Service Resources

Quick Reference Guide: Service and Success Partnership

Service Engage a **Customer Advocate** (Operational)	Success Engage a **Customer Success Manager** (Relational)

1. Assistance with day-to-day system inquiries.
    • *Assistance is needed to process a payroll*
    • *Assistance is needed to run a report*
    • *Bank authorization needs to be modified*
2. Provide follow up on an existing inquiry
    • *Receive the status of an existing case*
 	
*Contact support directly **via phone or chat** for all **time sensitive** inquiries.*
	1. Provide exposure to available on-demand Paycor resources.
	    • *Access to Training, Webinars, User Groups, Community*
	2. Provide guidance to best understand and navigate within the Paycor ecosystem to achieve your business objectives.
	    • *Your organization has a new leader who has never been exposed to Paycor.*
	    • *Your organization has complex project requirements and wants to discuss big picture needs to ensure the right skill set resources are engaged.*
	3. Provide a temporary voice to further articulate the business impact of an inquiry or concern.
	    • *You'd like to share your overall experience and believe there is a need for oversight on an existing or recently closed case.*

Scenario (left vertical label)

Support Center: Utilize self-service options with easily accessible knowledge articles in **Paycor Support Center**. We will continue to update these resources based on our customer needs and trends in case type. *Sign into Paycor.com > Get Help > Paycor Support Center.*

Chat: **Chat live** with a Customer Advocate for quick assistance with general, time-sensitive matters. *Sign into Paycor.com > Get Help > Paycor Support Center > Scroll downward to the dark blue chat bubble in the bottom right corner.*

Phone: Speak with a live Customer Advocate via **phone** for assistance with more specific matters that require the communication of more detail. *Call us at 855-565-3285.*
- *We experience peak volumes on Tuesdays and Wednesdays, 10-2 PM EST.*

Web Case: Launch a **web case** from within Paycor Perform. Provide the Customer Advocate with replication steps and necessary details. *Sign into Paycor.com > Contact Us > Submit a Case.*
- *Valuable information like current behavior, desired behavior, troubleshooting already completed along with any attachments will allow a quicker resolution.*

CSM: Submit an inquiry to speak with a CSM from within Paycor Perform. Provide the CSM with details regarding your experience or project that you'd like to review. A CSM will follow up and complete a discovery call with your organization. *Sign into Paycor.com > Contact Us > CSM.*

Choosing a Support Option

When should I call into Support?

- Calling Support at **855-565-3285** is the quickest option for speaking directly with a Support Advocate to troubleshoot system issues, receive technical advice, and for general questions.
- For **Urgent** items, including those that are critical to payroll processing or security, Clients should always **call** into Support.
- Hours are Monday – Friday from 8 am – 8 pm EST.
- *This is a preferred method of support.*

When should I Live Chat Support?

- Chat Support within the Paycor Support Center is the ideal option to address simple questions that do not require detailed work or advanced research. This channel is intended for quick asks and to avoid call wait times.
- Hours are Monday – Friday from 8 am – 8 pm EST.
- *This is a preferred method of support.*

When should I submit a Web Case?

- Paycor's Web Case Creation feature allows Clients to easily submit support cases and Tax notices to the Support and Tax teams for assistance. Clients can easily describe their issue and attach related files when submitting a case.
- This channel is intended for **non-urgent** matters.
- **All tax notices** should be submitted via a Web Case using the "submit a tax notice for research" option.
- Web Case is available through the Paycor Support Center and open 24/7 for case submission.

Pro Tip:

The support email address, support@paycor.com will eventually be deactivated. For the quickest service, please utilize one of the other support options here based on your level of urgency.

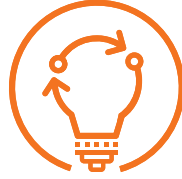Please note, email support has the longest turnaround time for assistance.

The Role of the Client Success Owner

Strategic Planning

Conduct Executive Business Reviews where we review progress against partnership objectives and plan how to evolve with your business.

Solution Optimization

Provide independent and objective analysis of your solution. Recommend business process efficiencies, additional products / services as your needs advance.

Advocate

Serve as your insider advocate helping you navigate the Paycor ecosystem as your trusted advisor and making sure your voice is heard by the right people.

Delivery Champion

Direct access to all activity in your customer experience across all Paycor products / services providing escalated support for issue resolution as needed.