



Call Center Guidelines

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The purpose of this document is to define procedures, prioritization, and resolution targets for service requests (SRs) reported by customers of VSoft. It is the intent of VSoft to provide timely resolution to issues reported by VSoft Customers in a prompt and courteous manner.

Hours of Operation and Contact Number

The VSoft Call Center line is available from 7:00am to 11:00pm Eastern time and on-call 24 hours a day for urgent business interruption issues via

1-866-99-VSOFT (1-866-998-7638) option 2 option 1 or email us at support@vsoftcorp.com.

Note: E-mail notification is preferred as it establishes an audit trail for the request and allows for supporting documents to be included with the request which can help better define the issue resulting in a more efficient resolution. Please be sure to provide is the severity level of the issue; Fatal, High, Medium, Low.

Normal Business Hours

The VSoft Call Center line is staffed during the hours of 9:00 a.m. - 6:00 p.m. eastern time Monday through Friday. Outside of these hours, all requests will go to voice mail and will be answered by a Support team member who will return the call to confirm receipt of the request and provide a Service Request (SR) number. If the request was sent by e-mail a response will be returned by e-mail including the SR number assigned.

Each request will be assigned a unique Service Request (SR) number as it is entered into the help desk system. At that time it will be assigned a priority, and placed in a queue. The SR will be addressed by the next available technician. SRs are handled in priority/severity order - not necessarily in the order received.

Target Response Times

Target response time is defined as the time elapsed between an issue being reported and start of the research/resolution process. The technician working the SR will contact the customer directly.

Target Resolution Time

Target resolution time is the duration between when the VSoft Call Center receives the support request and the time the customer receives a resolution or operational workaround. The Call Center Support Team strives to resolve all SRs within these time frames. However, in some cases, the SR may be passed to Level II support (Development Team) for assistance or resolution. These requests may take longer to resolve.

Service Level Agreements

Service Level Agreements (SLAs) are defined as the maximum expected time for resolution of particular issue, based upon the priority assigned. Software bug fixes that are passed to Level II support will be moved to their queue for re-prioritization.

The priority of issues and resolution will be determined using the following guidelines:

Support Level	Description	Target Response Time Frame	Target Resolution Time Frame	Maximum Resolution Time Frame (SLA)
Level 0 – Fatal	Severe – A major feature or function is not available to financial institution, unable to use system, or system severely impaired. Any case were a full disaster recovery event declared.	< 1 hour	< 4 hours to resolve or provide a workaround	< 1 day to resolve or provide a workaround
Level 1- High	Critical – Important feature or function is not available to financial institution. Any issues involving potential fraud or security. Significant end-user impact and or significant financial loss.	< 4 hours	< 1 business day to resolve or provide a workaround	< 1 week to resolve or provide a workaround
Level 2 – Medium	Moderate: Question on product usage/request for assistance with a product module or if defect – important feature not available, but a reasonable work around is available, or a less significant feature is not available with no reasonable work around. Also, requests for information for auditors or regulators.	<1 week	< 1 week to resolve or provide workaround	< 2 weeks to resolve or provide a workaround
Level 3 – Low	Low: Minor problems that do not impact or prevent use of any key feature.	< 2 weeks	< 2 weeks to resolve or provide workaround	< 4 weeks to resolve or provide a workaround

The following production issues should be considered Level 0 – Fatal issues:

1. Oracle Database Down
2. Inability to Create Cash Letter (Paper, IRD or ECL)

Service Request Tracking and Escalation

The following tracking and escalation procedures will be followed for all support requests 7 days a week, 24 hours a day.

Service Request Tracking

Once a service request has been placed a Support Technician will respond to the customer within 30 minutes to provide a Service Request (SR) number to begin tracking the request.

When the SR has been resolved, the Technician resolving the SR will work with the customer to verify that the request was resolved to their satisfaction.

Service Request Resolution

If requested, a group e-mail address can be used to have an automated e-mail sent to the customer when an SR is opened, assigned to a technician, and resolved. The e-mail will reference the service request number, initial description and resolution of the issue.

Service Request Escalation (Customer)

The customer may escalate or change the severity level assigned on any request by emailing Support@vsoftcorp.com and providing the SR number assigned or by dialing 1 866 88-VSOFT (1 866 888-7638) option 2, option 3 for service request escalation. The customer will be asked to leave a message with their name,

phone number and Service Request number. The on-call Technician will receive this notification and will update the ticket with the customer's request for escalation.

What is Not Supported

New installation requests, upgrades, and active projects will be supported by the Implementation Services team until the sign off of the project/upgrade from the customer is received and the Implementation Services team has turned it over to Support.

The VSoft Call Center does not support test systems or disaster recovery systems. These systems are supported by the VSoft Implementation Services team. DR tests should be scheduled, well in advance of the test date, by contacting your VSoft Client Executive or VSoft Sales Representative. These services may be billable, depending upon the customer agreement in place.

Discretionary system changes (hardware, operating system, software upgrades, etc.) are not supported by the Call Center and must be scheduled well in advance with the Implementation Services team and may be billable.

After Hours and Holiday Support After Hours

Call Center representatives are available on-call from 11:00 p.m.-7:00 a.m. EST and on weekends, as needed. Only critical issues are handled during off-hours. Non-critical requests will be handled when normal business hours resume on the next business day. When an SR is placed to the Call Center, a message should be left with the caller name, contact number and brief description of the problem. Please include the severity of the issue and if assistance is needed same day or if it can wait until normal business hours. The service request tracking and escalation procedures defined above will be followed by the after hours support team as needed.

Holiday Support

VSoft observes all Federal Reserve Bank Holidays. If support is needed on a holiday regular SR reporting procedures should be followed.

Applying Oracle and Microsoft Patch Updates

A list of Certified Microsoft Patches and Oracle Patches can be found at www.VSoftcorp.com.

Click on the VShare portal - Announcements.

If the customer would like VSoft to install Oracle patches please notify your Client Executive. A work order will be generated and the project will be scheduled with the Implementation Team. This is a billable request.

The VSoft Corporation Patch Management Policy with regard to Oracle and Microsoft updates is available upon request.

The Remote Support Process

To provide faster response on customer support issues, VSoft uses a remote-support tool called Citrix® GoToAssist™. This application enables VSoft support personnel to connect to a computer in your office in order to identify and resolve technical issues in real time. These secure, remote sessions improve the support process and significantly expedite the problem resolution process.

Security Overview

VSoft selected GoToAssist because it uses the latest security technology to ensure that the data exchanged between our support representatives and your site is completely secure. GoToAssist uses randomly-generated session keys and advanced encryption to ensure that sessions are secure and private.

GoToAssist provides a highly secure connection with end-to-end, government-approved Advanced Encryption Standard (AES) encryption, which means that all data is encrypted throughout the entire support session. In addition, GoToAssist includes best-practices security measures, including permission-based support modes, unique session logins and the recording of all remote-support sessions, customer data and chat logs.

For more information about security, see “Security Features” on the next page.

How It Works

The following table outlines the process.

Step 1:	<p>You access the GoToAssist support portal and type in a support request. With your permission, the GoToAssist thin client is downloaded to your PC. A VSoft representative then begins a remote-support session with you.</p> <p>Alternatively, you can move directly from a phone call with a VSoft representative to a remote-support session. To do this, VSoft provides you with the Web portal URL and a unique connection code to begin the remote-support session.</p>
Step 2:	<p>VSoft can immediately diagnose, troubleshoot and resolve the incident using a variety of incident-resolution tools, including:</p> <ul style="list-style-type: none"> • ChatLink™ • Remote Diagnostics • File Transfer • Reboot/Reconnect • Remote Viewing/Control • Whiteboard
Step 3:	<p>At the end of the session, you immediately provide input on the support experience. This input enables VSoft to continuously evaluate and improve our support procedures.</p>

At the beginning of a remote session, Citrix Online servers issue randomly-generated session keys to both participants to ensure that only the designated parties are connected. During the session, all transferred information—including screen views, file-transfer data and identities—are encrypted, compressed, encoded and decoded using the Citrix Online technology. GoToAssist uses end-to-end encryption and decryption, so data cannot be read during transit and can only be viewed with GoToAssist software.

You are in Control

GoToAssist sessions can only be initiated by you. During a session, you can decline the start of screen sharing or screen viewing, decline the initial download or refuse receipt of a transferred file. At any time, you can take control of the mouse and keyboard or end screen sharing altogether. Once a session has ended, VSoft personnel can no longer connect to your computer. Any future sessions require new session keys and can only be initiated by you.

Password Protection

Access to GoToAssist by VSoft personnel is protected by strong password authentication. Passwords are never transmitted over the network, so they cannot be intercepted by a third party.

Advanced Encryption

Citrix Online only uses outbound connections protected by state-of-the-art 128-bit Advanced Encryption Standard (AES) encryption to prevent intruder access to the information exchanged during all GoToAssist sessions. Chat, Remote and Local Viewing/Control, and File Transfer data is encrypted end to end, and packets are never decrypted in transit by Citrix Online servers. Because Citrix Online employs AES encryption, a third party cannot decrypt or inject packets. AES encryption ensures that recorded GoToAssist sessions, stored on Citrix Online servers, are cryptographically protected.

Uncompromised Firewalls

GoToAssist works easily with firewalls. In most cases, remote-support connections are possible without any firewall reconfiguration. GoToAssist only requires access to outbound ports at both ends of a connection, so there is no need to open holes in firewalls.

Customer Privacy

Citrix Online has a strong privacy policy that prohibits unauthorized disclosure of personal or corporate information to any third party. Citrix Online's published privacy policy is included in every service agreement. Citrix Online is a TRUSTe licensee and complies with its stringent privacy policies.

For more information, see the GoToAssist web site: www.gotoassist.com