



# Client360 Power Hour

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October 2024

# Client360 - the Fiserv Service Management Platform

End users can use self-service resources to discover solutions.

- Knowledge Base
- Built-in artificial intelligence (AI)
- Client360 Resources
- Inquiry creation for non-urgent issues

# Objectives



## GOAL 01

Navigate in Client360.



## GOAL 02

Access Self-Service Resources.



## GOAL 03

Work an Inquiry.



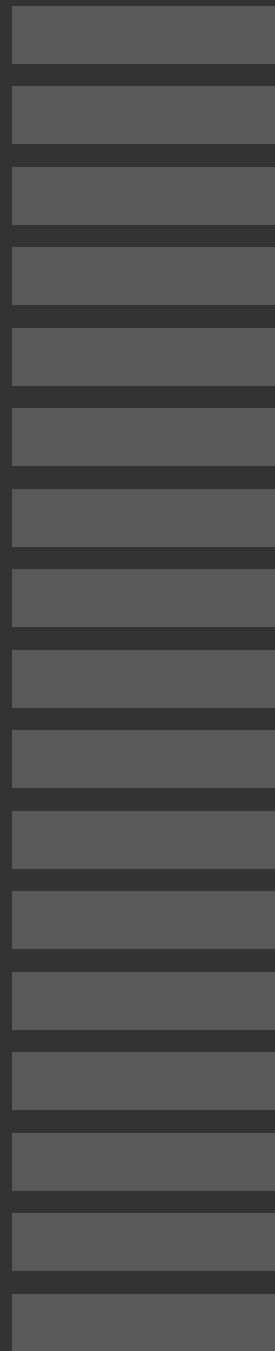
## GOAL 04

Manage User Settings.



## GOAL 05

Review Helpful Resources.



# Navigate in Client360



- Client360 Homepage
- Quick Access Menu

# Client360 | Homepage Highlights



The screenshot shows the Client360 homepage for a demo client, Fiserv Inc. The interface includes a top navigation bar with 'Client360', 'Fiserv Inc (Demo Client)', and buttons for 'Inquiries' and 'Client360 Help'. Below this is a search bar with the text 'Search here to find information and troubleshooting tips' and a subtext 'Begin searching for knowledge, technical documentation or SIG answers'. The main content area is divided into several sections: 'Service Interruptions (beta)' with a notification for 'Product: SecureNow - Notice of Multiple App...' dated SEP 19, 2024; 'Featured (beta)' with three featured items including 'Card Risk Office - Key Resources', 'Business Process Manager - Release Notes and Upgrade Instructions: Form...', and 'Client360 Featured Training | Register for Upcoming Sessions'; 'Publications' with three items including 'Prologue Webinar - DNA General Ledger and Prologue Processing (PUB0051199)', 'Fiserv Oversight Portfolio (Compliance Package) (PUB0016113)', and 'Wisdom™ Suite Release 2024.3 (PUB0051049)'; and 'Inquiries' at the bottom with a 'New Inquiry' link and a 'View All' link. The 'Inquiries' section shows a summary of inquiry counts: 0 PENDING ACTION, 1 PENDING CLOSE, 1 OPEN, 1 UPDATED, 12 RECENTLY CLOSED, and 64 TOTAL. A vertical navigation menu is visible on the right side of the page.

**Inquiries:** a dedicated page for management of inquiries

**Inquiries Dashboard:** inquiry counts by state and activity

**Client360 Help:** help files, user and admin guides and training opportunities specific to Client360

**Search:** knowledge articles, videos, SIG content and launch to the technical documentation portal

**Service Interruptions:** Notifications regarding any disruptions affecting your product's service, including outages.

**Featured:** KAs raised to you by Fiserv, with important and time sensitive information related to your products

**Publications:** Product-specific communications and compliance information you have subscribed to.

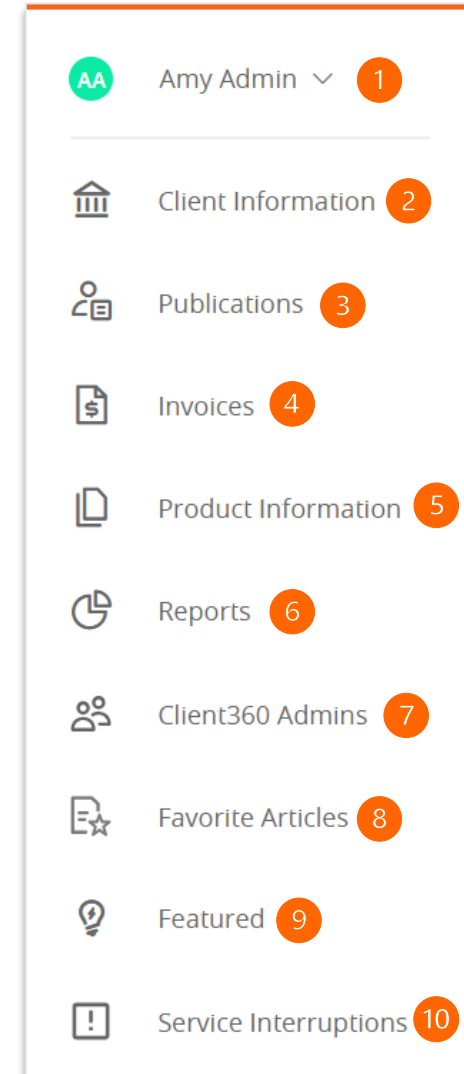
**Quick Access Menu:** Expand and collapse the navigation point for all portal features, excluding Inquiries.

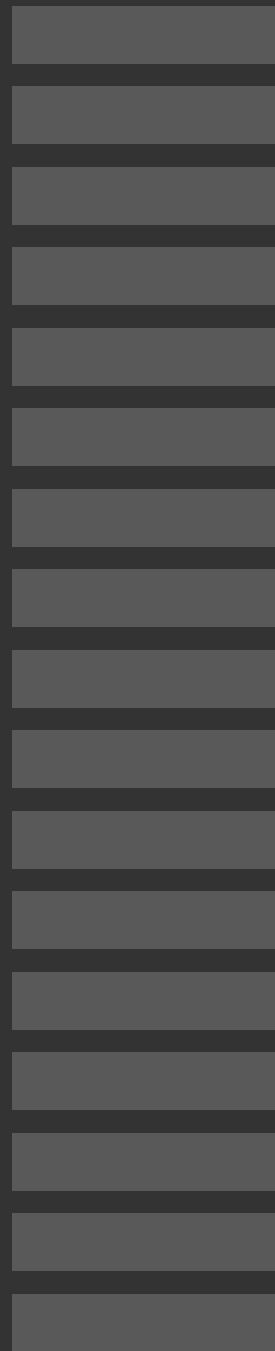
# Client360 | Quick Access Menu



## Descriptions:

- 1 Personal Profile: Logout, Profile Settings, Admin Portal (Admin Only)
- 2 Client Information
- 3 Publications: Searchable list of News/Announcements, and Product Communications
- 4 Invoices: Billing information
- 5 Product Information: Fiserv products in use by your organization
- 6 Reports: Downloadable Inquiry Reports (All Users) and Admin Reports (Admin Only)
- 7 Client360 Admins: List of your Client360 Administrators
- 8 Favorite Articles: List of your bookmarked Knowledge Articles and SIG Content
- 9 Featured: Searchable list of latest Knowledge Articles, Release Notes, and Training
- 10 Service Interruptions (Beta)





# Access Self-Service Resources



- The Knowledge Base
- Formatting Your Searches
- Filtering Search Results

# Client360 | Knowledge Base



Client360 Fiserv Coral Springs Inquiries Client360 Help

Search here to find information and troubleshooting tips

Begin searching for knowledge, technical documentation or SIG answers

**Featured (beta)** [View All](#)

- DNA - Operations: Most Useful Resour...  
APR 19, 2024 KB0214357
- Premier - Release Notes and Upgrade...  
APR 16, 2024 KB0220275
- Premier - Software Downloads and Upg...  
APR 15, 2024 KB0153881

**Publications** [View All](#)


- Monthly Compliance News™ Publications...  
APR 10, 2024 PUB0002330
- Compliance Package - Deposit Solutions Se...  
MAR 25, 2024 PUB0002172
- Card Risk Office Client Webinar - Recorded...  
MAR 15, 2024 PUB0042374

## Client360 Knowledge Base

Access product related information, resources, and support 24/7

### Browse the Knowledge Base for:

- Knowledge Articles
- Video tutorials
- Technical documentation
- SIG questionnaire responses

 The Knowledge Base does not include Publications or Inquiry information.



# Knowledge Articles vs. Technical Documentation: Key Differences



## Knowledge Articles



- Geared towards problem-solving, providing solutions, and answering specific inquiries.
- Short and to the point, focusing on common issues and frequently asked questions.
- Designed for end-users who need quick answers or troubleshooting steps.
- Less structured, part of the knowledge base that users can search through.
- **Examples:** FAQs, troubleshooting steps.



## Technical Documentation

- Provides comprehensive, detailed information about a product, system, or process.
- In-depth and technical, covering all aspects of the product or system.
- Intended for administrators and end-users seeking comprehensive information.
- Highly structured, often organized into sections and chapters for easy navigation.
- **Examples:** User manuals, API documentation, system architecture guides



# Knowledge Base Search Format



## Too Many Search Results?

Include the platform or product to your search terms to return more focused results.

**Product/Platform – Concise Description of Issue/Topic/Feature**

**Reports**

**Client360 – How to run report**



# Why We Format Knowledge Base Searches

## Reports

### SMS/Contextual Messaging: Admin Tool Reporting

Last Modified:  
04/27/2022

Management Console Reports You can view reports for the Contextual Messaging service...

### Reports: Troubleshooting when Reports Are not Generating

Last Modified:  
04/28/2022

The Fiserv Processing System provides you with statistical and managerial reports through three...

### Commonly Used Reports: VISA Reports

Last Modified:  
04/28/2022

SD-066, Validation Exception Detail Report The most commonly used report is the Visa EP-100A/EP-100B,...

### Portico - Reporting Analytics: Recommended Knowledge

Last Modified:  
11/29/2022

Goals Change a month end to a daily query Email reports Error logging into Reporting Analytics...

### Portico - reports for web signature envelopes

Last Modified:  
10/06/2022

Goals Are there any reports available for web signatures Are there reports for DocuSign Are the...

## Client360 – how to run report

### Client360 - How to run a report

Last Modified:  
07/18/2022

Goals Run a report in Client360 Run an admin report in Client360 Run a custom inquiry report i...

### Client360 Admin - How to run an admin report

Last Modified:  
07/18/2022

Goals Run an admin report in Client360 Generate an admin report Export an admin report...

### Client360 - Most Useful Resources

Last Modified:  
12/06/2022

Goals Client360 assistance Using Client360 Resources for Client360 Edit your profile Edit inqui...

### Client360 - Release Notes 15Jan2023

Last Modified:  
04/10/2023

Goals What are the new features and updates to Client360 as of 15-January-2023 Environment...

### Client360 Admin - Run a Report for Multiple Clients

Last Modified:  
09/16/2022

Goals Client360 Admin - Run a Report for Multiple Clients How to run a report for multiple client...



# Knowledge Base Results & Filters

Further refine your Knowledge Base results by applying filters.

- Select on the Content tabs to view specific content.
- Filter by Product Families and Content Type.
- Select **Apply** to set Product and Content filters.
- Choose to view articles in Client360 or in a new tab.

Client360 Fiserv Inc (Demo Client) Inquiries Client360 Help Client360 - How to update your profile & X Q AA

Home > Search Results

### Search Results

Filters [Reset](#) [Apply](#)

Type to search prod Q

**Product Families**

- ATM Solutions
- Biller Solutions
- ClientSupport
- Client360
- Credit and Debit Solutions

**Content Type**

- Knowledge
- Video
- API
- Guide

KNOWLEDGE TECHNICAL DOCUMENTATION SIG

6,906 total results found.

[Client360 - How to update your profile and contact preferences](#) Last Modified: 08/14/2024  
Goals Client360 profile update Client360 preferences How to update your profile Update my Client360...

[Client360 Admin - How to create a new contact](#) Last Modified: 03/24/2024  
Goals Create a new contact in Client360 How to add a new contact Set product preferences for a user...

[Client360 - How to access publications](#)  
Goals How to search for a publication Pub Publication search W...

[Client360 Featured Training | Register for Upcoming Sessions](#) Last Modified: 09/16/2024  
Client360 | Featured Training Training Opportunities: Client360 Service Portal Training At Fiserv, we believ...

Open in Client360  
Open in new tab

# Knowledge Article Elements



Client360 Fiserv Inc (Demo Client) Inquiries Client360 Help client360 how to run a report

Home > Search Results > KB0200846 ★

## Client360 - How to run a report

DATE MODIFIED 03/19/2024 Fiserv External Knowledge Base Client360

Was this information relevant to "client360 how to run a report"?

Attachments

- Reports.PNG 52 KB
- Reports.PNG 52 KB

**Goals**  
Run a report in Client360  
Run a custom inquiry report in Client360  
Client360 - How to run a report

**Environment**  
UI: Client360  
Platform: All  
Product: Client360  
Audience: External

**Resolution**  
Inquiry Reports contain information regarding the Inquiries for the organization. Inquiry Reports can be filtered by Client, Product, Inquiry State, Contact, Assigned To, and Date Range. The reports can be run for the previous three months and exported into XLS or CSV

- ✓ Favorite articles, videos, and SIG responses for easy access.
- ✓ Vote thumbs up or down to train the AI on relevance.
- ✓ Articles include goals, environmental facts, and resolutions.
- ✓ Provide feedback at the bottom of the page.

Was this article helpful?

### Give feedback

Add Feedback

2000 characters left

# Technical Documentation



Client360 Fiserv Inc (Demo Client) Inquiries Client360 Help CardValet - mConsole

Home > Search Results

Search Results

Filters Reset Apply

KNOWLEDGE TECHNICAL DOCUMENTATION SIG

105 total results found.

TECHNICAL DOCUMENTATION - PAYMENTS

104 results found.

CardValet - Accessing mConsole Last Modified: 05/03/2022

Close Accessing mConsole To work with the application, you must have access to Client Central SM and the

CardValet - mConsole Last Modified: 05/03/2022

Close mConsole Management Console (mConsole) provides real-time information about the cardholders...

CardValet - Resetting Registration State Last Modified: 05/03/2022

Close Resetting Registration State You can use this tab to reset a card or user state locked during the use of...

Explore and preview Technical Documentation within the Client360 Knowledge Base.

fiserv. Library Watchlist My Topics Amy\_adm N2022

## CardValet App

Filter This publication x Search Documentation

Home > CardValet App > ... > Accessing mConsole

### Accessing mConsole

Document Uploaded On Mar 25, 2022 | 1 minute read |

Payments Digital Solutions CardValet + 2 >

#### TABLE OF CONTENTS

- Introduction
- Implementation >
- CardFree Cash via CardValet >
- Push Provisioning >

#### Accessing mConsole


To work with the application, you must have access to Client Central<sup>SM</sup> and the correct permissions. Security tokens are required to access Client Central. Your Primary Security Administrator (PSA) manages user records and requests hard or soft tokens; contact your PSA for additional information.

In This Topic








- Accessing mConsole

- ✓ Apply Content Type Filters or select the Technical Documentation tab.
- ✓ Preview within the Results List.
- ✓ View full product documentation at [documentation.fiserv.com](https://documentation.fiserv.com).

## Search Results

Filters [Reset](#) [Apply](#)Type to search products 

## Product Families

- ClientSupport 
- Client360
- Credit and Debit Solutions 
- CUnify (592) 
- CUSA 
- DataSafe (573) 
- Deposit Solutions (2) 
- Digital Payment 

KNOWLEDGE

TECHNICAL DOCUMENTATION

SIG

105 total results found.

## TECHNICAL DOCUMENTATION - PAYMENTS

104 results found.

**CardValet - Accessing mConsole**Last Modified:  
05/03/2022

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**CardValet - Resetting Registration State**Last Modified:  
05/03/2022

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# CardValet App

## TABLE OF CONTENTS

Introduction

Implementation >

CardFree Cash via CardValet >

Push Provisioning >

Filter



This publication ×

Search Documentation



[Home](#) > [CardValet App](#) > ... > [Accessing mConsole](#)

## Accessing mConsole

Document Uploaded On **Mar 25, 2022** | ⌚ 1 minute read |

Payments

Digital Solutions

CardValet

+ 2 >



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#### In This Topic

Accessing mConsole



# Welcome to Fiserv Technical Documentation

Find documentation, videos, and walkthroughs to help you succeed

Filter ▼  ⓘ 🔍



## Resources

Helpful resources for Client360 and Xchange

[Client360 - Recorded Training](#)

[Client360 - Resources](#)

[Xchange - eLearning courses for Fiserv products](#)



## Find Information Faster

Multiple ways to search

[Use the Search Documentation bar](#)

[Find specific documents by title](#)

[Use filters](#)

[Set search preferences](#)



## Tips & Quick Tutorials

Get started with the basics

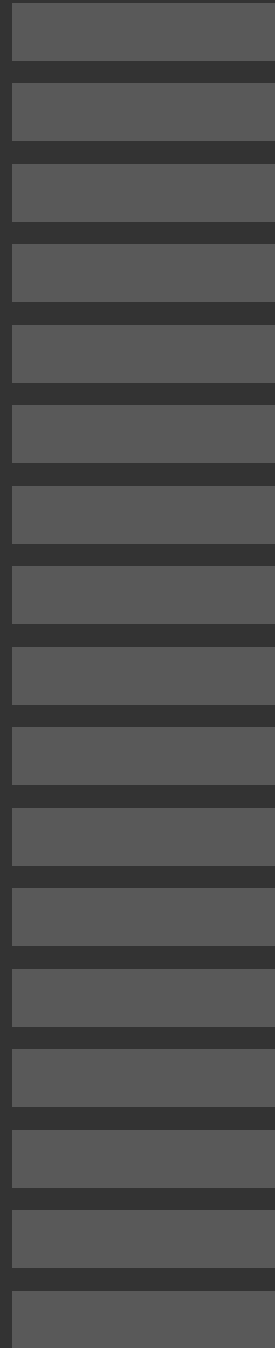
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# Work an Inquiry



- Create an Inquiry
- Update an Inquiry
- Close an Inquiry

# Create an Inquiry



Client360 Fiserv Inc (Demo Client) Inquiries Client360 Help AA

Inquiries **New Inquiry** View All

MY INQUIRIES ALL INQUIRIES MY WATCHLIST

0	2	0	5	12	64
PENDING ACTION	PENDING CLOSE	OPEN	UPDATED	RECENTLY CLOSED	TOTAL

Clients can create Inquiries from two areas on Client360.

Clients can open inquiries from:

- ✓ **Homepage:** Navigate to the bottom of the page and select "New Inquiry" above the Inquiry activity tabs.
- ✓ **Inquiries Tab:** Access the new inquiry form via the blue "New Inquiry" button above the Inquiry dashboard.

Client360 Fiserv Inc (Demo C... **Inquiries** Client360 Help Search for Knowledge, video:Q AA

Home > Inquiries

Inquiries **New Inquiry**

MY INQUIRIES ALL INQUIRIES MY WATCHLIST

Reporting Category: All Save Filter Reset to Default Saved filter: IP asc

0	2	0
PENDING ACTION	PENDING CLOSE	OPEN

Benefit of Multiple Access Points:

- ✓ **Enhanced Accessibility:** Initiate Inquiries quickly from different sections of the platform, promoting convenience and efficiency.

# New Inquiry Form



### Update Product

Product List

CLIENT NAME: Fiserv Inc (Demo Client)

12 Items selected [Select All](#) [Deselect All](#)

PRODUCT NAME
<input type="checkbox"/> Access Manager
<input checked="" type="checkbox"/> Account Analysis Cash Counts
<input checked="" type="checkbox"/> Account Auto Close
<input checked="" type="checkbox"/> Account Numbers for Cleartouch
<input checked="" type="checkbox"/> Accounts Receivable Conversion
<input type="checkbox"/> Adjustments Express ACH
<input type="checkbox"/> Adjustments Express Cards

← 1 2 3 4 5 ... 16 →

Don't see the product you're looking for? [Request it here](#)

## Select Product:

- Click to reveal a drop-down menu.
- If permitted, use the 'Update Product' option to revise settings.

## Inquiry Type:

- Defaults to Service but may include options like Project/Implementation based on your institution.

## Inquiry Urgency Codes:

- Options: 'Critical,' 'High,' 'Medium,' 'Low'.
- Can be changed post-inquiry creation.

## Short Description:

- Acts as the inquiry title.
- Best practice: include only the product and issue.

## Inquiry Categories:

- Category 1: Aligns with the selected product.
- Category 2: Further subcategories.
- Category 3: Radio buttons to specify the exact issue, routing to appropriate teams.



# New Inquiry Form | Further Information

### New Inquiry

**Additional Information**

Alt Inst / Impersonation will be used to review

**Inquiry Details**

Inquiry Details \*

8000 characters left

**Sensitive Comment**

8000 characters left

**Attachment**

Add Attachment

**Watch List**

Add Me Add

Back Cancel Create Inquiry

**Additional Information:** Dynamic section where additional input may be required based on specific Product and Category selections.

**Inquiry Details:** Include information about the issue's context, preceding steps, and relevant environmental factors.

**Sensitive Comment:** Reserved for PCI/PII data, like account numbers or card details. Upon inquiry creation, sensitive comments will be encrypted and available in the Comments tab.

**Attachments:** Attach pertinent screenshots, images, error messages, and software version details relevant to the issue.

**Watch List:** Add users as watchers to receive updates when the inquiry is modified.



# Locate Inquiries | Inquiries Page

Locate Inquiries by navigating to the Inquiries Page.

- ✓ Inquiry Dashboard will default to “My Inquiries” tab.
- ✓ Dashboard activity tab will default to “Open”.
- ✓ Use the inquiry search bar to narrow down list.
- ✓ Once located, select the Inquiry card to launch and view the Inquiry Details.

The screenshot shows the Client360 Inquiries page for Fiserv Inc (Demo Client). The 'Inquiries' tab is selected. The page features a search bar at the top right and a navigation bar with 'MY INQUIRIES', 'ALL INQUIRIES', and 'MY WATCHLIST' tabs. Below the navigation bar, there are filter options for 'Reporting Category' and 'Save Filter', 'Reset to Default', and 'Saved filter: IP asc'. A summary bar displays the following counts: 0 PENDING ACTION, 1 PENDING CLOSE, 1 OPEN (highlighted), 1 UPDATED, 12 RECENTLY CLOSED, and 64 TOTAL. A search bar is located below the summary bar. The table below the search bar shows an inquiry with the following details: IP27444976, Client360 - Running Admin Report, Validation Date: —, In Progress status, Business Process Manager, Client Defined Field: —, Assigned To: Clara CSR, Created Date: 09/11/2024 10:39:46 ..., Updated Date: 09/19/2024 01:34:35..., and Updated By: Clara CSR (Fiserv).



# Update an Inquiry | Inquiry Details Pane

The Inquiry Details pane provides general Inquiry information and enables client updates.

- ✓ **Details:** Summary of Inquiry information.
- ✓ **Comments:** Communicate with Fiserv and view shared Knowledge Base resources.
- ✓ **Attachments:** Upload and download supporting documentation.
- ✓ **Watchlist:** Keep users informed about the progress of the inquiry
- ✓ **Timeline:** Track the history of an Inquiry.

IP27444976 ×

## Inquiry Details

IP27444976 In Progress

Client360 - Running Admin Report

[Details](#) [Comments](#) [Attachments](#) [Watchlist](#) [Timeline](#)

### Summary

GENERAL INFORMATION

PRODUCT	CATEGORY 1	CATEGORY 2	CATEGORY 3
Client360	Client360	Education / Training	General Inquiry
CONTACT NAME	INQUIRY URGENCY	ASSIGNED TO	CREATED DATE
Amy Admin	4 - Low	Amy Admin	08/06/2024 01:39:04 PM
CLOSED DATE	UPDATED BY	UPDATED DATE	RESOLVED DATE
—	Amy Admin	08/06/2024 02:29:21 PM	—
CLIENT DEFINED FIELD	SUFFIX FIELD	REPORTING CATEGORY	REPORTING SUB CATEGORY
—	—	Service	—



# Close an Inquiry | Inquiry Resolution

Fiserv sends detailed information to Client360 users upon inquiry resolution.

- ✓ Review email notification containing resolution details.
- ✓ Review resolution notes in the **Details** and **Comments** tab.
- ✓ Inquiry status transitions from “In Progress” to “Resolved.”
- ✓ Respond to the Inquiry resolution at the bottom of the **Details** tab.
- ✓ Fourteen-day window to respond to resolution.

IP27444976 ×

## Inquiry Details

IP27444976 Resolved

Client360 - Running Admin Report

Details **Comments**<sup>1</sup> Attachments Watchlist >

### Resolution

RESOLUTION NOTES

Perform the following steps to resolve to run Admin Reports.

1. Log into Client360
2. Navigate to the Quick Actions Menu and select Reports
3. (Download) for the report you would like to run.
4. Select the Report Type (PDF or XLS).
5. Select Download.
6. Note: Admin reports are only visible to Client360 Contact Administrators. Examples of each report are provided in the Client360 Contact Administrator Guide, located in the References - User Guides section of Client360 Resources [less](#)

Was the inquiry resolved?

Yes No





# Manage Contact Settings



- General Information
- Portal Information
- Admin Portal: Profile Templates

# Personal Profile Settings



The screenshot shows the Client360 Admin Portal interface. At the top, there is a navigation bar with the Client360 logo, the client name 'Fiserv Inc (Demo Client)', and links for 'Inquiries' and 'Client360 Help'. On the right side, there is a user profile dropdown menu with options for 'Admin', 'Profile', and 'Log Out'. A callout box highlights the 'Personal Profile' section, listing three key actions: 'Admin Portal link for Client360 Administrators.', 'Update Profile settings.', and 'Log Out of Client360.' The main content area features a search bar with the text 'Search here to find information and troubleshooting tips' and a search icon. Below the search bar, there are sections for 'Service Interruptions' and 'Featured (beta)'. The 'Featured (beta)' section includes three cards: 'Card Risk Office - Key Resources', 'Business Process Manager - Release Notes and Upgrade Instructions: Form...', and 'Client360 Featured Training | Register for Upcoming Sessions'.

Client360 Fiserv Inc (Demo Client) Inquiries Client360 Help

AA

Admin  
Profile  
Log Out

Search here to find information and troubleshooting tips

Begin

**Personal Profile**

- ✓ Admin Portal link for Client360 Administrators.
- ✓ Update Profile settings.
- ✓ Log Out of Client360.

Service Interruptions

Featured (beta) View All

Card Risk Office - Key Resources

Business Process Manager - Release Notes and Upgrade Instructions: Form...

Client360 Featured Training | Register for Upcoming Sessions


# General Information



Update basic personal details in the General Information tab.

Users can modify the following information:

- ✓ First and last name
- ✓ Email address
- ✓ Title
- ✓ Business/Mobile Phone #
- ✓ After hours contact details
- ✓ Language preferences
- ✓ Time zone settings

 View profile modifications in the Change History panel.

**Client360** Fiserv Inc (Demo Client) Inquiries Client360 Help  AA

### Profile

GENERAL INFORMATION PORTAL INFORMATION

#### General Information [Edit](#)

FIRST NAME	LAST NAME	EMAIL
Amy	Admin	amy_adm.n2022@outlook.com
TITLE	CLIENT NAME	PRIMARY CLIENT
—	Fiserv Inc (Demo Client)	Fiserv Inc (Demo Client)
BUSINESS PHONE	MOBILE PHONE	AFTER HOURS PHONE
(402) 419-0209	5613137168	—
LANGUAGE	AFTER HOURS CONTACT	
English	No	

#### Time Zone Settings

TIME ZONE  
(GMT -4:00) Eastern Time (US & Canada)

### Change History

09/19/2024

- AA Amy Admin edited contact.  
09:50:14 AM
  - Selected , , Create Inquiry, Client Communications, View Service Interruption for ATM Management
  - Selected , , Create Inquiry, Client Communications, View Service Interruption for Director
  - Selected , , Create Inquiry, Client Communications, View Service Interruption for Education Services
  - Selected , , Create Inquiry, Client Communications, View Service Interruption for Debit Processing
  - Selected , , Create Inquiry, Client Communications, View Service Interruption for Mobiliti Business
  - Selected , , Create Inquiry, Client Communications, View Service



# Portal Information

## Review and edit Portal and Product Preferences.

- ✓ Manage Information: Admin-managed. Contact system administrators for revisions.
- ✓ Product Preference list: View a full list of products associated with the institution and account.
  - ✔ = feature enabled.
  - ✘ = feature disabled.
- ✓ Some users may have the ability to edit product preferences.
- ✓ Can edit in bulk or one by one.

GENERAL INFORMATION | PORTAL INFORMATION

### Portal Information [Edit](#)

**Manage Information**

NOTIFICATIONS	SHOW INQUIRIES OF ALL CONTACTS	SHOW SENSITIVE COMMENTS AND ATTACHMENTS
Yes	Yes	Yes

**Product Preferences**

CLIENT NAME  
Fiserv Inc (Demo Client) ▼

**Preferences**

Click Edit to change the preferences

PRODUCT NAME	SERVICE INTERRUPTIONS	PUBLICATIONS	CREATE INQUIRY
Client360	✘	✘	✘
Wire Request Workflow	✔	✔	✔
XP2	✔	✔	✔

# Admin Portal | Profile Templates



Create Contact

**Manage Settings**  
Select the checkbox or checkboxes for the information you want to display.

- Notification
- Show all inquiry of all contacts
- Show all sensitive comments and attachments

**Product Preferences**  
For each product, click the checkboxes for the functionality desired. Products locked by Admin are not selectable.

The user's custom selection will be highlighted in orange.

**Product List**

Apply Template: No template

PRODUCT NAME	NO template	SERVICE INTERRUPTIONS ⓘ	PUBLICATIONS ⓘ	CREATE INQUIRY ⓘ	ADMIN LOCK ⓘ
Access Manag	Template 1 - Business Banker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Analy	Template 2 - eBanking Engineer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Auto	Template 3 - Lending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Numbers for Cleartouch	Template 4 - Branch Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounts Receivable Conversion		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Back to General Information](#)

Client360 Admins can create user profile templates with preloaded product preferences.

## Profile Template Tab

- ✓ Set up users with preloaded product preferences.
- ✓ Apply templates to multiple contacts at once.

## Creating Templates

- ✓ Create role-specific templates.
- ✓ Set permissions for service interruptions, publication access, and inquiries.

## Applying Templates

- ✓ Go to the user's portal information tab.
- ✓ Select 'Apply Template' and save.



# Review Helpful Resources



- Helpful Knowledge Articles
- Client360 Help Pages

# Client360 Knowledge Articles



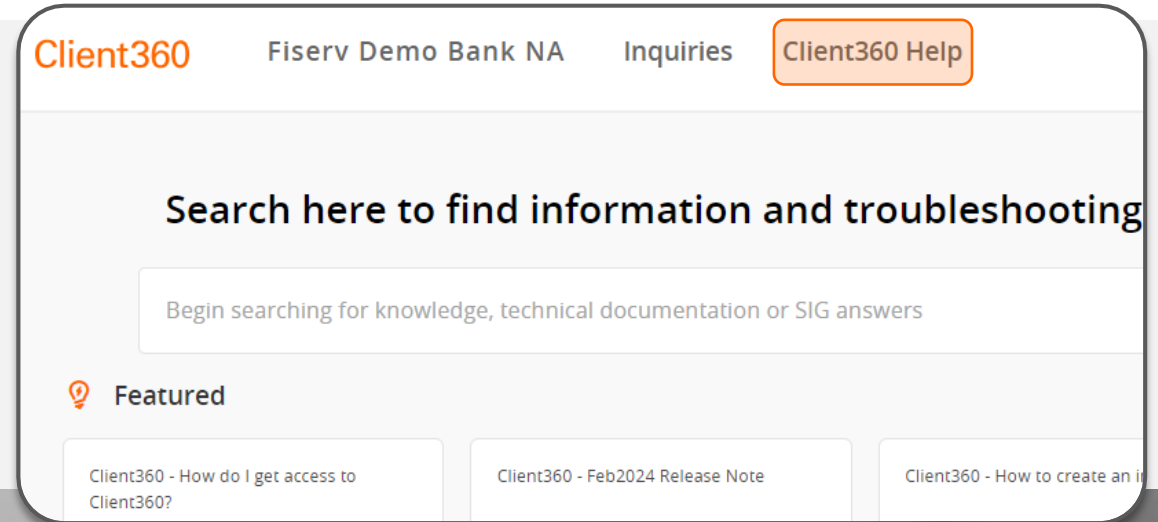
Article #	Short Description
KB0200533	<a href="#"><u>Client360 - How to update your profile and contact preferences for notifications</u></a>
KB0210090	<a href="#"><u>Client360 - Accessing Compliance Packages</u></a>
KB0201397	<a href="#"><u>Client360 - How do I reset my password?</u></a>
KB0200803	<a href="#"><u>Client360 - How to create an inquiry</u></a>
KB0201474	<a href="#"><u>Client360 - Most Useful Resources</u></a>
KB0203817	<a href="#"><u>Client360 - How often will my password expire?</u></a>
KB0202228	<a href="#"><u>Client360 - How to reopen a Pending Close inquiry</u></a>
KB0201425	<a href="#"><u>Client360 Admin - How to create a new contact</u></a>
KB0200846	<a href="#"><u>Client360 - How to run a report</u></a>
KB0200190	<a href="#"><u>Client360 - Where can I learn more about Client360, and how do I get support?</u></a>

# Additional Resources



## Client360 Resources

Select the [Client360 Help](#) link at the top of the Client360 home page to view additional information.







# Q&A





# Thank You!

