Global Support Policies & Automation Procedures Handbook

Document Version: 2.1
Effective Date: October 26, 2023
Department: Customer Support & Operations

1. Introduction & Purpose

This document outlines the standard operating procedures (SOPs) for the automated processing of customer support tickets. The purpose of these policies is to ensure consistent, efficient, and fair resolution of customer issues by leveraging automation for low to medium-complexity requests. This allows our human support agents to focus on high-priority and complex cases that require expert intervention.

Scope: These policies apply to all customer support tickets submitted through the official company channels.

Guiding Principles:

- **Customer First:** All decisions must be made in the spirit of fairness and in accordance with our terms of service.
- **Efficiency:** Automate repetitive tasks to provide instant resolution where possible.
- **Accuracy:** Ensure automated decisions are based on clear, verifiable data points.
- **Escalation:** Clearly define thresholds where human oversight is required.

2. General Definitions

- **Ticket:** A single customer support request.
- **Priority Level:** The assigned urgency of a ticket.
    - **Low:** A minor issue with no immediate impact on service (e.g., information request, minor bug).
    - **Medium:** A functional impairment that affects the customer but has a workaround (e.g., login issue, partial feature outage).
    - **High:** A critical issue that prevents core service usage (e.g., full service outage, major security concern).
    - **Critical:** A widespread issue affecting multiple customers or posing a significant security risk.

- **Remuneration:** Compensation provided to a customer for a verified inconvenience or error. Types include refunds, service credits, or physical replacements.
- **SLA (Service Level Agreement):** The maximum time target within which a ticket should be addressed.

3. Policy Categories & Detailed Procedures

Category A: Billing & Payment Issues

A.1: Sub-Category: Overcharge / Duplicate Charge

- **Procedure:**
    1. The system will verify the transaction against the payment gateway API using the provided invoice number.
    2. It will check for identical transaction IDs or amounts within a 72-hour window for the same customer.
- **Automation Rules:**
    - **IF** the ticket priority is **Low OR Medium AND** the disputed amount is **less than or equal to $150.00**:
        - **ACTION:** Initiate an automated refund to the original payment method.
        - **REMUNERATION:** Full refund of the disputed amount.
        - **SLA:** 24 hours.
        - **APPROVAL:** Not Required.
    - **IF** the ticket priority is **High OR Critical OR** the disputed amount is **greater than $150.00**:
        - **ACTION:** Immediately escalate the ticket to the dedicated Billing Specialist team.
        - **REMUNERATION:** Pending manual review and approval. May include a full refund or a service credit as a gesture of goodwill.
        - **SLA:** 4 business hours for initial contact.
        - **APPROVAL:** Required.

A.2: Sub-Category: Subscription Cancellation & Refund

- **Procedure:**

1. The system will verify the subscription status and the date of the most recent payment.
2. It will check if the cancellation request falls within the mandated 14-day cooling-off period.

- **Automation Rules:**
  - **IF** the cancellation request is within the **14-day cooling-off period**:
    - **ACTION:** Process immediate cancellation and pro-rated refund.
    - **REMUNERATION:** Pro-rated refund for the unused portion of the subscription cycle.
    - **SLA:** 12 hours.
    - **APPROVAL:** Not Required.
  - **IF** the request is outside the cooling-off period:
    - **ACTION:** Escalate to the Customer Retention team.
    - **REMUNERATION:** None automatically. Retention team may offer incentives.
    - **SLA:** 24 hours.
    - **APPROVAL:** Required.

Category B: Technical Support Issues

B.1: Sub-Category: Login Failure / Password Reset

- **Procedure:**
  1. The system will verify the user's email address exists in the database.
  2. It will ensure the account is not locked or deactivated for security reasons.
- **Automation Rules:**
  - **IF** the ticket priority is **Low OR Medium**:
    - **ACTION:** Trigger the automated password reset workflow (sends a secure, time-limited reset link to the registered email).
    - **REMUNERATION:** None.
    - **SLA:** 12 hours.

        - **APPROVAL:** Not Required.
    - **IF** the user reports multiple failed attempts **OR** priority is **High**:
        - **ACTION:** Escalate to the Security Operations team to check for fraudulent activity.
        - **REMUNERATION:** None.
        - **SLA:** 1 hour.
        - **APPROVAL:** Required.

B.2: Sub-Category: Service Outage / Downtime

- **Procedure:**
    1. The system will cross-reference the user's report with the status page API for any ongoing confirmed incidents.
- **Automation Rules:**
    - **IF** a related incident is **already confirmed** on the status page:
        - **ACTION:** Post an automated reply acknowledging the outage, providing the incident ID, and linking to the status page for updates.
        - **REMUNERATION:** None (company-wide service credit may be issued later based on the duration of the outage).
        - **SLA:** 1 hour.
        - **APPROVAL:** Not Required.
    - **IF** no incident is reported **AND** multiple similar tickets are received:
        - **ACTION:** Immediately escalate to the Network Operations Center (NOC) to investigate a potential new incident.
        - **REMUNERATION:** None.
        - **SLA:** 30 minutes.
        - **APPROVAL:** Required.

Category C: Refunds & Returns

C.1: Sub-Category: Damaged or Faulty Physical Product

- **Procedure:**

1. The system will validate the product's serial number and purchase date against the customer's order history.
2. It will check if the product is still under warranty.

- **Automation Rules:**
    - **IF** the product is under warranty **AND** the issue is minor (cosmetic damage, accessory fault) **AND** priority is **Low**:
        - **ACTION:** Automatically generate a shipping label for return and initiate a replacement shipment.
        - **REMUNERATION:** Replacement unit.
        - **SLA:** 48 hours.
        - **APPROVAL:** Not Required.
    - **IF** the product is under warranty **AND** the issue is major (e.g., screen crack, not powering on) **OR** priority is **Medium/High**:
        - **ACTION:** Escalate to the Operations Team for manual review and specific troubleshooting instructions.
        - **REMUNERATION:** Replacement unit or repair, as determined by the team.
        - **SLA:** 24 hours.
        - **APPROVAL:** Required.
    - **IF** the product is **not** under warranty:
        - **ACTION:** Escalate to the Operations Team. The customer may be offered a paid repair service.
        - **REMUNERATION:** None.
        - **SLA:** 24 hours.
        - **APPROVAL:** Required.

4. Exception Handling

- Any ticket that does not clearly match the conditions of the above policies will be automatically flagged and routed to a **"Policy Exception"** queue for manual review by a senior support agent.

- Agents have the authority to override automated decisions in exceptional circumstances, provided they document a clear and justified reason for the override.

5. Documentation & Audit

- Every action taken by the automated system, including the specific policy that was triggered, must be logged in the ticket's audit trail.
- All automated remunerations (refunds, credits) must be recorded in the central financial ledger with a link to the corresponding ticket ID for full auditability.

Disclaimer: This document is a living entity. Policies will be reviewed quarterly and updated based on system performance, customer feedback, and changes to business operations. All changes must be approved by the Head of Support and the Head of Operations.

Global Support Policies & Automation Procedures Handbook - Part 2

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Department: Customer Support, Operations, & Security

Category D: Access & Permissions Management

D.1: Sub-Category: New User Account Provisioning

- **Procedure:**
    1. The system shall receive a validated request from an authorized administrator's email address or through an integrated HR system API call.
    2. It will verify that the new user's email domain is approved and does not already exist in the system.
- **Automation Rules:**
    - **IF** the request originates from a **pre-approved admin list AND** the requested role is **"Standard User"**:
        - **ACTION:** Automatically create the account, assign the default "Standard User" permissions package, and send a welcome email with login instructions.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 1 hour.
        - **APPROVAL:** Not Required.
    - **IF** the requested role is **"Admin," "Super User,"** or requires **access to financial data**:
        - **ACTION:** Route the ticket to the Security & Compliance Officer for manual review and approval.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 4 business hours.
        - **APPROVAL:** Required.

D.2: Sub-Category: Access Revocation (Offboarding)

- **Procedure:**

1. The system shall receive a formal notification from the integrated HR system or a designated IT manager.
2. It will immediately suspend login capabilities and initiate the account decommissioning workflow.

- **Automation Rules:**
    - **IF** the request is received from the **integrated HR system** (indicating termination):
        - **ACTION:** Immediately disable user login, revoke all API keys, and forward all emails from the account to the designated manager. Schedule account for permanent deletion in 30 days.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** Immediate (Automated within 15 minutes of the HR system trigger).
        - **APPROVAL:** Not Required.
    - **IF** the request is for a role change (e.g., transfer to a new department):
        - **ACTION:** Escalate to the user's new manager and the IT Manager to define a new permissions set.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 12 hours.
        - **APPROVAL:** Required.

Category E: Feature Requests & Product Feedback

E.1: Sub-Category: New Feature Request

- **Procedure:**
    1. The system will parse the ticket description using natural language processing (NLP) to categorize the request (e.g., "UI/UX", "New Reporting", "Integration").
    2. It will check for duplicate requests by comparing keywords against existing tickets in the "Feature Request" backlog.
- **Automation Rules:**
    - **IF** the request is **unique** (no similar request found above a 5% threshold):

        - **ACTION:** Create a new entry in the product backlog, tag it with the relevant category, and send an automated response thanking the customer for their input and providing a unique tracking ID.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 24 hours.
        - **APPROVAL:** Not Required.
    - **IF** the request is a **duplicate** (matching an existing request with >80% confidence):
        - **ACTION:** Automatically respond, informing the customer that their idea has been previously submitted, provide the tracking ID of the original request, and invite them to upvote it on the public ideas portal.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 12 hours.
        - **APPROVAL:** Not Required.

E.2: Sub-Category: Bug Report

- **Procedure:**
    1. The system will analyze the description for error messages, stack traces, and steps to reproduce.
    2. It will attempt to correlate the report with ongoing system errors or known issues from the development environment.
- **Automation Rules:**
    - **IF** the bug is **correlated with a known issue** already being tracked by engineering:
        - **ACTION:** Post an automated reply with the known issue ID, current status (e.g., "Under Investigation," "Fix in Development"), and a link to the public status page. Ask user if they wish to be notified on update.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 4 hours.
        - **APPROVAL:** Not Required.

    - **IF** the bug is **new** and contains clear reproduction steps **AND** priority is **Medium** or below:
        - **ACTION:** Automatically create a ticket in the development team's backlog, triage it with labels, and send a confirmation to the customer.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 12 hours.
        - **APPROVAL:** Not Required.
    - **IF** the bug is **new** and causes a **High** or **Critical** impact (e.g., data loss, system crash for user):
        - **ACTION:** Immediately page the on-duty engineering team, attach all ticket details, and mark as "Critical Outage."
        - **REMUNERATION:** May warrant service credits based on severity and impact (determined post-resolution).
        - **SLA:** 30 minutes.
        - **APPROVAL:** Required for remuneration only.

Category F: Data Management & Compliance Requests

F.1: Sub-Category: Data Export Request (Subject Access Request)

- **Procedure:**
    1. The system must verify the requester's identity through a mandatory multi-factor authentication challenge before processing.
    2. It will compile user data from all systems into a standardized, machine-readable format (e.g., JSON, CSV).
- **Automation Rules:**
    - **IF** identity verification is **successful**:
        - **ACTION:** Initiate the automated data compilation workflow. Upon completion, provide a secure, time-limited download link to the user via email. Log the action for compliance auditing.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 72 hours (as mandated by GDPR/CCPA).

        - **APPROVAL:** Not Required.
    - **IF** identity verification **fails**:
        - **ACTION:** Escalate immediately to the Data Protection Officer (DPO) for manual identity verification.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 24 hours.
        - **APPROVAL:** Required.

F.2: Sub-Category: Right to be Forgotten (Data Erasure Request)

- **Procedure:**
    1. The system must verify the requester's identity with the same rigor as a Data Export Request.
    2. It will initiate a two-step process: (1) immediate anonymization of personally identifiable information (PII) in production databases, (2) secure deletion of all data from backups within the next scheduled cycle.
- **Automation Rules:**
    - **IF** identity verification is **successful**:
        - **ACTION:** Immediately anonymize user data in live systems. Flag the account for secure deletion from backups in the next cycle (within 30 days). Send a confirmation of anonymization to the user.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** Anonymization within 72 hours; full deletion within 30 days.
        - **APPROVAL:** Not Required (process is fully automated and logged).
    - **IF** the account has **pending financial transactions** or is part of an **active legal hold**:
        - **ACTION:** Halt the automated process. Escalate immediately to the Legal and Compliance department.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 4 business hours.
        - **APPROVAL:** Required.

6. Policy Review and Update Cycle

- **Automated Review:** A quarterly automated report will be generated, analyzing the volume, automation success rate, and escalation causes for each policy.
- **Stakeholder Review:** This report will be reviewed by the Heads of Support, Operations, Security, and Product.
- **Update Protocol:** Proposed policy changes must be documented, tested in a staging environment, and approved by the change advisory board (CAB) before deployment to production.
- **Version Control:** This document shall be versioned, and all changes tracked with effective dates. Archived versions will be maintained for audit purposes.

Disclaimer: The automation policies outlined in this document are designed for standard scenarios. The system is programmed to err on the side of caution and escalate any request exhibiting anomalous patterns, ambiguity, or potential high risk. Final discretion for remuneration and complex cases always resides with the designated human manager.

Global Support Policies & Automation Procedures Handbook - Part 3

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Category G: Security & Abuse Management

G.1: Sub-Category: Suspected Account Compromise

- **Procedure:**
    1. The system shall analyze the ticket for triggers: impossible travel logins, sudden spike in activity, or user-reported unauthorized access.
    2. It will immediately cross-reference against active security threats (e.g., known breached credential lists, malicious IP addresses).
- **Automation Rules:**
    - **IF** a **High confidence** compromise is detected (e.g., login from a blacklisted IP with valid credentials):
        - **ACTION:** Immediately force-logout the user from all active sessions, disable the password, and require multi-factor authentication (MFA) reset. Place the account in a "Quarantined" state. Page the Security Incident Response Team (SIRT).
        - **REMUNERATION:** Not Applicable. Security action required.
        - **SLA:** Immediate (Automated within 5 minutes of trigger).
        - **APPROVAL:** Not Required.
    - **IF** a **Low confidence** anomaly is detected (e.g., single login from new country):
        - **ACTION:** Trigger an automated security challenge email and SMS to the user asking them to verify the activity. Log the event for monitoring.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 1 hour.
        - **APPROVAL:** Not Required.

G.2: Sub-Category: Report of Abuse or Malicious Content

- **Procedure:**

1. The system shall parse the reported URL, content ID, or username.
2. It will check the reported entity against the internal abuse database and pre-defined content policy violation keywords.

- **Automation Rules:**
  - **IF** the reported content matches a **confirmed** pattern of spam, phishing, or malware:
    - **ACTION:** Automatically take down the content, quarantine the user account, and append a permanent strike to the account. Notify the reporting user of the action taken.
    - **REMUNERATION:** Not Applicable.
    - **SLA:** 2 hours.
    - **APPROVAL:** Not Required.
  - **IF** the report is for **harassment** or **complex policy violation** (e.g., hate speech, disputed ownership):
    - **ACTION:** Escalate immediately to the Trust & Safety moderation team for human review. The content remains active but is hidden from public view pending review.
    - **REMUNERATION:** Not Applicable.
    - **SLA:** 6 hours.
    - **APPROVAL:** Required.

Category H: Shipping, Logistics & Inventory

H.1: Sub-Category: Shipping Status Inquiry

- **Procedure:**
  1. The system shall use the provided order number to query the shipping carrier's API (e.g., FedEx, UPS) for real-time tracking data.
  2. It will parse the carrier's status code (e.g., "delivered," "in transit," "exception").
- **Automation Rules:**
  - **IF** the carrier API returns a status of **"In Transit"** or **"Processing"**:

        - **ACTION:** Post an automated reply with the latest tracking status, the carrier's estimated delivery date, and a direct link to the carrier's tracking page.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 4 hours.
        - **APPROVAL:** Not Required.
    - **IF** the carrier API returns a status of **"Exception"** (e.g., weather delay, address issue) **OR** the delivery date has passed without a "delivered" status:
        - **ACTION:** Escalate to the Logistics Coordinator for manual intervention with the carrier.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 12 hours.
        - **APPROVAL:** Required.

H.2: Sub-Category: Inventory Allocation / Stock Notification

- **Procedure:**
    1. The system shall monitor inventory levels for all SKUs in real-time.
    2. For back-in-stock requests, it will manage a first-in, first-out (FIFO) notification queue.
- **Automation Rules:**
    - **IF** a customer requests a **"Notify Me"** for an out-of-stock item:
        - **ACTION:** Add the customer's email to the queue for that specific SKU. Send an immediate confirmation of notification sign-up.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 1 hour.
        - **APPROVAL:** Not Required.
    - **IF** inventory for a SKU increases from **0 to >0**:
        - **ACTION:** Automatically process the notification queue in order, sending a personalized "Back in Stock" email with a priority purchase link. Dequeue emails upon successful send.
        - **REMUNERATION:** Not Applicable.

        - **SLA:** 24 hours from inventory update.
        - **APPROVAL:** Not Required.

Category I: Financial Services & Remuneration

I.1: Sub-Category: Proactive Service Credit Issuance

- **Procedure:**
    1. The system shall monitor platform-wide uptime and performance metrics against contractual Service Level Agreements (SLAs).
    2. If uptime falls below the guaranteed threshold for a billing cycle, it will automatically calculate the owed credit based on the customer's plan.
- **Automation Rules:**
    - **IF** the monthly uptime is calculated at **< 99.9%** for a customer on a qualifying plan:
        - **ACTION:** Automatically generate a service credit equivalent to **10%** of that month's recurring fee. Apply the credit to the next invoice. Generate and send a formal SLA report and credit notice to the billing contact.
        - **REMUNERATION:** Service Credit.
        - **SLA:** 72 hours after the monthly billing cycle closes.
        - **APPROVAL:** Not Required.
    - **IF** uptime is **< 99%**:
        - **ACTION:** Escalate to the Customer Success Director and VP of Operations. The automated credit is applied, but a human must contact the customer to apologize and discuss remediation.
        - **REMUNERATION:** Service Credit (higher percentage, e.g., 25%) + Human Outreach.
        - **SLA:** Credit applied in 72 hours; Human contact within 24 hours of application.
        - **APPROVAL:** Required for outreach plan.

I.2: Sub-Category: Invoice Dispute & Payment Plan Request

- **Procedure:**

    1. The system shall analyze the customer's payment history, account tenure, and current invoice details.
    2. It will assess the risk of the requested payment plan based on pre-defined rules.
- **Automation Rules:**
    - **IF** the customer has a **> 24 month tenure AND** a perfect payment history **AND** the requested plan is for ≤ 2 months:
        - **ACTION:** Automatically approve the payment plan. Adjust the invoice due date and issue a new schedule. Notify the customer of approval.
        - **REMUNERATION:** Not Applicable (Payment plan is the accommodation).
        - **SLA:** 12 hours.
        - **APPROVAL:** Not Required.
    - **IF** the customer has a **< 6 month tenure OR** a history of failed payments:
        - **ACTION:** Automatically deny the automated request and escalate to the Accounts Receivable team for a manual counter-offer or other arrangements.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 24 hours.
        - **APPROVAL:** Required.

7. System Overrides & Manual Control

- **Authority to Override:** Senior Support Agents, Team Leads, and Managers possess the authority to manually override any automated decision.
- **Override Logging:** Every manual override must include a mandatory text field explaining the business justification for the exception. This log is audited weekly.
- **Emergency Stop:** Designated personnel can trigger an "Emergency Stop" on specific automation policies in the event of a widespread system error, reverting all tickets of a certain category to a manual review queue.

Disclaimer: The policies outlined in this document represent the standard operating procedures. The company reserves the right to make goodwill gestures and accommodations that fall outside these policies on a case-by-case basis at the discretion of management. All automated actions are subject to audit.

Global Support Policies & Automation Procedures Handbook - Part 4

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Category J: Enterprise & High-Priority Client Management

J.1: Sub-Category: Dedicated Technical Account Manager (TAM) Escalation

- **Procedure:**
    1. The system shall identify the submitting customer's tier based on their contract value or plan ("Enterprise," "Platinum").
    2. For identified high-tier clients, it will bypass standard queues and apply specialized routing and communication protocols.
- **Automation Rules:**
    - **IF** the ticket originates from a **"Platinum"** or **"Enterprise"** account **AND** priority is **Medium** or higher:
        - **ACTION:** Immediately route the ticket to the dedicated Technical Account Manager (TAM) assigned to the account. Simultaneously, send an alert to the TAM via SMS and internal messaging platform. The ticket is removed from all public-facing queues.
        - **REMUNERATION:** Not Applicable (The dedicated support is the feature).
        - **SLA:** 15 minutes for TAM acknowledgment.
        - **APPROVAL:** Not Required.
    - **IF** the assigned TAM does not acknowledge the ticket within **15 minutes**:
        - **ACTION:** Escalate the ticket to the Backup TAM and notify the Head of Enterprise Support.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 30 minutes from initial submission.
        - **APPROVAL:** Not Required.

J.2: Sub-Category: Scheduled Production Change Request

- **Procedure:**

    1. Enterprise clients may request scheduled changes to their configuration or environment that carry potential risk.
    2. The system must validate the request against a maintenance window pre-approved in the contract and check for conflicts with other scheduled changes.
- **Automation Rules:**
    - **IF** the requested change window is **approved** in the contract **AND** no system-wide maintenance is scheduled:
        - **ACTION:** Automatically confirm the change window, create a change ticket in the ITSM system, and assign it to the appropriate engineering team. Send a calendar invitation to all listed client contacts.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 4 business hours.
        - **APPROVAL:** Not Required.
    - **IF** there is a **scheduling conflict OR** the request is outside standard approved windows:
        - **ACTION:** Escalate to the Enterprise Support Manager to negotiate a new time directly with the client.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 8 business hours.
        - **APPROVAL:** Required.

Category K: Partner & Reseller Channel Support

K.1: Sub-Category: Partner Lead Registration & Conflict Check

- **Procedure:**
    1. A partner submits a prospective customer lead to register for sales attribution and protection.
    2. The system must check the lead against the global customer database and other partner registrations to avoid conflict.
- **Automation Rules:**

- **IF** the lead (company name/domain) is **not found** in any system database:
    - **ACTION:** Automatically approve the registration. Lock the lead to the partner for 90 days. Send a confirmation certificate to the partner.
    - **REMUNERATION:** Not Applicable.
    - **SLA:** 2 hours.
    - **APPROVAL:** Not Required.
- **IF** the lead is **already an existing customer OR** is registered by another partner:
    - **ACTION:** Immediately escalate to the Partner Channel Manager to investigate and resolve the conflict according to the Partner Agreement rules.
    - **REMUNERATION:** Not Applicable.
    - **SLA:** 4 business hours.
    - **APPROVAL:** Required.

K.2: Sub-Category: Elevated Support Access for Partner Engineers

- **Procedure:**
    1. A certified partner engineer may require temporary elevated access to debug a client issue.
    2. The system must validate the engineer's certification status and require partner manager approval for each request.
- **Automation Rules:**
    - **IF** the engineer is **certified AND** approval is granted by the pre-approved Partner Manager (via automated email link):
        - **ACTION:** Grant time-bound (max 4 hours), read-only access to the relevant client environment. Log all activity. Automatically revoke access after the time limit.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 1 hour after approval is received.
        - **APPROVAL:** Required from Partner Manager.
    - **IF** the engineer is **not certified OR** requests write access:

        - **ACTION:** Deny the automated request and escalate to the Internal Security Team for a full manual review.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** 8 business hours.
        - **APPROVAL:** Required from Internal Security.

Category L: Support System Governance & Internal Operations

L.1: Sub-Category: Automation Policy Exception Report

- **Procedure:**
    1. The system shall generate a weekly report detailing all tickets where an automated policy was overridden by an agent.
    2. The report must analyze the reason for override and categorize them (e.g., "Policy Gap," "Agent Error," "Valid Exception").
- **Automation Rules:**
    - **IF** the report identifies a **policy gap** (e.g., 10+ similar overrides for the same reason):
        - **ACTION:** Automatically create a task for the Support Operations Manager to review and draft a new policy or amend an existing one. Notify the Head of Support.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** Report generated every Monday 9 AM.
        - **APPROVAL:** Not Required (Notification only).
    - **IF** the report identifies potential **agent error** (e.g., inconsistent override reasons from the same agent):
        - **ACTION:** Flag the agent for a targeted training review by their Team Lead. The ticket is not created automatically to avoid public shaming.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** Report generated every Monday 9 AM.
        - **APPROVAL:** Required for training mandate.

L.2: Sub-Category: Knowledge Base Article Gap Identification

- **Procedure:**
    1. The system shall use NLP to analyze the text of resolved tickets.
    2. It will cluster similar resolved issues and check if a public-facing Knowledge Base (KB) article exists for the solution.
- **Automation Rules:**
    - **IF** a cluster of **> 20 resolved tickets** is found **without** a corresponding KB article:
        - **ACTION:** Automatically task the subject matter expert (SME) for that product area with drafting a new KB article. The ticket includes key phrases from the resolved tickets to guide content.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** Weekly analysis.
        - **APPROVAL:** Not Required (Task assignment is automatic).
    - **IF** a cluster of **> 50 resolved tickets** is found for an existing KB article:
        - **ACTION:** Automatically flag the existing KB article for the Content Team to review for clarity, accuracy, or discoverability issues.
        - **REMUNERATION:** Not Applicable.
        - **SLA:** Weekly analysis.
        - **APPROVAL:** Not Required.

8. Continuous Improvement & Feedback Loop

- **Post-Resolution Survey:** An automated satisfaction (CSAT) survey is sent upon the closure of every ticket, regardless of resolution method (automated or manual).
- **Feedback Integration:** Qualitative feedback from low-scoring surveys is automatically appended to the original ticket and flagged for the Team Lead's review.
- **Policy Optimization:** Machine learning models will analyze resolution times, CSAT scores, and escalation paths to periodically suggest optimizations to policy thresholds and conditions to the Support Operations team.

Final Disclaimer: This handbook is the culmination of cross-departmental collaboration. Its effectiveness relies on continuous input from Support, Security, Engineering, and Product teams. No automated system can replace human judgment; this framework is designed to augment it, ensuring consistency and efficiency while safeguarding the customer experience and company security.