



# FPS**GOLD**

## Client Support Reference Guide

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FPS GOLD Financial Software  
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## Need Help?

We all need help from time to time. FPS GOLD has provided several options for handling the challenges, both major and minor, that come up in the normal course of business.

The purpose of this resource guide is to let you know your options for finding solutions to your challenges. This guide also outlines the correct procedures for your organization to follow to help FPS GOLD provide solutions for you in the quickest and most efficient way.

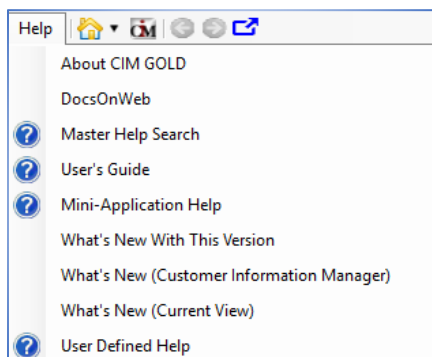
Our function is to make sure your organization operates smoothly and efficiently. When a challenge is found that interferes with your ability to function well, we have help, solutions, and dedicated and loyal employees ready to assist you.

Our dedication to service and support for our clients on a proficient personal level is what sets us apart from other financial software options available. We have several areas that focus on service and support. Our goal is to communicate and work to provide the services our clients need. We are continually looking for ways to improve communications and shorten turn-around time to benefit our clients.

### Documentation

**F1 Help** is provided in CIM GOLD and all major systems, including Deposits, Loans, General Ledger, Customer Information Systems (CIS), etc. Simply place your cursor in any field and press <F1> on your keyboard to find documentation about the field and/or the screen you are in.

**CIM GOLD Help menu** has several options for help and user guides for programs and systems within CIM GOLD.



**DocsOnWeb** is where to look for information about FPS GOLD products. The website contains user guides, as well as report documentation and updates. DocsOnWeb can be accessed from the CIM GOLD Help or Miscellaneous menus or by logging into the FPS GOLD secure site [www.fpsgold.com](http://www.fpsgold.com).

**FPS GOLD University** is accessed through the FPS GOLD secure site [www.fpsgold.com](http://www.fpsgold.com) under Quick Links. Provided here are Scheduled Online Classes, Webinar Class Recordings, Directions Conference Materials Archive, Multimedia Training Videos, and Monthly Software Updates.

**Client Services** specializes in certain areas of FPS GOLD systems—loans, deposits, accounting, Platform, etc. Client Services is made up of product consultants who are each part of a regional team. You can call or email your client representatives directly. If your Client Services representative is unavailable and there is an immediate need, you can press #1 for another member of your Regional Team or #2 to be transferred to another consultant in the same product area (loans, deposits, financial applications, Platform, etc.).

### **Client Services Account Manager (CSAM)**

Each FPS GOLD client has an Account Manager (CSAM) assigned to oversee the client relationship. More specifically, the CSAM responsibilities are outlined as follows:

- ❖ Being aware of all communication between the bank and FPS GOLD and helping escalate service calls if needed (particularly any service-level agreement priority 1 challenges, as outlined on page 6 and at <https://secure.fps-gold.com/severity.htm>).
- ❖ Increase utilization of FPS GOLD products and facilitate the implementation and deployment of new functions, features, and services.
- ❖ Understand the client's strategic initiatives and determine how FPS GOLD can assist with achieving those goals.
- ❖ Address billing inquiries.
- ❖ Plan and coordinate on-site visits to the bank to provide training and ongoing customer support.

### **Client Services Regional Teams**

The clients assigned to each CSAM are supported by a team of Client Services consultants that are most familiar with your operations. These teams are for day-to-day support and questions that relate to the specific product areas. You can contact the various experts on your Client Services Regional Team directly by phone or email without

going through your Account Manager. Additionally, each team has an email and group extension that will put you in contact with the team when you require assistance.

The **eBanking Team** specializes in the eBanking products offered by FPS GOLD. The eBanking team is made up of Client Support, designers, and programmers. The eBanking team works with the other specialty groups to ensure smooth online and mobile banking, website, and marketing for your organization. Keep up to date by attending the eBanking webinar that is offered the first Wednesday each month at 9:30 a.m. MT.

**Network Control Center (NCC)** provides networking and computing resources for FPS GOLD applications. NCC supports, monitors, and provides the data communications, networks, and servers. In most cases, challenges with the FPS GOLD systems should be reported to Client Services. In an emergency, or in the case of a known networking problem, call NCC directly.

**Work Orders** can be submitted directly to FPS GOLD by logging into the FPS GOLD secure site [www.fpsgold.com](http://www.fpsgold.com). Work orders are for any request that requires intervention by FPS GOLD personnel, such as program changes, institution option changes, file initializations (INITs), PCI vault BIN setups, Platform file changes, transmission setup and changes, etc.

The length of time required to complete a work order varies based on the request being made. A minimum of two weeks from the date the work order is submitted to the date the request is required is the minimum time frame for most client services-related work orders. However, most programming work orders will take longer than two weeks, or may not be feasible at the current time.

Please plan and submit your work order requests well in advance of the needed completion date and be aware that we will do our utmost to complete the requested task on or before the date requested. Communication between your organization and Client Services can help determine an acceptable completion date for both parties. For additional details regarding work orders, see pages 14–19.



## Who Should I Call?

This always seems to be the first question when a challenge arises. There are a few questions you should ask yourself before this one comes up. Try the following first, and you may find you already have an answer.

### FPS GOLD Liaison

Each organization designates an individual employee as the liaison to FPS GOLD. This is the individual FPS GOLD deals with directly in matters concerning your organization. Your FPS GOLD liaison may already be aware of the challenge and may be working with FPS GOLD personnel to find a solution.

The liaison also receives all documentation for your organization, including FPS GOLD *Update* (our monthly electronic publication explaining enhancements to the systems), information about the annual Directions Conference, email information regarding system-wide challenges, webinar training schedules and documentation, etc. You should know who your organization's FPS GOLD liaison is and how to reach him or her when needed. In addition, your organization should have assigned key people within your organization who will be the first point of contact for you when an issue arises. If they can't solve the problem for you, they will call FPS GOLD to seek a solution.

### Is This a Training, System, or Equipment Issue?

A **training issue** would involve personnel who simply do not know what information the system requires or how to perform a certain task on the system. Training issues can usually be handled by referring to documentation or another individual at your organization who is familiar with the system tasks and functions. If you still don't have the answer you're looking for, contact a Client Services consultant.

A **system issue** generally means the system is not functioning properly. This could be a malfunction in our systems or network negatively affecting previously-working programs and services. These issues may require the manual intervention of Client Services, programmers, or NCC to resolve.

An **equipment issue** is PCs not functioning properly, printer problems, Internet connection issues, firewall challenges, etc. Typically, your organization's IT consultants should be contacted to assist in resolving onsite equipment issues. Your IT consultants may need to work with Client Services or NCC to assist in resolving these issues.

## Documenting Issues

Documenting an issue helps FPS GOLD personnel locate and solve the problem much faster. For example, providing screen shots/snips of an error with an explanation of the process you went through before receiving the error helps Client Services solve the problem faster. You will also need to define the severity of the issue according to your organization's needs.

### How Do I Document an Issue?

In order for FPS GOLD personnel to fix a system problem, we often need to recreate it. Any documentation you can give us regarding an issue can help us recreate and solve the problem.

When documenting issues arise, please provide the following details:

What Happened?	
Program and Version Number	What program were you using when the issue happened? (CIM GOLD, GOLDteller, GOLDWriter, Platform, etc.) What is the version number of the program?
Date/Time	When did the problem begin? How often did it occur? Is it still occurring?
Process	What process did you go through before the error happened? Can you recreate the error each time you go through the process?
*Customer Information	Customer name? (last name and first initial) Account number? (last four digits) Account type? (loan, deposit, G/L) Card number? (last four digits) Login name/number?
*Error Message	Can we get a snip/screenshot? Can you get the precise verbiage?
Action	What actions led up to the error? Can you reproduce it?
Users	Are other users at your organization also having the same issue?

\*When providing information via email, please follow the Gramm-Leach-Bliley Act (GLBA) and the PCI compliance rules and avoid disclosing non-public information. We take the security of non-public information seriously. We can suggest ways to send us non-public information securely

if you do not have the ability to encrypt emails or to password-protect attachments that contain non-public information.

When documenting information regarding issues with eBanking, please provide the following details:

What Happened? eBanking	
User/Logon	Who is having trouble? Is it multiple users? Business or Personal?
Date/Time	When did problem begin? How often? Is it still occurring?
Device	Smart Phone, Tablet, PC, Apple, etc.
Browser	IE 11, Firefox, Google Chrome, Safari, Edge, Mobile App, etc.
OS (and version)	Windows 10, IOS 9.5, Android Lollipop, etc.
Error Message	Can we get a snip/screenshot? Can you get the precise verbiage?
Action	What actions led up to the error? Can you reproduce it?
User Activity Log	What does the User Activity Log show?

The more information you provide when reporting an issue, the faster FPS GOLD personnel can research and resolve it.

### How Severe is My Issue?

Before notifying FPS GOLD of a problem, check with your liaison and superiors and determine the severity of the problem. We have based our response time on the following priority levels.

Client Issue Severity		
Priority Level	Description	Response Target Times
1	Severe Business Impact: Customer's business has vital loss or degradation of services	Client will be updated on the progress of the service call every hour until the item is resolved.
2	Critical Business Impact: Customer's business has significant loss or degradation of services	Client will be updated on the progress of the service call every four hours until the item is complete.
3	Moderate Business Impact: Customer's business has moderate loss or degradation of services, but work can reasonably continue in	Client will be updated on the progress of the service call every day until the item is resolved.

	an impaired manner	
4	Minimum Business Impact: Customer's business is substantially functioning with minor impediments to services.	Client will be updated on the progress of the service call every three days until the item is complete.
5	This is a non-critical item and should be resolved within the week.	Client will be updated on the progress of the service call weekly until the item is resolved.

## How Do I Contact FPS GOLD?

You can contact FPS GOLD Client Services by telephone or email directly. Your organization has a CSAM and several Client Services consultants who specialize in the different systems available through FPS GOLD. We encourage you to contact Client Services whenever you need assistance with issues that arise. You can dial your Client Services consultants directly at the following number:

**(800) 453-9400**

Option 8

extension of your Regional Team or a specific Client Services consultant

You can also email your Client Services Regional Team or consultants directly.

### What If My Client Services Consultant Is Not Available?

Your liaison should have a list of the Client Services consultants who work directly with your organization. Sometimes your assigned consultants will not be available due to business trips, vacations, illness, or other reasons. You can leave a detailed voice message, dial #1 for another member of your regional team, or dial #2 for another Client Services consultant in the same specialty group (Deposits, Loans, G/L, Platform, etc.)

We encourage you to work directly with the Client Services consultants assigned to your organization. In case of extreme urgency, feel free to contact any of our Client Services consultants directly at their extension numbers or email. You may receive new lists periodically as changes are needed. However, please do *not* call two or more different people to work on the same issue.

Remember, your CSAM and Client Services consultants that are assigned to your organization are the most familiar with your personnel, your needs, current projects, and any issues you may be experiencing. Please contact them first. If they are not available, please contact any FPS GOLD Client Services consultant. Our Client Services consultants are happy to help in any way they can.

### When Can I Contact FPS GOLD?

You can email or leave voice messages with Client Services at any time. In most cases, email and voice messages will only be picked up during our normal operating hours:

Monday–Friday

6:00 a.m.–6:00 p.m. MT

### **Does FPS GOLD Provide Afterhours On-Call Support?**

In the event of an emergency when you need to call FPS GOLD after our normal operating hours, you can call extension 2150. This will put you in contact with our computer room personnel who have access to afterhours contact information for our Client Services consultants and programmers.

Direct	(801) 373-5818 ext. 2150
Toll Free	(800) 453-9400 ext. 2150

Alternatively, you can call the Client Services on-call phone. This will put you in contact with the Client Services consultant who is on call to deal with emergency situations outside of our operating hours.

Monday–Friday 6:00 p.m. – 6:00 a.m. MT  
Saturday – All Day  
Client Services On-Call Phone: (801) 361-3108

Please limit after operating hours calls and Saturday calls to connection issues, transmission/alert issues and teller balancing issues. General questions should be held for Client Services during normal operating hours.

### **Pre-Conversion Contact**

Pre-conversion organizations are those who are currently in the process of converting from another data center to FPS GOLD. These organizations are not yet processing on the FPS GOLD systems and generally are still learning about FPS GOLD options and systems.

At the time of the pre-conversion meeting, FPS GOLD personnel are assigned to the organization as part of the conversion team working for a successful, trouble-free conversion. These individuals keep in close contact with the organizations currently in the conversion process.

If you have any questions at all during the conversion process, please call the conversion team members assigned to your organization. These are the people most familiar with your organization and any unique needs you may have. They are the FPS GOLD personnel who can best answer your questions and find the information you need.

## FPS GOLD Client Services Contact Information

### Director of Client Services, SVP

### Client Services Product Director, VP



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### Client Services Account Managers (CSAM)



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## eBanking Contact Information

### eBanking Products & Services, SVP



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### eBanking Client Consultants



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## **What About Training and Documentation?**

FPS GOLD is intent on seeing that our clients receive the most thorough and comprehensive training and documentation. With new regulations and customer-requested enhancements necessitating changes in programs, training and documentation become a top priority. The following training and documentation options are available to every organization using the FPS GOLD systems.

### **In-Person Training**

Every organization that converts to the FPS GOLD systems will experience several weeks of intensive trainings. Preferably, these training sessions are located at our facilities in Provo, Utah. Typically, the first two weeks are for the accounting personnel at your organization, the second week is for deposit personnel, and the third week is for loan personnel. Any additional need for training is scheduled after the main training sessions are held. Those employees who attend these training sessions are responsible for training the rest of your organization's personnel. FPS GOLD's conversion team will be on-site to help your personnel at the time of the conversion.

When you have employee turnover and need to bring on new personnel, you can work with your Client Services Account Manager (CSAM) to have your personnel come to our offices in Provo, Utah, to attend scheduled training classes. There is a charge for these trainings, depending on how many individuals you send and which training sessions are attended.

FPS GOLD prefers training sessions at its facilities in Provo, Utah. This provides your employees a setting that is away from day-to-day work and distraction in an environment where your employees can focus on the training being given. However, if you prefer training on-site at your location, this can also be arranged through your organization's CSAM. There is also a charge for these trainings.

### **Annual Directions Conference**

Each year the second week of June is reserved for FPS GOLD's annual Directions Conference. Typically, the conference is held in the beautiful mountain resort areas of Park City, Utah. During the three days, there are trainings on a wide variety of areas pertaining to existing FPS GOLD systems, major enhancements, upcoming programming, system forums, and individualized lab training.

### **Training Webinars**

You can schedule with your CSAM to have online training webinars specific to your organization's training needs. Once scheduled, these webinars are given

by your CSAM's support team members and are typically billable training sessions.

Scheduled webinar trainings are held each week on Wednesday at 9:30 a.m. MTN. These are webinar trainings, updates, and forum classes. Your FPS GOLD Liaison receives information about these webinar sessions. These sessions are recorded and published on our secure website [www.fpsgold.com](http://www.fpsgold.com) for access and review.

### Online Training and Documentation

All FPS GOLD documentation and training modules are located on our secure website [www.fpsgold.com](http://www.fpsgold.com) and can easily be accessed by your organization. Users can log into the website using an Internet browser or by selecting DocsOnWeb from the Help or Miscellaneous menus in CIM GOLD.

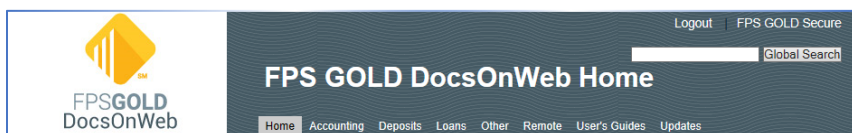
#### What Is DocsOnWeb?

This is where to look for information about FPS GOLD products. The website contains all the information in our documentation manuals and user guides, as well as report documentation and updates.

#### How Do I use DocsOnWeb?

We have designed the website to be as user friendly as possible. Please take a moment to view the training demonstration offered to familiarize yourself with DocsOnWeb.

[training demonstration](https://secure.fps-gold.com/docsonweb/flash/docstraining.asp) (<https://secure.fps-gold.com/docsonweb/flash/docstraining.asp>)



The documentation has been divided into seven main categories: Accounting, Deposits, Loans, Other, Remote, User's Guides, and Updates. Click a link in the top navigation menu on the page to read more about each of these sections and to select documentation manuals from within each category.

#### Navigation and Search


The side navigation within each manual is intuitive and easy to use. For example, the link under the Introduction is the title of Chapter 1 followed by Chapter 2, etc. Use the arrow to the left of the chapter link to reveal sub-chapter sections. Additionally, the site contains an

easy-to-use search function that will search all documents on DocsOnWeb, a specific category, or an individual manual.

### Feedback

Feel free to contact us with comments or questions about DocsOnWeb. If you find a problem or have helpful comments regarding the FPS GOLD documentation, please let us know by emailing the details to your Client Services consultant.

**FPS GOLD University** offers several sections containing knowledge-based training and documentation. Your organization can use these for training new employees, refresher training, and keeping up to date on new programming. We are committed to keeping you up to date.

<b>Quick Links</b> <a href="#">FPS GOLD University</a> <a href="#">DocsOnWeb</a> <a href="#">Alerts</a> <a href="#">Contacts</a> <a href="#">Software Download</a> <a href="#">EIS Reports</a> <a href="#">Work Orders</a> <a href="#">Disaster Test</a> <a href="#">Monitor</a> <a href="#">Vendor Documents</a>		<b>Section Navigation</b> <a href="#">FPS University Home</a> <a href="#">Scheduled Online Classes</a> <a href="#">Webinar Class Recordings</a> <a href="#">Directions Conference Materials Archive</a> <a href="#">MultiMedia Training Videos</a> <a href="#">Semi-Annual Software Updates</a>
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### Scheduled Online Classes

FPS GOLD University offers online webinar classes on a variety of system- and application-related subjects. The class schedule is posted here each quarter. Additionally, your organization's FPS GOLD liaison receives email information regarding these classes.

<https://secure.fps-old.com/fpsuniversity/scheduledOnlineClasses.htm>

### Webinar Class Recordings

Missed a class? No problem. FPS GOLD University classes are recorded and published here for new employees or refresher training.

<https://secure.fps-gold.com/fpsuniversity/onlineClassRecordings.htm>

### **Directions Conference Archives**

Download class handouts, presentations, and other materials from the five most recent Directions conferences here.

<https://secure.fps-gold.com/fpsuniversity/DirectionsArchive.htm>

### **Multimedia Training Videos**

Multimedia training on the Web provides a variety of FPS GOLD system and application lessons for basic and advanced self-paced learning and review.

<https://secure.fps-gold.com/fpsuniversity/webBasedTraining.htm>

### **Monthly Software Updates**

FPS GOLD University offers an online forum to introduce enhancements included in each monthly software release. Your institution benefits by receiving release documentation and previewing new and updated functionality.

<https://secure.fps-gold.com/fpsuniversity/SemiAnnualUpdates.htm>

### **Monitor Newsletter**

Monitor is published monthly, and is the official FPS GOLD regulatory compliance and current events newsletter. We invite your involvement! If you have any suggestions or comments, please notify the editor or a Compliance Committee member.

<https://secure.fps-gold.com/monitor/>

### **On The Horizon Newsletter**

This document provides a quick executive-level look at the progress of major FPS GOLD projects completed and/or planned for completion in the future. Completed items include significant changes released in the last 6 to 12 months.

<https://secure.fps-gold.com/onTheHorizon/>

For a complete list of all software changes, please refer to the FPS GOLD Update documentation. For a complete list of all regulatory projects in process, please refer to the *Monitor* newsletter available on the FPS GOLD customer web portal.



## How Do I Submit a Work Order?

**Work Orders** can be submitted directly to FPS GOLD by logging into the FPS GOLD secure site [www.fpsgold.com](http://www.fpsgold.com). A work order needs to be submitted to FPS GOLD whenever a task requires the direct involvement of FPS GOLD personnel to complete. The following are some of the tasks that will require a work order:

- Changes of institution options
- Requests for new software licenses or equipment
- Program changes for enhancements
- Program changes for reporting errors
- File Initializations (INIT)
- Transmission requests or changes
- BIN number setups/changes
- eBanking-related changes (to your Web or marketing sites)
- General Ledger report setup
- Loan or Deposit report setup
- Document additions or changes on Platform or GOLDTrack PC

FPS GOLD uses a proprietary project management program to track work orders. Client Services consultants have access to view the work order requests at any time.

For some requests, you may only want an estimate of cost for the requested changes. Other requests, such as report setup changes, mailing labels, or Platform file changes, you may want to have completed without an estimate provided. You can specify your preference on the work order.

The length of time required to complete a work order varies based on the request being made. A minimum of two weeks from the date the work order is submitted to the date the request is required is the time frame for most client services-related work orders. Most programming work orders will take longer than two weeks, and some may not be feasible at the current time. When requesting programming changes, keep in mind the time it takes to estimate, design, write, test, document, and release the program changes. This time is needed to ensure that the requested changes are fully tested, implemented, and integrated with other areas of the FPS GOLD systems.

Please plan and submit your work order requests well in advance of the needed completion date and be aware that we will do our utmost to complete the requested task on or before the date requested. Communication between your organization and Client Services can help determine an acceptable completion date for both parties.

When determining the priority level of a work order, please refer to the following chart:

Work Order Priority Level		
Level	Description	Response Target Times
1	My organization cannot do business until this problem is resolved.	Both the liaison and the client representative will stay on the job until the problem is resolved. Priority One events receive 24-hour attention. FPS GOLD will defer any lower-priority task in progress to resolve Priority One events. When the user and FPS GOLD classify an event as Priority One, both parties agree to have qualified employees work continuously until they are resolved. If a Priority One event occurs at night, both parties will call members of their staffs in to work. If a solution to a Priority One event is not found within two hours, executive management will be notified.
2	My institution is severely hampered in their ability to do business.	FPS GOLD will attempt to resolve Priority Two events within three business days. If a solution to the problem cannot be found during that time, the user will receive a progress report toward resolution each day until the event is resolved.
3	This problem must be resolved, but does not interfere with normal business activity. This is an item in which the problem needs to be resolved and released prior to the next scheduled release.	A work order is to be submitted to FPS GOLD. FPS GOLD will attempt to resolve Priority Three events within two weeks. If a solution to the problem cannot be found in that time, the customer receives a progress report toward resolution each day until the event is resolved.
4	This problem needs to be solved within the next two months and will be released in the next scheduled release.	A work order is required for all Priority Four events. All enhancements will be reviewed by the FPS GOLD Governance Committee for prioritization and final approval. On a periodic basis, clients and the FPS GOLD Account Manager will be asked to prioritize the approved requested enhancements, placing them into one of the scheduled release dates. Status reports of enhancement requests will be sent to FPS GOLD clients and staff.  Most requests for changes and enhancements to the system to improve user efficiency and effectiveness will be given a Priority Five status.
5	This is a non-critical item that will be resolved within the next year and will be released in a scheduled release.	A work order is required for all Priority Five items. All enhancements will be reviewed by the FPS GOLD Governance Committee for prioritization and final approval. On a periodic basis, clients and the FPS GOLD Account Manager will be asked to prioritize the approved requested enhancements, placing them into one of the scheduled release dates. Status reports of enhancement requests will be sent to FPS GOLD clients and staff.

To submit a work order, log into the FPS GOLD secure site, [www.fpsgold.com](http://www.fpsgold.com). Placing a work order request requires security access; if you do not have access, you will not see the work order option.

## Sign In

User Name

Password

Institution Number

[Log In](#)

### Quick Links

- [FPS GOLD University](#)
- [DocsOnWeb](#)
- [Alerts](#)
- [Contacts](#)
- [Software Download](#)
- [EIS Reports](#)
- [Work Orders](#)
- [Disaster Test](#)
- [Monitor](#)
- [Vendor Documents](#)

## Work Orders

[Create a New Work Order](#)
[View Work Order List](#)

You can create a work order or view the list and status of the work orders your organization has submitted.

## FPS GOLD Work Order Request Form

\* Required Fields

### Client/Contact Information

Client Number:

Client Name:

Contact Name\*:

Contact Phone\*:

Contact Email\*:

### Choose a System \*

- ☐ CIS (Customer Info. System)
- ☐ Cust. Service Deposits
- ☐ Cust. Service GOLDTrak
- ☐ Cust. Service Loans
- ☐ Deposit - Programming
- ☐ E-Banking
- ☐ Financials ( GL, AP, etc )

- ☐ GOLDteller Platform
- ☐ GOLDTrak - Programming
- ☐ Loan - Programming
- ☐ Mailing Service
- ☐ Network Control/Equip.
- ☒ Other

**Client/Contact Information** is typically automatically filled in from your login information.


Mark the **System** for which the work order is being written. If the system is not listed, select **Other** and select the system from the list.

## Work Order Request

**Request Type\*:**  
☐ Enhancement Request ☐ Future Enhancement Suggestion ☐ Report a Problem ☒ Work Request

**Billing Option\*:**  
☒ Provide a Billable Quote Before Work is Started ☐ Proceed With Work Without a Quote ☐ N/A

**Short Description\*:**

**Creation Date:**  **Desired Completion Date\*:**    
 (mm/dd/yyyy)

**Detailed Description of the Request (1500 character limit)\*:**  
 Be as detailed as possible and attach all supporting documentation and/or examples of what you are requesting.

**Do you have any attachments?**  
☒ Yes (They will be added later) ☐ No

Mark the **Request Type** applicable for the request being made.

Mark the applicable **Billing Option**.

**Provide a Billable Quote** is an estimate of the cost for completing this work order. This option is typically marked with a programming request that may require considerable programming time and therefore has an unknown cost until evaluated by FPS GOLD management and programmers. Once the cost is evaluated, you will be provided with a written estimate and will need to sign an approval to have the work completed. FPS GOLD may bill you for the time it takes to evaluate the cost of a work order, as this evaluation process can require research and take several hours/days to complete.

When the option to **Proceed with Work Without a Quote** is selected, FPS GOLD personnel will complete the work order, and you will be billed for the work. This option authorizes us to bill you for work done without an estimate approval being given. This option is used for most work orders that do not require programming, such as changing institution options, setting up afterhours reports, GOLDWriter setup assistance, document changes for Platform, etc. Review the most current 'Exhibit A' for the minimum cost of submitting a work order.

The **Short Description** is what you are requesting on the work order.

The **Creation Date** will default to today's date.

The **Desired Completion Date** is the specific date you need the request completed. Remember to allow at least two weeks between the creation date and completion date for non-programming work order requests. You will need to allow longer for programming requests. Long-term programming projects will need to be scheduled with FPS GOLD and will typically follow our monthly release schedule.

Be as specific as possible in the **Detailed Description** of the request. This is the most important area of the work order. Please submit only one request type per work order. Attach supporting documentation and/or examples of what you are requesting, and state why it is needed. If the space provided for the description is insufficient to describe the work needed, attach a document and indicate on the work order that there is additional detail attached. When attaching documents for changes, such as for GOLDTeller, check formats, Platform, or GOLDTrack PC, the document(s) provided need to be exactly as you would like the form produced.

Once you have completed the detail, make sure you indicate that you have attachments when needed. Click <Next>. Here you can review the request for accuracy and confirm the information is correct.

## Confirm FPS GOLD Work Order Request

Please confirm that the information below is correct.

\* Required Fields

### Client/Contact Information

Client Number:

Client Name:

FPS GOLD CLIENT

Contact Name\*:

Your Name

Contact Phone\*:

888-888-8888

Contact Email\*:

youremailaddress@bank.com

### Choose a System \*

☐ CIS (Customer Info. System)

☐ Cust. Service Deposits

☐ Cust. Service GOLDTrak

☐ Cust. Service Loans

☒ Deposit - Programming

☐ E-Banking

☐ Financials ( GL, AP, etc )

☐ GOLDteller Platform

☐ GOLDTrak - Programming

☐ Loan - Programming

☐ Mailing Service

☐ Network Control/Equip.

☐ Other

## Work Order Request

Request Type\*:

☒ Enhancement Request ☐ Future Enhancement Suggestion ☐ Report a Problem ☐ Work Request

Billing Option\*:

☒ Provide a Billable Quote Before Work is Started ☐ Proceed With Work Without a Quote ☐ N/A

Short Description\*:

Short, but make it specific

Creation Date:

Desired Completion Date\*:

5/25/2018

10/18/2018

Detailed Description of the Request (1500 character limit)\*:

Be as detailed as possible and attach all supporting documentation and/or examples of what you are requesting.

Do you have any attachments?

☒ Yes (They will be added later) ☐ No

Save & Add Attachments

Edit

Cancel

After you have confirmed the information input, click <Save & Add Attachments>, attach the supporting documents, and submit the work order.

## FPS GOLD Work Order Request – Add Attachments

Click "Browse" to locate and choose the file(s) you want to attach.

### Add Attachments

File 1:  No file chosen

File 2:  No file chosen

File 3:  No file chosen

## FPS GOLD Work Order Request – SUBMITTED

Work Order Number: 52271

### Client/Contact Information

Client Number:

Client Name:

Contact Name\*:

Contact Phone\*:

Contact Email\*:

### Choose a System \*

- ☐ CIS (Customer Info. System)
- ☐ Cust. Service Deposits
- ☐ Cust. Service GOLDTrak
- ☐ Cust. Service Loans
- ☒ Deposit - Programming
- ☐ E-Banking
- ☐ Financials ( GL, AP, etc )
- ☐ GOLDteller Platform
- ☐ GOLDTrak - Programming
- ☐ Loan - Programming
- ☐ Mailing Service
- ☐ Network Control/Equip.
- ☐ Other

## Work Order Request

### Request Type\*:

☒ Enhancement Request ☐ Future Enhancement Suggestion ☐ Report a Problem ☐ Work Request

### Billing Option\*:

☒ Provide a Billable Quote Before Work is Started ☐ Proceed With Work Without a Quote ☐ N/A

### Short Description\*:

Creation Date:

Desired Completion Date\*:

### Detailed Description of the Request (1500 character limit)\*:

Be as detailed as possible and attach all supporting documentation and/or examples of what you are requesting.

### Do you have any attachments?

☒ Yes (They will be added later) ☐ No

☐

[Printer Friendly Version](#)

After you submit the work order, you can “snip” the screen or print the work order, which will contain the assigned number. If needed, contact your CSAM

or Client Services support team to report that you have submitted a work order and provide the work order number so it can be easily located in the system. Assignments will be made, and you will be notified when the work order is received and assigned, and for any other necessary details.

**Where Do I Find the Status of a Work Order?**

To see the status of a work order, you can look online at the list and status. Your CSAM and Client Services team will update you throughout the work order process. If at any time you need the status of a work order, contact a member of your Client Services team and provide the work order number.



## **Fairly Simple, Right?**

That is all there is to it. FPS GOLD is dedicated to providing the service and support our clients need and deserve, including information and training, at any time. Simply follow the guidelines and information provided in this reference guide, and the information and solutions you need are just an <F1> or website click, email, or phone call away.