Brass Fax — Customer Support Standard Operating Procedures (SOP)

Version 1.0 — Internal Use Only

# Overview

This document is the standard procedure for handling all customer inquiries, questions, and issues for Brass Fax.

Our primary goal is to provide:

- Friendly, helpful, and professional support.

- Simple, jargon-free communication with clients.

- Efficient resolution for day-to-day requests.

- Escalation to management (Michael) when required.

# Tone of Voice

- Friendly but professional.

- Reassuring.

- Calm, even when the customer is frustrated.

- Always helpful — even if we don’t have an immediate solution.

# Primary Responsibilities

- Answering basic service questions.

- Assisting with common technical issues.

- Explaining how Brass Fax works.

- Handling simple account or billing queries.

- Logging and escalating any refund requests, complaints, or technical failures to management.

# Common Customer Questions & Responses

## How does Brass Fax work?

Brass Fax builds fully managed AI assistants using your existing business content — like your website, FAQs, and documents. Once built, your AI assistant answers customer questions 24/7, helping you reduce emails, save time, and provide better customer service. We handle all setup, management, and updates for you.

## Do I need to upload any files to get started?

Yes! To build your assistant, we simply need any documents, PDFs, policies, FAQs, or website pages you'd like included. You’ll receive a secure upload link as part of your onboarding.

## Can I update my AI assistant later?

Absolutely. You can submit updated documents or policies at any time. We’ll update your assistant as part of your managed plan.

## What if my assistant gives a wrong answer?

We actively monitor your assistant and review flagged responses. If you notice anything specific, just let us know and we’ll correct or retrain the AI as needed.

## Is my data private and secure?

Yes — your data is private, secure, and fully GDPR-compliant. We never use your data to train public AI models. Only you and our managed service team have access to your content.

## What platform is this built on?

We build Brass Fax on a fully managed private AI stack using leading AI models (like OpenAI GPT-4) combined with private knowledge bases. We control the full system end-to-end to ensure your data remains private.

## Can I cancel at any time?

Yes, your managed plan is billed monthly and can be canceled any time.

## How long does setup take?

Most assistants are fully built, tested, and live within 5–7 business days after receiving your content.

## Do you integrate with Shopify / Wix / Squarespace / WordPress?

Yes! We provide you with a simple embed code that works across all common platforms. If you need help installing it, we can assist directly.

## What if my website gets updated — do I need to notify you?

Yes please — whenever your website content or documents change, simply send us the new content and we’ll update your assistant accordingly.

# Technical Troubleshooting

## Widget not displaying on website

Confirm website platform (Wix, WordPress, etc).

Check that the embed code has been added correctly.

If unresolved: I’ll escalate this to our technical team to check your integration.

## Widget loads but doesn’t respond

Confirm network access is stable.

Check if API keys or services are experiencing downtime (internal status page).

If unresolved: I’ll raise this to our engineering team to investigate further.

## Assistant provides blank or empty responses

Confirm if new content was recently added.

Escalate for retraining or indexing issues.

Thank you for reporting this — I’ll log this with our technical team for prompt review.

# Complaints, Refunds, or Difficult Customers

If the customer expresses unhappiness, requests refunds, or threatens to cancel:

DO:

- Stay calm and professional.

- Apologize for the frustration.

- DO NOT promise refunds or credits.

- Collect clear contact information and details.

- Escalate directly to Michael via email.

Use this script:

“I completely understand your frustration and appreciate you bringing this to our attention. I'd like to escalate this to our senior management team to review your concerns in detail. May I please confirm the best email and phone number to reach you? Our management team will be in touch shortly.”

After collecting details, email Michael directly with subject: Client Complaint Escalation — [Client Name]. Include full notes.

# When in Doubt — Always Escalate

If you are unsure how to handle any customer issue, refund request, or technical problem:

- Pause the conversation.

- Politely inform the customer you will escalate internally.

- Notify Michael via email.