Client360 Power Hour

Inquiry Life Cycle

Client360 is the comprehensive service management platform by Fiserv.

Discover solutions for licensed products:
- Knowledge Base
- Built-in artificial intelligence (AI)
- Client360 Help Pages
- Create an Inquiry for non-urgent issues

📌 For production incidents or outages, contact Fiserv via telephone. Inquiries are not handled 24x7 – report critical incidents through appropriate channels for immediate response.
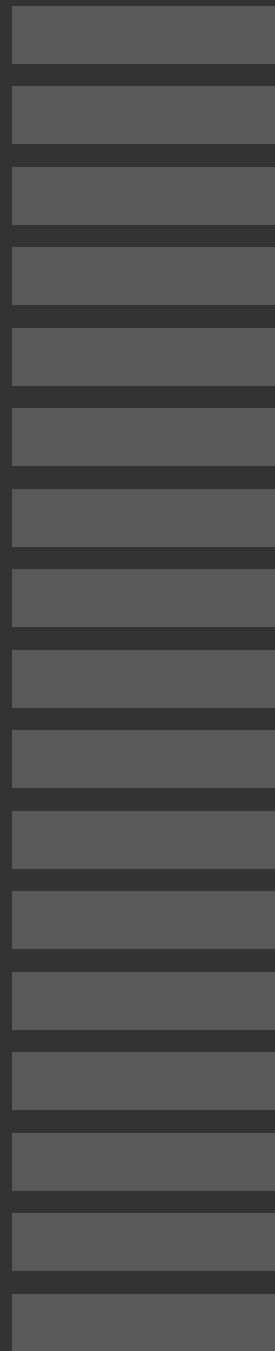
Where Are We Going?

Mastering Inquiry Management

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

Client360 Self-Service Resources

- Review Client360 Knowledge Articles.
- Access Client360 Help Pages.

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Create an Inquiry

- Initiate an Inquiry

- Key Elements of the New Inquiry Form

- Using Inquiry Assistant

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Creating Inquiries on Client360

Users can create Inquiries from two areas in Client360.

Homepage:

- Scroll to the bottom of the Client360 homepage.

- Select **New Inquiry** above the Inquiry activity tabs.

Inquiries Page:

- Click the blue **New Inquiry** button above the Inquiry dashboard.

Benefit of Multiple Access Points:

✓ Quickly initiate inquiries from various sections of the platform, ensuring convenience and efficiency.

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New Inquiry Form | Product & Inquiry Type

Product Selection:

- Click to reveal a drop-down menu.

Update Product:

- If permitted, use the **Update Product** option to revise settings.

Service Interruptions:

- Pop-up window will inform you of any interruptions and direct you to the Service Interruptions page for details.

Inquiry Type:

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

Update Product ✕

Product List

CLIENT NAME: **Fiserv Inc (Demo Client)**

12 items selected

Select All   Deselect All

Type to search

Account Analysis Cash Counts

PRODUCT NAME

☐ Access Man...

☑ Account An...

☑ Account Au...

☑ Account Nu...

☑ Accounts Re...

☐ Adjustment...

☐ Adjustments Express Cards

Confirm Product ✕

This product may be connected to a current service interruption impacting your experience. To learn more about the Incident, click here ⎋

Do you wish to continue creating an inquiry?

No   Yes

Client360

Pay by Bank

Update Product

Don't see the product you're looking for? Request it here

Cancel   Update

Next

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New Inquiry Form | Inquiry Urgency Codes

New Inquiry

CLIENT NAME *
Fiserv Inc (Demo Client)

INQUIRY URGENCY *

1 - Critical

2 - High

3 - Medium

4 - Low

1 – Critical / 2 – High

- Avoid reporting emergency production incidents and outages via Inquiry.
- Contact Fiserv via established communication channel (telephone) in the event of an emergency production incident or outage.

3 – Medium

- Primary service functions impaired, short-term workaround in place.

4 – Low

- Cosmetic issues or software defects with no direct impact to primary functions.

Inquiry Urgency Codes can be changed post-inquiry creation.

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New Inquiry Form | Inquiry Short Description

Effective Short Descriptions should be formatted as follows:

Product/Core – Brief Description of the Issue/Question

New Inquiry

CLIENT NAME *
Fiserv Inc (Demo Client)

Product *

Inquiry Type *

Inquiry Urgency *

Short Description *

Best Practices for Crafting Short Descriptions:

✓ Keep it short and concise.

✓ Include the product or platform name.

✓ Provide a brief description of the issue or question.

Benefits of a Well-Formatted Short Description:

✓ Quickly conveys the main point of the inquiry.

✓ Aids in categorizing and prioritizing inquiries.

✓ Inquiry Assistant uses the Short Description to find possible self-service resources.

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New Inquiry Form | Inquiry Assistant

Harnesses the power of Inquiry Assistant to enhance your inquiry experience.

- Designed to search the Knowledge Base for related articles as you enter your **Product** and **Inquiry Short Description**.

- Retrieves relevant Knowledge Articles, displaying them in a panel to the left.

- Format your short description to include the product name and issue for more relevant results.

- Selecting a Knowledge Article opens it in a new tab, keeping your Inquiry information intact.

Client360   Fiserv Inc (Demo Client)   Inquiries   Client360 Help

BPM - Unknown Scan Transport During Up|

Home > Search Results > KB0144792 ☆

BPM - ScanShell 800DX not will not scan ID in Business Process Manager

DATE MODIFIED
10/09/2023   Fiserv External Knowledge Base   Business Process Manager

Was this information relevant to "BPM - Unknown Scan Transport During Upload"?

👍   👎

Attachments

CSSNSDKInsta
885 KB

Symptoms and Errors
BPM - ScanShell 800DX not will not scan ID in Business Process Manager
Scanner not Valid
Is Scanner plugged in?

Environment
Platform: **Precision**
Product: **BPM**
Resolution
Perform the following steps if a calibration has not been performed after 300-400 scans:
1. Go to *Start>Devices and Printers*.
2. Right-click on **ScanShell 800DX** and select **Scan Properties**.
3. Select the **Advanced** tab and click on **Calibrate**.
4. Insert **Calibration Sheet** and click **Calibrate** on the verification screen.
Perform the following steps if the bank is Precision Service Center Client
1. Have user log out of all service center programs
2. Reach out to Precision Service Center Help Desk to determine if user has any hung sessions
   ○ **Note:** You will need the Service Center profile name. This will start with V0XXX. XXX=PSC bank number.
Perform the following steps to Uninstall and Reinstall the ID Scanner:
Under **Start**, right-click on **Computer** and select **Manage**.
On the **Hardware** tab, select **Device Manager**.
Click on the plus sign by **Imaging devices**.

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New Inquiry Form | Category Menu

New Inquiry

CLIENT NAME *
Fiserv Inc (Demo Client)

PRODUCT *
Business Process Manager

INQUIRY TYPE *
Service

INQUIRY URGENCY *
4 - Low

SHORT DESCRIPTION *
BPM - Unknown Scan Transport During Upload

Category

Type to search.

- Business Process Manager ◉
- Acuant Scanshell ○

Business Process Manager

⊡ Account / System Maintenance
- ○ Product Configuration

⊡ Application Functionality
- ○ I32
- ○ Interface(s)
- ○ Product "How To"

⊡ Education / Training
- ○ Client Request
- ○ Parameter / Spec Review

⊡ Product Request / Question
- ○ File / Programs
- ○ Publications / Documentation
- ○ System Configuration

⊡ System Request
- ○ Disaster Recovery

⊡ Technical Issue
- ◉ Application Error / Outage
- ○ Installation / Configuration / Environment

Cancel   **Next**

Accurate Category Selections:

- Ensure inquiries are directed to the appropriate teams.
- Lead to faster resolution times.
- Enables service teams to access the right resources for your inquiry.

- **Category 1**: Aligns with the selected product.
- **Category 2**: Provides additional granularity to better understand the nature of the inquiry.
- **Category 3**: Radio buttons to specify the exact issue, routing to appropriate teams.

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New Inquiry Form | Additional Fields

New Inquiry ✕

Additional Information

Are You Receiving an Error Message? * ▾ | When did it start? * 🗓 | Describe the changes that occurred *

Inquiry Details

Inquiry Details *

8000 characters left

Sensitive Comment

8000 characters left

Attachment

Add Attachment

Watch List

Add Me   Add
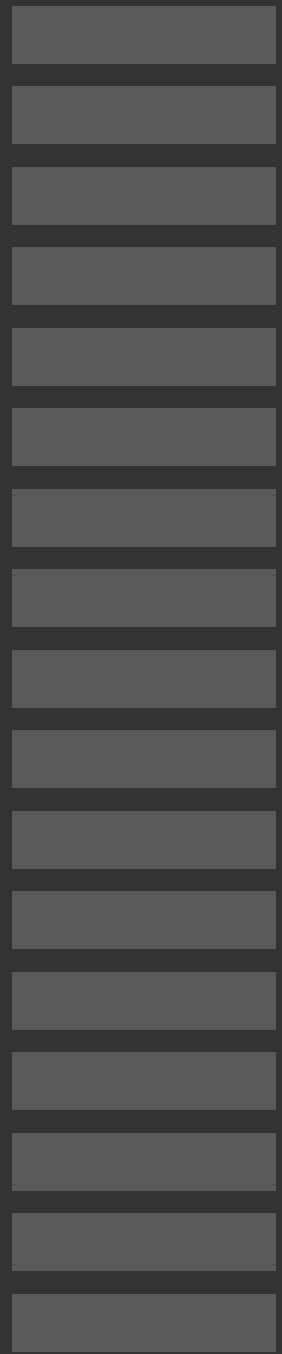
Back   Cancel   **Create Inquiry**

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.

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Update an Inquiry

- Locate an Inquiry

- Inquiry Details Pane

- Revise Inquiry Details

  - Details, Comments, Attachments, Watchlist and Timeline.

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Inquiries Page

Locate Inquiries by navigating to the Inquiries Page.

✓ Inquiry Dashboard defaults to the **My Inquiries** tab.

✓ Dashboard activity tab defaults to **Open**.

✓ Use the inquiry search bar to narrow down the list.

✓ Filter, sort, and export inquiry data.

✓ Select an inquiry card to view its details.

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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.

IP27741805 ×

Inquiry Details

IP27741805   In Progress

BPM - Unknown Scan Transport During Upload

| Details | Comments 3 | Attachments 2 | Watchlist | Timeline |

Summary

GENERAL INFORMATION

PRODUCT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CONTACT NAME	INQUIRY URGENCY
Business Process Manager	Business Process Manager	Technical Issue	Application Error / Outage	Amy Admin	4 - Low

ASSIGNED TO	CREATED DATE	CLOSED DATE	UPDATED BY	UPDATED DATE	RESOLVED DATE
Clara CSR	10/14/2024 01:27:13 PM	—	CLara CSR (Fiserv)	10/18/2024 07:25:36 PM	—

CLIENT DEFINED FIELD	SUFFIX FIELD	REPORTING CATEGORY	REPORTING SUB CATEGORY
—	—	Service	—

INQUIRY DETAILS

When attempting to upload a new SAV account to the host today, this error returned. Unknown Scan Transport During Upload. The wizard was populated on Saturday, then saved. I opened the saved project today planning to transport the account, when the error presented itself.

ADDITIONAL INFORMATION

ARE YOU RECEIVING AN ERROR MESSAGE?	WHEN DID IT START?	DESCRIBE THE CHANGES THAT OCCURRED AROUND THAT TIME	DID IT IMPACT ALL USERS OR SPECIFIC USERS?
Yes	10/12/2024	Two non-business days since last successful upload.	All Users

DID IT IMPACT ALL COMPUTERS OR SPECIFIC COMPUTERS?	PROVIDE STEPS TO RECREATE	ATTACH ALL ERRORS / MESSAGES / SCREENSHOTS	
All Computers	N/A	Not Applicable	

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Update an Inquiry | Details Tab

Details Tab Overview:
- ✓ Review and edit general information related to your inquiry.
- ✓ Admins can reassign inquiries from the Details tab.
- ✓ Edit the Inquiry Urgency Code.
- ✓ Create and update Client Defined Fields for custom classification.

Client Defined Field:
- ✓ Classify inquiries by specific departments or teams (e.g., IT Team, Network Admin Team).
- ✓ Use these terms to search for specific inquiries in the inquiry dashboard.
- ✓ Enter up to 20 characters of text for flexible, free-form customization.

Update an Inquiry | Comments

Communicate with the Fiserv Representative handling your inquiry in the 'Comments' tab.

- Designed for direct communication to address questions and concerns.
- Include all relevant details in your comment for accurate responses.
- Find sensitive comments in this tab and unmask them by selecting **Show Sensitive Comment**.
- Access Knowledge Articles and Videos shared by the representative.
- Regularly check for updates or additional resources from the representative.

Update an Inquiry | Attachments

Using the Attachments Tab

- Access a list of documents uploaded by you or the Fiserv representative handling your inquiry.

- Download documents individually or in bulk.

- Click the info icon to view details:
  - ✓ Upload date
  - ✓ Uploader's name
  - ✓ File size

- Use the add attachment icon to upload additional documents.

- Name documents clearly and include a comment to notify the Inquiry handler of the new attachment.

All uploaded attachments are encrypted for confidentiality and accessible for 90-days after Inquiry closure.

IP27741805 ×

Inquiry Details

IP27741805

BPM - Unkno

Details

Add Attachments ×

⚠ All attachments are considered sensitive and will be encrypted for storage.

Files can be uploaded in ACH, ACS, ASCII, AUD, BAK, BMP, CERT, CFG, CMP, CRT, CSS, CSV, CTX, DAT, DB, DB2, DEF, DIS, DOC, DOCX, EPS, EVT, EVTX, EXP, FCO, FFP, FLS, FMT, FTP, GIF, HTM, JPEG, JPG, LIS, LMF, LOG, MSG, P12, P7B, PCAP, PCAPNG, PDF, PMML, PMS, PNG, PPT, PPTX, PRN, QBO, QFX, RAR, RF0, RF1, RPT, RTF, SAV, SMT, SQL, T01, TIF, TIFF, TRC, TRP, TXT, VSD, XLS, XLSM, XLSX, XML, XPS, ZIP, or ZIPX format. The maximum file size is 300 MB. Maximum submission size is a total of 500 MB per upload.

Attachment

Example

Example

Drag and drop or click to upload files

Total size of valid files: **0/500 MB**

Cancel   Upload

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Update an Inquiry | Watchlist

IP27741805 ✕

Inquiry Details

IP27741805 🔲   In Progress

BPM - Unknown Scan Transport During Upload

Details   Comments³   Attachments²   **Watchlist**¹   Timeline

WATCHERS   Add Me   Edit

AA Alex Associate (Client) ✕

Keep other Client360 contacts at your organization Informed with the Watchlist.

- ✓ Keep colleagues updated by adding them to the Watchlist.
- ✓ Watchlist users get updates on new comments, attachments, and resolutions.
- ✓ Use **Add Me** or **Add** buttons to manage watchlist contacts.
- ✓ Watchers' names appear on the list, and a new icon shows next to the inquiry number.
- ✓ All actions related to watchers are logged in the Timeline for transparency.

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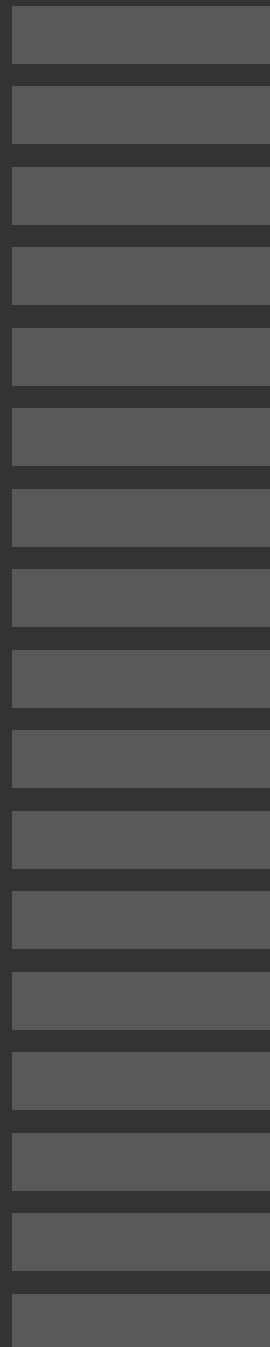# Update an Inquiry | Timeline

The Timeline tab provides a comprehensive record of the inquiry's lifecycle.

Track Key Actions:

- Inquiry creation
- Assignment
- Transfer
- Comment updates
- Attachments
- Billing

Features:

- Magnifying Glass: Search and sort timeline activities.
- Expand/Collapse Button: Expand or collapse fields for a clear view.

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Close an Inquiry

- Inquiry Resolution
  - Resolution Acceptance
  - Resolution Rejection
- Self-Closure
- Survey and Feedback

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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.

✓ Respond within 14 calendar days to avoid system auto-closure of the inquiry.

✓ For additional questions, call Fiserv with your Inquiry number and service representatives name for a smooth transfer.

IP27741805 ✕

Inquiry Details

IP27741805   Resolved

BPM - Unknown Scan Transport During Upload

Details   Comments ⁴   Attachments ²   Watchlist   ›

AA   Enter comment here

Comments

TODAY

CC   **Clara CSR (Fiserv)**
10/18/2024 08:14:48 PM

Resolution Note - Hello Amy,
Ensure the PDS1450 URL path is correct by logging into the Navigator server and noting the location of the PDS1450 program. Then, in Business Process Manager Administrator, from the Management menu, select Specifications, double-click Business Process Manager, select the Image API tab, and confirm the PDS1450 URL field matches the location noted.
...more

CC   **Clara CSR (Fiserv)**   👁 Show Sensitive Comment
10/18/2024 07:25:36 PM

Sensitive Note: Click 'Show Sensitive Comment' to reveal the details.

10/14/2024

Inquiry Details

Reject Resolution ✕

⚠ Please provide the reason you are rejecting the inquiry resolution.

Reason *

Reopen Notes * ⌄

Action not taken as communicated

Ask a follow-up question

Inquiry not resolved

Response not clear

8000 characters left

Cancel | **Reject**

VALIDATION DATE
—

Was the inquiry resolved?

Yes | No

Rejecting a resolution allows clients to highlight unresolved issues and ensure all critical points are addressed.

Steps to Rejecting an Inquiry Resolution

✓ Carefully review the proposed resolution details.

✓ Determine why the resolution is unsatisfactory. Note any specific unresolved points.

✓ Select **No** and clearly state your reasons for rejection. Include additional context if necessary.

✓ Click the **Reject** button to formally reject the resolution.

✓ Monitor for updates and be prepared to provide more information if requested.

Create a new inquiry for new questions to ensure proper routing and avoid delays.

Close an Inquiry | Resolution Acceptance

Responding to an Inquiry Resolution

✓ **Ensures Accuracy:** Confirms that the inquiry has been resolved correctly.

✓ **Closes the Loop:** Officially closes the inquiry, ensuring it is no longer pending.

✓ **Enhances Record-Keeping:** Keeps your records up-to-date and accurate.

✓ **Improves Service:** Provides feedback that can help improve future inquiry handling.

Depending on the product selected, you may be prompted to complete a survey once you formally close an inquiry.

Close an Inquiry | Survey and Feedback

Completing the Survey

- Responses provide essential insights into the resolution process.

- Feedback is shared with service leaders to identify areas for improvement.

- Holds the service team accountable for the quality of their resolutions.

- Enables the service team to make data-driven decisions to enhance their processes.

If you cancel out of the survey, you can return to the inquiry details and complete it later. You have 14 days from the closure date to respond.

Inquiry Survey

Survey

Survey reference: IP27741805

Please rate your satisfaction with the service you received for you last inquiry.

QUESTION

How wo...
inquiry?

How sati...
the clien...

How sati...
service r...

Please pro...

500 characters left

Cancel   Submit

Saved Survey

⚠️ Your responses have not been saved. You can complete this survey before 11/02/2024.

Close

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Close an Inquiry | Self-Closure

Inquiry Details

IP27722564 — In Progress

BPM - Unknown Scan Transport During Upload

Close Inquiry ✕

Please provide the reason you are closing this inquiry.

Reason *

[text box]

8000 characters left

Cancel   **Close**

INQUIRY DETAILS

BPM - Unknown Scan Transport During Upload

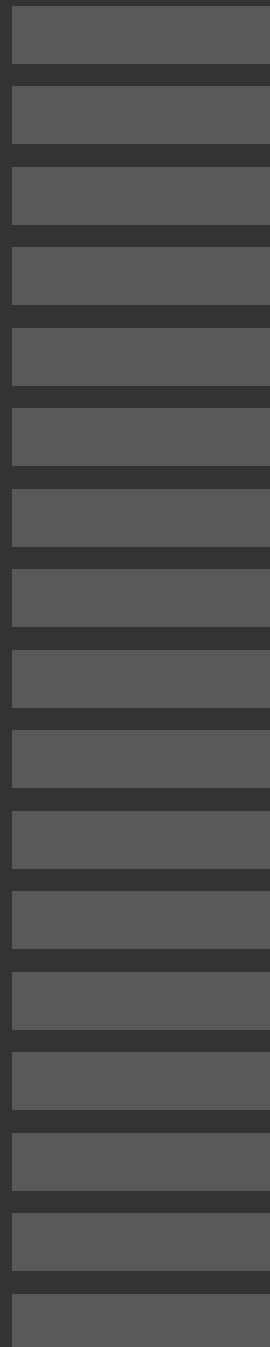Actions   Close Inquiry

Why Self-Close an Inquiry?

✓ Manage and close inquiries that have been resolved.

✓ Keep your inquiry list up-to-date by removing resolved items.

Steps to Self-Close an Inquiry

✓ Locate and open the Inquiry Details.

✓ Navigate to the bottom of the Details tab.

✓ Select **Close Inquiry**.

✓ Enter the Reason.

✓ Click Close.

Post-Closure

▪ The inquiry will no longer appear as **Open** or **In Progress**.

▪ The inquiry cannot be reopened once closed.

▪ Closed inquiries remain accessible for review for up to 18 months from the Total Inquiries list.

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Client360 Self-Service Resources

- Review Client360 Knowledge Articles.
- Access Client360 Help Pages.

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Client360 Knowledge Articles

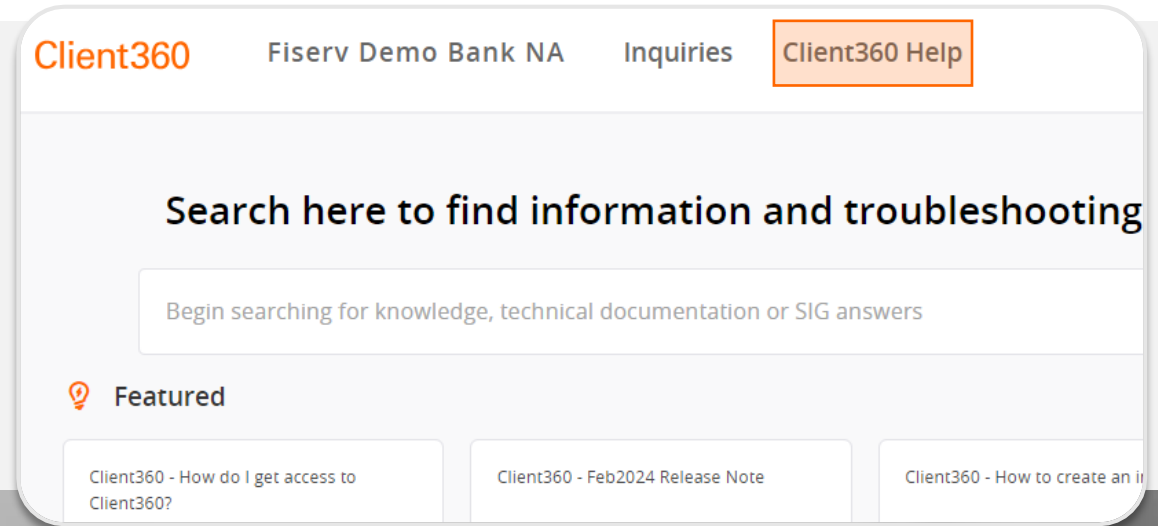| Article Number	Short Description
KB0200533	[Client360 - How to update your profile and contact preferences for notifications](#)
KB0210090	[Client360 - Accessing Compliance Packages](#)
KB0201397	[Client360 - How do I reset my password?](#)
KB0200803	[Client360 - How to create an inquiry](#)
KB0201474	[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?](#)

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Additional Resources

Client360 Resources

Select the Client360 Help link at the top of the Client360 home page to view additional information.

Q&A

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Thank You!

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