SUNTELL

SUPPORT GUIDE

Updated 04.01.2011

SQUARE 1
CREDIT SUITE ™

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Introduction to Suntell Support

Suntell's Support Team is dedicated to providing continued and excellent support for our products, including how-to questions and assisting customers with day-to-day operations. Our Support staff builds solid customer relationships through our ongoing commitment to helping our customers maximize the return of their software investment. Our knowledgeable Support staff will work quickly with you to resolve any questions or issues that might arise.

About this Guide

This Support Guide provides an overview of the services provided to current Suntell customers as part of the Annual Maintenance Fees (AMF) your organization pays for the use of your licensed Suntell products. Some services may incur an additional charge, and they will be noted. This guide is intended to provide you with an explanation of how support questions or issues will be handled, and what you can expect when contacting Suntell Support. This guide may be updated periodically and the most recent version can be found on our website under Support/Documentation.

Support Hours

Our hours of operation are as follows:

Customer and Technical Support: 8:00 a.m. – 5:00 p.m. CST, Monday – Friday

Contacting Support

Phone:

Customer Support: 888.848.7349, Option 1

Technical Support: 888.848.7349, Option 2

Email:

support@suntell.com

Web:

http://www.suntell.com/Support/tabid/94/Default.aspx

*Log-in to access web based support is required.

Maintenance and Support

Included in the AMF paid by your organization, you will have access to the following areas of Support, as afforded by the products licensed:

- Unlimited access to telephone/email support, within reason, from Customer Support and Technical Support during the hours of operation.

- Access to the Support website (registration required) which includes downloads, community forums, and Frequently Asked Questions.

- Downloads for and updates to the latest releases of supported products, including enhancements, upgrades, corrections, and hotfixes as they are made available.

- Access to current product documentation.

- Troubleshooting of issues related to Import of data from core accounting system or Upload of data to core accounting system, or interfaces to Third-Party products.

- Review of database upon request and feedback from a knowledgeable Suntell representative regarding the current use of the software, along with suggestions for improvement. Such a request can be made once per year; additional requests will be subject to then-current pricing.

The following services are considered outside of your Annual Maintenance agreement, and will be considered billable.

- Excessive telephone/email support. If support becomes excessive, you will be notified. In such event, Suntell reserves the right to invoice for support time.

- Access to Customer or Technical support outside of hours of operation. Such access is available upon request, but will be billable at an hourly rate.

- Support for operational difficulties resulting from hardware, operating system, or Third-Party software changes made by your organization to the computer system or any other matters not directly related to Suntell software operation may be billable if Suntell agrees to provide such support.

- Creation of a custom query to provide you with a report of information from your database. Suntell provides a large array of reports within the software suite; however, your organization may have specific reporting needs that are different from the reports included. Such reports can be created upon request but will be billable depending on the length of time required to create the query.

- Re-work of import due to conversion to a new core accounting system, report writer, extract file format or layout. When such changes are required, your organization should contact Suntell immediately to request a Statement of Work for such services.

- Installation, maintenance, and/or support of Suntell software on any non-production equipment such as pilot and disaster recovery servers.

- Software and data migration from one location to another.

- Data Recovery efforts in the event of loss of data without a bank defined and administered back-up plan.

- Frequent corrections to Suntell data specifically related to perpetual end-user operator error or hardware/network issues.

- Installation/maintenance of operating system updates and service packs or installation of any other software or hardware components unrelated to Suntell solutions.

Product Licensing

Upon initial licensing of the Suntell products, or renewal of licensing by paying your AMF, your organization will receive a Passkey with instructions on how to enter this Passkey into your system. Each Passkey is specifically generated for a Suntell customer and controls the products that your organization has access to and the length of time for access (one year). Upon receipt of the AMF billed, your organization will receive a new Passkey which will extend your licensing of the Suntell products for an additional year.

Licensing of new products will require a new Passkey be generated.

In some instances, your organization may be a Limited License customer. The products included in your Limited License agreement may not be Passkey controlled, but you will be informed of the areas that you are licensed to use. If you use other areas of the system outside of your licensing, Suntell reserves the right to increase your AMF accordingly.

Support Questions

Suntell has two main departments within Support: Customer Support and Technical Support. One of the questions you may have as you first begin to use the product is: which department should be contacted? Below is a breakdown of the types of support questions handled by each department.

Customer Support:

The following questions will be handled by Customer Support:

- How-to questions on the use of the software (How does this area work?)

- Questions related to functionality (What is the intended use of this area?)

- Navigation of the software (Where is this located?)

- Business use of the software (I want it to do this – how can I do that?)

- Requests for changes to the software (It doesn't currently do this and I would like it to in the future)

- Product issues (This area is not functioning the way that it should)

In no instance will a Customer Support representative provide any legal, regulatory, or compliance related advice. Support representatives may reference their knowledge on a specific area; however, this should not be substituted for your organization's compliance officer or legal counsel. It is the responsibility of your organization to follow all lending regulations and requirements and not the function of the Suntell representative to ensure that your organization is adhering to the regulations and requirements.

Additionally, Suntell advice on end-use of the software should not be substituted for your organization's policies and procedures. While we strive to be as familiar with each customer's specific lending environment as possible, we cannot maintain knowledge on each organization's specific practices. Therefore, suggestions on use of the software to end-users should always be reviewed and approved by your organization before they are implemented.

Technical Support:

The following questions/actions will be handled by Technical Support:

- Installation of hardware (server) purchases from Suntell.

- Installation of software products purchased/licensed by Suntell.

- Perform updates or hotfixes to the Suntell software.

- Troubleshoot software access or performance issues directly related to the Suntell software.

- Retrieval of customer data at the request of Customer Support (see *Troubleshooting Issues* and *Requests for Data* under Support Issues Management).

In no instance will Suntell tech support perform the following: Install server in rack, join server to Domain, install backup software, install antivirus software, install printers, install RDP 6.0 and publish to clients, install TS Licensing server service and licenses, or install scanner and drivers.

In no instance is Suntell responsible for the client's backup system, Disaster Recovery efforts or Business Continuity Plan. It is the sole responsibility of the client to ensure all mission critical data is properly protected in the event of a disaster.

Contacts Within Your Organization

Anyone within your organization is welcome to contact Suntell Support either by phone or email. Contact information for your organization will be stored and maintained by Suntell within a database.

Contacts within your organization who need to receive important notifications regarding updates, fixes, company information, or product information must register on Suntell's Support Website. Email notifications will only be sent to registered users. You may have multiple contacts within your organization registered on the website and receiving these email notifications. In all instances, your organization is responsible for ensuring that the information communicated by Suntell reaches the appropriate parties.

Product Updates

Several times throughout the year, Suntell will provide updates to our core products. These updates are available to your organization at no charge, as part of what you pay in your Annual Maintenance Fees. The Support Contact(s) within your organization registered on Suntell's Support website will receive email notification when these updates are available. Your organization is then responsible for contacting Technical Support to schedule the update. Updates will be scheduled on a first-come, first-serve basis.

During the deployment of a new release, we will support both the old and the new version; however, if you contact Support with an issue related to the old version that requires troubleshooting, you will be required to receive the update to the new version before any support is provided, to ensure that the problem is not corrected with the update. Therefore, it is recommended that your organization schedule updates as soon as they become available.

Suntell may also release add-on modules to existing products, or new products. These products must be separately licensed. Your organization will receive information regarding new or add-on products and should contact Support for additional information, a demonstration, or pricing.

Support Issue Management

Each time your organization contacts Suntell Support, a Work Order is created and a unique case number is assigned. These Work Orders allow Suntell to track the progress of the issue from what was originally reported through resolution. It is our policy to respond to all support questions as quickly as possible. If your question requires further research, assistance from Quality Assurance, or troubleshooting with your own database, the turnaround time may be longer and you will be informed. The order in which support issues are managed are determined solely at the discretion of Suntell based on severity of the issue and current workload of Support Representatives.

Requests for Support:

When you contact either Customer or Technical Support, please prepare in the following way:

- Check the Support website to see if it is a Known Issue and if so, what the fix or resolution is.

- Know the Version of the Suntell product that you are using (available in the Help Menu).

- Review the Release Documentation if you are working with a new update and have questions related to functionality.

- See if you can duplicate the problem more than once.

- Check to see if the problem is isolated to a single user or machine (Technical Support).

- Check to see if there have been any changes to your system or environment (Technical Support).

Error Messages:

Sometimes, you will receive an Error Message with certain actions within the software. These error messages can contain details that will help Support determine the problem. If you receive an error message:

- Click the "Copy" button within the error message and paste into an email to send to Support or a document to save for contacting Support. <u>Be sure to include the details of the steps that you took that produced the error</u> under the Additional Info box.

- Or, click the "Send Email" button if your organization has this feature enabled. This will send a copy of the error message directly to Support. <u>Be sure to include the details of the steps that you took that produced the error</u> under the Additional Info box. Also, do not click the button more than once.

Once Suntell has received the error via email, you will be contacted by a Support Representative to obtain more information. Please do not forward the Error Message if you would not like to be contacted or the issue does not persist.

Troubleshooting Issues:

Suntell Support uses the following guidelines in troubleshooting issues:

- A Work Order is opened for the specific contact within your organization. Contact information may be confirmed at this time.

    o The original question or issue will be documented.

    o The product and version will be documented.

    o The conversation or email with the contact will be documented.

    o If the question or issue is resolved during the course of the conversation (i.e. general support question on functionality), the Work Order will be closed.

- The Support Representative will attempt to recreate the issue in the customer's environment. This may be done via a WebEx support session initiated by the Suntell Support Rep, allowing a secure method for viewing the customer's desktop. The customer must grant permission for the Support Rep to view the desktop in order for this step to occur.

    o If the issue cannot be recreated, the Support Rep will likely advise the customer to call back or contact again if the issue reappears.

- If the issue can be recreated, the Support Rep will attempt to recreate the issue on his/her own machine, using a test database.

    o If the issue can be recreated, the Support Rep will forward to Quality Assurance for assistance or review.

    o The customer will be notified if the issue is considered a Bug in the software, and if a work-around is available, the customer will be notified of that as well.

    o The customer will be notified when the Bug has been corrected either by an update to the version of the software or a hotfix.

- If the issue cannot be recreated by the Support Rep using his/her own database, a copy of the customer's database may be requested for further testing. See *Requests for Data* below for more information.

- If the issue cannot be recreated on a copy of the customer's database by Suntell in-house, then the problem is likely environmental. The customer will need to contact the internal IT administrator for assistance, who may then contact Suntell Technical Support.

Requests for Data:

Occasionally, it may be necessary to obtain copies of the organization's data to troubleshoot an issue that cannot be duplicated by a Support Representative in-house. This may include copies of your database, copies of the import folder or extract files from the core, or copies of the files that are created during an interface to a Third-Party product. If this is the case, the following procedures will be followed.

- Upon determining that data is needed, the Suntell Customer Support Rep will make a request to Technical Support to obtain copies of the necessary information.

- Technical Support will make an outbound call to the organization's IT administrator requesting the data. The data will be securely transferred to Suntell's own server for testing. The IT administrator must grant permission for Suntell Technical Support to obtain copies of the requested data. Suntell does not have access to a customer's data without permission. Once the issue is resolved or a cause is determined, the copy of the database will be deleted from Suntell's server.

- If the IT administrator for the organization cannot be reached or is busy, the Suntell Technical Support Rep will request that the IT admin return the call when ready to transfer the data.

- If the IT administrator for the organization does not call Suntell Technical Support Rep within 24 hours, the Customer Support Rep will contact the end-user who reported the issue and inform him/her that the issue cannot be worked on until data is received. It is the responsibility of the organization to contact Suntell at this time and make sure that the necessary data is transferred. Suntell will make no further outbound calls to attempt to obtain data.

- If data is not received within two (2) weeks of initial reporting of the issue, Suntell will consider the issue closed. The issue will not be re-opened or reviewed until the IT administrator of the organization contacts Suntell to transfer the data. The initial end-user who reported the issue will receive an email from the Customer Support Rep at that time that the issue has been closed due to an inability to troubleshoot without receipt of the data.

Suntell requires that you have at least one individual on-site within your organization that has access to and can log-in to the Suntell server as the administrator. The Suntell Technical Support Rep will assist in obtaining and transferring data: this person only needs to have access. Having only an outsourced or off-site IT administrator could substantially delay the troubleshooting of issues.

Enhancement Requests

Our customers are the number one most important and reliable source of feedback and expertise when it comes to input on product development and feature modifications. For this reason, we encourage feedback at all times. As enhancement requests are received, they are logged into a central database under the specific customer. As we review each request, a determination as to whether or not the request fits within the Executive Strategic Plans for the product(s). This plan is set forth by Executive Management based upon market feedback (customers and prospects) and the direction the industry is going (what our competitors are doing).

If it is determined the request fits within the corporate focus, the enhancement will be queued for inclusion in a future release, but no timeframe for inclusion in the software is set or communicated at that point. If it has been determined that the request is outside the bounds of our current focus, the request is denied and the customer is notified. Suntell does several releases throughout the year: two of those will typically be quite extensive in terms of product modification. As Suntell looks to plan for each release and the content of that release, we refer back to the approved enhancements to determine which ones make up a logical "grouping", and set forth the specific project plans accordingly. We are typically looking at

300+ open and approved requests at any given time. Because we agree with a request and approve it, does not mean that it will be included in the product immediately.

Submitting a Request:

You may submit a request at any time by contacting Customer Support and describing the product affected and the nature of the request. The Support Rep will attempt to gather as much information regarding the specific business need for the request as possible. Sometimes, you may be contacted at a later point to obtain more information regarding the request. A Work Order will be opened to track the progress of the request. Your Support Rep may provide you with the Work Order Number assigned for your own tracking.

You may also submit enhancement requests through the Support website by filling out the form provided.

At any point, your organization may request to see a list of all outstanding enhancements.

Training

Suntell encourages the ongoing training and education for our customers, whether it be for new employees at your organization, refresher courses for existing employees, or training on new enhancements to the software for maximum utilization. Suntell offers a variety of training options:

- Webinars: A Suntell representative covers a specific topic for 1 to 1.5 hours. For a listing of currently offered webinars, please refer to our Support website.

- Virtual Training: Developed specifically for your organization, this web-based training will include interaction by your employees in the form of labs and hands-on practice

- Regional Training: At a location determined by Suntell, Regional Training will bring together employees from different organizations for a 2-3 day hands-on training session in a small group setting. Topics and upcoming locations are listed on our Support website.

- On-Site Training: Request that a Suntell representative travel on-site to your location to work with your employees in a hands-on or classroom style environment.

- Consulting: A knowledgeable Suntell representative will work with your organization to ensure a smooth transition to the use of the Suntell products and integrate Suntell into your daily processes.

Additional Professional Services are also available. For more information or pricing on any training options or services, please contact Suntell's Customer Support.

Our Goal

We believe that providing efficient; effective software solutions is only a part of the equation to our success and pride ourselves in delivering the best customer service in the industry.

"Suntell surpassed our expectations. Not only with their software, but with their customer service as well. The rule of thumb I always ask myself after a software installation is, 'would I make the same decision again,' and in this case there is no doubt whatsoever, we definitely made the right decision."

Tom Aleshire, COO
Eastwood Bank