

Thank you for selecting TrialWorks, the most feature rich Case Management Software used by the best firms in the industry. Our Customer Service Team is committed to providing world-class support by focusing on three main areas:



People

Extensive and ongoing training for employees ensures our skills meet the dynamic and demanding requirements of our customers. Our team is dedicated to continuous process improvement and exceeding expectations.



Technology

Our goal is to make incident resolution as effective and efficient as possible utilizing the latest technology, customer communication, and satisfaction surveys.



Quality

Through continuous refinement, we seek to provide customers with a prompt, friendly, and accurate response to all inquiries.

SET-UP FOR SUCCESS

To ensure a successful transition to your new case management system, a team of highly trained specialists will be assembled and assigned to your firm to guide you through the implementation process; from installation to data conversion to system customizations & configurations and user training. Once completed, our skilled team of Customer Support Specialists will take over as your primary point of contact.

SERVICE EXCELLENCE

Customer Support Case Resolution and Escalation

Regardless of your contact method for Customer Support, each inquiry is assigned a unique case number which will be emailed to you to track its progress. The support technician will gather additional information about your case and may be able to address the issue immediately. If the issue cannot be resolved by our Tier 1 team, they will escalate to Tier II or even Tier III for additional assistance.

To make your support outreach more efficient, please refer to these items when engaging:



Is your question addressed in the online training?



If receiving an error message, what is the exact error?



What were the exact steps performed before the error occurred?



Is the issue impacting a single user, multiple users, or all users?



Is this the first time this issue has occurred?

Prior to logging into your case, ensure you have immediate access to the following information:

- ⓧ Are you hosted by TrialWorks or an on-premise installation?
- ⓧ What version of TrialWorks are you using?

PRODUCT INNOVATION

We are committed to providing timely releases and product enhancements to support the growing and dynamic needs of our customers.

Upgrades and releases are communicated a week or two prior to the production upgrade. In addition, we may conduct Service Releases to address specific items outside of these planned releases. Each product and corresponding deployment model has a specific targeted rollout window.

- ⓧ Any update window that requires product downtime will be communicated to the firms.
- ⓧ The upgrade notification emails will detail the changes and which platforms are impacted.
- ⓧ The maintenance window will be reserved for the implementation of proactive system and hardware maintenance.
- ⓧ The number, duration and operational impact of the service windows will be minimized.

Product Feedback

As the premier provider of legal software, we value product feedback from our customers. Our Product Feedback Committee meets throughout the year to review customer ideas for possible acceptance into future versions of our software. Submit your ideas at - ideas.trialworks.com.

Get In Touch

support@trialworks.com
www.trialworks.com-Contact- select "Support" (Department)
(305) 357-6500

Support Hours of Operation

8:30 AM-5:30 PM EST Monday-Friday.
After hours, U.S. holiday and weekend support are provided only for emergencies.

2019 Holidays Observed

New Year's Day (1/1)
Martin Luther King Day (1/21)
President's Day (2/18)
Memorial Day (5/28)
Independence Day (7/4)
Labor Day (9/2)
Thanksgiving (11/28, 11/29)
Christmas (12/24, 12/25)