platinum
Online resources	✓	✓	✓
Defect resolution and product release schedule information	✓	✓	✓
Availability	9 to 5	24/5	24/7
Hours response time for Severity 1	4	2	1
Hours response time for Severity 2	24	16	4
Hours response time for Severity 3	48	24	24
Online issue tracker	✓	✓	✓
Availability by phone			✓
Hot fixes on Backbase products		✓	✓
Number of support requests per year	48	unlimited	unlimited
Number of technical contacts at your company	2	4	4

Contacts for support

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Project Development

Backbase Product Support provides advice on standard out-of-box product features. If you require customised solutions tailored to your specific business needs, our Professional Services specialists can help by:

- Advising on and supporting the specific non-standard implementation.
- Meeting non-trivial project requirements.
- Arranging migration between different product versions.

Who to contact:
Professional Services

Please contact your account manager for further details or to arrange consultancy services.

Training

Should you opt for Backbase-specific training for your employees, Backbase trainers will work with you to deliver an optimal training programme that:

- Provides an overview of the Backbase product suite.
- Allows for the testing of features and functionality in a safe environment.
- Prepares your team for the implementation of Backbase products.

Backbase provides a number of courses, ranging from standard introductory courses to tailored ones, based on your unique project and overall business situation. Contact us for help with selecting the best option for your business.

Who to contact:
Academy team

Please contact your account manager for the upcoming training schedule or for further details on training.

Product issues, questions and feature requests

Support engineers are the first point of contact for analysis and classification of Product issues concerning environments hosting Backbase applications:

- Specific functionality (e.g. what features are available out-of-the-box and how to make use of them).
- Issues with standard out-of-the-box functionality (e.g. nothing happens when the export button is clicked).
- Installation and configuration advice of Backbase portal in customer's local development environments.

Who to contact:
Product Support

If your question is beyond the scope of Backbase Product support, you may be advised to make use of Backbase Professional Services.

Issue reporting

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Online Support Tickets

The Backbase Product Support issue tracker is an online web interface where you can log a support call (a question, problem or incident).

Email

All registered technical contacts can reach the Global Product Support team via email at **support@backbase.com**

Telephone Hotline

A Platinum Support Package includes a Support phone hotline to contact the Product Support team. Relevant phone numbers are indicated in Appendix A and defined in the service level agreement.

How to log and track issues online

Login to the issue tracker via **support.backbase.com** (each technical contact receives a user account upon registration).

Note: According to the Support Terms and Conditions, support accounts are personal and delivered only to a particular technical contact. Sharing of credentials is not permitted. Additional user accounts can be requested via your account manager.

To create a new ticket, click “**Submit a request**” and fill in the following fields:

1. **Subject** - Short, descriptive line of the request.
2. **Description** - Comprehensive explanation of the actual issue or question.
3. **Priority** - Indication of urgency.

Then click “**Submit as New**”.

The screenshot shows a web interface for creating a new support ticket. The form is titled "New ticket" and has a "Ticket" button. It contains three main sections: "Requester" with a search bar, "Priority*" with a dropdown menu showing a red circle with the number 3, and "Subject" with a text input field. Below the "Subject" field is a large "Description" text area with a red circle and the number 2. At the bottom right, there are buttons for "Close tab", "Submit as New", and a dropdown arrow.

A new ticket with a unique number will be created, which can be used on the same interface to track progress.

Can keep track of cases using the same Backbase Product Support portal at: **support.backbase.com**

The status of tickets can be viewed, and comments and/or attachments added to existing tickets. Automatic emails will notify you and the Backbase Product Support team of any changes to status or content.

Technical Contacts

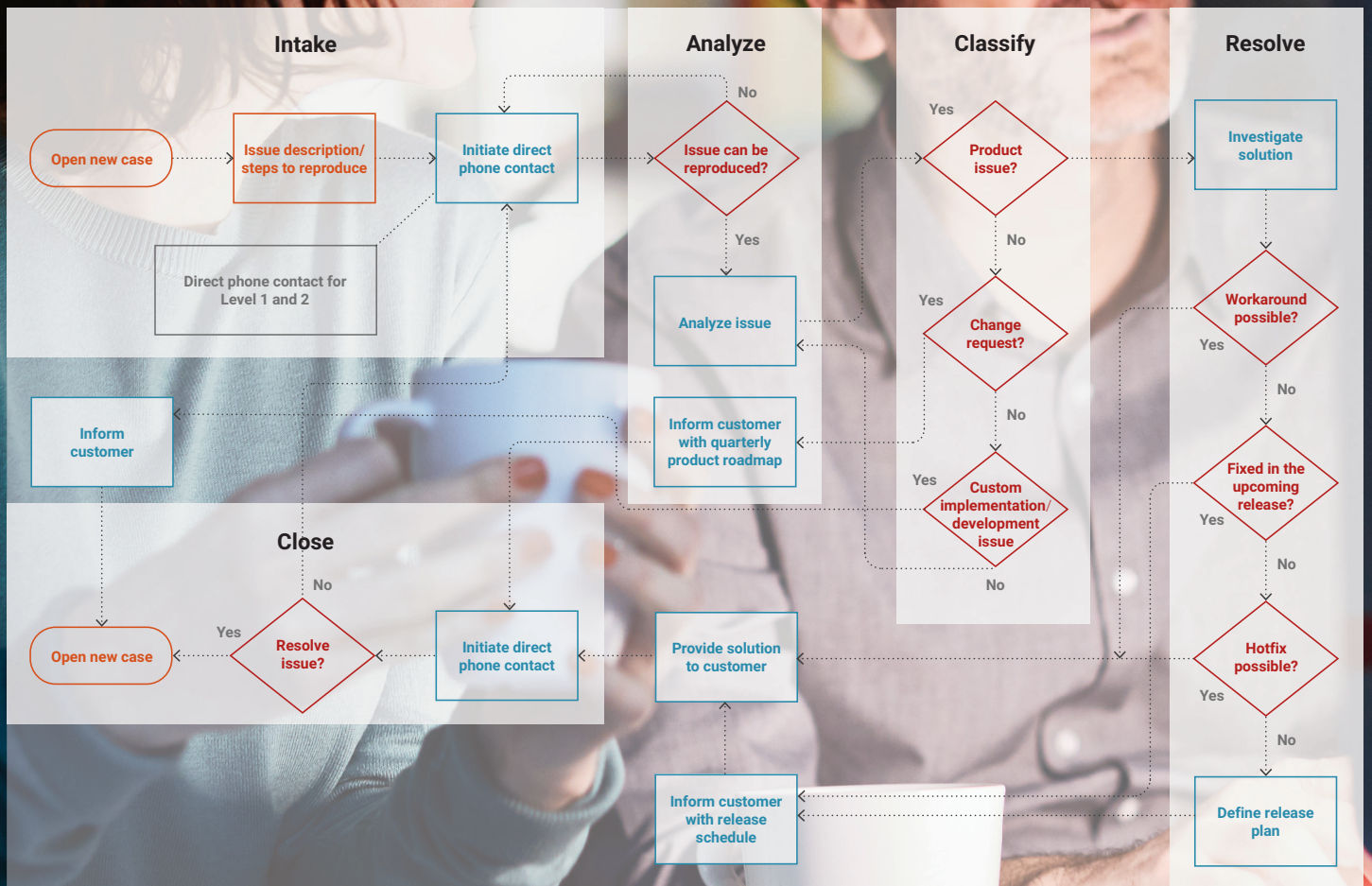
Only registered technical contacts can log support issues. Depending on your Products Support subscription you can register up to four technical contacts for the Backbase Product Support services. If you haven't done so already, please send an email to **support@backbase.com** with subject **"technical contacts"** and provide the following details:

- First name;
- Last name;
- Email address;
- Phone number;
- Position (for example, architect, project manager, developer).

Information required to complete a Product Support Ticket

In order to ensure a fast, effective resolution of issues, the following basic details are mandatory when logging an issue. A complete report will facilitate an immediate analysis, saving time when a ticket has been logged. The Product Support team are on hand to assist with any difficulties in obtaining this information.

- Version of Backbase products (CXP, Widget Collections, Forms, Mobile SDK).
 - Operating System, Database, Web Application Server, JDK and browser versions.
 - Detailed description of the issue with steps outlined on how Backbase can reproduce in an standalone isolated environment.
 - All available server log files (e.g. portal foundation, content services, orchestrator) or screenshots if helpful in defining the issue.
 - Approximate timings for when the issue started and whether any changes were made around this time.
 - Impact of the issue (please refer to the priority definitions below).
 - Information on any troubleshooting activities already carried out.
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Product support **workflow**

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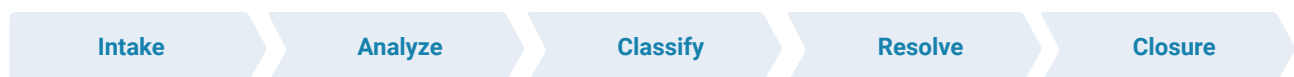
Once an issue has been successfully submitted, an automated confirmation will be given. Following this confirmation, the issue is assigned to a Product Support member, according to the timelines applicable to your service level agreement. The issue will then be managed through to its resolution, initially by making every effort to replicate it on one of our in-house systems, based on the information provided in the ticket.

The type and complexity of the issue will determine the next steps.

- If the answer is found, a resolution is delivered in the most expedient way.
- If we cannot replicate the issue, assistance will be required to gather more detailed information until the issue can be replicated or resolved. Product Support may organize remote screen sharing sessions with key Backbase product experts for issues that require urgent attention or are hard to reproduce in an isolated environment.

Backbase Issue Lifecycle

Every case passes through certain stages in its overall lifecycle. The different stages are:



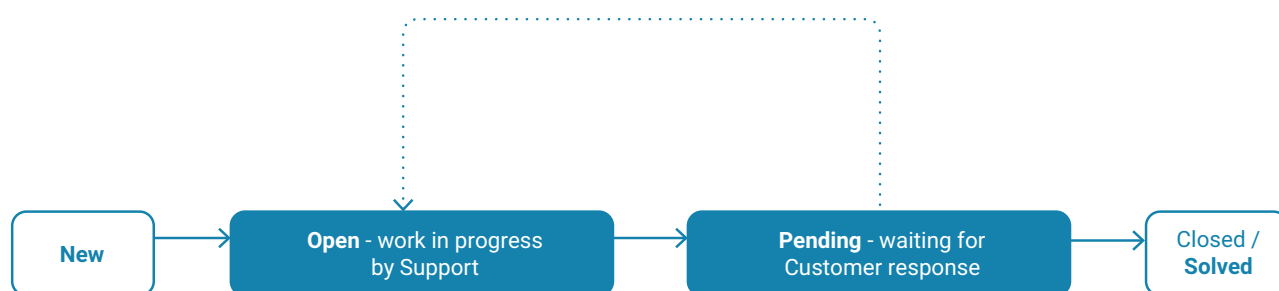


Issue Status

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The different status indicators for support issues are:

- **New** - the case has not yet been taken up by the Support team.
- **Open** (support work in progress) - support is currently working on the case.
- **Pending** (awaiting customer response) - the Support team requires input from the customer before proceeding. If no response from the customer is received within 72 hours of the last Support team followup, the issue is automatically marked as inactive/solved. A ticket can be reactivated by adding a comment. If more time is needed for a particular ticket, just notify us and this automation can be disabled.
- **Solved** - the reported case is confirmed solved by the reporter or auto-solved via ticket automation, and is automatically closed within 7 days.



Escalating an Issue

Occasionally, an issue will require more attention than normal.

The first step is to verify the current priority level of your ticket in our system and ensure it matches your priority level (please refer to Severity Levels table).

Having established this, please ask the Backbase Support engineer working on your issue to change the Priority if applicable.

The escalation order is as follows:

1. **Support Engineer** (assignee) - via the active ticket.
2. **Support Manager** - contact details as defined in SLA or support@backbase.com
3. **R&D Manager** - contact details as defined in SLA
4. **Account Manager** - contact details as defined in SLA

Issue Severity Levels

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The table below shows the Priority Levels Backbase Support uses to prioritize issues. Priority types are differentiated by Incidents, Problems and Change requests.

All issues logged as incident level Urgent or High will alert our Production Support specialists within the Product Support team and mitigation actions will be planned and executed.

Please note that the differences between Incident and Problem management make it vital to indicate the appropriate priority as per the below table.

Title & Priority	Description	Example
Production Incident (Urgent - Level 1)	Very high impact on business. Very serious disruption to the functionality of the service/application, impacting a large group of end-users/ customers.	A significant number of end users (for example, > 80% customers) are not able to access and/or use one or more widgets in production.
Production Incident (High - Level 2)	Processing capability is limited. Adverse business impact.	The Backbase Portal Administrator is not available to manage the portal. A significant number of end users are experiencing slow response times or other difficulties with widgets in productions.
Problem Management (Normal - Level 3)	Product issues discovered or Product questions arise during the development phase. Moderate business impact.	Problems related to the Backbase products.
Change Management (Low - Level 4)	Product Enhancement request.	Product Enhancement requests are evaluated by the Backbase R&D Product Board on a monthly basis. The outcome is communicated via the Backbase Roadmap.

Hotfix Resolution for Premium and Platinum Support

Hotfix resolution can be requested if no valid workaround is available. Premium and Platinum Support Packages allow for Hotfix requests. Under the standard terms and conditions, Hotfixes are only provided for production incidents and critical security vulnerabilities.

Hotfixes can be requested only for the current supported versions. We will, however consider the viability of every non-production blocking the Hotfix request.

Each Hotfix has the following 5 stages:

1. The Hotfix request undergoes analysis and acceptance to validate the technical feasibility of providing a Hotfix.
2. Once the Hotfix request had been accepted, the Hotfix will be available on a new patch version of the affected release (e.g. 5.7.1.x) where x denotes the patch version. Changes made for the patch are also put in the upcoming maintenance release.
3. The Hotfix is tested in an environment closest to the customer's infrastructure (e.g. Application Server, Database, deployment topology etc).
4. The Product Support team delivers the Hotfix resolution to the customer. This can be in the form of a complete patch release or a set of fixed files. A detailed read-me document will include all necessary steps to take in using the Hotfix.
5. The customer verifies the fix and confirms the issue is resolved.

Using inaccurate priority levels will only hinder a timely resolution. Repeated inappropriate usage of priority may be reported or lead to a temporary account suspension in order to maintain a fair usage policy under the Backbase Product Support terms and conditions.

Product release lifecycle

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Release Types

Maintenance Services include the provision of new Releases and Versions of Backbase Software to the Licensee. Maintenance & Support begins on the Effective Date of the License Agreement.

There are four release types:

- Major Releases (e.g. 5.0, 6.0)
- Major Versions (e.g. 5.6, 5.7)
- Minor Versions (e.g. 5.7.1, 5.7.2)
- Hotfixes (if necessary)

Major Releases are retired twenty-four (24) months after the next Major Release has been issued. This is subject to the client having made use of the last Major and Minor Version of the previous release.

Major Versions are retired twelve (12) months after the next Major Version has been released. This is subject to the client having made use of the last Minor Version of a related Major Version.

Minor Versions are retired two (2) months after release of the next Minor or Major Version.

Releases with retired status are not fully supported. Limited technical assistance is provided and is subject to the availability of trained personnel and resources. No further updates or hotfixes are issued. The limited technical assistance consists of helping customers with questions and workarounds. It does not include new bug fixes or the integration of any bug fixes into previous updates, delivery of customer specific Hotfixes, new Minor Versions, or certifications.

Release Announcements

Release announcements for all official Backbase product releases will be sent to all support contacts you have appointed. You can request additional recipients to be added to the release announcement emails.

To do so, just email your request to support@backbase.com, providing the recipient's full name and contact email.

Release Frequency

The release frequency of New Versions and Releases is at the discretion of Backbase, and in the normal course of business this depends, without limitation, on the following factors:

- The phase in the release lifecycle (developmental, active, mature, retired); for example a new product is likely to have a higher frequency of updates, which may reduce as the product matures.
- The demand on a product; for example products used by many customers are likely to be updated more frequently than those used by a relatively small number of customers.
- Overall satisfaction with a product; for example if customer satisfaction is lower than desired, release frequency is likely to increase.

Backbase resources and downloads

You can find all Backbase Documentation such as How-To's, training materials, and community support at **my.backbase.com**. Select the required Backbase Product (CXP, Widget Collections, Forms, Mobile SDK), choose the applicable version, and browse the installation, maintenance and development guides for detailed information and advice on product specific issues.

In "My Downloads" in your corporate space on **my.backbase.com**, you will find links for product downloads.

Or use the direct download links on **repo.backbase.com** in which you also have full access to the product repository.

About Backbase

Backbase is a fast growing fintech software provider that empowers financial institutions to accelerate their digital transformation and effectively compete in a digital-first world.

We are the creators of the Backbase Omni-Channel Banking Platform, a state-of-the-art digital banking software solution that unifies data and functionality from traditional core systems and new fintech players into a seamless digital customer experience.

We give financials the speed and flexibility to create and manage seamless customer experiences across any device, and deliver measurable business results. We believe that superior digital experiences are essential to stay relevant, and our software enables financials to rapidly grow their digital business.

More than 100 large financials around the world have standardized on the Backbase platform to streamline their digital self-service and online sales

operations across all digital touchpoints.

Our customer base includes ABN AMRO, Barclays, CheBanca!, Credit Suisse, Fidelity, Hapoalim, HDFC, Hiscox, ING, KeyBank, Legal & General, Al Rajhi Bank, NBAD, OTP, PZU, PostFinance, Societe Generale de Banque au Liban and Westpac.

Industry analysts Gartner, Forrester and Ovum recognize Backbase as an industry leader in terms of omni-channel banking platform capabilities, and award the company high marks for its deep focus on customer experience management and unparalleled speed of implementation. Forrester named us a leader in the Forrester Wave for Omni-Channel Banking. Ovum nominates Backbase as the market leading provider of next-generation digital channel banking platforms, from both a functionality perspective and execution perspective.

Backbase was founded in 2003, is privately funded, with headquarters in Amsterdam (HQ Global) and Atlanta (HQ Americas) and regional operations in London, New York, Cardiff and Singapore.

Support Communication Channels:

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