



Premier Support

for ClickPoint Software



Introductions



How We Can Help



What If Something Fails?



Your Agreement and Beyond



Resources & Next Steps



Proactive Services

- ✓ Conduct Weekly Webinar Training
- ✓ Account Configuration
- ✓ Email Nurture
- ✓ Distribution
- ✓ Phone Solutions and Integrations
- ✓ Sales Workflow
- ✓ Troubleshooting



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Support Team Project Manager

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Hours 8–5pm MST



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Hours 8–5pm MST



Proactive Services

- ✓ Invoicing
- ✓ User Counts or Questions



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Hours 8–5pm MST



Configuration

- ✓ Record Type
- ✓ Workflow
- ✓ Add Agents
- ✓ Delivery Settings
- ✓ Lead Sources
- ✓ Email & Notifications
- ✓ Phones



Training

- ✓ Webinar
- ✓ GoTo Meeting
- ✓ Documentation
- ✓ Specific or KB
- ✓ Videos



Testing

- ✓ Delivery
- ✓ Nurture
- ✓ Reporting

New Conversation

ClickPoint Team
Active in the last 15 minutes

Grace Brandon Nathan

Have a question? Chat with us

Start a conversation...



Intercom provides a personal chat experience with a support team member to answer your questions while working in SalesExec.

Knowledge Base is located on SupportHero and contains a library of instructional articles and videos. A client can also submit a support ticket should further assistance outside of Intercom and Knowledge Base be required.



SUGGESTED FOR YOU [BROWSE HELP LIBRARY](#) CONTACT US

Search our Help Library

– Getting Started

- ▶ How to Customize Your Lead Manager Screen
- ▶ How to Customize Your Lead Fields
- ▶ How to Create an Automated Sales Script
- 📄 How To Create Lead Fields
- 📄 How to Edit Record Type & Lead Fields
- 📄 How to Create a Sales Workflow
- 📄 How to Edit Workflow - Status and Action Copy Function
- 📄 How to Create Automated Events
- 📄 How To Edit the Lead Manager Screen
- 📄 How to Edit Transfer Action Operation
- 📄 How to Manage Notifications

What if Something Fails?



Reactive Services

What is a ticket?

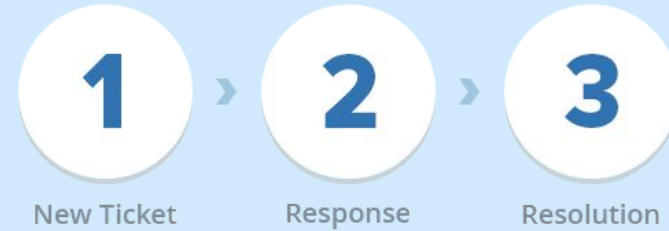
A ticket is a log or receipt of a reported concern.

When to create a ticket?

If you are experiencing a concern with functionality or a feature is not working properly.

Need to check on the status of a ticket?

Even when you aren't logged in to SalesExec or LeadExec you can check on your tickets. [Go to.](#)



Login to the support portal
Enter the details below

Your e-mail address

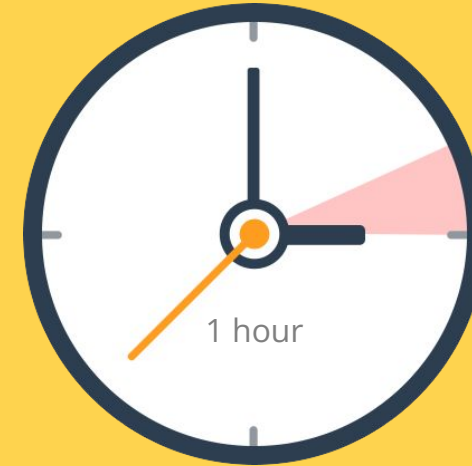
Password

Remember me on this computer

[forgot your password?](#)

LOGIN

All Requests Receive
Initial Response/Review



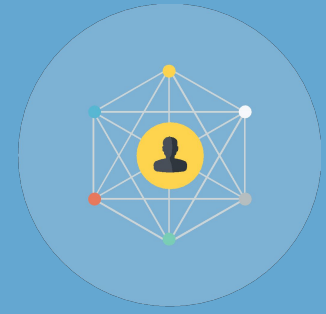
*All hours are based off of business hours unless otherwise noted. Resolution times may vary based on request. All requests are escalated internally after review and are subject to change.



Service Incident



Unplanned Downtime



Communicate



Service Level Agreement



Post Incident Review

SalesExec Support Portal

Please submit your SalesExec related ticket using our support portal. Our dedicated support team will quickly respond within our SLA and provide immediate service. If this is an after-hours emergency please call our toll free number and select the emergency support option.

 Submit Ticket

 Knowledgebase

 Chat With Our Support

LeadExec Support Portal

Please submit your LeadExec related ticket using our support portal. Our dedicated support team will quickly respond within our SLA and provide immediate service. If this is an after-hours emergency please call our toll free number and select the emergency support option.

 Submit Ticket

 Knowledgebase

- Call After Hour for Emergency 1-866-372-9431
- Go to www.ClickPointSoftware.com
- Go to Support for Live Twitter Updates
- <http://www.clickpointsoftware.com/server-status.html>
- Submit a Ticket, Email, or Call