

Service Description

PCI Sponsor View Compliance Validation Service

Reference service: Merchant Compliance Validation & Security Service

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PCI Sponsor View Compliance Validation Service

SecureTrust™ is a division of Trustwave Holdings, Inc. SecureTrust.

“Partner” refers to program sponsor, client of

“Merchant” refers to end-user of compliance validation service.

Refer to your account manager or master service agreement for details on any custom offerings.

SERVICE DESCRIPTION

PCI Manager provides an industry-leading compliance validation service that helps merchants of all sizes achieve and maintain compliance. It simplifies the self-assessment process for merchants by presenting a pathway customized to their business type. SecureTrust’s intelligent PCI Wizard walks the merchant step-by-step through the entire process of validating compliance, including the ability to complete the PCI Self-Assessment Questionnaire (SAQ) that’s most appropriate for their business type, and generate their certification documents. Vulnerability scanning by a PCI Approved Scanning Vendor (ASV) may be included and integrated into the overall merchant experience. Program administrators also receive access to PCI Sponsor View, powered by PCI Manager. PCI Sponsor View provides the ability to track and manage the merchant portfolio, query and download reports and view merchant details.

Based on the contracted tier, the solution may include additional products and services like dedicated program management, marketing resources, strategic planning guidance, security tools and an integrated cloud platform.

BASE SERVICE FEATURES

SecureTrust’s PCI Sponsor View service includes a combination of technology products and managed services, including but not limited to the following features. Unless noted, English is the default support language.

Technology

TrustKeeper® cloud-based portal

PCI Manager Merchant View with Wizard and Self-Assessment Questionnaire (SAQ): PCI Manager Merchant View allow merchants to work on their compliance validation by completing the right PCI self-assessment questionnaire (SAQ). The included smart PCI Wizard makes the process easier, guiding the merchant step-by-step by asking simpler profiling questions and automatically determining and completing the right SAQ type, where applicable.

- **SAQ Express Renewal:** Annual re-assessments are made easier for eligible merchants by providing an automatically generated new SAQ based on previously compliant form.
- **Vulnerability Scan Management:** For those merchants required to perform external vulnerability scanning of their card-processing environment, the scan engine is integrated into the process. An easy-to-use interface facilitates scan set up, maintenance, scan results and dispute management. Trustwave is a PCI-listed Approved Scanning Vendor (ASV).
- **Security Policy Advisor:** All users have access to a library of security policy templates designed to comply with PCI DSS. This feature helps merchants certify specific PCI requirements around documented procedures, including those related to Requirement 12.x. Available in supported languages.
- **Security Awareness Training:** PCI Manager’s integrated self-guided educational courses break down each step of the compliance process and help merchants meet PCI compliance requirements related to

education and training. Security Awareness Training consists of online modules that are available for a variety of businesses and employee roles. Available in English only by default.

- **Trusted Commerce Seal and Certification:** Compliant merchants may display the Trusted Commerce site seal on their website to reflect their validation against PCI DSS. This integrated seal may also confirm the merchant's digital server certificate (SSL), if using SecureTrust certificates. Printable PDFs of the Certificate of Compliance and the PCI Attestation of Compliance (AoC) are also available.

PCI Manager Sponsor View (for Program Administrators)

PCI Manager Sponsor View, powered by PCI Manager, is the program administrators' tool to see an aggregate snapshot of their merchant compliance program, providing information on merchant milestones, such as progress made toward the program's objectives and compliance status by merchant type. Sponsor View provides the ability to track and drill into account specifics, like PCI details and compliance history, as well as filter and sort groups of accounts to facilitate reporting and other purposes. Role-based access is supported to serve the needs of different administrator user types, including read-only and managers. Standard pre-formatted program reports are automatically generated every month and made available for download through the cloud platform, providing current compliance insights and other valuable metrics. By default, PCI Manager Sponsor View includes:

- Cloud-based administrator's dashboard powered by PCI Manager.
- Role-based access with six (6) user roles included.
- Ability to track and manage portfolio including bulk operations, view account details, manage administrator users, view and download portfolio reports, and view support issues (if applicable).
- Set of account service email notification templates for program.
- Included up to three (3) PCI sponsor groupings total

Services

Marketing services are included with SecureTrust's Merchant Compliance Validation & Security service including:

Automated Account Service Email Templates: Powered by PCI Manager, a library of service email notification templates is included by default. These service emails include account registration, SAQ submission, expiry and vulnerability scanning notifications.

Co-branded Splash/Landing Page (optional): Powered by PCI Manager, SecureTrust may host a co-branded landing page that guides merchants towards registration.

- Client may use their logo on this page to help users identify the program and register.

DELIVERY AND OPERATIONS

Program/Project Management: SecureTrust will provide guidance to support the launch of the program. A SecureTrust resource will be assigned to the program to help ensure its success in meeting defined program goals and objectives. Responsibilities may include but are not limited to pre-launch activities, coordination between organizations and teams, resource allocation and escalations, establishing standard operations procedures and ongoing program monitoring. Deliverables includes establishing a standard operating procedure document (also known as Operations Guide) that defines mutually-agreed roles and responsibilities for the Partner and SecureTrust. Service available in English only by default.

- 1) Scope of Program/Project Manager service ends upon successful launch of program, after which program changes are directed to the appropriate Customer Support team(s).

Administrators Success Training: Customer success resources dedicated to help ensure program success. Service provided to the Partner administrators for product training, launch strategy planning and guidance, best practices for maintaining a compliance program and PCI DSS training, if needed. Conducted over virtual meetings, recordings and published guides. Available in English only by default.

- 1) Limit to two (2) sessions per year, dedicated to “train-the-trainer”.

Operations and Support Services

Telephone and Email Customer Support: The support team consists of support analysts, team leaders, supervisors, managers, quality assurance and a work force management team to ensure that correct, consistent and timely support is provided to both our merchants and Partners. Locations¹ of global SOC and Support Centers include but are not limited to Chicago, Denver, Manila, and Warsaw. The operations management team are active participants in ongoing Partner calls and are engaged to help ensure merchant needs are met and issues are solved quickly. Generally, the support organization handles all program and PCI questions except Partner-established deadlines, fees, fines and Partner billing questions. Standard customer support is accessed by telephone and/or email. Standard customer support categories include the following:

- General questions
- PCI compliance and reporting process
- Wizard & SAQ support
- Vulnerability scan support
- Portal navigation support
- Merchant boarding questions
- PCI compliance and reporting escalations
- Portal support escalations
- Endpoint Protection support escalations
- Vulnerability scan finding disputes

Standard support service level:

- Telephone (English): 24 hours / 7 days per week.
- Email (English): 24 hours / 7 days per week.

¹ SecureTrust reserves the right to appropriately utilize its resources as needed in its sole judgment.

Localization

Summary of the general language capabilities based on key areas of the program, including the technology product and the services:

- PCI Manager Merchant View: Default PCI Language Set²
- PCI Manager Merchant Standard Account Service Email Templates: Default PCI Language Set
- Endpoint Protection software: Endpoint Language Set³
- Security Awareness Training online courses (embedded): Default PCI SAE Language Set⁴
- Co-branded Splash/Landing Page: English⁵
- PCI Manager Sponsor View: English
- PCI Manager Vulnerability Scan Report and Disputes: English
- PCI Manager Merchant Add-on Emails (optional): English
- Customer Support: *See Customer Support section*

² “**Default PCI Language Set**” is defined as:

- English (US), English (UK), Spanish, French, French (Canada), German, Polish, Swedish, Chinese (Traditional), Chinese (Simplified), Japanese, Portuguese, Dutch, Norwegian, Danish, Finnish, Icelandic. – 17 total languages. *SecureTrust reserves the right to make changes without notification.*

³ “**Default Endpoint Language Set**” is defined as:

- English (US), Spanish, French, French (Canada), German, Polish, Greek, Japanese, Korean. – 9 total languages. *SecureTrust reserves the right to make changes without notification.*

⁴ “**Default PCI SAE Language Set**” is defined as:

- English (US), Spanish, French – 3 total languages. *SecureTrust reserves the right to make changes without notification.*

⁵ Other languages must submit change request, additional fee may apply. Terms and conditions apply.