Client360 Power Hour

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.

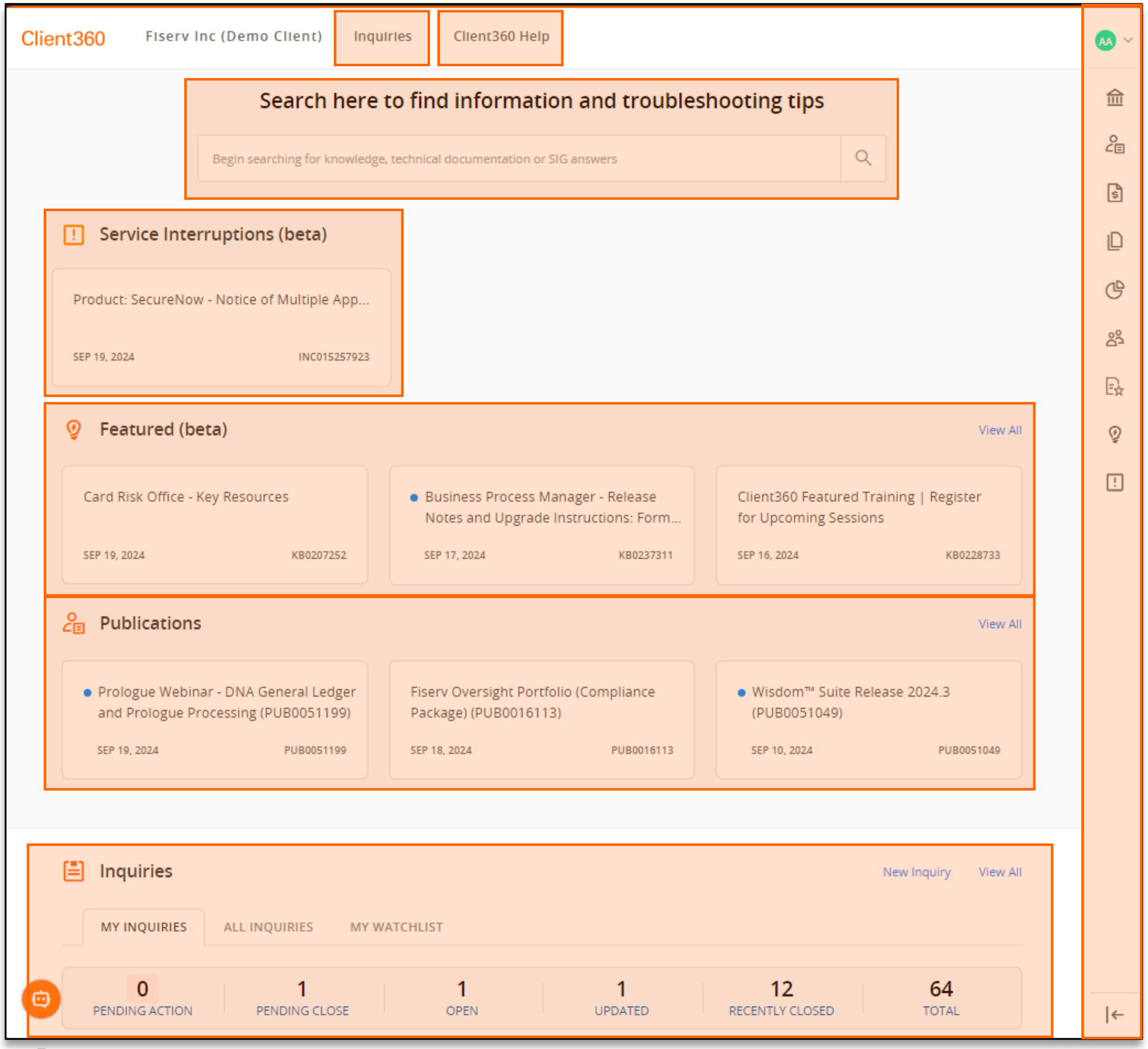
GOAL 05

Review Helpful Resources.

Navigate in Client360

- Client360 Homepage
- Quick Access Menu

Client360 | Homepage Highlights



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

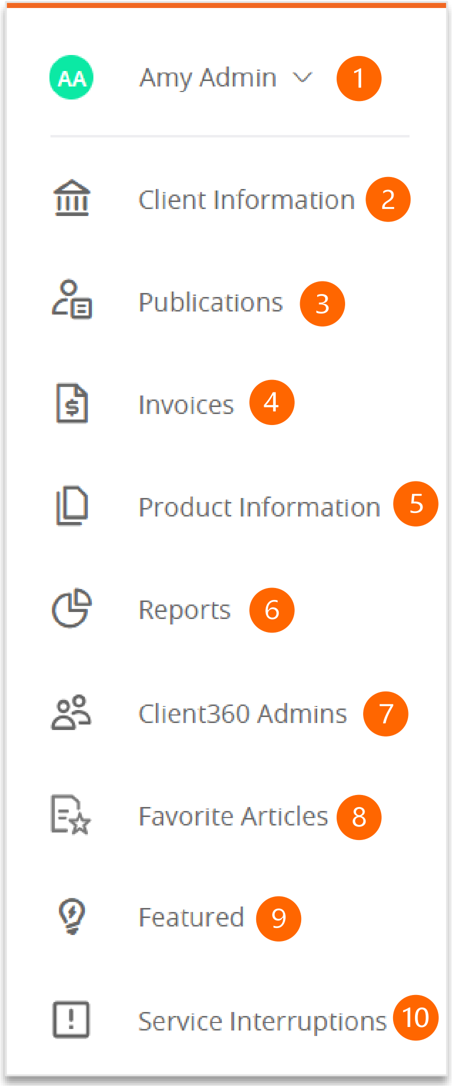
Publications: Product-specific communications and compliance information you have subscribed to.

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

Client360 | Quick Access Menu

Descriptions:

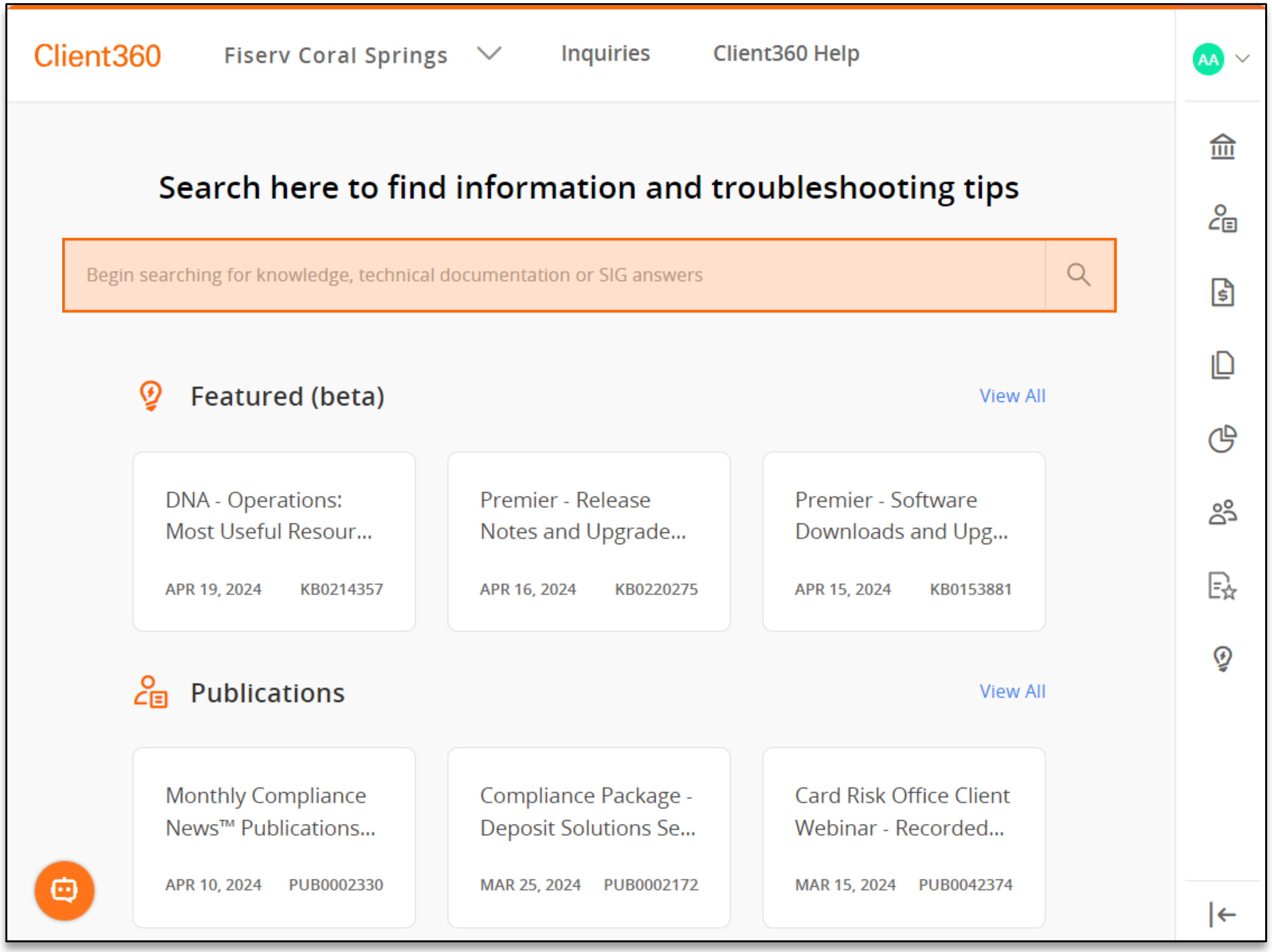
1. Personal Profile: Logout, Profile Settings, Admin Portal (Admin Only)
2. Client Information
3. Publications: Searchable list of News/Announcements, and Product Communications
4. Invoices: Billing information
5. Product Information: Fiserv products in use by your organization
6. Reports: Downloadable 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 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 p[illegible]you with statist[illegible] managerial reports through thre...

Commonly Used Reports: VISA Repo[illegible] — Last Modified: 04/28/2022
SD-066, Validation Exception Detail Re[illegible]eport 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 admi[illegible]rt Export an admin report...

Client360 - Most Useful Reso[illegible] — Last Modified: 12/06/2022
Goals Client360 assistance Using Clien[illegible]ces for Client360 Edit your profile Edit inquiri...

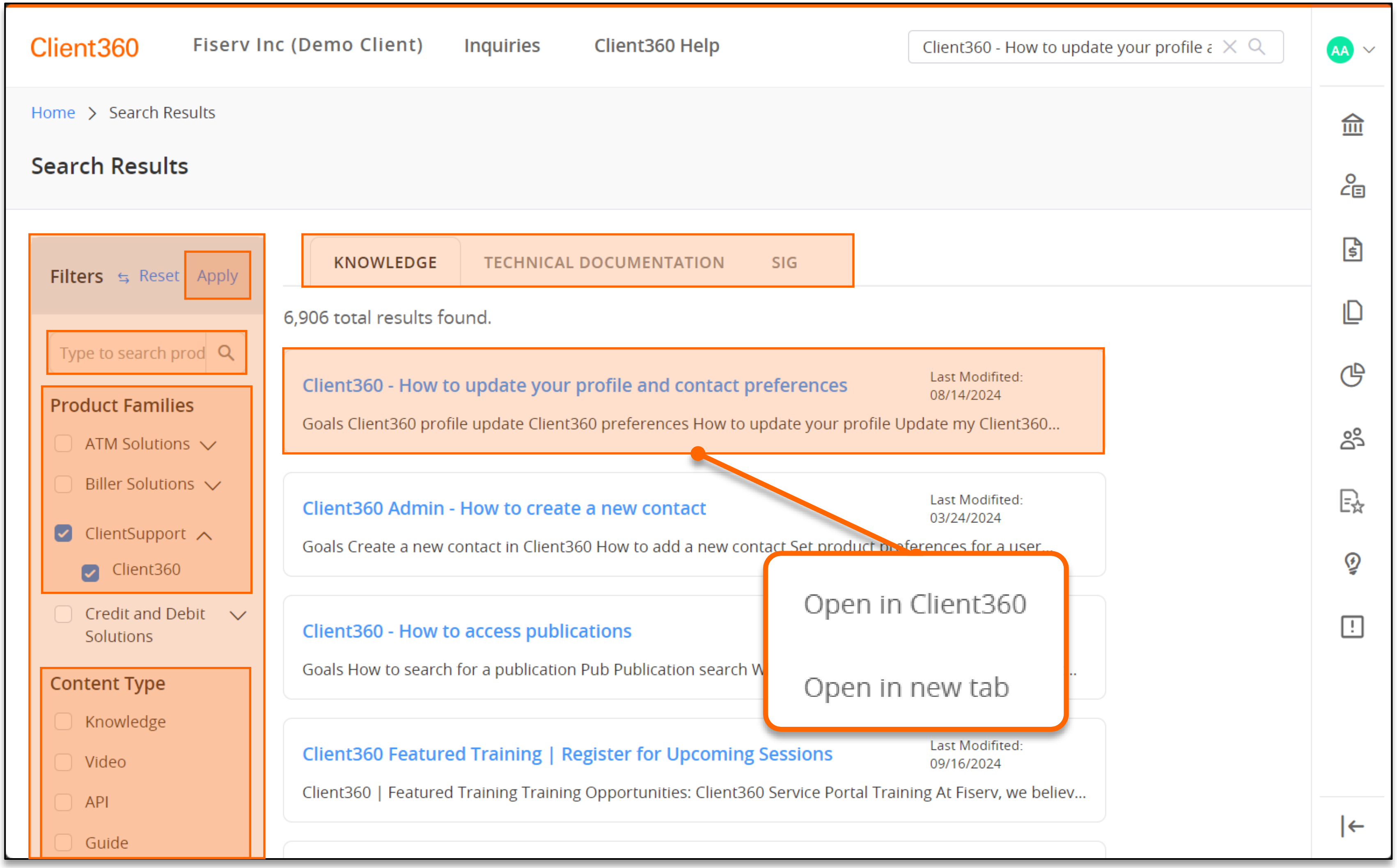
Client360 - Release Notes 15Jan2023 — Last Modified: 04/10/2023
Goals What are the new features and updates to Client360 as of 15-January-2023 Environment...

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...

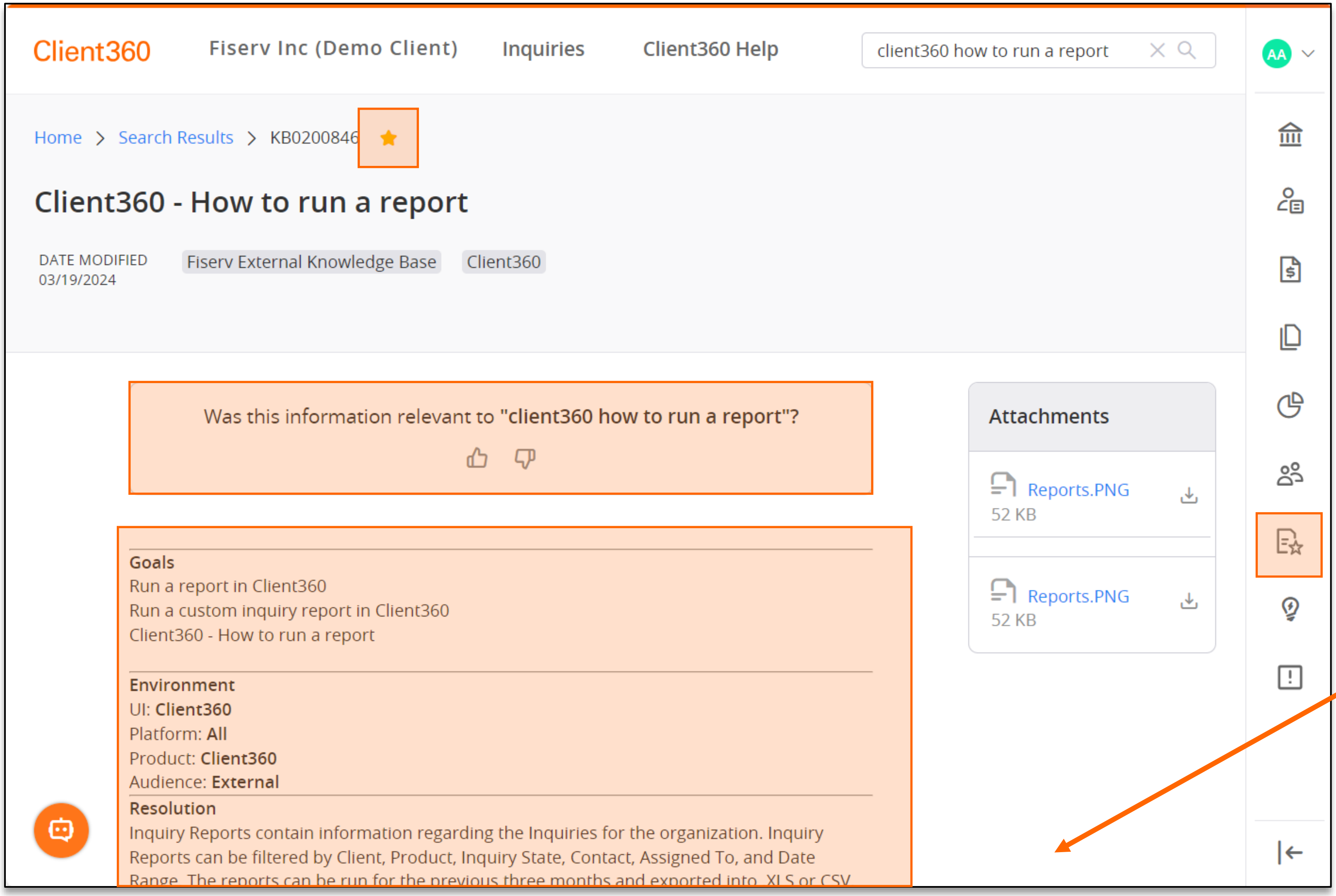
Knowledge Base Results & Filters

Further refine your Knowledge Base results by applying filters.

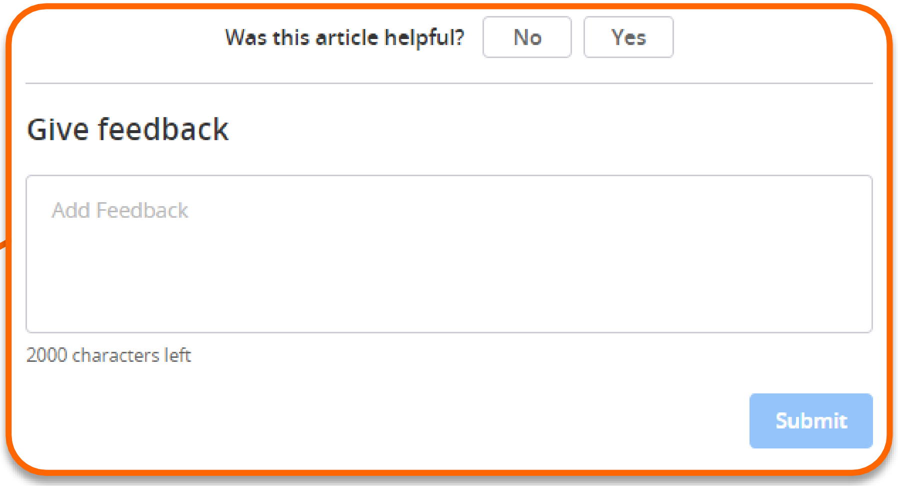
- Select on the Content tabs to view specific content.
- Filter by Product Families and Content Type.
- Select **Apply** to set Product and Content filters.
- Choose to view articles in Client360 or in a new tab.



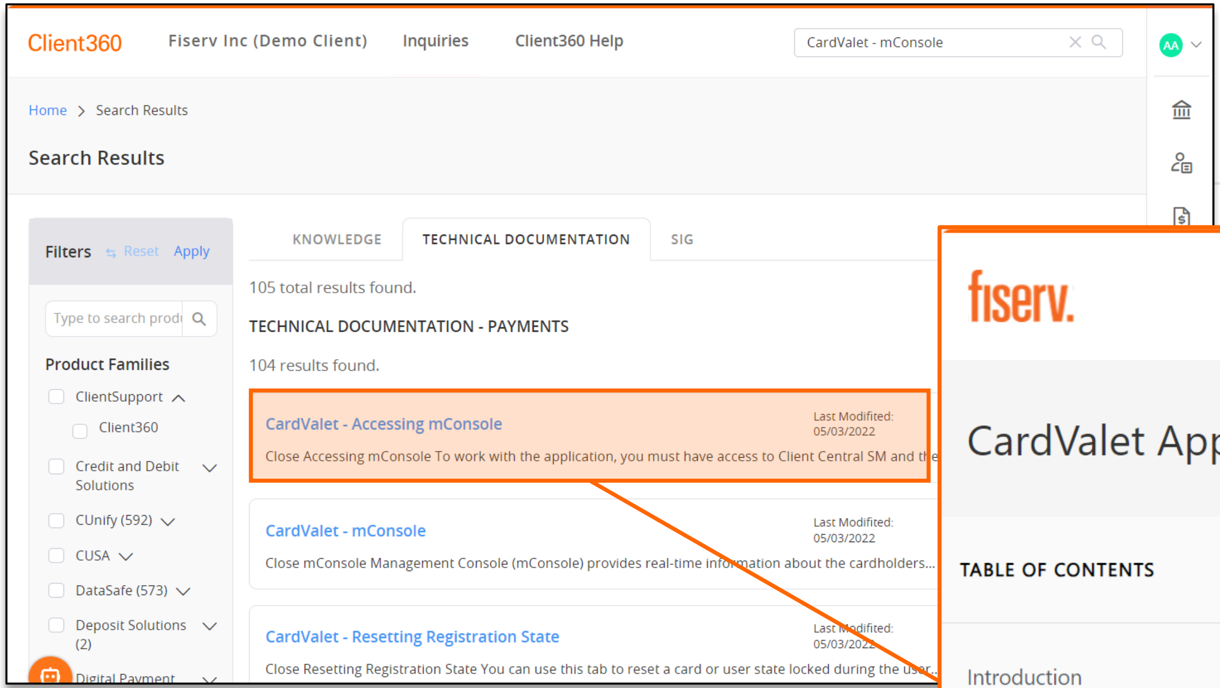
Knowledge Article Elements



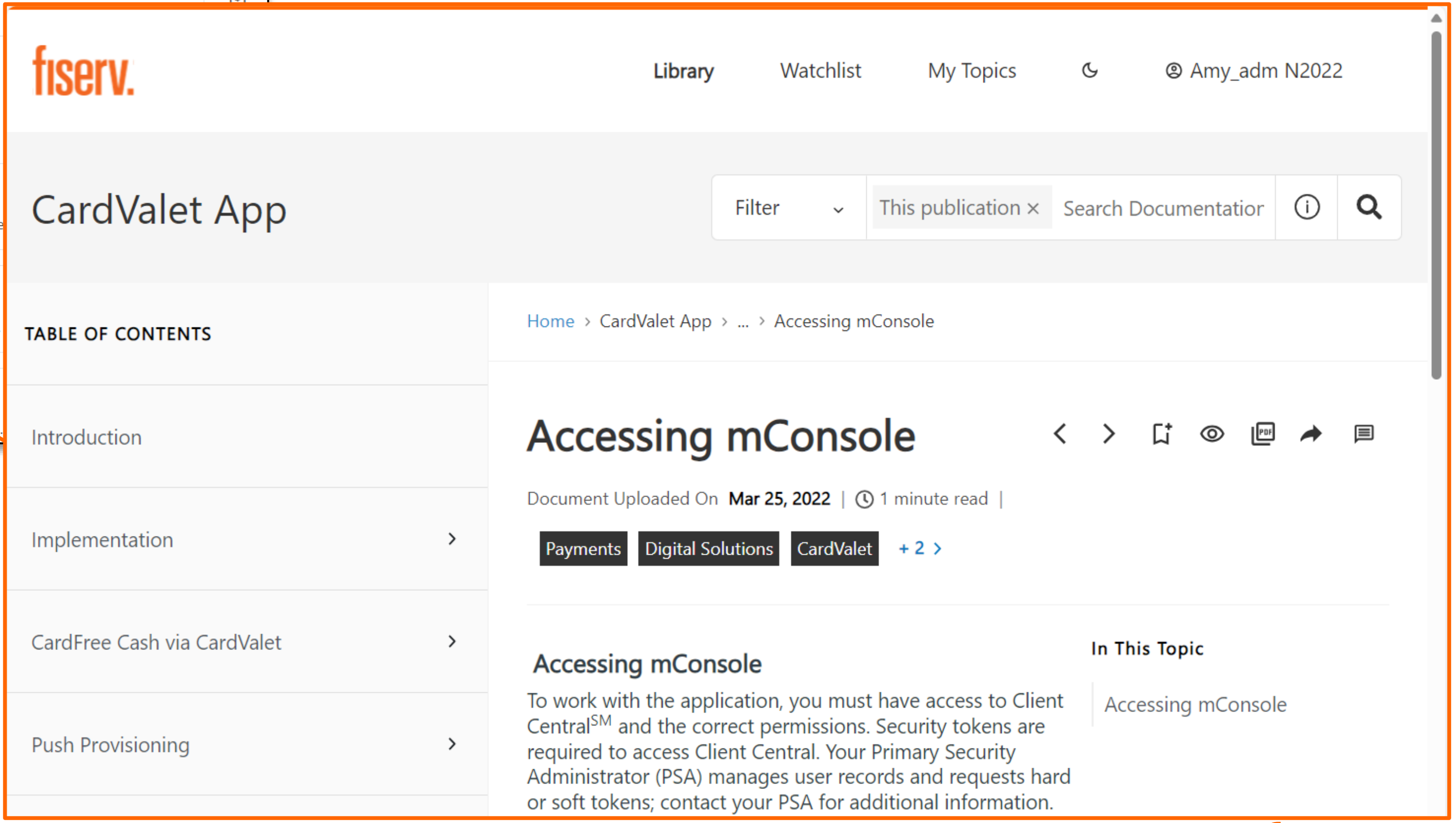
- ✓ Favorite articles, videos, and SIG responses for easy access.
- ✓ Vote thumbs up or down to train the AI on relevance.
- ✓ Articles include goals, environmental facts, and resolutions.
- ✓ Provide feedback at the bottom of the page.



Technical Documentation



Explore and preview Technical Documentation within the Client360 Knowledge Base.



- ✓ Apply Content Type Filters or select the Technical Documentation tab.
- ✓ Preview within the Results List.
- ✓ View full product documentation at documentation.fiserv.com.

Client360 Fiserv Inc (Demo Client) Inquiries Client360 Help

CardValet - mConsole

AA

Home > Search Results

Search Results

Filters Reset Apply

Type to search prod

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 Modifited: 05/03/2022
Close Accessing mConsole To work with the application, you must have access to Client Central SM and the...

CardValet - mConsole
Last Modifited: 05/03/2022
Close mConsole Management Console (mConsole) provides real-time information about the cardholders...

CardValet - Resetting Registration State
Last Modifited: 05/03/2022
Close Resetting Registration State You can use this tab to reset a card or user state locked during the user...

CardValet App

Filter This publication × Search Documentation

TABLE OF CONTENTS

Accessing mConsole

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

Payments Digital Solutions CardValet + 2

In This Topic

Accessing mConsole

To work with the application, you must have access to Client Central℠ 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.

Library Watchlist My Topics Amy_adm N2022

Welcome to Fiserv Technical Documentation

Find documentation, videos, and walkthroughs to help you succeed

Filter | Search Documentation

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

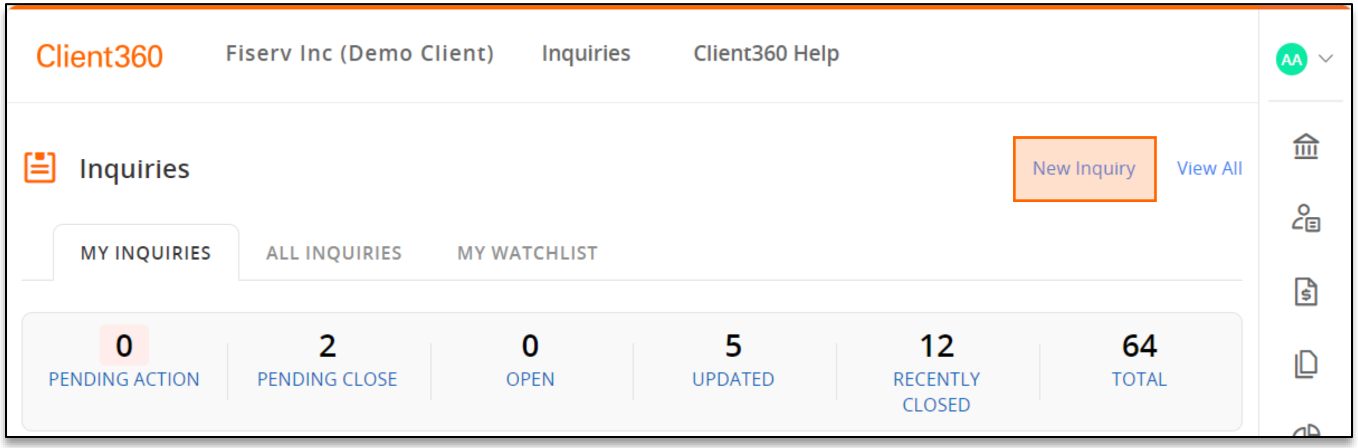
- Sign in to Documentation.Fiserv.Com
- Save favorites
- Share collections
- Build PDFs
- Send feedback

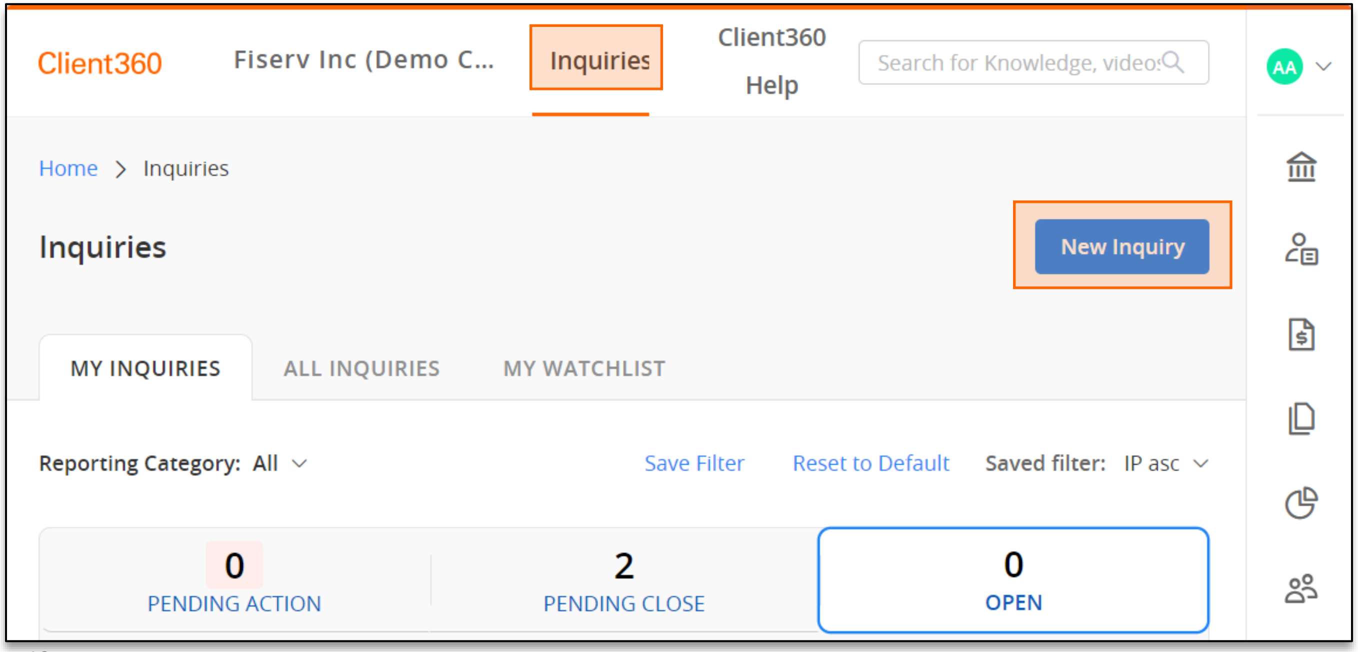
Industry

Work an Inquiry

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

Create an Inquiry





Clients can create Inquiries from two areas on Client360.

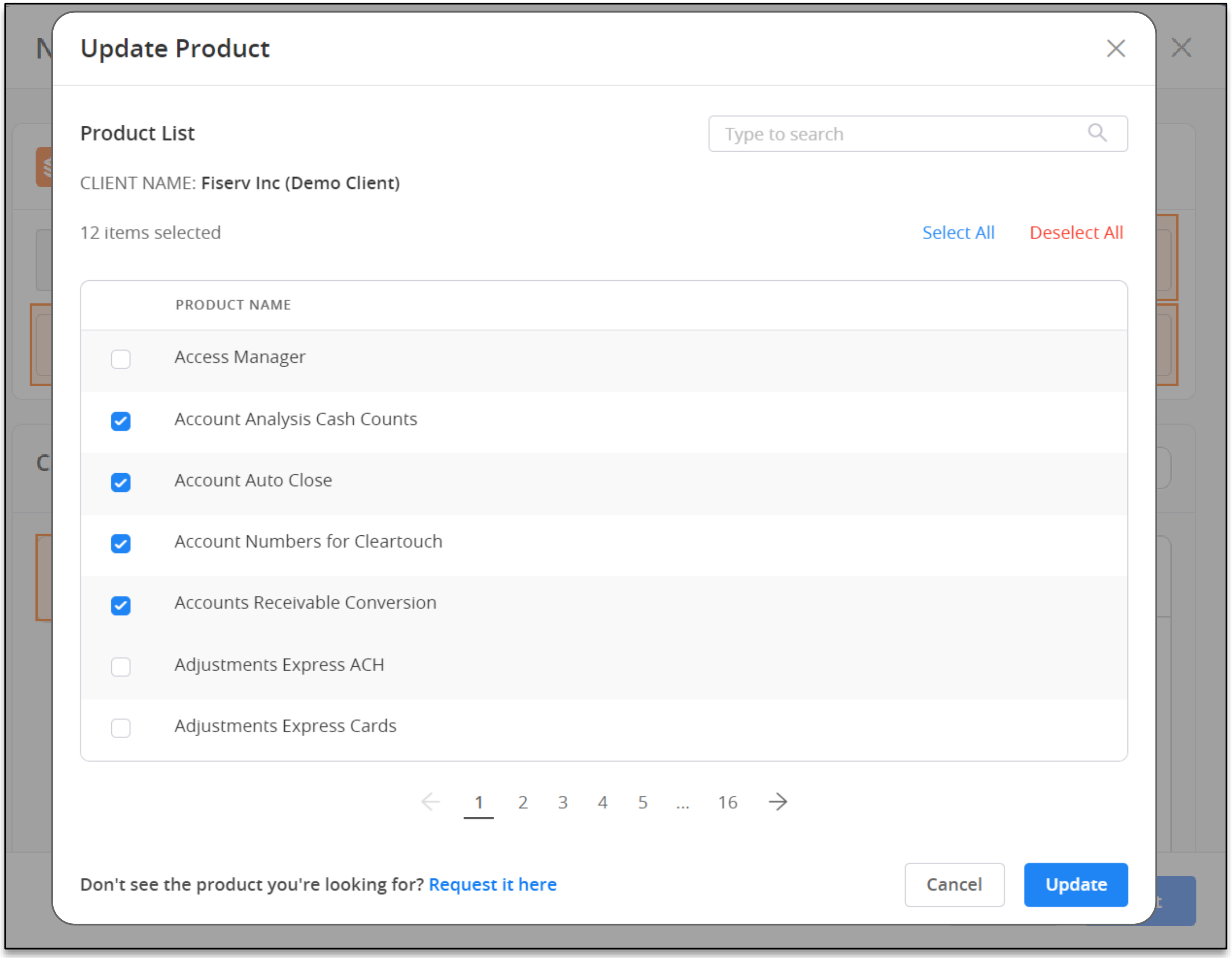
Clients can open inquiries from:

- ✓ **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.

Benefit of Multiple Access Points:

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

New Inquiry Form



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.

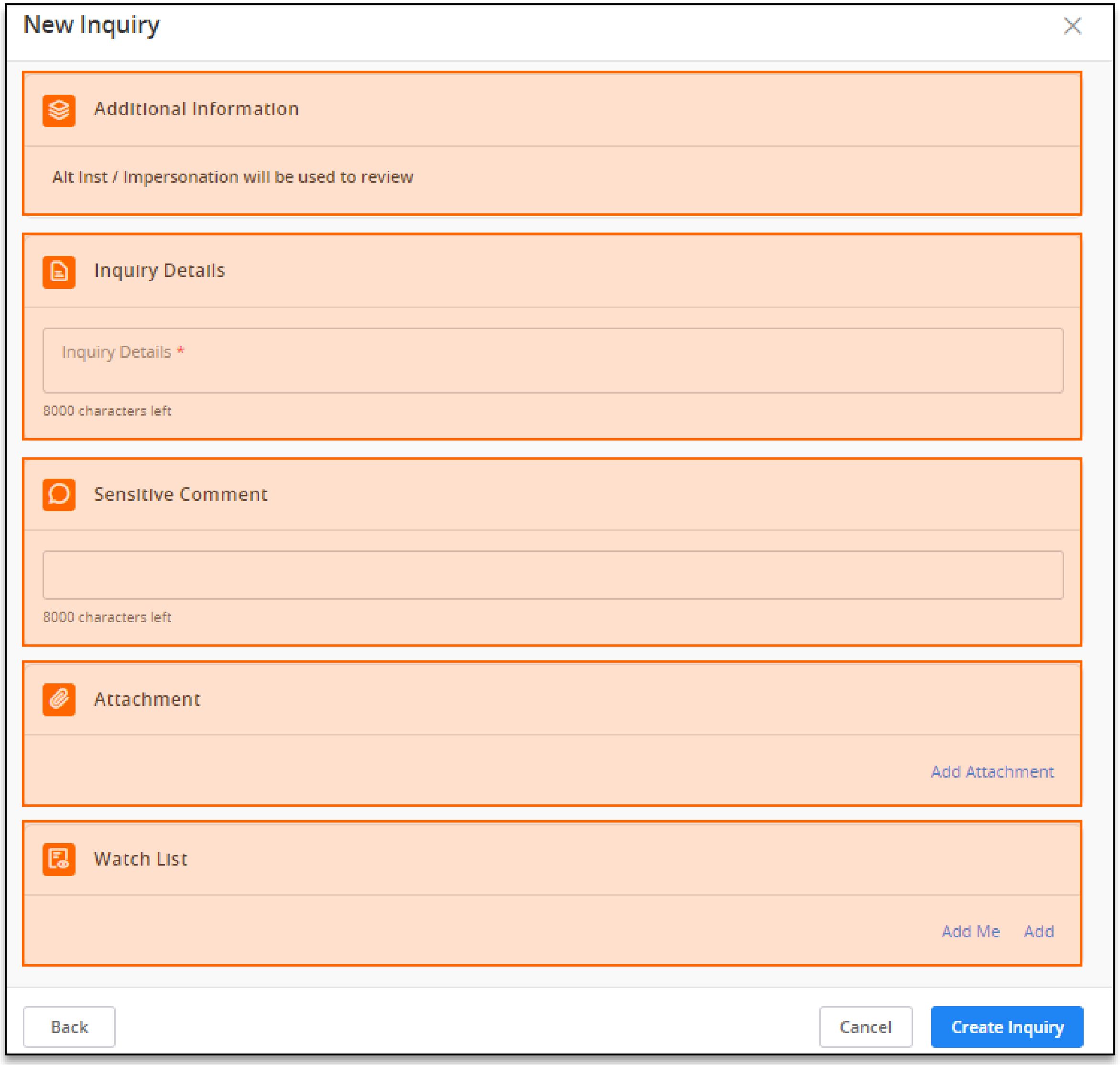
Short Description:

- 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



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.

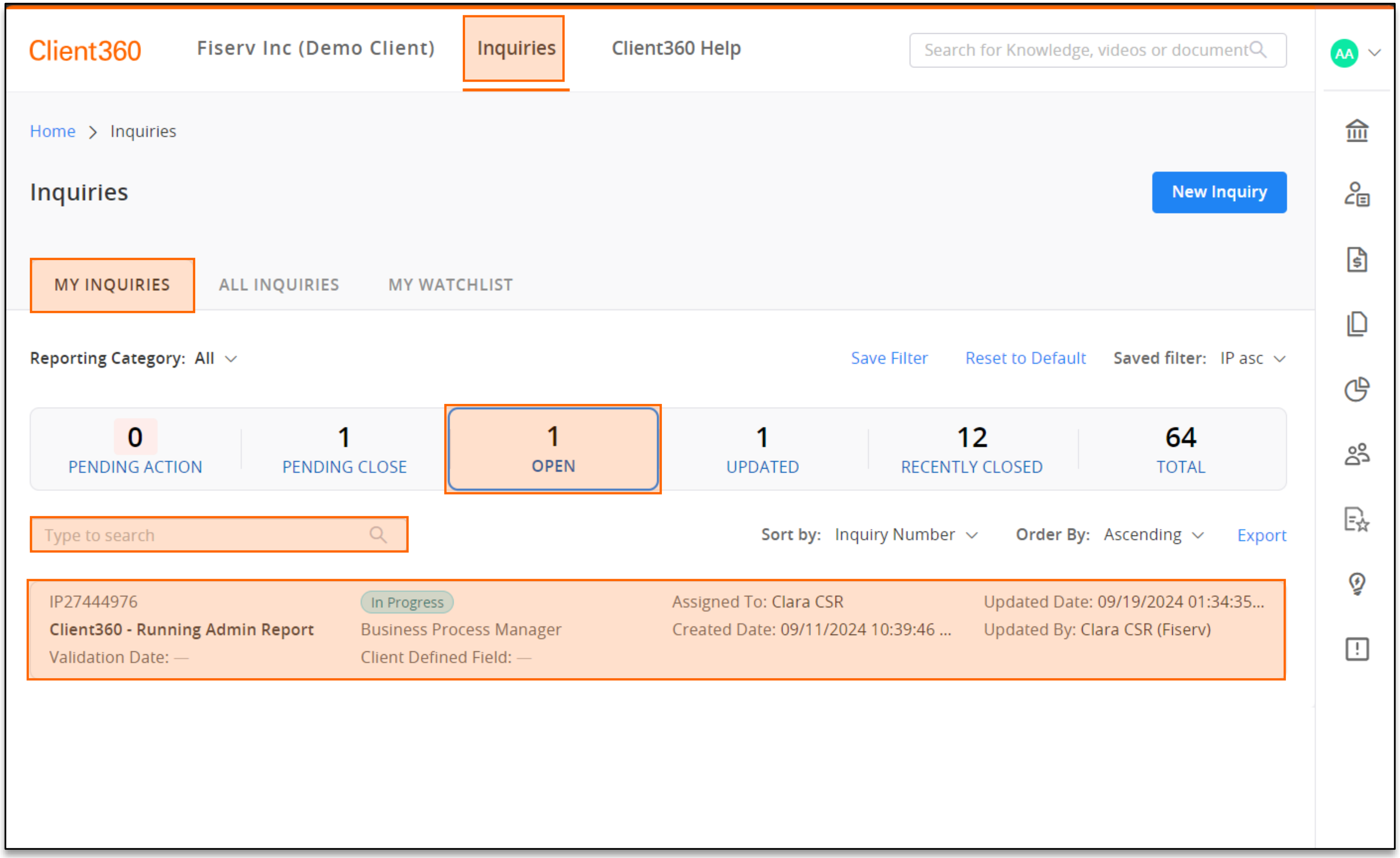
Attachments: Attach pertinent screenshots, images, error messages, and software version details relevant to the issue.

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.

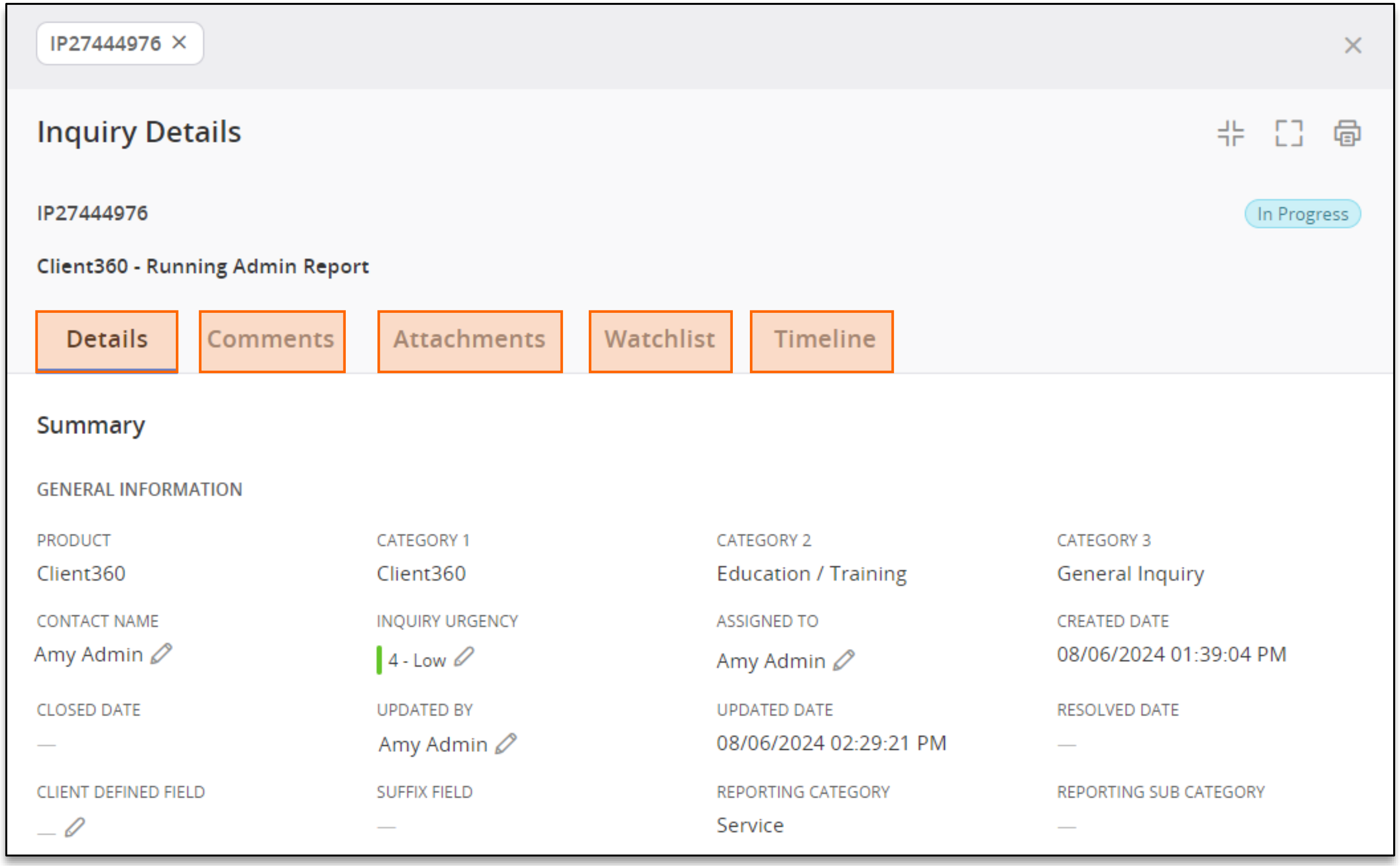
- ✓ Inquiry Dashboard will default to "My Inquiries" tab.
- ✓ Dashboard activity tab will default to "Open".
- ✓ Use the inquiry search bar to narrow down list.
- ✓ Once located, select the Inquiry card to launch and view the Inquiry Details.



Update an Inquiry | Inquiry Details Pane

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

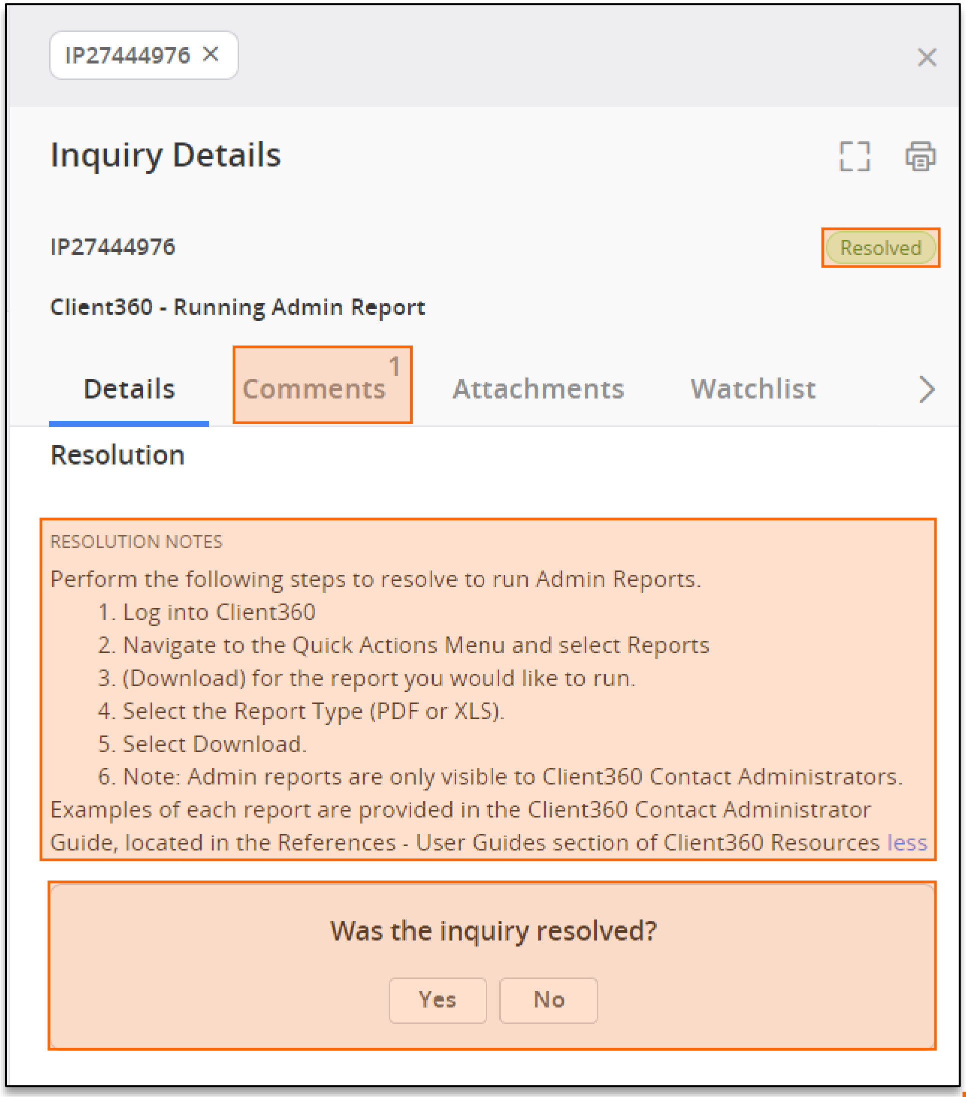
- ✓ **Details**: Summary of Inquiry information.
- ✓ **Comments**: Communicate with Fiserv and view shared Knowledge Base resources.
- ✓ **Attachments**: Upload and download supporting documentation.
- ✓ **Watchlist**: Keep users informed about the progress of the inquiry
- ✓ **Timeline**: Track the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



Close an Inquiry | Inquiry Resolution

Fiserv sends detailed information to Client360 users upon inquiry resolution.

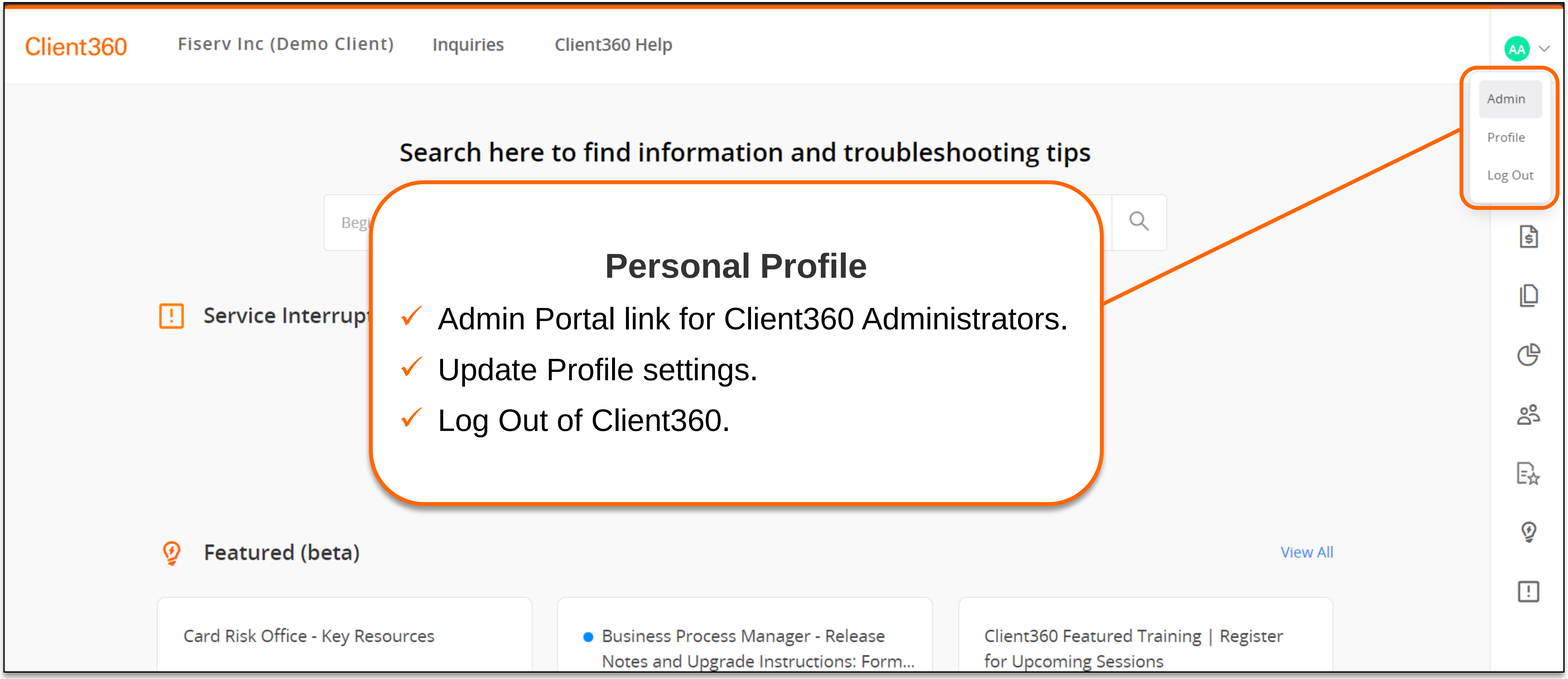
- ✓ Review email notification containing resolution details.
- ✓ Review resolution notes in the **Details** and **Comments** tab.
- ✓ Inquiry status transitions from "In Progress" to "Resolved."
- ✓ Respond to the Inquiry resolution at the bottom of the **Details** tab.
- ✓ Fourteen-day window to respond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



Manage Contact Settings

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

Personal Profile Settings



Personal Profile

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

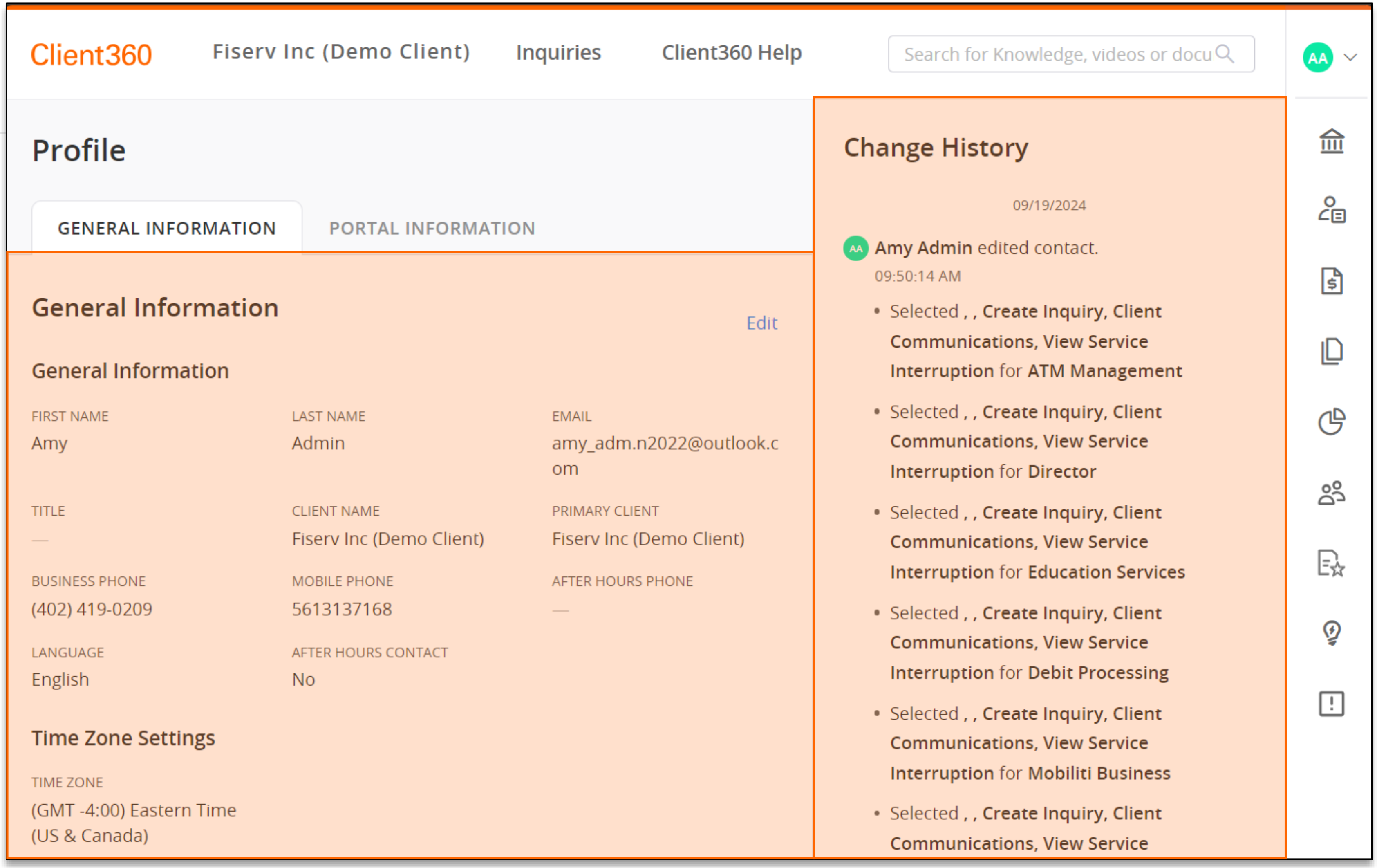
General Information

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

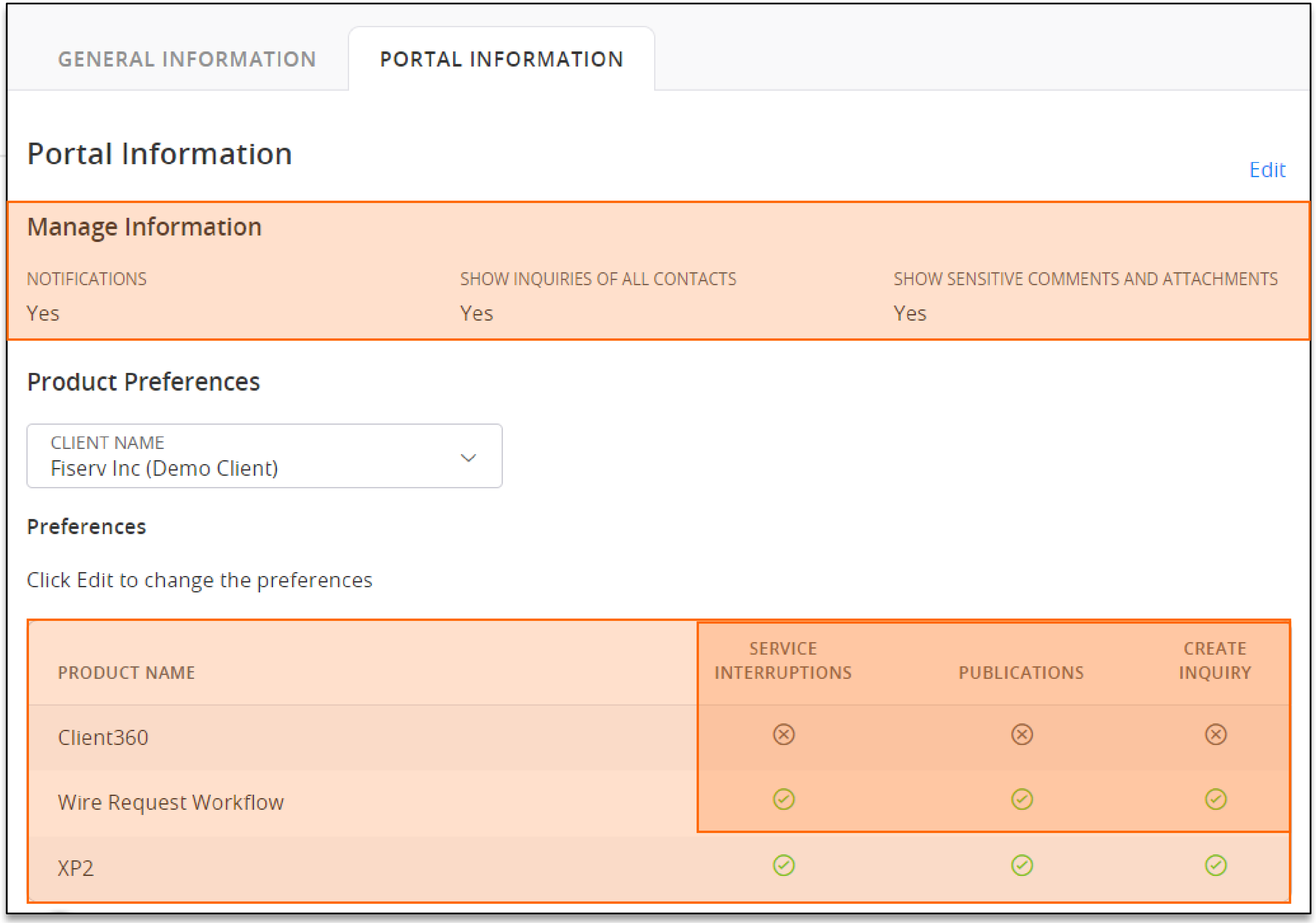
View profile modifications in the Change History panel.



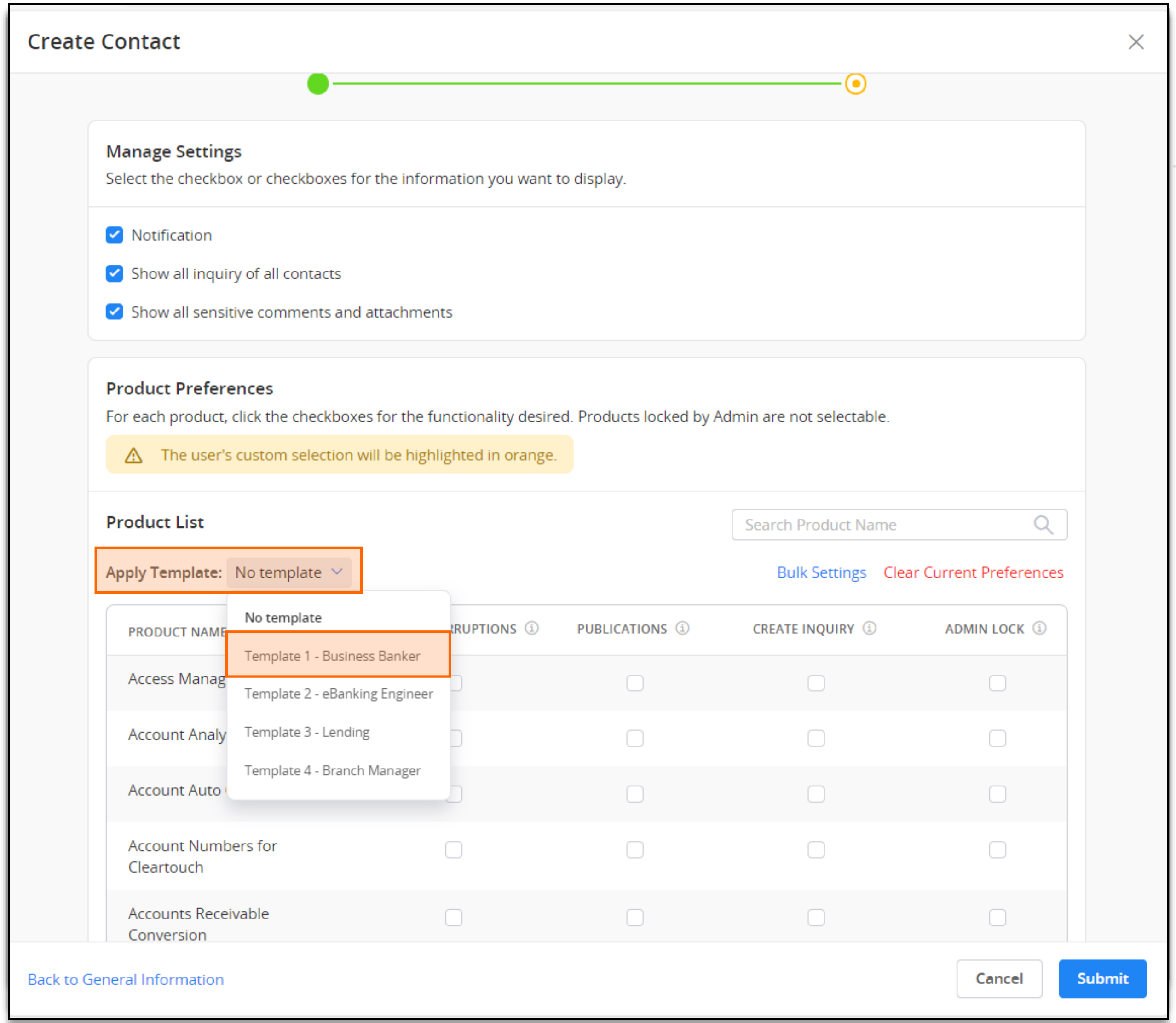
Portal Information

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.



Admin Portal | Profile Templates



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

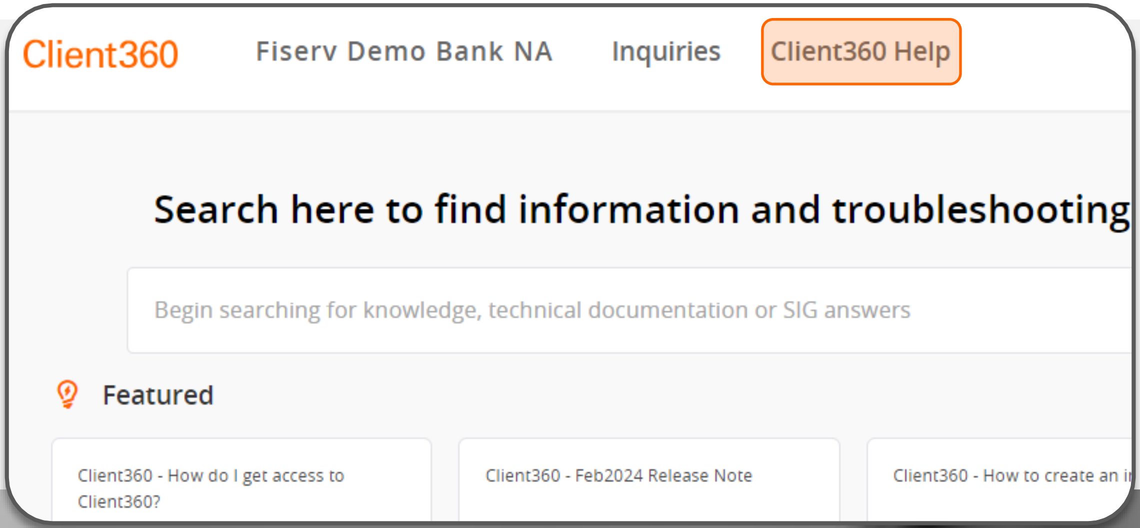
Client360 Knowledge Articles

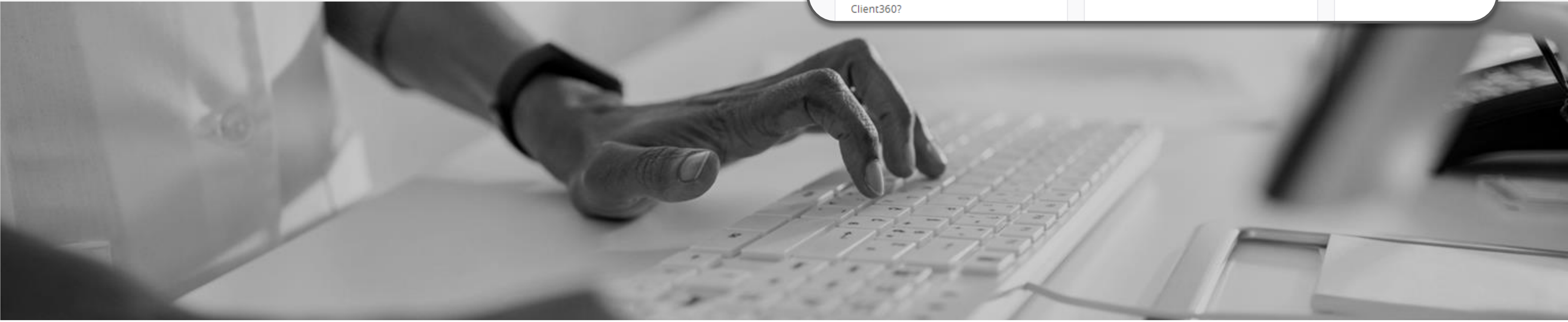
Article #	Short Description
KB0200533	Client360 - How to update your profile and contact preferences for notifications
KB0210090	Client360 - Accessing Compliance Packages
KB0201397	Client360 - How do I reset my password?
KB0200803	Client360 - How to create an inquiry
KB0201474	Client360 - Most Useful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

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!

