

Support Process Overview

A review of the tools and process Geezeo uses to respond to issues and questions of PFM users and financial institution employees.

Introduction

Customers/members will submit a support request using the HELP link directly in the PFM. This ticket will be sent to Geezeo support staff via our online portal called Zendesk. Our staff will handle this inquiry with the customer/member directly via email, but will reach out to your designated support agent if additional help is required.

The screenshot shows a user interface for submitting a support request. At the top right, there are links for 'Settings' and 'Logout'. The main heading is 'Submit a Support Request'. Below this, there are three sections: 1. 'Which of these best describes your problem?' with a dropdown menu showing 'I'm not sure how something works'. 2. 'Please describe the issue you're experiencing.' with a text area containing 'How do I tag a transaction?'. 3. 'What email address should we contact you at?' with a text input field containing 'demo.support@geezeo.com'. At the bottom, there is a 'SUBMIT YOUR REQUEST' button and a small disclaimer: 'Don't share confidential information such as account numbers, credit or debit card numbers, or social security numbers.'

Ticket Response Time

Once a ticket has been submitted to Zendesk, the customer/member will receive an automated response to the email address provided, stating that we have received their inquiry. Our Support Team will then review and respond to the ticket by the end of the next business day. We strive to respond to any additional questions or comments by the end of the following business day as well.

Inquiries Unrelated to PFM

Any questions we receive that are not related to the PFM will be directed to your support agent's email address through Zendesk. Our protocol for these tickets is as follows:

1. Upon receiving the ticket, we will notify your customer/member that we are researching the issue further for them.
2. We will then reach out to your designated support agent via Zendesk. The agent will receive an email from 'Online Banking Support' detailing the inquiry and asking for assistance.
3. We will wait 24 hours for a response. To respond to us, the agent needs simply to reply to the email they receive.
4. If we do not receive a response from the agent on how to proceed, we will close out the ticket by providing the customer/member with your regular support channel contact information.

Ticket Submission

If you'd like to submit a ticket to us at a time when you don't have access to the PFM, please follow these steps:

1. Email support@geezeo.com with your inquiry.
2. Be sure to include the customer/member PCID and/or their registered email address. The PCID (partner customer ID#) is a unique identifier that we are sent for each customer/member. If you don't know it, this information can be found in your monthly usage reports under column G.
3. Give us a detailed description of the problem encountered; step-by-step instructions to replicate, if possible.
4. Send any screenshots/error codes, if applicable.
5. Tell us what internet browser & version number was used to reproduce the error, especially if there is a display or formatting issue with the PFM.

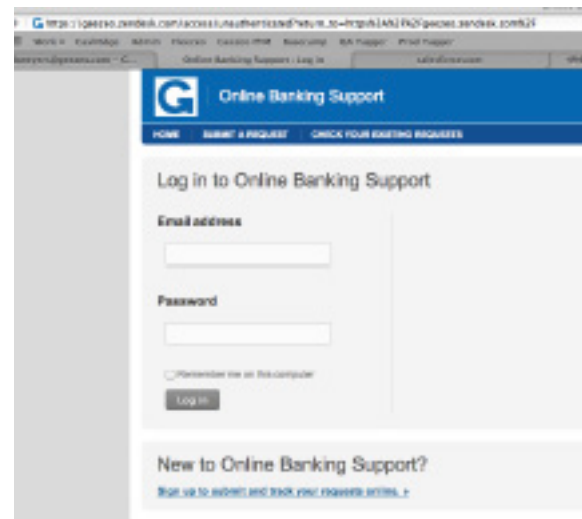
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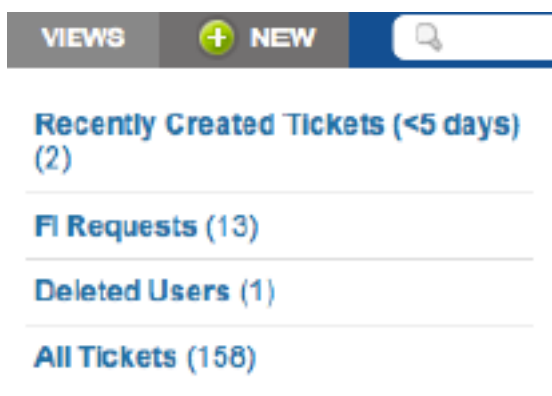
Logging into Zendesk

1. Go to <https://geezeo.zendesk.com>.
2. Use the support email address you provided to sign in.
3. Your password is set up upon receiving the verification email at this address.
4. If you have trouble logging in or have any further questions regarding Geezeo support, please contact one of our Support Managers —
Erin Stevens esteven@geezeo.com
or Erica Gee egee@geezeo.com.



Viewing Tickets

1. Hover over the 'Views' button and select the applicable view for the information you are interested in. (e.g. select 'FI Requests' to see all your customer/member requests for new institutions).
2. Click on a ticket to view the details. Current details for the ticket are listed at the top, with the latest activity displayed in the box below. You can see all comments made on this ticket by scrolling down below the description box.



ID	Subject	Description	Reported	Solved	Assignee	Status
1001	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1002	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1003	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1004	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1005	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1006	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1007	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1008	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1009	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1010	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1011	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1012	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1013	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1014	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1015	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1016	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1017	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1018	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1019	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed
1020	Failed to connect to the database	...	July 11, 2018	July 11, 2018	SupportTeam	Closed

Ticket Status

- New:** Ticket is recently created and has yet to be handled by Geezeo support.
- Open:** Currently being handled by Geezeo or waiting for more information from an outside source (e.g. CashEdge, our aggregation provider).
- Pending:** Waiting for more information from the customer/member to continue troubleshooting.
- Solved:** The issue has been resolved by Geezeo. Customer/member has been notified and can re-open the ticket if there are any further concerns.
- Closed:** Ticket has been marked 'solved' for thirty or more days. No further edits can be made.

Assignee

This is the Geezeo employee who is currently working on the ticket.

Adding Comments

A green chat bubble next to a message indicates this message is public and can be seen by the requester of the ticket and the ticket assignee.

A grey chat bubble indicates that the message is private between Geezeo support and/or your support team. You are not able to create public comments in Zendesk; you can only use our system to communicate directly with the Geezeo Support Team.

Querying using Zendesk

1. Click on 'Views' in the main grey menu bar.
2. In the right column, find the 'Browse' table and click 'Tickets by properties'.
3. Use an infinite number of conditions to find specific tickets and Click 'Browse!'



The screenshot shows the 'Browse tickets' interface in Zendesk. It features a search filter configuration area with two sections. The first section is titled 'Meet all of the following conditions:' and contains a dropdown menu with the text '-- Click to select condition. --' and a red minus icon. Below this is an 'Add condition' button with a green plus icon. The second section is titled 'Meet any of the following conditions:' and also contains a dropdown menu with the text '-- Click to select condition. --' and a red minus icon, followed by an 'Add condition' button with a green plus icon. At the bottom right of the interface is a 'Browse!' button.

Exporting and Aggregating Information

You can export your information for use in a spreadsheet program by clicking the 'csv' link to the right of the name heading of any view. This will allow you to sort and manipulate your tickets as you see fit.

Determining Resolution Times

To find the resolution times on your tickets, we recommend exporting them to .CSV format (instructions above) from a custom view that contains the 'requested date' and 'solved date' for the desired data set. Please follow these instructions.

1. Follow the instructions under Querying using Zendesk.
2. Click the 'Add to my views' link (in the gray box in the right-hand column).
3. Enter a title for the view in the field at the top of the page.
4. Change 'formatting options' to Table.
5. Drag the 'Solved Date' box under the 'Request Date' box in the column on the right to make sure it is included in the table and click 'Add View'.
6. Click the 'csv' link above the yellow table header. Download the file as prompted by your browser and open it in your spreadsheet program.
7. Create a new column after the 'Solved Date' column and label it 'Resolution Time'.
8. In the first cell below, enter '=[Solved Date] - [Request Date]' (i.e. =G2-F2).
9. Drag this cell down by its lower right-hand corner to apply the formula to all the tickets in the spreadsheet.
10. To get the average resolution time, run the AVERAGE function against the column of resolution times.

If you need any help,
contact your Client Success Manager

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or

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