Backstop

Support Process: FAQ

Support is here to help and we invite you to work with our team. The enclosed includes commonly asked questions with answers on ways we can best service you and help you get things done as efficiently as possible.

When would I contact Support?

Contact Support once your organization has completed implementation and you would like assistance with the following:

- features in the Backstop Suite
- calculation inquiries
- you are experiencing an issue or would like to suggest an improvement request

How will Support assist me?

- When you call Support, we will always ask for your name, email address, and company name to verify your user credentials against our records. We do this to protect your privacy and the confidentiality of your data.*
- We strive to assist with each inquiry as quickly and efficiently as possible; to do so we may ask (what seems like) a lot of questions to reach a resolution in a timely manner. This is a critical part of helping to best understand your end goal, consistently reproduce an issue, accurately provide details to our Product and Development teams, and more.
- When on a call, Support may ask to do a shared screen Teams meeting, so that we can best see your workflow.
- Each time you contact Support with a new inquiry, we create a ticket. If you would like to follow-up on a specific inquiry, please provide the associated ticket number *(in {curly brackets} within the subject of a Support email)*.
- If you have been corresponding with a rep regarding a specific inquiry, and you would like to connect on a *different* inquiry, please send a new, separate email, so we are able to track new questions efficiently and assist you as quickly as possible.
- If you have multiple inquires you would like to work on with Support, we suggest first emailing that list us so that we can best internally investigate and respond with details promptly.
- If you are looking for training on Backstop (e.g. getting familiar with the basics or doing a deep dive into a specific area or process in Backstop or Backstop Portal), Support can connect you with a subject matter expert on our Client Experience team to schedule a session. See the "Training" section of this document for more details.

*Who can contact Support?

Any active user or authorized contact is welcome to work with Support (note that this does not include Email Only users, unless they are listed as an authorized contact). Local Administrators at your organization manage these valid user accounts via System Tools (System Users and Manage Authorized Contacts). This authorization is necessary because, as a Service Provider that holds Personal Information (PI) as defined under 201 CMR 17, the Massachusetts data protection law, we are obligated to enforce our clients' security procedures for access to the PI with which we have been entrusted. We cannot risk inadvertently revealing, confirming or denying confidential information contained in a Backstop Account. Therefore, we require individuals who wish to open a support ticket to be in possession of a valid user account.

When and how can I connect with Support?

Support reps are available via phone and email Sunday, 3:00 pm CT through Friday, 7:00 pm CT. During that timeframe, our target response time is one business day. These hours are in place to support a range of time zones.

When are Backstop offices closed outside of standard hours?

To best align with our clients' schedules, Backstop-US follows NYSE scheduled holidays and Backstop-UK follows UK Bank Holidays. See the Support Holiday Schedule in the In-App Help. During holidays, Backstop Support operates with a smaller team and monitors email and voicemail in case you are unable to access your Backstop instance or you are locked out of your account. For these urgent issues, please leave a voice message or send a new email .