

Let's Get Started!

Please answer a few questions as we check through possible causes.

Is the problem widespread or limited to you?

- **Check with the Bank Admin on the account; usually your Compliance Officer – are you the only one having these issues? – Survey all Bank Users first!**
- **This is important – Are you new staff?** Often your IT may simply be unaware you need access to C/A and haven't set your office system up to connect with us.
- Check your browser – Yes, check your browser! As of June 2019, Internet Explorer 11 will no longer work with parts of our system - especially with C/A's chat feature.
- Has your IT department or group done a security update or patch? Did they shut down the system after hours? Have they tightened the firewall?
- **Know the answers to these questions before calling us - it's very important!**

NOTES ON CLEARING CACHES:

There can be problems when clearing the cache / clearing browsing data, especially if your bank already has an automated cookie/cache deletion program running. **Check with your IT dept. before doing this** to insure you haven't added a layer of complexity to the proceedings.

- Restart your computer and log back in
- Open C/A's website in Chrome – **Chrome is recommended by Zendesk.**
- Do you have known connectivity issues? Do these issues happen when you are busiest?
- Are you hardwired to your network or on Wifi? Hardwire is best as chat and connection to chat is based on a firm connection.

WHITELISTING:

Make sure your IT Department has whitelisted these and checked the exceptions, etc.

- Whitelist *zopim.com
- Whitelist *zopim.io
- Whitelist *zendesk.com
- Whitelist *development@mightycitizen.com
- Whitelist *info@compliancealliance.com
- Whitelist *no-reply@compliancealliance.com
- Whitelist *pstmrk.it
- Whitelist *webex.com
- Whitelist *messenger@webex.com
- Whitelist *support@compliancealliance.com
- Whitelist *bankersalliance.org
- Zendesk Chat uses ports 80 and 443 - set to be open on all firewalls – (standard).
- Zendesk relies on Amazon Web Services - some banks blacklist Amazon IPs and this could negatively impact chat.
- Is Zopim an exception for your popup-blocker?

Many times everything improves, including the C/A videos, by simply redoing these settings!

BROWSERS AND FIREWALLS

We often see security upgrades, system maintenance, popup blockers, and other background firewall nets being set and re-setting defaults that need to be changed back again. Security is high for everyone these days!

- Are you using any anti-virus software that could be blocking access? Can this be temporarily disabled?
- Popup blockers always get thrown under the bus, but there is good reason for it! Check for these and ensure they are not problematic.
- Are you using any browser extensions? Are these causing problems?
- **What browser and version are you running?** We do our best to keep up with browser updates, but can only guarantee a few versions. As of June 2019, Zendesk (C/A's chat) will only support Chrome, Safari, Firefox and Edge.

CHECK THE CONNECTIVITY

As part of these basic checks, have your IT Group run a check on your connectivity.

- Known issues like slow, sluggish, spotty or overloaded internet connections can play havoc with applications that rely on specific speeds and relay times to work properly. *Chat is one of these.* It needs to acknowledge you are "there" in order to remain connected. If you drop off, the chat will end.
- If connectivity slows, lags, or is intermittent, the chat button or the video server may disappear or flicker as your connection cuts in and out. (we have seen this with numerous accounts during peak office hours when everyone is on the same server or using the same internet connections).
- We continually make adjustments on our end, yet it's worth checking what your download and upload speeds are, and figure out if you are getting consistent internet connection. Chats being interrupted and chat transcripts going undelivered are almost always at the root a connectivity issue at the member-level. Once this is resolved, the chats are back! Need a temporary workaround? Send your questions to hotline@compliancealliance.com or call (888) 353-3933 and speak to Hotline.
- **Issues with chat transcripts not delivering are most often not a connection problem.** *The chat transcript won't "send" until the Bank User closes and ends the chat. The transcripts are also sending from an unfamiliar email source. This is why "missing" chats are sometimes found to be delivered minutes or hours later. You may even need to check your spam filter – work with your IT group to make this delivery more efficient on your end.*

CAN-SPAM regulations mean unresponsive emails are blocked quicker than ever!

HAVE YOUR IT GUYS GO THROUGH THIS CHECKLIST FRONT TO BACK..,

Seriously, it happens often enough that we're putting it in writing here—make absolutely sure your IT group has worked through every aspect of this HELPsheet. Without doing that, we can't be sure where the problem lies. If they are unsure of how to proceed, have them call out Membership Development Team at (888) 353-3933.

STILL HAVING PROBLEMS? — YOUR BANK ADMIN SHOULD REACH OUT TO US

In a given year, we resolve many member issues with chats, videos, downloading tools, and more. In almost every case, there is something new on the member side that blocks the process or connection from completing it's proper loading or timing out once the process starts. Investigating your end first helps us better relate the problem to our vendor, if the issue is truly escalating. Meeting your challenge in this way kickstarts our problemsolving and helps us be more efficient. Having your Bank Admin reach out to us ensures we don't waste time verifying who you are and whether the rest of the bank and staff are experiencing the same issues.

LAST NOTES:

If your bank or financial institution's Compliance Alliance account doesn't have a designated Bank Admin for your account – you're operating at a disadvantage. Unlimited hotline requests and Open Access to tools and products for all staff are just two reasons why maintaining your open connection to C/A pays dividends; vendor management requirements for examiners require good record keeping, and a firm grasp on who has access and who doesn't. We can guide your bank through this process – just get in touch!

Please don't hesitate to call us at (888) 353-3933 or submit a new troubleshooting ticket to: info@compliancealliance.com

Remember – the more info you can provide, the less time we need to investigate the nature of the problem:

- Screenshot what you see using PrintScreen for Microsoft / Command–Shift-3 for Mac
- Copy and Paste into an email or ticket the error message you see.
- Grab the URL or Page Address of the page giving you trouble.
- For Tools or Videos, make sure we know which one exactly - grab the URL.

Very sincerely yours,

C/A Marketing – you can reach us at info@compliancealliance.com

Document your issue as much as you can and we can get to solving quicker!