

M360 Cloud Edition Product Support Guidelines

1. DEFINITIONS

“**Ancillary System**” is a system external to the Core Processor System that Customer uses to run its operations.

“**Core Processor System**” is a system that processes daily transactions and posts updates to accounts and other financial records. Core systems typically include deposit, loan, and credit processing capabilities, with interfaces to general ledger systems and reporting tools.

“**Documentation**” means any specifications, user guides, and/or technical documents accessible through the M360 CE Service “Help” system.

“**Incident**” means a reproducible error or problem that prevents M360 CE Service from operating in accordance with its Documentation and the M360 CE contractual agreement.

“**M360 CE**” refers to the M360 Cloud Edition service.

“**Product Support Team**” is comprised of Trellance employees who provide responses and resolutions to Incidents.

“**Production**” means the “live” Service environment where M360 CE is available to Customer.

“**Services**” is the provision of M360 CE and the support services under this Support Policy.

“**Support Contact(s)**” is Customer’s technical employee(s) who will serve as the Product Support Team’s primary contact(s).

“**Workaround**” is a series of instructions, procedural steps, or usage clarifications to avoid an error or circumvent its effects. A workaround does not involve issuance of new programming code.

2. TRELANCE M360 CE SUPPORT

2.1. Support Hours are defined as follows:

- **Business Hours** are 8 AM – 8 PM EST Monday – Friday, with the exclusion of federal holidays.
- **Business After Hours** are 8 PM – 8 AM EST Monday – Friday, with the exclusion of federal holidays.
- **Non-Business Hours** are weekends and federal holidays.

2.2. STANDARD SUPPORT

Engaging Product Support – Product Support may be engaged through the Trellance support website <https://support.trellance.com/> click "Customer Login" and then click “Submitting a request.”

Standard Support includes an unlimited number of cases and one (1) primary Customer Support Contact.

Response Guidelines				
Severity Level	Urgent	High	Normal	Low
Response Time – Business Hours	4 Hours	6 Hours	24 Hours	48 Hours
Response Time – Business After Hours	Next Business Day	Next Business Day	Next Business Day	Next Business Day

Response Time – Non-Business Hours	Next Business Day	Next Business Day	Next Business Day	Next Business Day
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2.3. PREMIUM Support Tier

Engaging Product Support - Product support may be engaged through the following channels:

- Website: <https://support.trellance.com/> and click “Submitting a request”
- Email: support@trellance.com
- Phone: (888) 507-2206

Premium Support includes an unlimited number of cases and three (3) primary Customer Support Contacts.

Response Guidelines				
Severity Level	Urgent	High	Normal	Low
Response Time – Business Hours	2 Hours	4 Hours	12 Hours	48 Hours
Response Time – Business After Hours	Email: 4 Hours	Email: 6 Hours	Next Business Day	Next Business Day
Response Time – Non-Business Hours	Next Business Day	Next Business Day	Next Business Day	Next Business Day

2.4. Severity Level Descriptions

Severity Level	Description
Urgent	<p>System down/Services unavailable condition that severely impacts the Production environment involving:</p> <ul style="list-style-type: none"> • Services outage or failure that severely impacts Customer’s business operations. • Widespread unavailability of business-critical features or functions of the Services that causes major disruption to Customer’s ongoing business operations. • Serious performance degradation that significantly impacts a large group of Customer’s end users. • An issue for which there is no immediate Workaround available.
High	<p>A high impact business condition where:</p> <ul style="list-style-type: none"> • Services are available but functionality is significantly restricted causing disruption to Customer’s normal business operations. • M360 CE is not working, negatively impacting Customer’s business productivity. • There is no Workaround available.

Normal	M360 CE is generally usable, but there is an issue causing minor operational challenge(s). Issues may be isolated to specific end users and may have little impact on the availability/functionality of the Services.
Low	A minor defect that has no impact on the Services or a general inquiry on the functionality of the Services, including “how to” or informational queries.

3. SOURCE DATA SYSTEM UPGRADES

- 3.1. **Core Processor System and Ancillary Systems Software Version** – The M360 CE Service is enhanced, as needed, to stay up to date with the latest version of the M360 CE supported Core Processing Systems and Ancillary Systems.
- 3.2. **Core Processor System or Ancillary System Software Upgrade Notices**– Customer agrees to notify Trellance within five (5) Business Days upon receipt of a software upgrade notice from a data source vendor connected to Customer’s M360 CE installation. Customer will open a support ticket with Trellance and provide all available information about the upgrade.
- 3.3. **Core Processor System or Ancillary System Software Upgrade** - Core and Ancillary System software upgrades have the potential to disrupt M360 CE operations. Customer agrees to (i) provide notice to Trellance as required in section 3.2 and (ii) collaborate with Trellance on planning, preparing, and scheduling the upgrade. Failure to provide notice and/or joint planning may result in M360 CE downtime. Trellance is not responsible for downtime, disruption, or degradation of the M360 CE Services due to lack of notification or upgrade planning.

4. CUSTOMER RESPONSIBILITIES

- 4.1. Customer is not permitted to make any changes to the M360 CE Services.
- 4.2. To receive Product Support, requests must contain all pertinent information and a Customer Support Contact familiar with Customer’s environment or the Incident to be solved. Customer must make commercially reasonable efforts to communicate and cooperate with Trellance to verify the existence of the Incident and provide information about the conditions under which the Incident may be duplicated.
- 4.3. For Urgent Severity Incidents, Customer’s Support Contact(s) must be available via telephone and/or online to provide Trellance with relevant requested information, data gathering, and testing necessary to bring the Incident to resolution.
- 4.4. Customer must notify Trellance Support whenever there are Support Contact changes by logging a ticket with Trellance Product Support.

5. ADDITIONAL PRODUCT SUPPORT TERMS

- 5.1. Trellance shall not be obligated to provide technical support for:
 - Any third-party software not provided by Trellance,
 - M360 CE Service that is not used by Customer in accordance with the Documentation, or
 - Configuration modifications to M360 CE Service, customer-generated scripts, custom reports, or other content.
- 5.2 Customer is only eligible to receive product support if Customer is current on all applicable fees and charges due and payable to Trellance and is otherwise not in breach of Customer’s applicable contractual obligations to Trellance.

- 5.3 Trellance will use commercially reasonable efforts to meet the Response Guidelines but will have no liability for failure to do so.
- 5.4 Customer's Support Contacts must be fully trained in the use of M360 CE.
- 5.5 Trellance reserves the right to use offshore personnel for Trellance product support.
- 5.6 **"M360 CE Databox"** refers to a Trellance provided hardware appliance that in some instances may be installed at Customer's premises that connects to Customer's Core Processor System and Ancillary System(s) to extract data and transfer it securely to the M360 CE Service. If Customer requires an M360 CE Databox as part of its configuration, Customer agrees to grant access to Trellance or Trellance's designated third party vendor personnel to Customer's data center environment hosting the M360 CE Databox hardware appliance for the purposes of installation, troubleshooting, repairs or uninstall. In addition, the Product Support Team will require remote access to Customer's network and hardware infrastructure hosting the Trellance M360 CE Databox hardware appliance to provide product support, issue troubleshooting, and software updates.
- 5.7 Trellance may use resolutions discovered while providing support services to Customer to provide similar services to other M360 CE customers. Customer's confidential information will not be shared.
- 5.8 Trellance reserves the right to revise these Product Support guidelines upon thirty (30) days' notice.

Dated: December 10, 2020