



Client Policy Checklist

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Overview

The objective of this form is to outline your company's policies and procedures to be implemented by cleverbridge. By filling out this form, you provide us detailed guidance on how to best serve your customers. Furthermore, it also allows you to get valuable insights on our internal Customer Support policies and more general procedures when dealing with mutual customers.

Once you return the form to us, the data will be entered into the Commerce Assistant so that cleverbridge Customer Support can refer to it any time for guidelines in handling daily business activities. Customer Support will ensure all information complies with our communication standards.

Important: please remember to inform us about any changes you might have, especially regarding contact information or support web links.

Please define this information as clearly as possible. If you have any questions about any part of this document, do not hesitate to contact the Client Experience Team. We are happy to assist you with any questions or concerns.

Date:

Company Information

Your Client ID (to be filled by the cleverbridge Client Experience Team):

Company name:

Your headquarters' city and country:

Your company website

Primary website:

Additional websites:

Previous or additional e-commerce providers

What other e-commerce solutions have you worked with?

In-house solution

Other provider(s):

Neither

Will you be working with another e-commerce provider?

No, we are only working with cleverbridge

Yes, we will work with another provider

Name of the provider(s):

Your Customer Support

Where can cleverbridge direct customers with technical and product-related questions?

Online contact form:

Email:

Online FAQs:

Live Chat:

Phone:

Fax:

In which languages do you offer customer support?

German

Italian

Japanese

English

Spanish

Chinese

French

Portuguese

Other:

Contact information for cleverbridge

(The following information will not be given to your customers)

For customer-related questions or escalations, cleverbridge can contact:

Name: _____ Phone: _____

Email: _____

For key generator errors (if applicable), cleverbridge can contact:

Name: _____ Phone: _____

Email: _____

For Client Experience Team / Commerce Assistant / Technical issues, contact:

Name: _____ Phone: _____

Email: _____

For accounting and payment issues, cleverbridge can contact:

Name: _____ Phone: _____

Email: _____

Other general issues:

Name: _____ Phone: _____

Email: _____

For updates regarding the content of this policy document, cleverbridge can contact:

Name: _____ Phone: _____

Email: _____

Refunds

cleverbridge will execute refunds on your behalf in the following manner:

In all circumstances.

Refunds may be executed within _____ days after purchase*.

Recommendation: Our experience shows that a grace period of at least 30 days significantly increases customer satisfaction and reduces time-consuming escalations and chargebacks.

If a refund request is outside of your grace period, cleverbridge will contact you per email and submit a refund request on the customer's behalf. Should cleverbridge not hear back from you within 2 business days, the refund will be processed.

Name:

Email:

The customer should fill out a refund form on your website:

Other – Please explain your policy in detail:

If your refund policy is available on your website, please provide the link:

After a refund is processed, an email notification will be sent to you automatically through the Commerce Assistant.

*Please note that cleverbridge reserves the right to immediately refund orders as agreed upon in the Reseller Agreement (usually section 4.2). This includes, but is not limited to the following cases:

- Duplicate orders placed by a customer,
- Orders placed for the wrong product,
- Orders that were placed fraudulently,
- Cases within your money-back guarantee,
- The product key has not been successfully generated 2 days after payment,
- To avoid chargebacks/courts suits,
- EU Statutory right of revocation.

Underpayments

Underpayments occur occasionally. They are usually due to banks charging extra fees for international wire transfers. Do you have a maximum amount or percentage that you would accept as an underpayment?

Note: Some allowance for underpayment saves you considerable administrative work.

Percentage of order value:

Fixed amount:

No underpayment accepted

cleverbridge should contact us on a case-by-case basis at:

Email:

Purchase orders

cleverbridge only accepts Purchase Orders on official letterhead from companies, schools, universities and authorities.

Purchase orders are based on invoice and are processed before we receive the customer's payment. Purchase orders are commonly used by companies, universities, and government agencies due to their organizational structure and payment policies (cleverbridge does not offer purchase orders for individuals).

The customer faxes the purchase order, receives the product, and issues the payment within 30 days. cleverbridge has a Payment Delinquency Notice (PDN) process in place to remind customers of overdue payments.

No, we do not accept purchase orders

Yes, Purchase Orders are accepted

We process them ourselves

Email:

cleverbridge processes them

Enter here any restrictions/exceptions such as min/max order value, etc.:

Quotes

Quotes are a common element of the order process for companies, universities and government agencies. This is due to their organizational structure and payment policies.

Are customers able to request a quote on your webpage?

Yes, URL:

No

Is cleverbridge authorized to send price quotes of your products to your customers?

Yes

Please specify maximum amount of licenses:

Quote validity (example 14/30/60 days?):

No

Redelivery of keys and download links

Customers often contact cleverbridge for a redelivery of license keys or download link extensions, for example after a computer crash. Can cleverbridge proceed with such requests?

Yes, cleverbridge can redeliver the original license keys and extend download links.

No, cleverbridge cannot redeliver license keys or extend download links.

If not, please provide us with the steps a customer has to take:

A service is offered. Key and/or download links are not available. If customers need the delivery again, cleverbridge should proceed as follows:

Product information

License Agreement

A license sent to a customer is valid for:

One computer only

No restrictions apply

Depends on product. Please specify:

Software update

Upgrades are available free of charge.

Upgrades are only available for purchase while minor updates remain free.

Other:

Physical products

Will you be offering any physical products like backup discs, USB sticks or other devices for your products?

Yes, cleverbridge should handle the production

Yes, but we handle production and shipment ourselves

No, physical products are not sold

In case you sell any physical products yourself:

Average time delivery: _____ days

Address customers can contact if they have questions about the shipment:

Channel Management

Reseller/Partner Management

Will you be using the cleverbridge reseller management service?

Yes.

Is there a login section available for resellers on your webpage?

Yes, URL:

No, we will not be using the cleverbridge reseller management system.

We will be using a different reseller management system:

For any reseller-related questions, cleverbridge can contact:

Name:

Phone:

Email:

Resellers can contact:

Name:

Phone:

Email:

Affiliate Management

Do you intend to use the cleverbridge affiliate management service?

Yes.

No.

For any affiliate-related question, cleverbridge can contact:

Name:

Phone:

Email:

Affiliates can contact:

Name:

Phone:

Email:

Subscription Management

Do you offer subscription products?

No, we don't offer subscriptions.

Yes, we offer subscriptions.

If a customer wants to cancel a subscription, cleverbridge may proceed with the cancellation for them.

Yes

No. The customer has to proceed as follows:

Do you offer a grace period for unpaid renewals before deactivating the software?

Yes, we give days

No, we don't give customers a grace period.

Any other information you would like to add:

cleverbridge contacts

For questions regarding...

Orders and customer issues:

cs@cleverbridge.com

The Commerce Assistant, reports, bugs, general requests:

ce@cleverbridge.com

Payments to you from cleverbridge:

clientpayments@cleverbridge.com