Customer Care Tips & Tricks

At Paymentus, we have adopted a Customer Success Client Engagement Model, which combines both operations support and expert strategic guidance to provide support for both you and your customers. **Customer Care is the front door to any request.**

- They have access to all departments, enhanced access to many tools, and they know how to triage and get it to the right place, should that be needed.
- Customer Care, Tier 2 and the Product Support (PSO) groups are trained to be able to assist on many things and in the event a Client Success Manager is needed, Customer Care will route your request to the appropriate team to support your request.
- In either scenario, if a case is opened, a case number is automatically assigned and provided for all in-bound requests for tracking purposes.

You have a dedicated team of Client Success Managers ready to provide support to you and your organization on a wide range of topics, and you may not always hear from the same person directly each time.

- If your inquiry is sent to the account management team, you will hear directly from someone on the team to partner with you through resolution.

<u>When reaching out to Customer Care:</u>

- Every email that creates a case receives an autoreply that provides the assigned case number that they can refer to. They can refer to it so that we can direct the case to the assigned person. Otherwise, we may spend significant time searching for the original case.
- When reporting an issue: Please provide all necessary information to help ensure efficient collaboration to resolution.
  - Examples (including but not limited to:
    - Screenshots
    - Account number example(s)
    - Exact error message
    - Time/date issue began
    - Is the issue occurring in production or UAT
- When replying to Customer Care/T2/PSO/etc.:
  - Please leave the ref tag in the subject line.
  - This will ensure the reply continues to route appropriately to the representative working with you.
- Do not reply to a closed case.
  - Once a case has been closed, the representative is no longer monitoring that case or any emails that come in for it.
  - In the instance the issue happens to occur again, additional questions come up, etc. please start a new email and reference the previous case number in the body of the email.
- If you have a new inquiry or issue:
  - Do not reach out in an old email.
  - Keep each issue, if not related, separate.
- Always keep customercare@paymentus.com copied on your replies.