fiserv.

Client360

Client360 Administrator Guide

May 2024

Contents

Introduction

Client360 provides intuitive navigation through a simplified user interface and artificial intelligence (AI) boosted search features. With each inquiry, Client360 gets smarter and moves the client and the supporting service associate more quickly to resolution. Product-specific service menus provide a clearer path to inquiry creation and reduce the number of requests for clarification and supporting documentation.

Client360 Features

- An easy-to-use interface with intuitive navigation and options for quick answers.

- Access to how-to videos for select products.

- Contact information for the Fiserv relationship management team on the home page.

- An interactive Chabot for fast support.

- AI-boosted search results based on client unique products and specific queries.

- Searchable Technical Documentation, Knowledge Articles, and more.

Getting Started

This Client360 Contact Administrator Guide provides information for administrators regarding technical requirements (including how-to add trusted sites/domains and whitelist emails), contact creation and permissions management, and contact reporting. This Guide complements the Client360 User Guide. Please consult the User Guide for basic Portal usage, such as   signing in, searching Knowledge, and managing Inquiries.

Technical Requirements

To ensure user access and interaction with Client360, the client information technology (IT) department should review the following sections and make necessary modifications prior to using Client360.

Trusted Sites

Certain web addresses require trusted-site recognition and client firewall acceptance to the Client360 Portal. Please proxy the following URLs:

- https://client360.fiservapps.com
- https://servicepoint.fiservapps.com
- https://fiservservicepoint.fiservapps.com
- https://fiserv.service-now.com
- https://login.microsoftonline.com
- https://ajax.aspnetcdn.com
- https://fiservservicepoint.blob.core.windows.net

Domain Names

Certain domain names require trusted-site recognition and client firewall acceptance to the Client360 Portal. Please proxy the following domains:

- *.fiservapps.com
- *.fiservcorp.com
- *.onmicrosoft.com
- *.microsoftonline.com

Email Whitelisting

Please whitelist the following email addresses and URLs in any security proxies and spam filtering systems:

- Client360@fiserv.com
- DoNotReply@transactionverify.com
- msonlineservicesteam@microsoftonline.com
- *@fiserv.com
- fiservservice@servicenow.fiserv.com

DNS Entry

Please whitelist the following IP addresses for clients that use DNS entries:

- Add: client360.fiservapps.com - 208.72.250.131 & 216.66.219.74
- Keep Existing: fiservservicepoint.fiservapps.com - 107.162.163.207

Multifactor Authentication (MFA)

To ensure the security of a user's financial institution information, authentication is required for every sign-in. This confirms the user's identity and allows access to personal information, including contacts, inquiries, and sensitive notes/attachments. Users can receive an email, phone call, or SMS text message for Multifactor Authentication (MFA).

Supported Browsers

The following browsers support Client360:

- Microsoft Edge (latest version)
- Firefox (latest version)
- Chrome (latest version)
- Safari (latest version, Mac only)
- Tablet mobile browser (native Android and iOS)

Network Session

Ensure the HTTPs (TCP/443) port is open for all IP addresses related to the URLs in the Trusted Sites section. . Some of those URLs use dynamic IP addresses due to a Microsoft cloud infrastructure implementation.

Accessing Client360

Access Client360 at https://client360.fiservapps.com/Client360/

Client Contacts and Settings

The Client Contact Administrator adds and maintains contacts for the client organization through the Client360 Admin portal.

Client360 Contact Administrators access the Admin portal by selecting Admin from the dropdown menu under the user initials in the upper right corner.
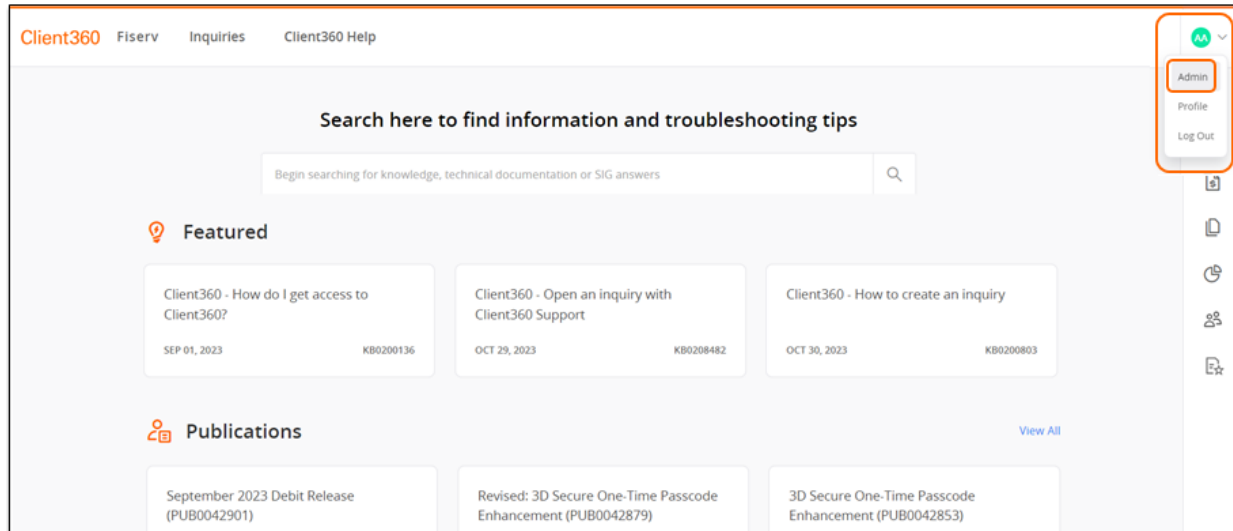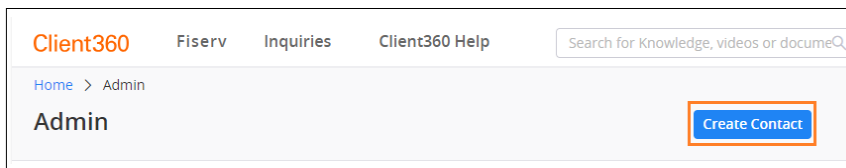

Fiserv Permission

To prevent Fiserv Administrators from updating client contact information and settings, select the checkbox in the Permission section.

Deselect the checkbox when a client requires Fiserv Administration assistance
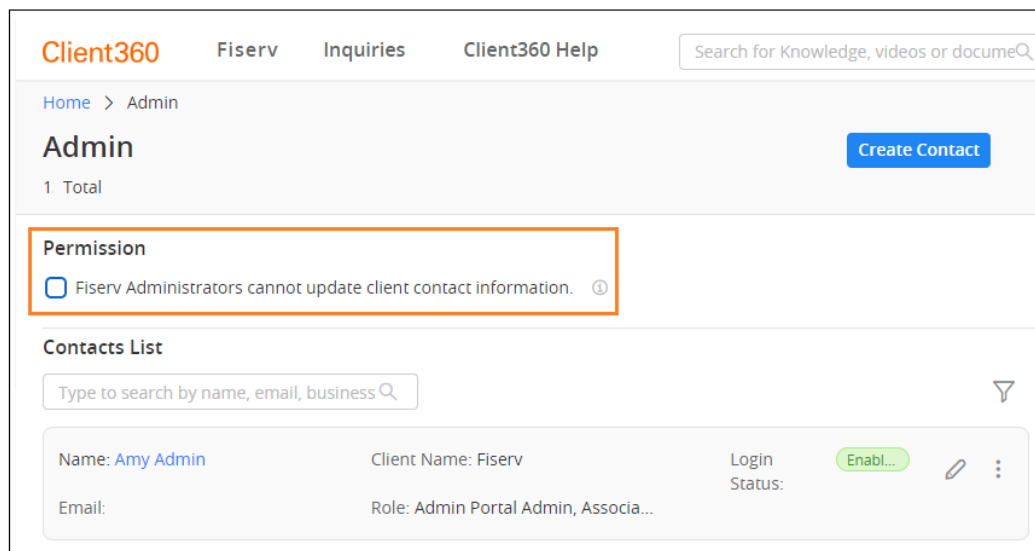
Creating a New Contact

1. From the Admin portal, select **Create Contact.**

2. Complete settings in the **General Information**, **Permission Information** section:

   Access to Portal: Selecting "Yes" allows the contact to sign in to Client360 to open inquiries. Selecting "No" prevents the contact to sign in to Client360 to open or view inquiries but does allow calls to Fiserv to open inquiries.

   Client Administrator Privileges: Selecting "Yes" grants a contact Client360 Contact Administrator privileges. Selecting "No" denies Client Administrator privileges.

3. Complete fields and settings in the General Information section.

   First Name

   Last Name

   Email: serves as the username for signing in to Client360 and is an option for delivery of MFA codes.

Client Name: select the organization(s) that the contact needs access to. With a Multi-Client Contact, select all organizations that the contact needs access to from the Client dropdown menu.

Primary Client: when selecting multiple clients in the Client field, designate the Contact's primary organization. In the Primary Client dropdown. This determines the contact's default view upon signing in, but the contact still has access to their other clients as required.

Business Phone

Mobile Phone

After Hours Phone

After Hours Contact: check this box to indicate the user accepts after-business hours calls. When the After Hours Contact box is selected, the After Hours Phone is required.

Note: the MFA feature offers all phone numbers when prompting for delivery of authentication codes. Only mobile devices can receive MFA authentication codes.

4. Select **Continue**

5. Complete settings in **the Portal Information, Manage Settings** section.

Notifications: selecting the Notifications box allows Client360 to send email notifications for inquiries to the user. If unchecked, the user does not receive email notifications for inquiry updates.

Note: This setting does not impact notifications initiated by Password Reset, Multifactor Authentication, Service Interruptions or Publications.

Show Inquiries of All Contacts: selecting the Show Inquiries of All Contacts box allows access to inquiries for any contact in the client organization. If unchecked, the user can only access inquiries for which they are the inquiry contact.

Show Sensitive Comments and Attachments: selecting the Show Sensitive Comments and Attachments box allows the user to view sensitive comments and attachments, such as card numbers and other Personal Identifiable Information (PII). If unchecked, the user cannot view sensitive data.

6. Complete settings in the **Portal Information**, **Product Preferences** section.

Product-level settings for **Service Interruptions**, **Publications,** and **Create Inquiry** appear in Product Preferences. A checked box mark indicates the options are on; an unchecked box indicates the options are off. User product preferences show a green, circled checkmark for enabled settings, and a black, circled x for disabled settings.

Admin Lock: selecting the Admin Lock setting restricts users from making changes to his/her Service Interruptions, Publications and Create Inquiry preferences for the product(s). An unchecked Admin Lock setting means users can make changes to Service Interruptions, Publications and Create Inquiry preferences for products in their profile.

Users can establish product preferences individually by product in the Preferences section or for multiple products through the Bulk Preference Settings feature as described below:

Bulk Preference Settings

Use Bulk Preference Settings to set preferences for one or many products at the same time.

1. Select desired preferences for **Publications**, **Create Inquiries,** and **Admin Lock**

2. Select the Product field to open a list of products. Make appropriate product selections or select the **All** option.

3. Select **Apply** to establish selected product settings. The Preferences section reflects the applied settings.

4. Select **Save.**

Service Interruptions: selecting the Service Interruptions box allows the user to receive email notifications about Service Interruptions for selected products. If the option is not checked, the user does not receive email notifications about Service Interruptions.

Publications: selecting the Publications box allows the user to view Publications in the Publications module and receive Publications by email for selected products. If the option is not checked, the user cannot access Publications for the product within the Publications Module or by email.

Create Inquiry: selecting the Create Inquiry box allows the user to open new inquiries for the product. If the option is not checked, the product does not display in the Product menu selections when creating a new inquiry.

Admin Lock: Checking Admin Lock allows the user's Contact Administrator to restrict the user from making changes to their own product preferences.

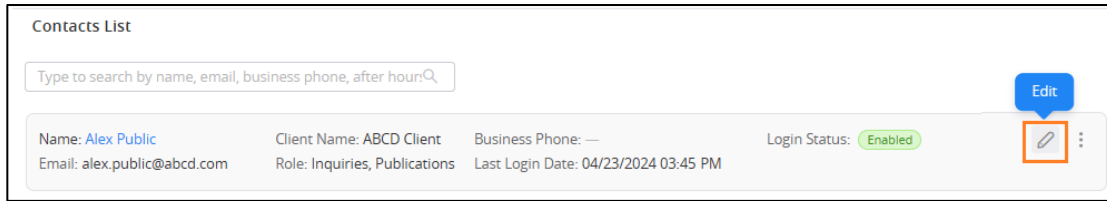7. Select **Save.**

Edit Contact

1. To maintain multi-client contacts, select the Client Name associated with the contact.

2. Locate the contact by scrolling through the list of contacts, or use the Search, Sort and Order features.

3. Select the Edit icon

4. Use the General Information and Portal Information tabs to update as needed.

5. Select **Save** to keep changes, select **Cancel** to return to the list of contacts, or select **Reset** to return the original values and settings.
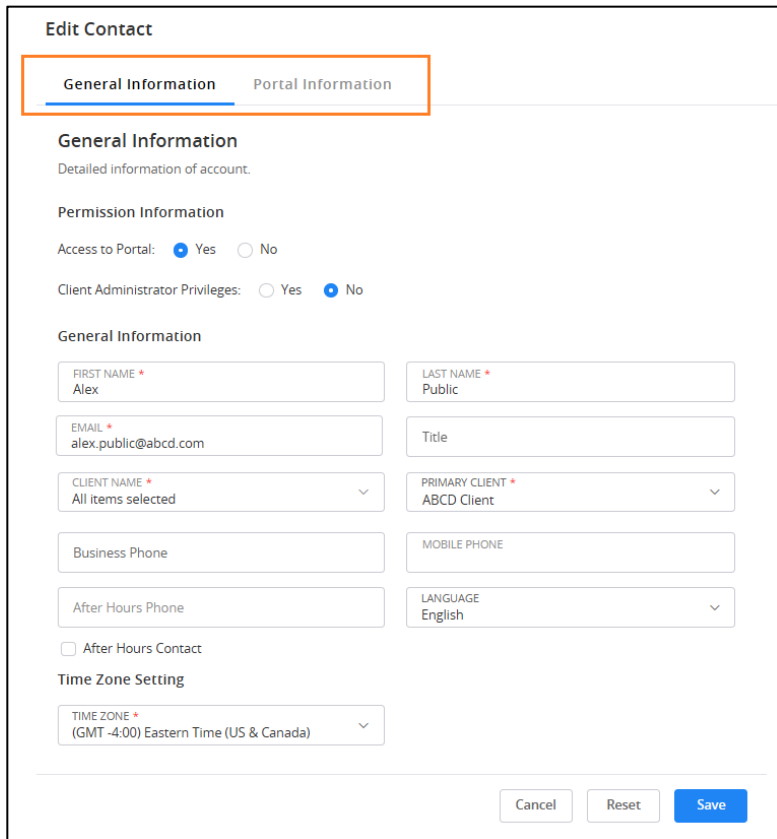
Additional Administrative Functions

The administrator can access additional functions by selecting the vertical ellipsis image to open the Actions menu.
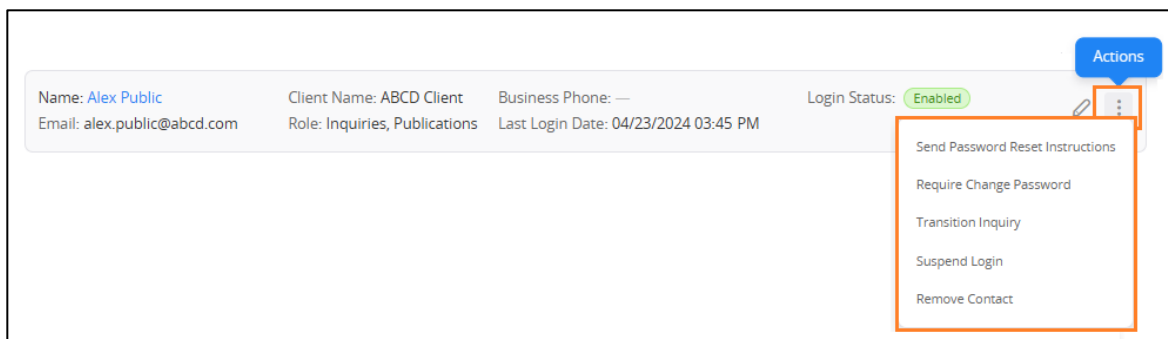
Send Password Reset Instructions: sends an email with password reset instructions to the user. After selecting the option, the "Password Reset Instructions Sent" banner appears at the top of the page.

Require Change Password: sets a password change upon next contact sign in. After selecting the option, the "Password change on next login triggered" Banner appears at the top of the page.

Transition Inquiry: prompts the administrator to select and confirm the user who is to receive all open inquiries for the selected user. Selecting Confirm reassigns all inquiries to the confirmed user. The "Inquiry Reassigned" Banner appears at the top of the page.
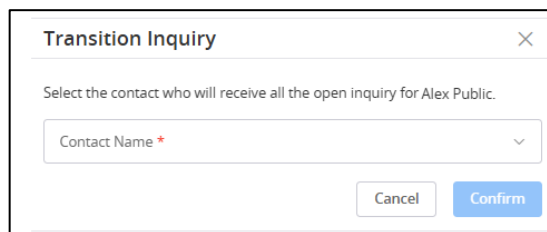
Suspend Login: prevents the user from logging in to the Client360 Portal without deleting the user. This is beneficial to the organization because it allows time to transfer open inquiries to another user. After selecting the option, the banner "Login Suspended." is displayed at the top of the page, the Login Status for the user displays "Suspended" and the option "Enable Login" replaces "Suspend Login" in the Actions menu.

Enable Login: enables the user to allow log in to the Client360 Portal. After selecting the option, the banner "Login Enabled." is displayed at the top of the page, the Login Status for the user displays "Enabled" and the option "Suspend Login" replaces "Enable Login" in the Actions menu

Remove Contact: requires the administrator to confirm removal with the prompt "Note: This contact may have open requests. Please remember to update the contact on those requests." The Remove Contact feature is intended for use after open inquiries have been moved to another contact from the edit contact feature or using the transition inquiry feature. Upon selecting Confirm, the banner "Contact Removed." Is displayed at the top of the page and the contact is removed. All inquiries related to the contact are still accessible from the Inquiries tab.
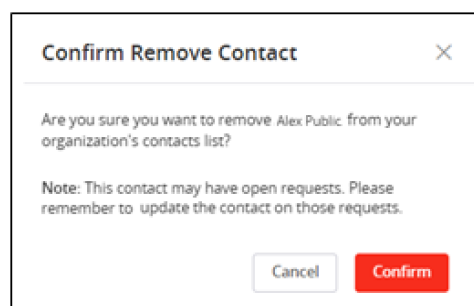
Reports

The Client360 Contact Administrator can run Admin Reports for their organization.

Admin Reports contain information about contacts and their organizational settings. Only Client360 Contact Administrators can view these reports.
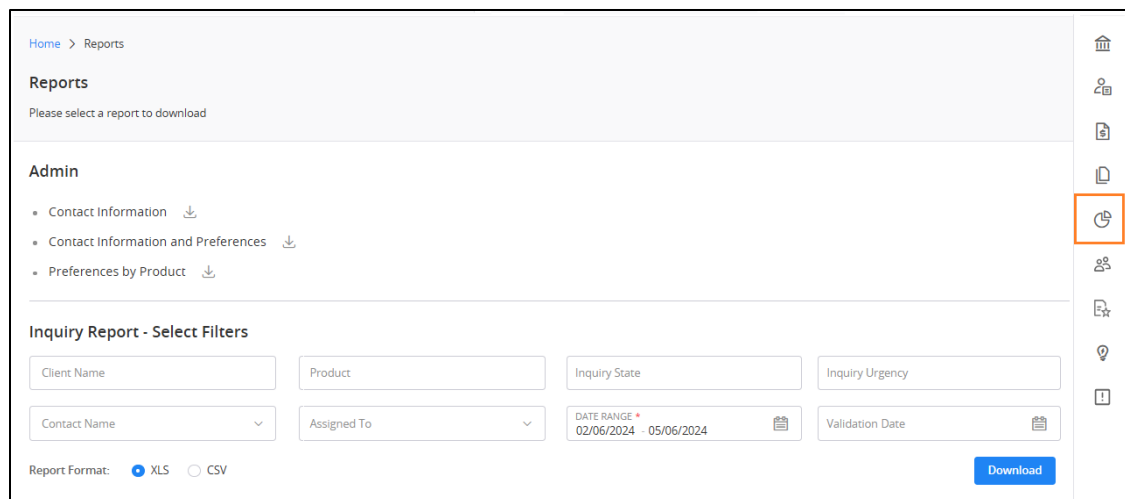
1. From the **Quick Access Menu**, select the **Reports** icon.
2. Select the desired report, complete the Select Filters section and chose a report format.
3. Select **Download**.

Three Admin reports are available.

Contact Information: prompts for selection of Contact Name(s) or All for download, includes contact information and general account settings for each contact.

Report format options:

.**XLS** (one row per contact).

Contact name	Date created	Date last log in	Client Name	Email	Title	Business phone	Mobile phone	After Hours phone	Notifications?	Language	Admin	View all inquiries	View all sensitive notes/attachments	Locked out?	Invoice admin	Invoice access	After hours contact
Bob Smith	08/16/2021	04/18/2022	Fiserv Inc	Bsmith@email.com	Associate	(111) 222-3333		(111) 222-3333	Y	English	Y	N	N	N	N	N	No
Kathleen Johnson	10/06/2021	04/19/2022	Fiserv Inc	Kjohnson@email.com	Associate	(111) 222-4444	(123) 654-0987		Y	English	Y	Y	Y	N	N	N	No
Lisa Brown	08/16/2021	04/18/2022	Fiserv Inc	Lbrown@email.com	Director	(123) 456-7890			Y	English	Y	Y	Y	N	N	N	No
Lisa Brown	08/16/2021	04/18/2022	Fiserv Demo Bank	Lbrown@email.com	Director	(123) 456-7890			Y	English	Y	Y	Y	N	N	N	No

.PDF (one page per contact)

Contact Information		
CONTACT NAME	DATE CREATED	DATE LAST LOG IN
Bob Smith	10/06/2021	04/19/2022
CLIENT NAME	TITLE	BUSINESS PHONE
Fiserv Inc	—	(111) 222-3333
MOBILE PHONE	AFTER HOURS PHONE	LANGUAGE
—	—	English
AFTER HOURS CONTACT	EMAIL	
No	Bsmith@email.com	

Notifications	✕
Admin	✓
View all inquiry	✓
View all sensitive notes/attachments	✓
Locked out	✕
Invoice admin	✕
Invoice access	✕

Contact Information		
CONTACT NAME	DATE CREATED	DATE LAST LOG IN
Lisa Brown	10/06/2021	04/20/2022
CLIENT NAME	TITLE	BUSINESS PHONE
Fiserv Inc	—	(111) 222-444
MOBILE PHONE	AFTER HOURS PHONE	LANGUAGE
—	—	English
AFTER HOURS CONTACT	EMAIL	
No	LBrown@email.com	

Notifications	✓
Admin	✓
View all inquiry	✓
View all sensitive notes/attachments	✓
Locked out	✕
Invoice admin	✕
Invoice access	✕

Contact Information and Preferences: prompts for selection of Contact Name(s) or All for download. Includes contact information and general account settings from the Contact Information report plus product preferences. The length of each report varies according to the products licensed for the organization.

Report format options:

.XLS (report length varies according to the products licensed for the organization):

Contact name	Bob Smith		
Date created	10/06/2021		
Date last log in	04/19/2022		
Client Name	Fiserv Inc		
Email address	Bsmith@email.com		
Title			
Business phone	(111) 222-3333		
Mobile phone			
After hours phone			
After hours contact	No		
Notifications?	N		
Language	English		
Admin?	N		
View all inquiries	Y		
View all sensitive notes/attachments	Y		
Locked out?	N		
BANK OZK			
Preferences:			
	Publications	**Inquiry**	**Admin Lock**
ATM Management	✓	✓	✓
ATM Managed Services	✓	✓	✓

.PDF (report length varies according to the products licensed for the organization):

Preferences by Product: prompts for selection of Product(s) or All for download. For each product selected, a listing of all users and related settings for Service Interruptions, Publications, Create Inquiry and Admin Lock.

Report format options:

XLS:

Fiserv Inc			
PEP+	**Publication**	**Inquiry**	**Admin Lock**
Bob Smith	✓	✓	✓
Kathleen Johnson	✓	✓	N/A
Lisa Brown	✓	✓	N/A
PEP+: AML Advisor	**Publication**	**Inquiry**	**Admin Lock**
Bob Smith	✓	✓	✓
Kathleen Johnson	✓	✓	N/A
Lisa Brown	✓	✓	N/A
Fiserv Demo Bank			
PEP+	**Publication**	**Inquiry**	**Admin Lock**
Lisa Brown	✓	✓	N/A

PDF:

Preferences by Product

360 Portal Company

PEP+	PUBLICATIONS	CREATE INQUIRY	ADMIN LOCK
Agnes Boyd	✓	✓	N/A
Allyson Smith	✓	✓	N/A
Bethany Gearhart	✓	✓	N/A

PEP+: AML ADVISOR	PUBLICATIONS	CREATE INQUIRY	ADMIN LOCK
Agnes Boyd	✓	✓	N/A
Allyson Smith	✓	✓	N/A