



EASYLINK
S E R V I C E S

Support Handbook



Performance EDI

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Table of Contents

Welcome to EasyLink Performance EDI Support.....	3
Support Overview	4
Maximizing your Support Interaction	6
Optimizing your Internal Efficiency	10
Appendix.....	13

Welcome to EasyLink Performance EDI Support

The purpose of this handbook is to provide guidelines and reference information that you will need when requiring EasyLink support. Specifically, we aim to provide the following:

- Help you efficiently utilize support.
- Introduce you to the people in support.
- Provide information on support, including our policies and procedures.
- Explain how to supplement your support with additional services to meet your needs.

Please review this handbook carefully. It contains important information regarding your Performance EDI support.

Thank you for choosing EasyLink.

The EasyLink Support Pledge

EasyLink's pledge is to use our years of experience in the industry to deliver Performance EDI for your benefit. We know the industry; you benefit from our knowledge, expertise and experience. Count on us to make a noticeable difference in your business by delivering:

- Commitment to the customers we serve
- Proven software
- Thought-leading professionals
- Superior customer support

The intent of our support is to provide you with the solution you need to efficiently and cost-effectively facilitate transactions with your trading partners. Our emphasis on achieving superior support cannot be overstated. That's why we are available to help you in your operational environment by providing:

- Access to experienced consultants in our U.S. based Support Center
- Service from a trusted, knowledgeable, and familiar support specialist
- Self-help tools available 24 x 7
- Support team availability 8:00 a.m. to 7:00 p.m. EST Monday – Friday
- Flexible service options including telephone, self-serve via the web, or e-mail support
- Pro-active communications to keep you informed
- Timely problem resolution

The Support Center

Our Support Center comprises a team of individuals who work together to provide dependable and timely resolution to your inquiries. For complex problems, our Support Center team has immediate access to the experts in our Development Laboratories, Consulting Organizations and IT Operations. Therefore, you have access to the right level of our expertise when you need it.

The people in our Technical Support Center are dedicated, experienced, and skilled professionals who aim to ensure your satisfaction each time you call on us or use the Customer Portal for support. They are eager to help you in all facets of support whether it be solving your problems or answering your questions. Their goal is to ensure you operate productively and effectively to maximize your investment in Performance EDI.

Support Overview

Performance EDI maintenance and support includes the following:

- One-time basic training session via the web
- Registration to the Performance EDI Customer Portal
- Access to Performance EDI updates and enhancements
- Access to new and updated trading partner maps
- Access to pre-recorded sessions reviewing basic tasks within Performance EDI
- Remote configuration of new trading partners or new Performance EDI components
- Self-help assistance with product usage
- Support during first-time installation and configuration
- Assistance with problem analysis and resolution
- Clarification on product documentation
- Help with testing and compliance with a trading partner

For problems or training outside the scope of Performance EDI maintenance and support, professional services experts within EasyLink may be able to assist. You will be required to source those skills with a separate services contract. For more information on these services, see page 11 of this handbook.

Support Coverage

You are entitled to support for only the licenses and trading partners covered in your EasyLink Software License Agreement and addendums for additional trading partners.

If you seek support after your support and maintenance agreement has lapsed, you will need to reinstate coverage under a new Software Maintenance Agreement prior to receiving assistance.

Self-help

Our Customer Portal is designed to provide tools and information that will maximize Performance EDI in your operational environment. By utilizing your personal user id and password, you will be able to log onto the Customer Portal and gain access to a wide range of tools 24 x 7, including the following:

- [How To Articles](#) - This section provides many articles divided by topic explaining how to perform tasks in Performance EDI. These tasks range from basic to complex.
- [Glossary](#) - The glossary provides definitions for basic EDI terms, as well as field definitions useful for creating documents in Performance EDI.
- [Frequently Asked Questions](#) - This list of questions that our Support staff receives on a regular basis provides essential information regarding EDI and Performance EDI.
- [Troubleshooting](#) - This section provides solutions to common problems Performance EDI User's experience. It serves as a good starting point for correcting a problem or issue.
- [Recent Retailer Changes](#) - In this section, you will find a repository of all the recent retailer changes and e-mail alerts our staff has sent regarding the changes.
- [Documentation](#) - This section provides the most recent User's Guide and Support Handbook.

- [Downloads and Updates](#) - This section includes downloadable Performance EDI updates and enhancements as well as trading partner map additions and updates. Instructions for installation are also included in this section.
- [Guided Help](#) - This section has pre-recorded sessions on how to complete basic tasks in Performance EDI.
- [Contacting EasyLink Support](#) – This section describes the methods for submitting support issues online as well as guidelines of information to provide to our Support staff.

This tool is continually being updated. Our staff may refer you to this site if the answer to your question is available here. We recommend that you peruse this tool on a regular basis.

Phone and Electronic Support

Our phone and electronic support is intended to supplement your EDI and IT departments' skills in the use and operation of Performance EDI. As such, you have access to support professionals in our Support Center for help with Performance EDI specific installation and operational issues as well as trading partner specific requirements. The support representatives are in place to support you by:

- Assisting with first-time installation and configuration
- Adding trading partner relationships and additional Performance EDI components
- Clarifying documentation
- Assisting in problem analysis and resolution
- Assisting in testing and compliance with a trading partner

Hours of Operation

The Software Support Center is operational 8:00 a.m. – 7:00 p.m., Monday through Friday. The Support Center is not available on public holidays for EasyLink.

Maximizing your Support Interaction

Your technical contacts should be knowledgeable about Performance EDI, your trading partner's requirements, and your operating environment in order to help resolve issues. As such, they should have an understanding of EDI processing, completed product training for Performance EDI, and studied the Performance EDI User's Manual. In addition, they should be experienced with computers and comfortable with application usage to support business processing.

How to Access Self-Help

To log onto the portal, follow the steps below:

1. Access EasyLink's website at www.easylink.com/edi.
2. Click on the "Customer Portal" found at the top of the home page.
3. On the screen that appears, click on Performance EDI under EasyLink Customer Portals.
4. Enter your user id and password found in the Performance EDI Welcome Kit in the login area and click Login.

How to Reach a Support Representative

Phone

To reach a support representative, call us at 888-321-8139. It is critical that your call be directed to that number, not to an individual's phone extension. Directing your call to the correct number ensures that your request for assistance will be handled promptly and in accordance to our policies and practices.

E-mail

To reach a support representative by e-mail, send your email to perfedi@easylink.com. It is critical that your correspondence be directed to that e-mail address, not to an individual's e-mail. Sending your correspondence to the correct e-mail ensures that your request for assistance will be handled promptly and in accordance to our policies and practices.

Internet

To reach a support representative from the Internet, complete the support request form on the Customer Portal. To access the form, log into the Customer Portal and follow the instructions below:

1. Scroll to the bottom of the main Customer Portal page and click on "Contacting EasyLink Support".
2. Click on the words "Click here" located beside "Online Form" to open a support ticket.
3. Complete the "Request for Support" form. Be sure to include the information outlined in the next section, "How to Report a Problem".

Fax

To reach our support team, please send your fax to 866-276-0155. If you have been requested by a support representative to fax information to our Support Center, address your cover sheet to your support representative. Also, include your name, company and case number.

How to Report a Problem

Be sure to include the following information when you contact us:

- Company name
- Contact name

- Contact phone number
- Contact e-mail address
- Product you are requesting support for (i.e., RPM, ASN Module, Interface, ILINKWIZ, Batch Label Printing, Communications Package)
- Detailed description of problem
- Trading partner information (i.e., Wal-Mart, Target, etc.)
- Document type (i.e., ASN, PO, PO Change, etc.)
- Issue Number, if EasyLink has assigned one

Before contacting support, please take the necessary steps documented below. These steps are critical to solving problems, answering questions and addressing issues quickly. Preparing for contact with support will help ensure that the support representative has the information required to perform his / her job.

- **Define the problem:** Be as specific as possible by providing details and clearly articulating the problem.
- **Gather information:** Error messages, trading partner communications, etc. serve as vital information in the problem solving process.

Appendix A provides questions that will help you define the problem and gather information.

How the Support Submission is Acknowledged and Assigned

All requests for support are logged into a problem tracking system and assigned a case number. Your case is either directed to a support representative or placed in a queue for a call back. In either case, you will be assisted by the support representative assigned to your case.

If your issue is placed in the queue, you will be contacted regarding your issue within 1 business day. If your issue involves a severity level 1, you will receive a response on the same business day. All issues received after 3:00 p.m. EST will be considered received the following business day.

The support representative will research and resolve as appropriate, using reasonable efforts to respond to your request per the guidelines noted above. Our initial response to your inquiry might address your request for support, or it might form the basis for more in-depth investigation. If more in-depth expertise is required, your support representative will escalate the issue to the department or team member having the required expertise.

In all cases, you are expected to have a skilled person working with us on the request for support.

How Support Prioritizes the Queue Based on the Problem's Severity Level

Once a support representative contacts you, he or she will assign a severity level to the problem based on the information you provide. This severity level helps drive the prioritization of issues in the queue. As such, severity level is assigned with great care, so that support resources are solving the most severe issues first and foremost.

The following table provides a description of severity levels:

Table 1. Severity Levels

Severity Level	Description	Examples
1	<i>Critical Impact:</i> You have a time critical situation.	<ul style="list-style-type: none"> • ASN processing • Request for Routing (753)
2	<i>Severe Impact:</i> Your request is time sensitive, but not time critical.	<ul style="list-style-type: none"> • Purchase Order • UCC-128 Labels

3	<i>Moderate Impact:</i> Your request is necessary to complete the EDI process, but the issue is not time critical or time sensitive	<ul style="list-style-type: none"> • Compliance testing • Invoices
4	<i>Minimal Impact:</i> You request clarification of documentation, additional information, or an enhancement. There is no impact on the operation of Performance EDI or EDI processing.	<ul style="list-style-type: none"> • Documentation incorrect • Additional documentation requested • Enhancement requested

How to Follow-Up on a Submitted Problem

If you are following up on status of a submitted problem or have additional information regarding your issue, please have your case number ready if you call us or include the case number in your e-mail correspondence or support form accessed from our Web site.

If the recommendation failed to address the problem, you may re-open the case by referencing the original case number in your contact with support.

How Support Handles Installation Questions

Assistance from support personnel for installation of the software is available for the initial installation. In the course of answering questions, we may refer you to the Performance EDI User's Manual. A support representative can be engaged for an additional fee if re-installation is required.

Our support does not include addressing questions on system performance, handling complex questions regarding the PC configuration, or consulting on the environment to which Performance EDI has been added. A support representative may be able to help with issues, depending on the nature of the issue, in these areas for an additional fee.

How Support Responds to Technical Questions

Support representatives are available to research and respond to your questions. They may provide assistance by discussing the issue with you, referring you to the appropriate documentation, or helping you access the self service section of the Customer Portal.

How Updates are Handled and Released

An "update" is used to describe a release of Performance EDI that is made available at no additional license fee. Performance EDI updates are provided when available. They can be obtained for download on the Customer Portal. You are responsible for downloading and installing the updates. Instructions for downloading can be found on the Customer Portal in the 'Downloads and Updates' section.

How Support Handles Requests for New Features and Enhancements

You are a valuable source of information on which elements should be included in our product releases. We take your requests for new feature and enhancements seriously and encourage you to discuss requirements with your support representative.

Your support representative will ensure that your requirements are placed into our requirements database. That database serves as the repository of information our product managers use to evaluate and prioritize requirements for future releases and updates.

How Support Adds New Trading Partners

To add a new trading partner, simply call our support center. We will determine if you need to buy an additional block of 5 trading partners. Then, we will send you the necessary setup information, as well as instructions on how to apply the trading partner setup and what needs to be done after applying the setup.

If you are using EasyLink's value added network (VAN), we will setup the relationship with the EasyLink VAN; however, you must provide the support staff with the Sender/Receiver ID you wish to use and the Trading partner's Sender/Receiver ID.

How Support Addresses Testing and Compliance

You are responsible for all testing with your trading partners. If you receive errors during the testing process, you must submit those to our support staff for their assistance in correcting the problem.

How to Escalate an Issue

Our emphasis on achieving superior support cannot be overstated. If you believe we are not honoring our policies and practices or meeting our commitments to provide world-class support, you may ask to speak with the manager. Escalations to a manager are taken seriously.

If the manager determines that the support staff is not following policies and practices or failing to provide adequate support, the manager will ensure that the issue receives the prompt attention and proper focus.

Optimizing your Internal Efficiency

To boost your staff productivity and effectiveness with Performance EDI, you need to ensure your staff has the skills and training to operate the application within your environment. The following section outlines responsibilities that will help you plan for and assign your staff's daily tasks and projects. Please familiarize yourself with your responsibilities before you begin working with our Support Team. Our goal is to help you optimize your internal efficiencies utilizing Performance EDI and integrating it into your day-to-day work environment.

Training

Our standard training session, which is included in your software purchase, is a one-time session conducted over the web. During this session a Support representative will review basic processes within Performance EDI. We encourage you to cross-train personnel to prevent any problems created by absences or resignations. If you hire new staff, you are responsible for training them on how to use Performance EDI or requesting training from a support representative. Training new staff, retraining existing staff, tailoring our training session to your business or conducting an on-site session is available for an additional fee.

We encourage you to use EasyLink's Self Help and Web Based Management Tools whenever possible. Our staff will assist you by referring to these resources which can save you considerable time and improve your overall operations efficiency in many cases.

Business Environment

Maintaining knowledge of your specific business requirements and how to use our software within your environment is not included in your support. If you need assistance understanding how Performance EDI will function in your environment and in your customer interactions, an EasyLink consultant may be engaged for a fee.

Retailer Interactions

The contractual relationship you have with your trading partners is between you and your trading partners; therefore, it is your responsibility to maintain your relationship with your customer in the following areas:

- Buyer interactions
- EDI Testing
- Understanding your customer's business rules
- Routing requirements
- Sending and receiving documents for you
- Invoice collection

When we receive any retailer specific questions, we will refer you to their website or to your buyer. We recommend that you become familiar with the structure and information on your trading partners' vendor sites and peruse them on a regular basis to ensure you are aware of all changes. When you receive notifications about EDI changes that your trading partners are making, it is your responsibility to forward those changes to the Support Team.

EDI Traffic and Data

You are responsible for monitoring your EDI traffic. Additionally, you must address and respond to all retailer and VAN alerts or errors. While we can assist with problem or error resolution, we do not receive copies of these

alerts or errors until you engage our Support Team. Connectivity with your VAN must be maintained by your staff.

When you receive notification that your EDI data contains errors, you are responsible to correct and resend the data. Corrections to the data must be made through Performance EDI or the system supplying the EDI data. Manual changes to the EDI data cannot be supported.

Third Party Software

Third party software that interacts with Performance EDI is not considered part of our software offering. Thus, we do not have the in-depth technical skill to diagnose third party software problems. We will refer you to those third party software vendors for technical support when we diagnose the problem is not with Performance EDI.

IT Infrastructure

It is your responsibility to configure, monitor and maintain an IT infrastructure (computer, operating system, printers, Label Matrix, network, integration into backend systems, etc.) that enables Performance EDI installation, configuration and operation. An IT infrastructure is not considered part of our software offering; therefore, we do not have in-depth technical skill to diagnose IT infrastructure problems. When we diagnose the problem to be specific to your IT infrastructure, we will refer you to vendors or your IT staff for technical support and charge a professional services fee for diagnosis based on the number of hours we spent on the problem.

We recommend that you maintain a backup system for all EDI data within Performance EDI for data recovery purposes. EasyLink cannot recover your data if your system fails. Additionally, it is your responsibility to maintain a backup of the Performance EDI Software (and installation CD) and all associated applications including communication packages. Additional copies of a Performance EDI CD are available for purchase.

If you need to do a system migration, we will provide you with the how-to documentation. Assistance with this process is available for an additional fee.

Maintaining Your Performance EDI

It is recommended to download the Performance EDI upgrades and mapping changes on a weekly basis. The updates are available through our Customer Portal. Our staff can assist with the downloads for an additional fee.

Extended Support

If you require assistance with the items listed above or anything outside the scope of Performance EDI support, professional services experts within EasyLink may be able to assist you for an additional fee. Our professional and managed services are an extension to our basic support. These services are fully customized and tailored to your needs, which can include everything up to total operations outsourcing.

These services provided include, but are not limited to:

- Training tailored to your business needs, whether it be on-site, online, customized, additional staff training, or multiple sessions
- Database assistance
- System migration and re-build assistance
- Re-installation assistance
- Application and system configuration assistance

If you want to utilize any of our services mentioned above, simply contact our support team for more information and pricing.

Appendix A

Problem Worksheet

Preparing to work with support on a problem

Complete the form before calling support or submit the completed form along with an email request for support. A completed form helps us find the solution to your problem quickly.

Tracking a Document

If you do not use EasyLink's Value Added Network (VAN), you can contact the HelpDesk of your VAN for assistance. If you use EasyLink's VAN, EasyLink VAN Support can assist. They can be reached by calling 888-422-4401 or sending an email to techsupport@easylink.com. To assist you, they will require the following information:

QUESTION	RESPONSE
Who is the trading partner?	
What is the document type?	
When was the document sent?	
What is the ISA Control Number?	
What is your sender ID?	
What is your receiver ID?	

Reporting an Issue to Software Support

Your Environment

QUESTION	RESPONSE
Are you in test or production?	
Who is the trading partner?	
What is the document type?	
Label Issue: Batch label printing?	
ASN Issue: Manual or automatic casing?	

Problem Description

QUESTION	RESPONSE
What were the steps taken when the error occurred?	
What is the exact error number and message text? (Sending a print screen of the error in an email would be best- see next page for instructions.)	
Is this the first time the process has been attempted?	
When did this process last work?	
What has changed since this process last worked? New computer? Program update applied? Map update applied?	
Any additional information you can provide to assist support with determining the problem.	

Appendix B

Submitting a Print Screen

Sending Support the necessary information when working with an error

If you receive an error message, follow the steps below to send support a print screen of the error message before you contact support:

1. With the error still up on your screen, press the **CTRL** key and the **Print Scrn** key simultaneously.
2. Open a Word document.
3. Place your cursor at the beginning of the new document.
4. Press the **CTRL** key and the letter **V** simultaneously. This action will paste a copy of your screen in the document. Re-size if necessary.
5. Save the document.
6. Attach the Word document to an e-mail and send it to perfedi@easylink.com.

Appendix C

Submitting flat files or control file to EasyLink Support Sending Support the necessary information when working with a document error

Often, we may ask you to send us the flat files and control files to help us resolve EDI problems. When performing this task, the document in error must be the last document you translated (or processed).

For outbound documents, go to the \perfed\translat folder to get the documents named below:

You must include the following documents for any type of outbound document:

EDCOP	EDTTP
EDNUP	EDTPP

In addition, you must include the following document specific files:

<u>Document</u>	<u>File names</u>
Advanced Ship Notice (856)	EDSSP EDSAP EDSOP EDSIP
Invoice (810)	EDIHP EDIDP
PO Acknowledgement (855)	EDPAHIM EDPADIM EDPASIM
Remittance Advice (820)	EDRHP EDRDP
Request for Routing (753)	EDRFH EDRFD
UPC Catalog (832)	EDPIP EDPSP
Warehouse Shipping Order (940)	EDWSOH EDWSOD

If you have experienced an error for any other outbound document, please contact Support for a list of specific files.

In addition to the files specified above, we need the actual EDI, which can be found in your perfed\outbox. The file name can be found in the outbox screen under the column, 'Member Name'.

For Inbound documents, the Purchase Order (850) is the most common document we may ask you to send. You can find this document using either of the following methods:

1. Find the file in their \perfed\archive folder with the same date as the date you received the PO.
2. Use Windows search in the \perfed\archive folder to search for text and enter the PO number to search.

To submit any of these files to Support, simply attach them to an e-mail and send it to perfed@easylink.com.