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# Avoka Transact


# The Avoka Community 2016

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# The Avoka Community


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# Avoka Transact Product Documentation

The Avoka Community has moved to [community.avoka.com/](https://community.avoka.com/)

We are excited to announce that the new [community](https://community.avoka.com/) and [documentation](https://docs.avoka.com/) websites are now live. You can use the new websites to find product documentation, Q&A forums, and how-to articles.

## Avoka Community – [community.avoka.com](https://community.avoka.com/)

Avoka Community Features:

- Enhanced Q&A Forums, How-To Articles, and How-To Videos
- New Discussion Forums and Tech Blogs

## Transact Documentation – [docs.avoka.com](https://docs.avoka.com/)

Transact Documentation Website Features:

- Transact Product Documentation for Maestro, Transact Manager, and Insights
- Release Notes for all Transact products
- New content user paths and a Transact role-based structure

## Register for the New Avoka Community

The content available on the Community and Documentations websites will be publicly viewable, however users will need to have a community account to engage within the Community features (post questions, answer questions, comment on blogs, etc.).

Some users have been migrated from the existing Avoka knowledge base. For more information see [Accessing the New Community](#).

New community users can [Register Now!](#)



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# Avoka Customer Care Handbook

- [Message from our Vice President](#)
- [Support Definitions](#)
- [Roles and Responsibilities](#)
- [Accessing Documentation and the Knowledge Base](#)
- [Contacting Customer Care](#)
- [Product Updates and Upgrades](#)

# Message from our Vice President

Welcome! Thank you for your trust in Avoka as your partner in your Digital Customer Acquisition Journey. We are honored to be part of your business.

The Customer Care Team's sole focus is your success in achieving your business goals. Our passion is to remove roadblocks and other challenges on your journey. We intend to always be there when you need us and be your trusted advisor. This guide is designed to provide information about the Avoka's Customer Care Team, policies, procedures, and processes. We continuously work on improving our services.

I encourage you to engage with the Customer Care leadership team as we value your comments and feedback.

Olivier Biscaldi, Vice President Global Customer Care

# Support Definitions

Following is a general description of Avoka's support offerings; please consult your contract with Avoka or your Avoka Account Executive for further details on the offerings your company has ordered.

## Platform Support

Platform Support is included in your annual Platform subscription, though features differ depending on the support package purchased. It is intended to provide information regarding the Avoka Platform and help if the Platform should malfunction due to a defect or because of an issue with the hosting services.

The following is generally included in Platform Support:

- Availability and performance of the hosted Platform.
- Resolution of errors in the Platform that are not caused by client scripting, client configuration, or use of the Platform outside of its intended scope. Errors that cannot be reproduced on the reference implementation for the Platform version are not covered under Platform Support.
- Access to the Avoka Customer Care portal and ability to log incidents.
- Documentation of APIs and product features for all supported versions of the Platform.
- Updates and upgrades to the Platform when hosted.
- Product installers and installation guides for On-Premise installation clients.

Examples of activities that are NOT included in Platform Support include:

- Availability and performance of On-Premise products.
- Troubleshooting of On-Premise products and client configurations.
- Troubleshooting of client-specific configuration items, including payment gateway configuration, Groovy scripts, and JavaScript.
- Errors that cannot be reproduced on the reference implementation.

## Application Support

Application Support covers forms/web applications created by Avoka using Transact Maestro or Transact Composer. These are custom web forms unique to your environment. Application Support is an option that can be added to Platform Support. If you are interested in Application Support, please contact your Account Executive.

## Core, Extended, and Premium Customer Care

Avoka Customer Care offers different levels of Platform Support adapted to customers' needs and goals. Core Care is included with your subscription while Extended and Premium Care require additional fees. Please contact your Account Executive for further details.

# Roles and Responsibilities

Following is a general description of the personnel involved in providing Avoka's support under its various offerings.

Role	Will Do
<b>Avoka Support Engineer</b>	<ul style="list-style-type: none"> <li>• Understand the business impact of the customer's issue upon logging of a support ticket</li> <li>• Provide technical expertise</li> <li>• Troubleshoot and resolve the customer's issue</li> <li>• Provide status updates throughout the resolution process</li> </ul>
<b>Avoka Customer Success Coach</b>	<ul style="list-style-type: none"> <li>• Understand the customer's requirements and business goals</li> <li>• Recommend solutions with Avoka technology that meets requirements</li> <li>• Communicate product updates and important news</li> </ul>
<b>Avoka Customer Success Architect</b>	<ul style="list-style-type: none"> <li>• Advanced knowledge of the customer's solution</li> <li>• Guide and foster strategic product discussion</li> <li>• Provide technical expertise</li> <li>• Troubleshoot and resolve the customer's issue</li> <li>• Provide status updates throughout the resolution process</li> </ul>
<b>Avoka Hosted Platform Engineer</b>	<ul style="list-style-type: none"> <li>• Monitor cloud-hosted environment</li> <li>• Troubleshoot and resolve cloud-hosted related issues</li> <li>• Conduct upgrade and updates on cloud-hosted platform</li> </ul>
<b>Avoka Regional Customer Care Manager</b>	<ul style="list-style-type: none"> <li>• Ensure highest degree of technical know-how in department</li> <li>• Keep apprised of high-priority customer issues</li> <li>• Point of contact for customer escalation</li> </ul>
<b>Customer's Named Support Contacts</b>	<ul style="list-style-type: none"> <li>• Be trained and certified in Avoka's products</li> <li>• Train internal users to appropriate degree on Avoka products</li> <li>• Communicate business impacts of any technical issues appropriately</li> <li>• Collect diagnostics and other required information in submitting cases</li> <li>• Engage technical and management resources appropriately</li> <li>• Provide equal resource availability</li> </ul>

# Accessing Documentation and the Knowledge Base

Our Documentation and Knowledge Base can be accessed by login to <https://support.avoka.com/kb/>

Our Avoka Community platform offers access to multiple source of useful information.

## Product News and Information

All product announcements and advisories can be consulted in this section.

## Documentation

This section will provide you with release notes, installation and use guides, and architectural documents.

## Community Q & A

This is the space for our customers to ask questions to the wider user community.

You can directly access here: <https://support.avoka.com/kb/questions>

The Q&A is offered to foster community discussion to gather feedback and crowdsource ideas.

While it is expected to often be technical, this dashboard is separate from the Customer Care system, and is intended as a place to facilitate useful discussions and browse topics. Avoka staff may contribute where helpful.

## How-to Articles

This section allows you to browse how-to articles alphabetically or by topic.



The screenshot displays the Avoka Knowledge Base interface. On the left, there is a sidebar with a search bar and navigation options. The search bar is labeled "Search the Knowledge Base:" and contains a search button. Below it, the "Navigate the Knowledge Base" section lists "How-to articles" with sub-options: "Browse by Topic" (highlighted with a red box) and "Browse by Transact Subject". The main content area shows the Avoka logo, the text "Transact Knowledge Base / Transact Knowledge Base", and the heading "Browse by Topic". Below this, it says "Choose articles listed by common topics:" followed by five columns: "A" (abandonment), "B-C" (blocks), "D-E" (data), "F-I" (file-list), and "J-Q" (javascript).

If you are interested in specific topics you can set "Watch" and comment on topics on the watch page – <https://support.avoka.com/kb/questions/topics>

## Ideas & Feature Requests

In this section, you can submit ideas and vote for ideas you would like to see implemented. Ideas are sent to our Product Team and may be considered for future releases.

# Contacting Customer Care

## Customer Care Centers

Our centers and business working hours are:

- **London, UK** – Mon-Fri 9:00 AM-5:00 PM GMT
- **Broomfield, CO** – Mon-Fri 9:00 AM-5:00 PM MST
- **Sydney, AU** – Mon-Fri 9:00 AM-5:00 PM AEST

You can contact our Customer Care Team by logging a ticket on our portal, as explained below.

## After Hours Support

For customers who have Severity 1 issues, Avoka Customer Care may offer 24x7 Platform support depending on the Customer Care package purchased. Otherwise, any after-hours Severity 1 ticket will be routed to a region operating for resolution as a priority during normal business hours.

If your Customer Care package offers after-hour support for Severity 1 issues, you should log a ticket on our portal and you will be promptly contacted by one of our follow-the-sun engineers.

## Opening a Ticket

You can create new tickets and view existing tickets by logging on the Avoka Customer Care Portal URL:

<https://support.avoka.com/tickets/servicedesk/customer/portal/1>

The named contacts you have defined will be able to log in by using their email address as their username.

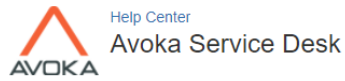
The Support portal will allow you to:

- Search our knowledgebase
- View existing support tickets
- Respond to tickets needing more information
- Create new tickets

Upon successful login, you will be directed to the landing page.

You can open a ticket by selecting one of the options below

- Product Issues
  - Platform issues and Unexpected behaviors
- Avoka Assist for Application Help
  - Requesting Avoka Assist for enhancement/fixes to an existing application
- Account Access
  - Request new or updated access users on Avoka systems
- Infrastructure
  - Request upgrades to hosted servers, IP-Whitelisting, and other requests for our infrastructure team



Welcome! You can raise a Avoka Service Desk request from the options provided.

- </>
**Product Issues**  
 Report product issues with Avoka products or your system.
- 👤
**Avoka Assist**  
 Ask questions or request Avoka development assistance on application issues, new project work, or suggest feature enhancements.
- 👤+
**Account Access Request**  
 Request changes to accounts or new accounts for Avoka systems. Ex: Maestro, Composer, E-learning
- 🗄️
**Infrastructure**  
 Request for anything related to hosted infrastructure including IP-whitelisting and upgrade requests.

You will be required to enter mandatory information to allow the Customer Care Team to start investigation.

It is important that the ticket is submitted with relevant, accurate, and detailed information as it will delay the ability for the Platform Support Engineer to initiate actionable work until provided.

## Reviewing an existing ticket

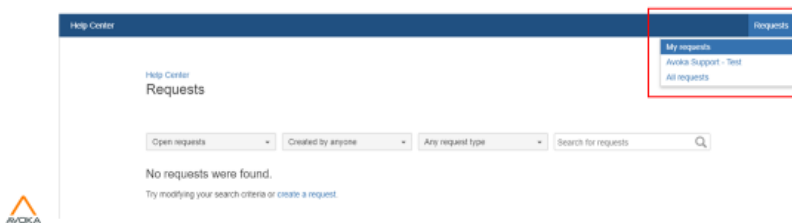
Click "Requests" in the upper right corner takes you to the request search page.

Here you can search for and view requests by different filters:

Status, Created By, Request Types, or by Text

## Searching for Open Requests

- Click "Requests" in the upper right corner takes you to the request search page.
- Here you can search for and view requests by different filters:
  - Status, Created By, Request Types, or by Text



## Ticket Information Required

Getting pertinent information about your ticket up front reduces the back-and-forth communication and significantly shortens the time it takes to resolve an issue.

When you open a ticket online, the Customer Care Portal will ask you for relevant pieces of information needed to work on and diagnose your ticket.

Of course, please add any additional relevant information and context.

In general, the following information will be required:

- Business impact and context, including whether project's schedule is at risk
- Product

- Severity and ticket type
- Third-party products impacted (if applicable)
- Verify and confirm your configuration-supported required specifications: <https://support.avoka.com/kb/display/ACH/Avoka+Transact+Platform+Support>
- Server and client details such as operating system, version, patch level, localization
- Screenshots and/or logs
- Was it working prior?
- What has changed?
- New patches?
- What error messages are received?
- When and how often does the problem occur?
- Can you reproduce the issue consistently?

During the life of a ticket, the assigned Support Engineer may require specific information pertaining to any of the above items or others that are unlisted.

It is common for the Support Engineer to require a remote session or a call with the customer in order to rule out support patterns.

## Severity Level Definitions

Our team uses severity to define the impact on your business and the urgency required for resolution. Below are summaries of the severity levels for Platform Support; please consult your contract with Avoka or your Avoka Account Executive for further details.

### Severity 1

- Problem with the Platform that results in continued unavailability of critical production operations with no workaround available.
- It has affected, or is reasonably likely to affect, the entire user community.
- Example: Platform is unresponsive, non-operational.

### Severity 2

- Problem with the Platform that results in continued degraded or intermittent performance of critical production operations, or the continued unavailability or degraded or intermittent performance of operations in a test environment, with no reasonable workaround available.
- It has affected, or is reasonably likely to affect, multiple users.
- Example: Email queue is stuck in Transact Manager; a service is stopped and won't restart in Transact Manager.

### Severity 3

- Problem with the Platform that results in impairment of non-critical operations in any environment.
- Example: Third-party integration is down and is affecting the form.

## Responses Procedure and Targets

When creating a support ticket, you can expect initial contact from a Platform Support Engineer within the following targeted response times, depending on the Customer Care Package you have purchased.

	Core	Extended	Premium
Severity 1	3 hours	2 hours (24x7)	1 hour (24x7)
Severity 2	1 business day	6 business hours	4 business hours
Severity 3	2 business days	1 business day	1 business day

Target communication updates shall be governed by the following default times unless other statuses are set.

	Core	Extended	Premium
Severity 1	Daily	Every 2 hours (24/7)	Every 1 hour (24/7)
Severity 2	Weekly	Every 3 business days	Every 2 business days
Severity 3	Bi-Weekly	Weekly	Weekly

Business Hours are 9 AM-5 PM Mon-Fri MST (MT) AEST (AET) GMT (BST)

## Tracking an Issue

Once a ticket is open, you can view the ticket's status, the owner, current case notes, and attachments.

Ticket statuses include:

Status	Description
New	The ticket is awaiting triage by a Support Engineer
In Progress	Your Avoka representative is actively working on the ticket
Waiting for Customer	Avoka is waiting on information or update from customer
Defect Acknowledged	Issue reported has been qualified to require a code change and is assigned to Engineering

Awaiting Version Release	Ticket is waiting for a code change to be released by Engineering
On Hold	Ticket has been suspended by agreement with customer
Closed	Ticket is now closed and no longer actively worked on

## Issue Resolution

The customer Care team will consider a ticket resolved and closed with the following possible outcomes:

- Provide documentation/information of product expected behavior
- Provide an acceptable workaround
- Provide a software update
- Provide a software upgrade
- Update to product documentation
- File an enhancement request
- Customer decided to close issue with no resolution
- Customer Care ticket is closed due to customer inactivity

## Issue Escalation

Occasionally, an issue requires a faster response, more attention, or a deeper understanding of the impact on your business.

Escalations can be requested when necessary.

The ticketing system has an “Escalate” button available you may use at any time.

We also have a time-based escalation / notification process internally to guarantee the right level of management visibility on progress of open support issues.

Our escalation hierarchy is:

- Customer Success Coach and Account Executive
- Regional Customer Care Manager
- VP, Global Customer Care
- Sr. Vice President of Global Client Services
- Chief Executive Officer

Escalations are triggered on the following frequency:

	<b>Core</b>	<b>Extended</b>	<b>Premium</b>
Severity 1	1 week	3 business days	1 business day
Severity 2	1 month	2 weeks	1 week

# Product Updates and Upgrades

Avoka updates its products on a regular basis. Updates are maintenance releases that provide fixes and security improvements. Upgrades are either major or minor releases that add new features.

Avoka only adds new features to the current release and does not port new features to previous releases.

Releases are designated as follows:

## Major release

A major release is denoted by the first digit of the release number - e.g., 17.10.y, 18.05.y

## Minor release

A minor release is denoted by the number after the first point - e.g., x.1, x.2

## Maintenance release

A maintenance release is denoted by the number after the second point - e.g., x.y.1, x.y.2

## End-of-Life Policy


Support will only provide assistance on supported product and Platform versions.

End -of-Life Support may be considered for an additional fee. Please contact your Account Executive more details.

While support will be provided to all versions until End-of-Life Date, it is likely that in the case of issues related to older versions, the Support Engineer will require an upgrade to resolve the issue.

View the [End-of-Life product matrix](#) for more information.

# Certification

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The Avoka certification program is a professional accreditation that Avoka offers to its employees, partners, and clients who demonstrate proficiency in basic and advanced topics relating to developing forms and applications using the Avoka Transact Platform.

## FAQ

[Click here](#)

## Transact Qualified Front End Builder

**Our Front End Builder Test has been updated to version 18.x and new exam guides are available!**

***Don't worry*** - if you are scheduled to take version 5.x you can continue with that registration as scheduled. [Click here](#) for 5.x Exam Guide.

**New testers** will only be able to register for 18.x and should use the new exam guide to prepare!

**Certifications are good for 2 years** so if you have already passed 5.x you do not have to retake the 18.x Exam.

[Click here](#) for 18.x Exam Guide.

## Transact Qualified Platform Developer

(Known as "Transact Qualified Services Developer" prior to May 2018)

[Click here](#) for Exam Guide

# Question and Answer Forum has Moved

The Question and Answer forum has moved to our new [Avoka Community](#).

All existing questions and replies have been moved to the new community forum. [Click here to view the new forum](#).

The content available on the Community and Documentation websites will be publicly viewable, however users will need to have a community account to engage within the Community (post questions, answer questions, comment on blogs, etc.).

Some existing community users have been migrated from this platform to the new community platform. If your account has been migrated, you will get a notification when you register for a new account (see 2b below). If your account was migrated, you can easily request a password reset, update your password, and then login to the new community.

New users, or those that weren't migrated, can self-register for an account on the Avoka Community. [Register now!](#)

## Client and Partner Login - [community.avoka.com](https://community.avoka.com)

1. Click **Login** (top right corner of [community.avoka.com](https://community.avoka.com))
2. Click **Reset here** or **Join here**

- a. Reset here - this is for users that account details have been migrated. They will need to enter their email address (same email used to register for the old KB) and request that a password reset be sent via email.
- b. Join here - this is for users where their account did not get migrated. They will need to complete the registration form. If they are trying to register with an email address that is already in use they will get the following error message

If your user account was migrated from KB ([support.avoka.com/kb](https://support.avoka.com/kb)), you will need to use your username found in the password reset email and/or password reset confirmation email.

# Accessing the New Community

The new Community and Documentation websites are now live.

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  - b. Join here - this is for users where their account did not get migrated. They will need to complete the registration form. If they are trying to register with an email address that is already in use they will get the following error message

*If your user account was migrated from this platform, you will need to use your username found in the password reset email and/or password reset confirmation email.*

# End-of-Life Policy

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The Avoka Transact product is updated and improved on a regular basis. Avoka only supports the most recent releases of the product as described in this document.

## Contents

- [Terminology](#)
- [End-of-Life Policy](#)
- [Feature and Maintenance Releases](#)
- [End-of-Live Schedules](#)

## Terminology

<b>Major release</b>	A major release is denoted by the first digit of the release number eg 3.y, 4.y
<b>Minor release</b>	A minor release is denoted by the number after the first point eg x.1, x.2
<b>Maintenance release</b>	A maintenance release is denoted by the number after the second point eg x.y.1, x.y.2

## End-of-Life Policy

Each minor release of a product will reach its end-of-life (EOL) date 3 years after its general availability (GA) date.

This policy relates to the core Avoka Transact product modules, including:

- Transaction Manager
- Composer
- Maestro
- TransactField App

Each module of the product has its own release numbering and GA dates.

All product module releases are supported and maintained until their EOL date. After the EOL date releases will only be supported in order to facilitate an upgrade to a supported release version.

After the EOL date, an Extended Support period is provided for customers planning to upgrade to a supported release.

Support	Period	Support & Maintenance	Cost
<b>Normal support</b>	Release to EOL date (years 1 to 3)	Full support available and maintenance releases available to fix issues.	Included in annual subscription.
<b>Extended support period</b>	EOL date plus 2 years (years 4 to 5)	Support only	20% uplift on previous years subscription (minimum cost may apply)
	After extended support period (years 6 +)	No support	

## Feature and Maintenance Releases

New features are added to the product in major and minor releases. Maintenance releases provide fixes and security improvements.

Avoka only adds new features to the current release and does not port new features to previous releases. For example, features added in 4.2 will not be available in 4.1.x.

New Maintenance Releases are only added to the current release, unless in Avoka's view there is significant reason to patch a previous release (eg major security issue). For example, a fix in 4.1.4 will not be released for 4.0.

## End-of-Live Schedules

Module	Version	GA Release Date	EOL Date	EOL Statement
<b>Transaction Manager</b>				
	5.0	Oct 17, 2016	Oct 17, 2019	
	4.3	Nov 25, 2015	Nov 25, 2018	
	4.2	Jul 15, 2015	Jul 15, 2018	

	4.1 - EOL	Nov 6, 2014	Nov 6, 2017	<a href="#">End of Life Transact 4.1.pdf</a>
	4.0 - EOL	Apr 15, 2015	Apr 15, 2017	
	3.6 - EOL	Aug 15, 2013	Aug 15, 2016	
	3.5 - EOL	Apr 8, 2013	Apr 8, 2016	
	3.4 - EOL	Sep 28, 2012	Sep 28, 2015	
<b>Maestro</b>				
	5.0	Oct 17, 2016	Oct 17, 2019	
<b>Composer</b>				
	4.4	Oct 17, 2016	Oct 17, 2019	
	4.3	Nov 3, 2015	Nov 3, 2018	
	4.2	Jul 15, 2015	Jul 15, 2018	
	4.1 - EOL	Nov 6, 2014	Nov 6, 2017	<a href="#">End of Life Transact 4.1.pdf</a>
	4.0 - EOL	Apr 15, 2014	Apr 15, 2017	
	3.6 - EOL	Aug 15, 2013	Aug 15, 2016	
	3.5 - EOL	Apr 8, 2013	Apr 8, 2016	
	3.4 - EOL	Sep 28, 2012	Sep 28, 2015	
<b>TransactField App</b>				
	4.3	Mar 1, 2016	Mar 1, 2019	
	4.2	Jul 9, 2015	Jul 9, 2018	
	4.1 - EOL	Nov 6, 2014	Nov 6, 2017	<a href="#">End of Life Transact 4.1.pdf</a>
	4.0 - EOL	Apr 15, 2014	Apr 15, 2017	
	3.6 - EOL	Aug 15, 2013	Aug 15, 2016	