

Contacting Client & Technical Support

Scenario	Requesting Support
Reporting a technical issue related to a connection for: • New prospects with tech needs • Expansion of what client already has ** Reporting a technical issue related to the application	Ask client – have you reported a problem on that connection? • If Yes: Obtain that case/ticket number. • If No: Ask them to, then have them provide the number. Send an email to TechSupportManagers@emoneyadvisor.com providing: • Case or Ticket number • Brief explanation of their complaint/request • Reason it's being escalated (business impact) ** If application related, there won't be a case/ticket – proceed directly to sending an email with the explanation of issue and reason it's being escalated. The Tech Support Managers will then ensure that the issue is escalated and follow up with the client.
Client Support questions and/or issues	<u>Client Support Tier 1 Representatives</u> Clients should contact this team for any questions related to the eMoney platform between 8 a.m. - 8 p.m. EST - Monday - Friday. • Phone: 888-632-8482 • E-mail: Customerservice@emoneyadvisor.com (External) • Chat: Must be done through the chat feature in the Application <u>Instances involving:</u> • Irrate advisor • Situation requiring white-glove service • Situation in which you've already worked with T1, but now need to escalate Escalations? cselevation@emoneyadvisor.com Not sure? ClientSupportManagers@emoneyadvisor.com
General questions that are not specific to an opportunity or client	• Connections: ConnectionSupport@emoneyadvisor.com (External) • Application: AppSupport@emoneyadvisor.com • Planning/Other: Post question in CS Escalation – Public Teams Room • Admin: Customerservice@emoneyadvisor.com (External)

Contacting Client & Technical Support Teams

Teams	How to Contact
Application Support App Support should be contacted for any technical issues related to the eMoney application.	• Phone Queue: ext. 8012 • Email: AppSupport@emoneyadvisor.com
Data Support Data Support should be contacted for any end user reported issues related to a connection. Before contacting Data Support, you should ensure that the user has 'Reported a Problem' on their connection to generate a case.	• Phone Queue: ext. 8050 • Email: ConnectionSupport@emoneyadvisor.com **Should only email in the event that a case cannot be generated on the connection directly or for something unrelated to a specific connection.**
Technical Data Analysts Technical Data Analysts should be contacted for data aggregation related issues/requests on a larger scale than a single user connection.	• Feed/API inquiries: DataFeeds@emoneyadvisor.com • Parser inquiries: AggregationSupport@emoneyadvisor.com • Internal inquiries unrelated to parser/API: TDAGroup@emoneyadvisor.com NOTE: This is not an external facing email, contacts outside of eMoney will not be able to email this address.