

precisely

Software Maintenance Handbook

Elevate your business success with our
enterprise data and software solutions.



This handbook outlines our flexible Precisely Support options – built to meet the needs of organizations of all sizes. Our expert support team provides guidance and troubleshooting, leveraging extensive industry expertise to address your unique challenges and needs. Use this valuable resource to ensure you receive the best technical support every step of the way.

Precisely provides world-class technical support to resolve data and software issues – helping you accelerate implementation, stay productive, and get the most from your investment. Your software subscription and maintenance include patches, bug fixes, and new versions – helping to keep your data and software up-to-date with the latest features and functionality. Our data products are released monthly, quarterly, and annually.

Have any questions or feedback about the functionality or use of our solutions? Please [contact our global Precisely Support team](#).

Software Maintenance Handbook

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Precisely is dedicated to ensuring you and your organization succeed with the software solutions you rely on.



Precisely Support Overview

Our software support services consist of:

- 30,000 technical knowledge base articles
- Expert technical support for Precisely products
- Access to new releases and updates during your term
- Best practice guidance for product use
- Data updates for licensed subscriptions
- Correction of technical errors and defects when using Precisely products
- 24/7 emergency support (when available and/or contracted for your product)

Precisely understands that some issues may require additional assistance that falls outside the scope of what Precisely Support provides. Assistance related to these issues may involve additional fees and include:

- Custom and in-depth workload analysis, performance analysis, and tuning recommendations of solutions and infrastructures
- Writing, troubleshooting, or customizing code
- Customer training on software products
- Answering extensive software configuration questions
- In-depth infrastructure or architectural reviews, planning, migration, and performance and health checks
- Interpretation or triage of defect scan reports from customers or third parties

Our **Precisely Global Professional Services** team helps our customers cost-effectively plan, build, and deploy secure, high-performance solutions – delivering the most value in the shortest possible time. If your request is outside the scope of technical support, we'll connect you with our Professional Services team.

To learn more about our Professional Services offerings, please reach out to your Precisely Account Executive or contact us at precisely.com/contact.

Software Support Maintenance Plans

Precisely Technical support can be purchased at the following maintenance plan levels:

- Standard Support
- Advanced Support (including 24/7 Severity 1 support)
- Enterprise Support (including 24/7 Severity 1 & Severity 2* support)
- Extended Support Maintenance (available to customers on Advanced and Enterprise Support)

To determine which level is most suitable for supporting the effective use, adoption, and maintenance of your software, please don't hesitate to contact your Account Executive or Customer Renewals Team for more information at precisely.com/contact.

* Mutually agreed Critical Support Severity 2 cases will be worked 24/7 if the Customer is also available to collaborate during that time.

Compare Precisely Support Plans

Service	Standard Support (formerly Standard Level 1)	Advanced Support (formerly Mission Critical Level 2)	Enterprise Support
Support Coverage Hours	Local Business Hours*	24/7 (Severity 1)	24/7 (Severity 1 & Severity 2)
Initial Response Targets	Severity 1 – Within 30 bus. mins Severity 2 – Within 4 bus. hours Severity 3 – Within 1 bus. day Severity 4 – Within 2 bus. days	Severity 1 – Within 30 mins. Severity 2 – Within 4 bus. hours Severity 3 – Within 1 bus. day Severity 4 – Within 2 bus. days	Severity 1 – Within 15 mins. Severity 2 – Within 1 hour Severity 3 – Within 2 bus. hours Severity 4 – Within 1 bus. day
Access online case management support.precisely.com	✓	✓	✓
Access to the Precisely online knowledge base: support.precisely.com	✓	✓	✓
Enable use of remote access tools (at the discretion of the Precisely Support team)	✓	✓	✓
Receive free version upgrades and patches	✓	✓	✓
24/7 Follow-the-Sun (FTS) Support** <ul style="list-style-type: none"> • Receive 24/7 critical production emergency Severity support (see page 5 for definition) • Excluding shrink-wrap products • Available only in the English language 		Severity 1	Severity 1 and Severity 2
Priority Emergency Bug Fix (EBF)			✓
Critical Event Support Coverage (scheduled go-live support/product upgrades) (min. 4-hour increments)		1 × 24-hour block/year	2 × 24-hour blocks/year & Emergency Response Team
Priority case routing to Senior Support Engineers		✓	✓
Designated Technical Senior or Principal Support Engineer (DTSE)			✓
Designated Technical Support Manager (DTSM)			✓
Escalation Management			✓
Quarterly Business Reviews & Case Trend Analysis Reporting			✓
Extended Support Maintenance Add-on		eligible	eligible

* Support coverage hours by country/region: Americas region: 8am—8pm (EST); UK: 9am—5:30pm; All other European countries: 9am—5pm; APAC region: 8am—6pm (AEDT)

** 24/7 Follow-the-Sun Support – Precisely will allocate 24/7 support team members to resolve Severity 1 and Severity 2 issues, depending on your plan and provided you have a technical resource available.

Standard Support

Our Standard Support maintenance level is designed for small to mid-sized businesses or companies with less complex or non-mission-critical environments. This is an ideal fit for workloads that are not mission-critical to your business environment.

Advanced Support

The Advanced Support maintenance level is best for our customers with a limited number of production business-critical applications. It includes a higher level of technical support, faster initial response times based on severity, 24/7 Severity 1 support (for eligible products), critical event support, priority case routing to Senior Support Engineers, and Escalation Management.

Enterprise Support

The Enterprise Support maintenance level offering is our highest support plan. This is for customers with mission-critical production environments that rely strategically on Precisely software products to run their business operations.

In addition to everything included in Advanced Support, this plan provides:

- A Designated Technical Senior or Principal Support Engineer assigned to your account (DTSE)
- A Designated Technical Support Manager (DTSM) who collaborates with our Support, DevOps, Engineering, and Product Management teams to manage product use and adoption to ensure your business outcomes are met

Extended Support Maintenance

Our Extended Support Maintenance offering was developed to assist customers with Precisely software products that have reached end of marketing, end of support, or end of life. We understand that some customers may need additional time when planning to move to a supported version. This offering provides customers with up to three additional years of support while you plan your next steps.



Support maintenance level upgrades and downgrades

You can upgrade your support plan at any time, with fees based on current contract rates and prorated to the next renewal date. Downgrades to a lower support plan are allowed at renewal without penalty, but mid-term downgrades are not permitted. For more information, please contact your Precisely Account Executive or the Renewals team.

Matching service levels

When you purchase a Precisely Software Maintenance & Subscription agreement, all licenses within a license set receive the same level of technical support. We do not offer partial support coverage within a set.

A license set is defined by a single implementation use case within your environment. For example, address validation for batch invoicing by an operations department is a different license set than real-time address validation for a web-based marketing campaign.

Ensure Priority Support with Dedicated Technical Leadership

Dedicated Technical Support Engineer (DTSE)

Assigned Designated Technical Support Engineer (DTSE) delivers senior-level expertise to resolve complex issues quickly, support upgrades and installations, and proactively maintain system performance. Through direct engagement, knowledge sharing, and customer Tech Talks, the DTSE helps reduce downtime, accelerate time to resolution, improve product adoption, and ensure your enterprise environment runs smoothly and efficiently.

Dedicated Technical Support Manager (DTSM)

Assigned Designated Technical Support Manager (DTSM) provides strategic oversight of your support experience, coordinating across Support, Engineering, DevOps, and Product teams to ensure consistent delivery and alignment with your business goals. By leading critical escalations to resolution, analyzing case trends to identify any recurring issues, and implementing improvement plans to close performance gaps, the DTSM helps reduce risk, strengthen system stability, and ensure priority support attention.

Service Level Objectives (SLOs) & Response Targets

Response targets specify the time it takes for Precisely Support to respond to new cases. Initial response time is the period between receiving a request and initiating a response. You can submit cases via our customer/partner support portal.

To ensure efficient troubleshooting, the necessary customer technical resources must be available. In critical situations, these resources should be immediately accessible to collaborate with our Support Engineers.

Severity Levels	Severity Definition – Business Impact	Support Initial Response Target	Expected Support Actions
Severity 1 – Critical Impact	Severity 1 is a mission-critical production emergency where the system or product is down, severely impacting business-critical operations, with no available workaround.	<p>Standard: Within 30 business minutes</p> <p>Advanced: Within 30 minutes</p> <p>Enterprise: Within 15 minutes</p>	<ul style="list-style-type: none"> • Work on critical issues during business hours until resolved. For 24/7 agreements, address issues around the clock. • Initiate internal Escalation Management Process. • A cross-functional team of technical support and engineering will collaborate to identify the problem and create a permanent solution or workaround to restore operations quickly. • Case severity will be lowered upon customer confirmation of system restoration.
Severity 2 – High Impact	Severity 2 involves a severe loss or reduction of service, where a critical function has a reproducible problem causing serious inconvenience. Business-critical or everyday operations fail occasionally.	<p>Standard & Advanced: Within 4 business hours</p> <p>Enterprise: Within 1 hour</p>	<ul style="list-style-type: none"> • Precisely Support Engineers will engage with our engineering team members as necessary to identify the source of the problem and, if required, develop a workaround or alternative resolution to restore normal business operations as soon as possible
Severity 3 – Medium Impact	Severity 3 involves a minor loss or reduction of service, where a secondary function intermittently fails. This less common operation frequently encounters problems, causing some inconvenience. A medium-effort workaround is available.	<p>Standard & Advanced: Within 1 business day</p> <p>Enterprise: Within 2 business hours</p>	<ul style="list-style-type: none"> • Precisely Support Engineers will engage with our engineering team members as necessary to identify the source of the problem and, if required, develop a workaround or alternative resolution to restore normal business operations as soon as possible.
Severity 4 – Low Impact	Severity 4 involves a minor inconvenience due to a loss or disruption of service. This occurs when a less common operation occasionally fails. A low-effort workaround is available.	<p>Standard & Advanced: Within 2 business days</p> <p>Enterprise: Within 1 business day</p>	<ul style="list-style-type: none"> • Precisely Support Engineers will engage with our engineering team members as necessary to identify the source of the problem and, if required, develop a workaround or alternative resolution to restore normal business operations as soon as possible.

Service Level Availability (SLAs)

For Precisely SaaS and Hosted Software products, you can review the current product availability / SLA terms [here](#).

Reporting an Issue to Precisely Support

Precisely has made significant technology investments to provide customers with a modern and personalized customer support experience when engaging our global support team. Our goal is to help you successfully use, adopt, and deploy your Precisely data and software products.

When you need help, we encourage you to start with our AI-enhanced search at support.precisely.com. We have incorporated our digital knowledge assets into these search experiences, which include:

- Over 30,000 technical knowledge base articles
- Updated product documentation
- Community Forum answers from Precisely experts and experienced users

Precisely Support Resources

At support.precisely.com, you can also access several other digital resources, including:

Product Documentation

- [Precisely Help](#) – Access documentation, knowledge articles, forums, announcements, ideas, downloads, and licenses.
- [Online Technical Documentation](#) – Browse our Help Center with online product documentation.

Product Status

- [Precisely Status Page](#) – View and subscribe to live system health and status updates for the Data Integrity Suite and other SaaS and hosted products.

Customer Community

- [Case Management](#) – Create, monitor, update, and close your support cases online.
- [Customer Community](#) - Access public knowledge articles and additional authenticated articles (login required).
- [Precisely Blog](#) – Stay current with the latest innovations and industry news. Learn from company executives, product owners, and industry thought leaders.

Product Training

- [Precisely Education](#) via [Precisely U](#) - Precisely structures training to your needs and provides courses for both beginners and advanced students.
- [Precisely U](#) – We offer online, self-paced, instructor-moderated, and instructor-led education. Select the learning path that best suits your needs.

For more information, contact the Education team at education@precisely.com.

Precisely Data Experience

- [Precisely Data Experience](#) – Download your active data and software subscriptions, and receive automatic downloads via the Auto Download tool and SDK.

Contacting Precisely Support

To submit a technical support case for your purchased products, follow these three easy steps:

1. Go to support.precisely.com and select [Contact](#).
2. Log in to the [Customer](#) or [Partner](#) portal and select [Create a Case](#). If you don't have a login, select [Register](#).
3. If you experience issues logging in, please don't hesitate to contact us at support.precisely.com/contact/.

Reporting Third-Party Vendor Issues to Precisely Support

In certain situations, resolving an issue may require the involvement of a third-party vendor. When that's the case, our support team will work closely with you to coordinate with the vendor, keep you informed throughout the process, and ensure the issue is resolved.

Reporting Enhancement Requests to Precisely Support

If you have an idea or suggestion to improve our existing and future offerings, please submit it to [The Precisely Ideas Community](#) portal.

This open, collaborative space lets you easily share new ideas or comment on others in a way that is visible to the entire community.

Our Product Managers review submissions and will engage with you directly to determine the feasibility of your request.

Reporting Critical Issues to Precisely Support

Critical issues can be reported by submitting a web case via our support portal. Be sure to include the severity and business impact so our support and engineering teams can prioritize your request correctly.

Reporting Billing Issues

If you encounter an issue with your account, invoices, or purchase orders, please submit a case through our customer support portal, and it will be routed to our Account Services team for resolution.

Software Support Case Life Cycle

When you report an issue through our customer support portal, our experienced Support Engineers promptly initiate the discovery and troubleshooting process. Support cases are automatically routed based on your selected product and the expertise needed to diagnose and resolve your issue.

We prioritize your concerns and ensure a seamless resolution process. From initial acknowledgment to detailed troubleshooting and timely updates, we are committed to providing you with exceptional support throughout the entire process. Your complete satisfaction is our top priority, and we strive to resolve your issues efficiently and effectively.

Case Submission Process

Step 1. Case Creation

- **Customer submits case:** You report an issue via the support portal.
- **Case logging:** A unique case number is emailed to you. Upon case assignment, the Support Engineer contacts you to verify submitted information and begins the troubleshooting process.

Step 2. Initial Assessment

- **Issue classification:** You and the assigned Support Engineer will jointly classify the issue based on severity and business impact.
- **Acknowledgment:** You'll receive an acknowledgment email adhering to the response times specified by the case severity.

Step 3. Discovery & Diagnosis

- **Information gathering:** The Support Engineer collects relevant information from you – including error messages, logs, and steps to reproduce the issue.
- **Preliminary analysis:** The Support Engineer conducts an initial analysis to understand the nature and scope of the problem.

Step 4. Troubleshooting & Solution Testing

- **Root cause analysis:** The Support Engineer identifies the root cause of the issue using diagnostic tools and techniques.
- **Testing solutions:** Potential solutions or workarounds are tested in a controlled environment to ensure they're effective and reliable.

Step 5. Case Closure

- **Case documentation:** The Support Engineer documents the resolution steps and any relevant information for future reference.
- **Closure notification:** You'll receive notification that your case has been closed. Our support team will make three attempts to confirm that the solution provided resolved the reported issue. If we don't receive a response from you, the case will be automatically closed.

Step 6. Case Follow-Up (if necessary)

- **Monitoring:** In some instances where reported issues are not reproducible or occurring randomly within the customer environment, we may follow up to ensure the issue has not reoccurred.
- **Further action:** If an issue persists, the same case may be reopened within 21 business days after it was initially closed, and additional steps will be taken to resolve it.

We encourage our customers to complete case surveys. By sharing your support experience, you help us improve our support delivery services.

This support case life cycle ensures a structured approach to diagnosing, troubleshooting, and resolving customer-reported issues, providing a transparent and efficient process for both support engineers and customers.

Case Escalations

If the criticality or business impact of your issue has worsened during the life cycle of your reported case, you can request an escalation. A regional support manager will review your case and ensure it receives the correct level of attention and resources to move it forward and get it resolved.

This can be achieved by simply updating your case in the support portal.

Product Release Support Policy

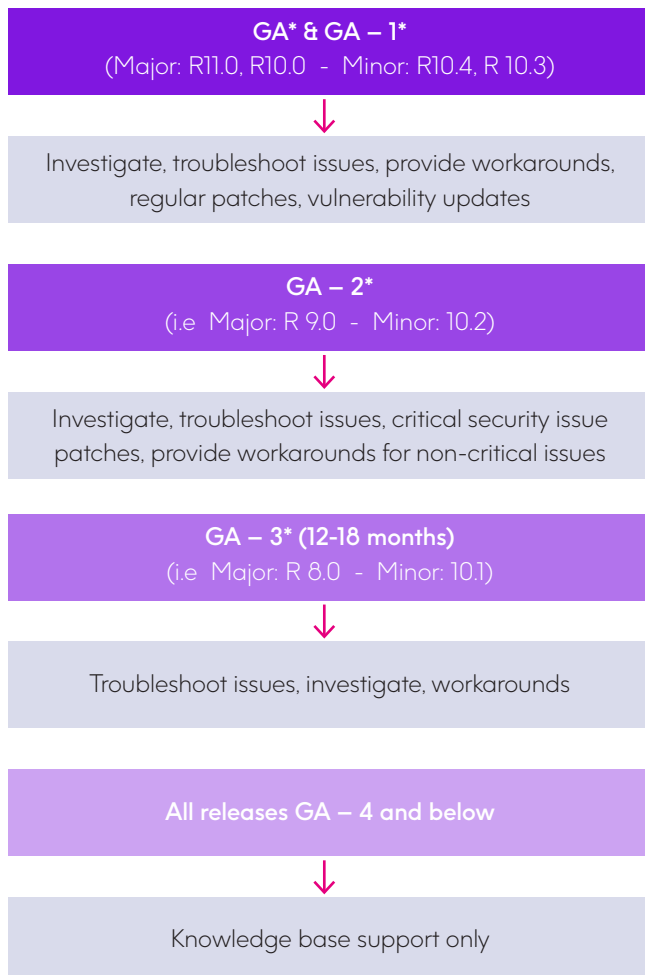
The Product Release Support Policy provides an overview of the support period for all Precisely products and their associated releases. Support encompasses both general availability and continued support phases. These timelines apply only to major and minor releases, not to patch-only releases.

General Availability (GA)

General availability starts when a product release becomes available to customers. This begins with an announcement that outlines its readiness for use and key features.

Support

Precisely will provide support for major and minor releases as outlined in the diagram below. Full technical and engineering support will be provided for the current and one previous release. Technical support will be provided for the current and three releases backward.



* Ability to patch in place or provide workarounds is restricted by 3rd party component availability and dependencies on existing component versions

Data Products

The data products policy provides at least one year of support or six months after a major successor release, whichever is longer. We recommend using the latest version to access all features and the most current data. Support issues are typically addressed in the next scheduled release, rather than as a patch.

Please review your data product policies, as specific contractual language with third-party vendors and data suppliers may override this policy.

Policy Exceptions

Exceptions to our Product Release Support policy are explicitly stated and outlined on a release-by-release basis. Common exceptions include:

- Frequent releases for SaaS products (e.g., the Data Integrity Suite)
- Significant lag between releases
- Significant change in third-party technology between releases (discussed in detail in the next section)
- Specific terms in your license agreement with Precisely that may be different and supersede this Product Release Support policy

Third-party vendor-specific support terms

Precisely uses various third-party products, including operating systems, database management systems, application servers, web servers, and device drivers. While we strive for broad product compatibility, we cannot test every combination. Untested configurations are unsupported, and issues must be reproducible in a supported environment to be investigated.

Supported environments are listed in the product release documentation on the support website. To continue receiving technical support, you must stay on a supported environment and upgrade if a vendor retires support for its product, as per your Precisely license agreement.

Virtual server environment support

Precisely strives to meet our customers' diverse and changing needs. Our software products support and integrate with many of today's leading platforms and operating systems found in enterprise IT environments.

Many customers utilize our software in virtual server environments, and we support its use through the license agreement. While we don't perform rigorous testing on virtualized deployments, we expect our software to function correctly in environments that simulate certified native environments. However, virtual environments may introduce overhead, which can impact performance and scalability. Therefore, you should consult your virtualization vendor for advice on hardware sizing and tuning.

Software Maintenance Renewal

You can renew your Precisely Maintenance & Subscription agreements if you have a valid perpetual or limited-term license or subscription that hasn't expired. Opting for a multi-year contract may also qualify you for savings based on the total calculated fee.

Renewal Quote

To assist you with the renewal process, we will issue a renewal quote at least 90 days before your agreement ends – and send email reminders up until the expiration date. If you haven't received a quote within 60 days of your renewal date, please contact your Precisely Renewal Account Manager.

Reinstatement Policy

If your Precisely Software Maintenance agreement expires, support will be terminated. To reinstate coverage, contact your Precisely Renewal Account Manager. A reinstatement fee will apply, calculated as the period of non-coverage plus 10%.

Standard Support Agreement

Eligibility

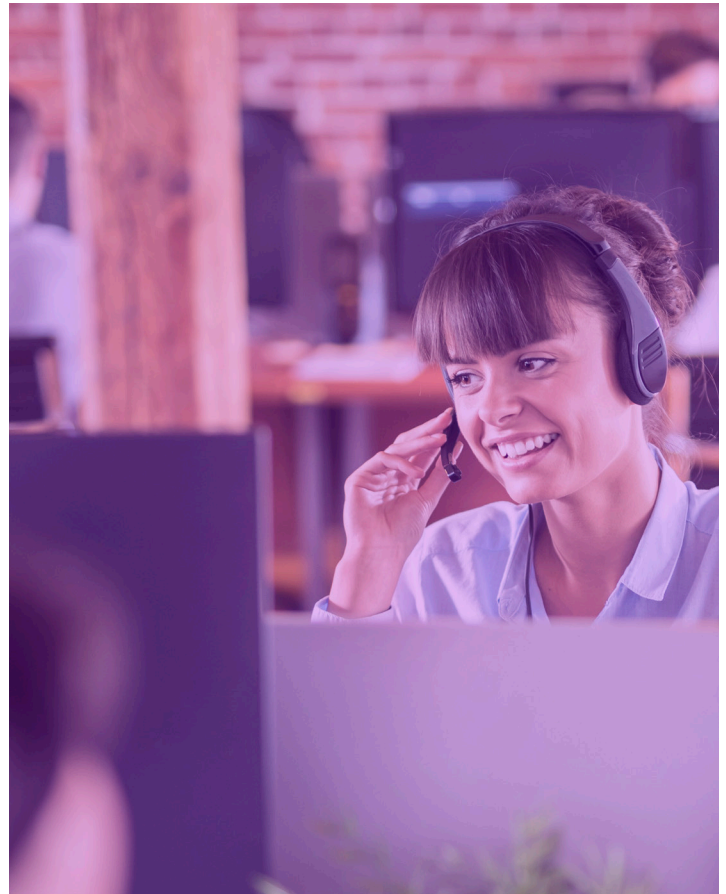
You are entitled to support for all Precisely solutions under the following conditions:

- The Precisely software license agreement and maintenance term are both current and active
- Technical support is provided exclusively to the primary licensee of the product

Scope

Our goal is to assist you with Precisely software by answering questions and resolving issues related to its operation. The standard support agreement includes:

- Access to the latest product and maintenance releases/patches
- Access to support.precisely.com to log and track support cases and view knowledge base articles
- Investigation of reproducible errors in Precisely software applications
- Basic advice on general usage and "how-to" questions



Out of Scope

Situations occasionally arise that may be outside the scope of Precisely Support services, including, but not limited to:

Professional Services: For help that extends beyond the standard scope of support – like new installations or upgrades, implementation, optimization, in-depth solution analysis, and training services – Precisely Support may recommend engaging our Professional Services team for an additional fee.

Third-party vendor issues: In certain situations, a fix from a third-party vendor may be required to resolve the issue. While we can't directly fix the issue, your Support Specialist will help you as much as possible through this process.

New product features: Precisely Support staff provides guidance and troubleshooting of Precisely solutions. However we cannot introduce new product features. If a problem requires functionality beyond the current product design, you must log an enhancement request for consideration in a future release at ideas.precisely.com.

Precisely Support Terminology

Term	Definition
Support case	A Precisely support case represents a customer inquiry, issue, or request that is logged and tracked within our customer relationship management (CRM) system. It is used to manage and resolve customer support interactions efficiently, ensuring customer satisfaction and effective service delivery.
Customer environment	A customer's hardware and network must be adequate and properly configured to support the products and applications the customer wishes to run. In some cases, we may be able to provide best practices for improving the performance of Precisely products; however, fine-tuning at the hardware and network levels remains the customer's responsibility.
Enhancement request	<p>An issue reported to Precisely Support is considered an enhancement request if its resolution changes the product's functionality. Our Product Management team reviews all requests for possible inclusion in future releases. Any product enhancement request cases submitted through the support portal will be closed, and we will guide our customers to formally submit the request through our Ideas Community Portal.</p> <p>To submit an enhancement request, visit our Ideas Community Portal (ideas.precisely.com).</p>
Product defect	A product defect (or bug) is an inherent problem in the software and/or product documentation. It is a verifiable defect in the intended functionality or design of the product.
Shrink-wrap products	Shrink-wrap products, such as MapInfo Pro, are desktop products that are not sold as an enterprise solution and are licensed under the standard Precisely end-user license.
Supported platforms	Individual product documentation provides details on supported platforms. Precisely will only support platforms certified for that product. For further information on approved platforms, please contact your Precisely Account Executive.
Unsupported environment	<p>Precisely relies on a variety of products developed by third-party vendors, which may include but are not limited to:</p> <ul style="list-style-type: none"> • Operating systems • Database management systems • Application servers • Web servers • Device drivers <p>While we make every effort to ensure the broadest possible product compatibility, it's not possible to test every combination. Untested configurations are considered unsupported environments. An issue must be reproducible within a supported environment before it can be investigated.</p>
Workaround	<p>A workaround is any solution to a problem that does not involve changing the code of the Precisely software product. Possible workaround solutions include:</p> <ul style="list-style-type: none"> • Using an alternate process/approach/method, depending on the problem, to accomplish the task while bypassing the problem • Possible software installation changes, including <ul style="list-style-type: none"> ○ Upgrading to a newer version of the product, incorporating the relevant fix ○ Upgrading the operating system, version, and/or service pack <p>If required, we'll provide patches or new builds, limited to the version of Precisely software products currently shipping. Assisting with installations or upgrades of third-party products is outside the scope of our support.</p>



About Precisely

As a global leader in data integrity, Precisely ensures that your data is accurate, consistent, and contextual. Our portfolio, including the Precisely Data Integrity Suite, helps integrate your data, improve data quality, govern data usage, geocode and analyze location data, and enrich it with complementary datasets for confident business decisions. Over 12,000 organizations in more than 100 countries, including 95 of the Fortune 100, trust Precisely software, data, and strategy services to power AI, automation, and analytics initiatives. Learn more at www.precisely.com.