



FPSGOLD

Client Services Reference Guide

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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 purpose 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 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

F1 Help is provided in CIM GOLD and all major systems. 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 viewing.

CIM GOLD Help Menu

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

DocsOnWeb

DocsOnWeb is where to look for information about FPS GOLD products. The website contains user guides, report documentation, and updates. DocsOnWeb can be accessed from the CIM GOLD Help menu, the CIM GOLD Miscellaneous menus, or by logging into the FPS GOLD [secure site](#).

FPS GOLD University

FPS GOLD University provides Scheduled Online Classes, Webinar Class Recordings, Directions Conference Materials Archive, Multimedia Training Videos, and Monthly Software Updates. FPS GOLD University can be accessed by logging into the FPS GOLD [secure site](#).

Client Services

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 Consultant 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

Each FPS GOLD client has an Account Manager assigned to oversee the client relationship. More specifically, an Account Manager does the following:

- ❖ Is aware of all communication between the bank and FPS GOLD and helps escalate service calls if needed (particularly any service-level agreement priority 1 challenges, as outlined on page 9 and on the [secure site](#)).
- ❖ Increases utilization of FPS GOLD products and facilitates the implementation and deployment of new functions, features, and services.
- ❖ Understands the client's strategic initiatives and determines how FPS GOLD can assist with achieving those goals.
- ❖ Addresses billing inquiries.
- ❖ Plans and coordinates on-site visits to the bank to provide training and ongoing customer support.

Client Services Regional Teams

The clients assigned to each Account Manager 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.

eBanking Team

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 design, 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)

The Network Control Center (NCC) provides networking and computing resources for FPS GOLD applications. NCC supports, monitors, and provides 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

Work Orders can be submitted directly to FPS GOLD by logging into the FPS GOLD [secure site](#). 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, or transmission setup and changes.

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 time they are requested.

Please plan and submit your work order requests well in advance of the needed completion date. 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 page 21.

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's *Update* (our monthly electronic publication explaining enhancements to the systems), information about the annual Directions Conference, email information regarding system-wide challenges, and webinar training schedules and documentation. You should know who your organization's FPS GOLD liaison is and how to reach them 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?

Training 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.

System Issue

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

Equipment Issue

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 with onsite equipment issues. Your IT consultants may need to work with Client Services or NCC to resolve these issues.

Documenting Issues

Documenting an issue helps FPS GOLD personnel locate and solve the problem much faster. For example, providing screenshots 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?

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 issues arise, please provide the following details:

| | |
|----------------------------|---|
| 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* | What is the customer's name? (last name and first initial) What is the account number? (last four digits) What is the account type? (loan, deposit, G/L) What is the card number? (last four digits) What is the login name/number? |
| Error Message | Can we get a screenshot of the error? Can you get the exact wording of the error message? |
| Users | Are other users at your organization also having the same issue? |

*The best way to securely share non-public information is to use Help Desk. If you need to provide 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. Never send non-public information or attachments in emails 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:

| | |
|------------|--|
| User/Logon | Who is having trouble? Is it multiple users? Is it a business or personal account? |
| 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? |
| Device | What type of device is the user on? (smart phone, tablet, PC, Apple, etc.) |
| Browser | What web browser is the user on? (Internet Explorer, Firefox, Google Chrome, Safari, Edge, mobile app, etc.) |
| OS and Version | What operating system is the user on? (Windows, MacOS, IOS, Android, etc.) What is the version number of the operating system? |
| Error Message | Can we get a screenshot of the error? Can you get the exact wording of the error message? |
| 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.

| 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 an impaired manner | Client will be updated on the progress of the service call every day until the item is resolved. |
| 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. | 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, Help Desk, or email. Your organization has an Account Manager 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 1

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 Account Manager 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, 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

Help Desk

The FPS GOLD Client Services Help Desk is a Web-based ticketing system developed by FPS GOLD to process, manage, and track customer issues from submission to resolution.

What is Help Desk?

Help Desk is a browser application that resides behind the firewall at FPS GOLD and allows you to securely submit help requests with details, including screenshots, sensitive data, non-public information, and PCI compliant data. When you submit a ticket, an email alert is sent to multiple support personnel so that you can receive a timely response and follow updates through to a resolution.

Using the Help Desk requires setup and security for your organization. Upon converting to FPS GOLD systems, you will have access to Help Desk for ticket submission. Information and training on the Help Desk will be provided. The Help Desk User Guide can be found on the FPS GOLD [secure site](#) under DocsOnWeb > User's Guides > Help Desk User Guide.

When do I Use Help Desk?

Your organization should use Help Desk anytime you need assistance from an FPS GOLD Consultant. Help Desk tickets should be submitted with as much detail as possible so that necessary research can be done and a resolution can be provided as quickly as possible. Help Desk is FPS GOLD's centralized communication center for Client Services. We encourage you to use Help Desk to ensure your requests can be tracked and are completed by our team of consultants.

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-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

Client Services Directors

Director of Client Services, SVP



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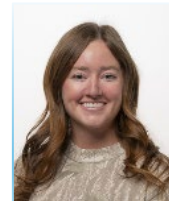
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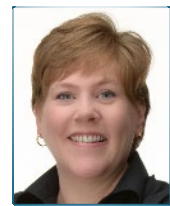
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GOLDTrak PC Product Consultants



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eBanking Vice President

eBanking Products & Services, SVP



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Team Leader



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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 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 staff. FPS GOLD's conversion team will be on-site to help you at the time of the conversion.

When you need to bring on new employees, you can work with your Account Manager to have your employees 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 Account Manager. 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 Account Manager to have online training webinars specific to your organization's training needs. Once scheduled, these webinars are given by your Account Manager'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 for access and review.

Online Training and Documentation

All FPS GOLD documentation and training modules are located on our secure site and can easily be accessed by your organization. DocsOnWeb can be accessed from the CIM GOLD Help menu, the CIM GOLD Miscellaneous menus, or by logging into the FPS GOLD [secure site](#).

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. The documentation has been divided into eight main categories: Accounting, Deposits, Loans, Other, Remote, User's Guides, CoreView GOLD, 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, within a specific category, or within 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

FPS GOLD University contains 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.

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-gold.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>

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>

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>

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/>

How do I Submit a Work Order?

Work Orders can be submitted directly to FPS GOLD by logging into the FPS GOLD [secure site](#). 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 information on how to use our proprietary work order software, see the user guide on the [secure site](#).

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.

When you contact a member of Client Services to discuss your work order, 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.

Fairly Simple, Right?

That's all there is to it. FPS GOLD is dedicated to providing the service and support you need and deserve at any time, including information and training. Simply follow the guidelines and information provided in this reference guide and remember that the information and solutions you need are just a click, email, or phone call away.