Technical Support Escalation Guide

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Our goal is to resolve your issues quickly and transparently. This article provides clear instructions on how to initiate requests, who to contact if you feel an issue is not progressing, and when escalation is appropriate. The article covers technical support.

Support Escalation Process

How to Initiate Support

- **Case Submission & Tracking via Support Portal***(Recommended Method)*
  - Log in to the Bold Group Support Portal to submit and track cases.
    - Provides visibility into **case owner, status, and communication history.**
    - Ensures faster routing and resolution.
- **Support Emails (Alternative Option):** Cases submitted by email automatically create a case in our system. Use the addresses below:
  - SedonaOffice: **sedonaoffice_support@boldgroup.com**
  - Managely: **managely_support@boldgroup.com**
  - AlarmBiller: **alarmbiller_support@boldgroup.com**
  - SIMS: **sims_support@boldgroup.com**
  - Manitou: **manitou_support@boldgroup.com**
  - Stages: **stages_support@boldgroup.com**

Phone Support: (719) 593-2829 or (800) 255-BOLD (Mon–Fri, business hours (see hours published)

Resources: Support, Knowledge Base, BoldU Training, Hosted Products Status Page, Webinars, FAQs

Escalation Paths by Category

Please allow at least 1-2 business days for an initial response to your case prior to escalation, unless Critical as defined below.

Best Practices for Escalation

✔ Always include **case number, issue summary, and business impact**
✔ Use subject lines like: *"Escalation – Ticket #12345 – [Brief Summary]"*
✔ Copy your **Account Manager / CSM** on escalations
✔ Escalate immediately for urgent issues affecting operations

EVERY ESCALATION REQUIRES AN ASSOCIATED CASE.

Support Area	1st Contact	2nd Contact	3rd Contact

Business Management (Managely, SedonaOffice, AlarmBiller)	Jacob Perez Jacob.perez@boldgroup.com	Shaun Blair shaunb@boldgroup.com	N/A
Alarm Monitoring (Manitou, Stages)	Jacob Perez Jacob.perez@boldgroup.com	Shaun Blair shaunb@boldgroup.com	N/A
Data Conversion & Technical Installation (Professional Services Projects)	Assigned Project Manager	Shaun Blair shaunb@boldgroup.com	N/A
General Projects w/ Project Manager	Assigned Project Manager	Bryant Hardy bryanth@boldgroup.com	Jenn Kirst jenn.kirst@boldgroup.com

Severity Levels

- **Critical:** System unavailable, billing/payments blocked, or technicians unable to operate →*Escalate immediately*. Critical issues may qualify for a **hotfix** outside of the normal quarterly release cycle.
- **High:** Major functionality impaired, but a workaround exists.
    1. If the issue can be resolved through support or configuration →*Escalate if unresolved after 3–4 business days*
    2. If the issue is a **verified development defect**, it will follow the **standard release cycle** (quarterly), with escalation ensuring **status updates, prioritization, and scheduling**, but not accelerating code delivery.
- **Normal:** Non-critical defect, usability question, or minor issue →*Handled through standard support*.

Important Note on Development Defects

Escalation ensures **visibility, communication, and prioritization** of your case. However, if the root cause requires a **code change to the underlying product**, resolution will follow the development lifecycle:

- Defect verification and replication
- Prioritization by Product Management to decide if we will include in an upcoming release cycle
- Fix development by engineering
- QA and regression testing
- Deployment in the **quarterly release** (or earlier if a **critical hotfix** is required)

In these cases, escalation provides regular updates outside of our automated notifications but does not bypass the technical steps required to safely deliver a fix.

After-Hours Support

Unless otherwise stated in your support agreement, after-hours support is **not included** in standard support

agreements and is **billable**.

- Call (719) 593-2829 or (800) 255-BOLD.
- Used only for **critical production issues** that cannot wait until the next business