

Client360 Power Hour

Admin Portal Training

Client360 is Fiserv's service management platform.

System Admins can manage users and contacts within the Client360 Admin Portal.

- Create and update contacts
- Manage access and preferences
- Transition Inquiries
- Run admin reports

Where Are We Going?



Goal 01

Access the Client360 Admin Portal



Goal 02

Manage Client Contacts and Settings



Goal 03

Additional Administrative Functions



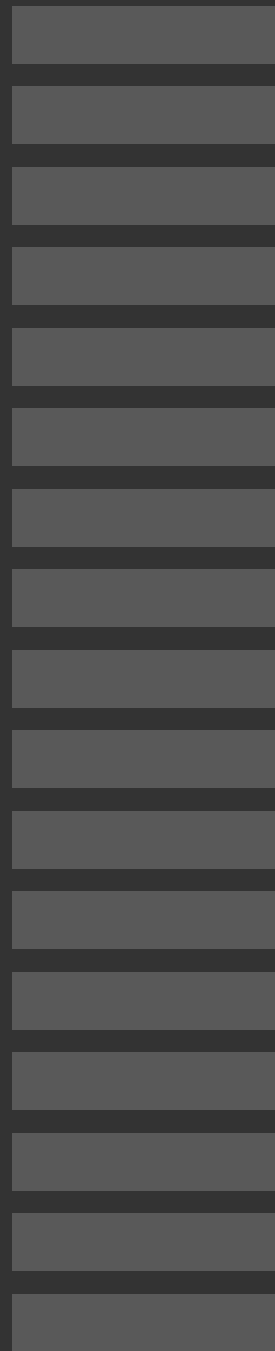
Goal 04

Admin Reports



Goal 05

Client360 Admin Resources



Access the Client360 Admin Portal



- The Admin Portal
- Client360 Admins Directory



Access the Client360 Admin Portal

Client360 Fiserv Demo Bank NA 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.

Featured

Client360 - How do I get started with Client360?
SEP 01, 2023

How to create an inquiry
KB0200803

View All

Publications

September 2023 Debit Release (PUB0042901)

Revised: 3D Secure One-Time Passcode Enhancement (PUB0042879)

3D Secure One-Time Passcode Enhancement (PUB0042853)



Admin Portal

The screenshot shows the Client360 Admin Portal interface. At the top, there is a navigation bar with 'Client360', 'Fiserv Coral Springs', 'Inquiries', and 'Client360 Help'. A search bar is present on the right. Below the navigation bar, the breadcrumb 'Home > Admin' is visible. The main content area is titled 'Admin' and contains several sections:

- CLIENT NAME:** A dropdown menu showing 'Fiserv Inc (Demo Client)' is highlighted with a red box and a circled '1'.
- CONTACT MANAGEMENT:** A tab is visible.
- Permission:** A checkbox labeled 'Fiserv Administrators cannot update client contact information.' is highlighted with a red box and a circled '2'.
- Contact List:** A section with a search bar 'Type to search by name, email, business phone' highlighted with a red box and a circled '3'. A 'Create Contact' button is highlighted with a red box and a circled '4'. A filter icon is highlighted with a red box and a circled '5'.
- Contact Cards:** Two contact cards are shown. The first card for 'Amy Admin' is highlighted with a red box and a circled '6'. The second card for 'Alex Associate' is partially visible below it.

Use the Client360 Admin Portal to add and maintain contacts for your organization.

Admin Portal Features:

1. Client Name
2. Fiserv Permission
3. Contact List Search
4. Create Contact Button
5. Sort and Order Contact List
6. Contact Card



Client360 Admins Directory

The Client360 Admins tab provides an overview of administrators within your institution.

- ✓ **Quick Search:** Locate system admins with ease.
- ✓ **Sorting & Ordering:** Organize admin details effectively.
- ✓ **Export Functionality:** Download admin lists in XLS format.
- ✓ **Contact Information Access:** View titles, names, emails, phone numbers, and status (active/inactive).

Client360 Fiserv Coral Springs Inquiries Client360 Help Search for Knowledge, videos or doc

Home > Client360 Admins

Client360 Admins

1 Total

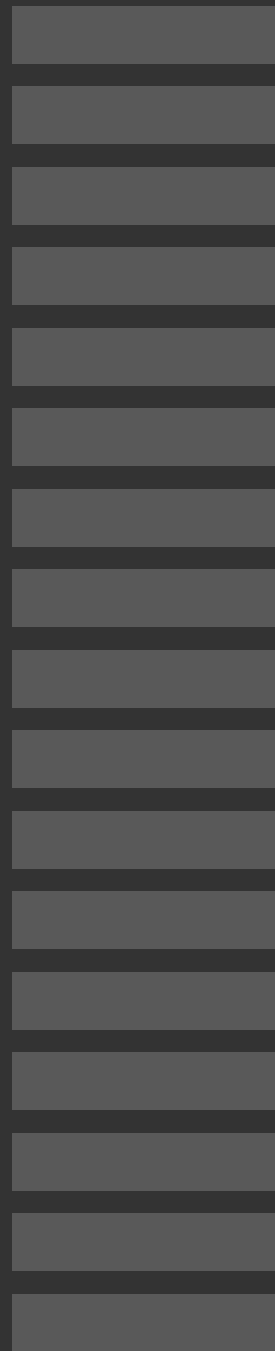
Type to search

Export

Clear and Reset

FC Fiserv Coral Springs

Admin Name: Amy Admin	Title: —	After Hour Phone: —	Status: Active
Email: amy_adm.n2022@out...	Phone: —	After Hour: No	



Manage Client Contacts and Settings



- Create Client Contacts
 - General Information
 - Profile Information



Create Contact | General Information

Create Contact

GENERAL INFORMATION PORTAL INFORMATION

General Information
Detailed information of account.

Permission Information

Access to Portal: Yes No

Client Administrator Privileges: Yes No

General Information

First Name *	Last Name *
Email *	Title
Client Name *	Primary Client *
Business Phone	Mobile Phone
After Hours Phone	LANGUAGE English
<input type="checkbox"/> After Hours Contact	

Time Zone Setting

Time Zone *

Permission Information:

- ✓ Enable or disable access to the Client360 portal.
- ✓ Assign or revoke Client360 administrator privileges.

General Information:

- ✓ Input contact's personal details –
 - Full Name
 - Email Address
 - Client Name/Primary Client
 - Business/Mobile Number
 - After-Hours Contact Information
 - Time Zone Preference



Create Contact | Portal Information

Home > Inquiries

Inquiries

New Inquiry

MY INQUIRIES ALL INQUIRIES MY WATCHLIST

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

Notification

Show all inquiry of all contacts

Show all sensitive comments and attachments

Customize portal information settings to meet specific requirements for each Client360 contact.

Manage Notifications

- ✓ Contacts can receive Client360 notifications.

Inquiry Visibility

- ✓ Contacts can view all inquiries, not just the ones they created.

Sensitive Information Access

- ✓ Enable access to all comments and attachments, regardless of the contributor.



Create Contact | Product Preferences

Create Contact

Preferences

Search Product Name

For each product, click the checkboxes for the functionality desired. Products locked by [Clear Current Preferences Admin](#) are not selectable.

PRODUCT NAME	SERVICE INTERRUPTIONS ⓘ	PUBLICATIONS ⓘ	CREATE INQUIRY ⓘ	ADMIN LOCK ⓘ
Accel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acquiring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AllData Aggregation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ATM Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BillMatrix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BillMatrix Next	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Branch Deposits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To manage product preferences, locate the product you want to update using the search bar or by scrolling through the product list.

Select or clear the options to reflect the desired state:

- ✓ **Service Interruptions:** Stay informed about any service interruptions.
- ✓ **Publications:** Stay updated with the latest publications.
- ✓ **Create Inquiry:** Option to create inquiries as needed.
- ✓ **Admin Lock:** Manage admin lock settings.



Create Contact | Bulk Product Preferences

- Under Bulk Preference Settings, select options to reflect your desired options for multiple products at a time.
- Select the product or products you would like to update.
- Select Apply.

The screenshot shows a 'Create Contact' dialog box with a 'Product Preferences' section. Under 'Bulk Preference Settings', there are three checkboxes: 'Publications', 'Create Inquiry', and 'Admin Lock'. Below these is a 'Product' dropdown menu. An orange box highlights the 'Product' dropdown, and an orange arrow points from it to a larger view of the dropdown menu on the right. The dropdown menu has a search bar at the top and a list of products: 'All', 'Accel', 'Acquiring', 'AllData Aggregation', and 'ATM Management'. The 'All' option is highlighted with an orange box.



Additional Administrative Functions



- Contact Management Actions
- Transition Inquiries
- Suspend Login
- Remove Contact



Contact Management Actions

Home > Admin

Admin

CLIENT NAME
Fiserv Inc (Demo Client)

CONTACT MANAGEMENT

Permission


Fiserv Administrators cannot update client contact information. ⓘ

Contact List

Type to search by name, email, busine

1 Total

1 result found

Name: Alex Associate	Client Name: Fiserv Inc (Demo C...	Business Phone: —	Login Status: Enab...	
Email: AlexAssociate01@outloo...	Role: Associate, Product, Public...	Last Login Date: 02/15/2024 04:...		

Clear and Reset

Actions

- Send Password Reset Instructions
- Require Change Password
- Transition Inquiry
- Suspend Login
- Remove Contact

Password Management:

- ✓ Send password reset instructions.
- ✓ Mandate password update upon next login.

Inquiry Allocation:

- ✓ Reassign inquiries with 'Transition Inquiry'.

User Access Control:

- ✓ Toggle user access with 'Suspend/Enable Login'.
- ✓ Permanently remove user with 'Remove Contact'.



Transition Inquiry

The screenshot shows the Client360 Admin interface. At the top, there is a navigation bar with 'Client360', 'Fiserv Coral Springs', 'Inquiries', and 'Client360 Help'. A search bar is also present. Below the navigation bar, a green notification banner with a checkmark icon and the text 'Inquiry transitioned.' is displayed, highlighted with a red box. The main content area is titled 'Admin' and includes a 'CLIENT NAME' dropdown menu set to 'Fiserv Coral Springs'. Below this is a 'CONTACT MANAGEMENT' section with a 'Permission' toggle for 'Fiserv Administrators cannot update client contact information.' and a 'Contact List' section with a search bar containing 'Alex A' and a 'Create Contact' button. The contact list shows '1 Total' and '1 result found'. The contact details for 'Alex Associate' are displayed, including 'Client Name: Fiserv Coral Springs', 'Business Phone: —', 'Login Status: Ena...', 'Email: AlexAssociate01@outlo...', 'Role: Associate, Product, Publ...', and 'Last Login Date: 02/15/2024 0...'.

Initiate Inquiry Transition

- ✓ The 'Transition Inquiry' feature prompts administrators to choose and verify the recipient for all pending inquiries of a selected user.

Confirmation of Reassignment

- ✓ By selecting 'Confirm', the system reassigns all open inquiries to the chosen user.

Notification of Completion

- ✓ An 'Inquiry transitioned' notification is displayed at the top of the page to indicate successful reassignment.



Suspend Login

The screenshot shows the Client360 Admin interface. At the top, there is a navigation bar with 'Client360', 'Fiserv Coral Springs', 'Inquiries', and 'Client360 Help'. A search bar is also present. Below the navigation bar, a green notification box says 'Login suspended.' with a close button. The main content area is titled 'Admin' and includes a 'CLIENT NAME' dropdown menu set to 'Fiserv Coral Springs'. Under 'CONTACT MANAGEMENT', there is a 'Permission' section with a checkbox for 'Fiserv Administrators cannot update client contact information.' Below that is a 'Contact List' section with a search bar containing 'Alex A' and a search icon. The list shows '1 Total' and '1 result found'. The contact details for 'Alex Associate' are displayed, including 'Client Name: Fiserv Coral Springs', 'Business Phone: —', 'Email: AlexAssociate01@outlook...', 'Role: Associate, Product, Publicat...', and 'Last Login Date: 02/15/2024 04:5...'. An Actions menu is open over the contact details, listing options: 'Send Password Reset Instructions', 'Require Change Password', 'Transition Inquiry', 'Suspend Login' (highlighted with an orange box), and 'Remove Contact'. Below the contact details, there is a 'Login Status' section with a 'Suspend...' button (highlighted with an orange box) and an edit icon.

Suspend User Access

- ✓ Temporarily deactivate a user's Client360 account.
- ✓ Blocks login attempts to the Client360 Portal while preserving the account.
- ✓ A confirmation notification appears, and the user's status updates to 'Suspended'.

Restore User Access

- ✓ The 'Enable Login' option becomes available in the Actions menu after suspension.
- ✓ To reinstate login privileges, navigate to the Actions menu and choose 'Enable Login'.



Remove Contact

Client360 Fiserv Coral Springs Inquiries Client360 Help Search for Knowledge

Home > Admin

Admin

CLIENT NAME
Fiserv Coral Springs

CONTACT MANAGEMENT

Permission

Fiserv Administrators cannot update client contact information.

Contact List

Alex A

1 Total
1 result found

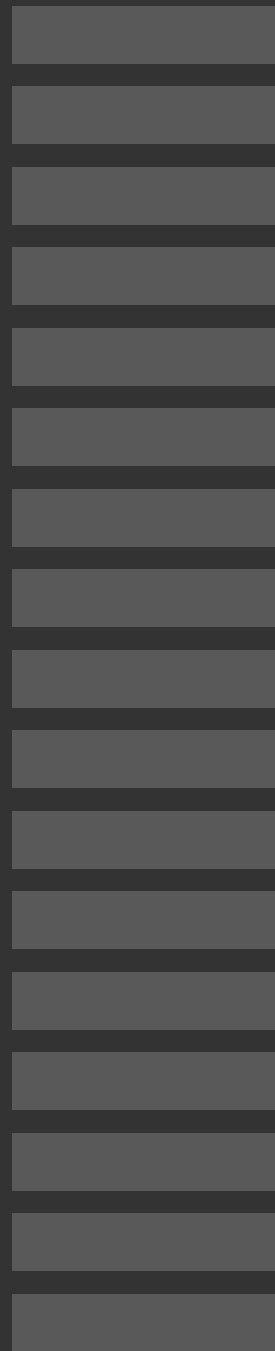
Name: Alex Associate	Client Name: Fiserv Coral Springs	Business Phone: —	Login Status: Enabl...
Email: AlexAssociate01@outlook....	Role: Associate, Product, Publicat...	Last Login Date: 02/15/2024 04:5...	

Confirm Remove Contact

Are you sure you want to remove Alex Associate from your organization's contacts list?

Note: This contact may have open requests. Please remember to update the contact on those requests.

Permanently delete user profiles in Client360 by selecting the 'Remove Contact' option.



Admin Reports



- Access Admin Reports
- Report Examples



Admin Reports

The screenshot displays the 'Admin Reports' interface. At the top left, it shows 'Client360' and 'Fiserv Coral Springs'. Below this is a navigation bar with 'Home > Reports'. The main content area is titled 'Reports' and contains the text 'Please select a report to download'. On the left, there is an 'Admin' section with a list of report types: 'Contact Information', 'Contact Information and Preferences', and 'Preferences by Product'. Each item has a download icon. The 'Contact Information' item is highlighted with an orange box, and an arrow points from this box to a modal window titled 'Contact Information Report'. This modal window contains the following elements: a dropdown menu for 'CLIENT NAME *' with 'Fiserv Coral Springs' selected; a dropdown menu for 'Contact Name *'; a 'Report Type' section with radio buttons for 'PDF' (selected) and 'XLS'; and 'Cancel' and 'Download' buttons. Below the modal, there is an 'Inquiry Report - Select Filters' section with various input fields: 'Client Name', 'Product', 'Inquiry State', 'Inquiry Urgency', 'Contact Name' (dropdown), 'Assigned To' (dropdown), 'DATE RANGE *' (03/12/2024 - 06/12/2024), and 'Validation Date'. At the bottom, there is a 'Report Format' section with radio buttons for 'XLS' (selected) and 'CSV', and a 'Download' button.

Admin Report Types:

- ✓ Contact Information
- ✓ Combined Contact Information & Preferences
- ✓ Product-Specific Preferences

Report Generation Steps:

- ✓ Choose the Client Name.
- ✓ Select either Multiple or Individual contacts or Products from the dropdown menu.
- ✓ Specify the report format, PDF or Excel (XLS).

Report Example



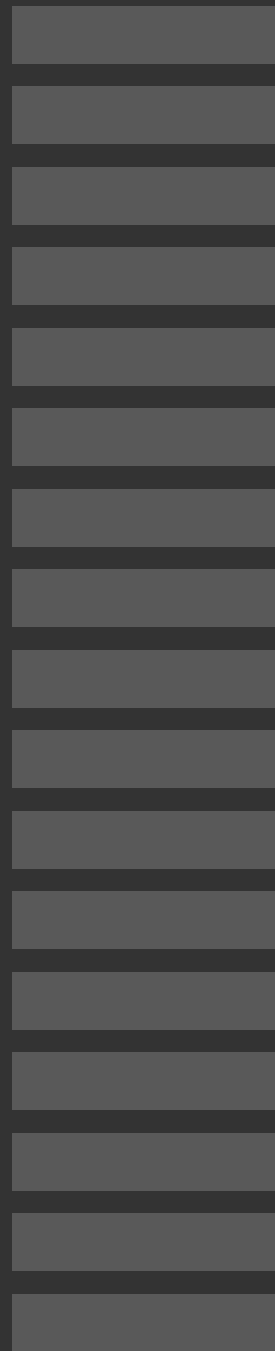
Contact Information

CONTACT NAME	ROLE	CREATED DATE
Amy Admin	Publication, Invoice, AI Assistant and Product permissions, Standard Admin	12/19/2023
DATE LAST LOG IN	CLIENT NAME	TITLE
06/12/2024	Fiserv Coral Springs	—
BUSINESS PHONE	MOBILE PHONE	AFTER HOURS PHONE
—	—	—
LANGUAGE	AFTER HOURS CONTACT	EMAIL
English	No	amy.admin@outlook.com

	A	B	C	D	E	F	G
	Contact name	Role	Created Date	Date last log in	Client Name	Email	Title
1							
2	Amy Admin	Publication, Invoice, Standard Admin	12/19/2023	06/12/2024	Fiserv Coral Springs	amy.admin@outlook.cc	
3	Alex Associate	Publication, Invoice, Standard Admin	05/08/2024	02/15/2024	Fiserv Coral Springs	AlexAssociate01@outlo	
4	Amy Admin	Associate	07/24/2023	06/12/2024	Fiserv Coral Springs	amy_adm.n2022@outlo	
5	Alex Public	Associate	07/24/2023	12/13/2023	Fiserv Coral Springs	alexpublic@gmail.com	
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27							

Retrieve Admin Reports in either PDF or Excel format to analyze contact details, settings, and product preferences.

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



Client360 Admin Resources



- Helpful Knowledge Articles
- Client360 Help Pages



Helpful Client360 Admin Knowledge Articles

Article #	Short Description
KB0204470	Client360 Admin - Add New Multi-Client Contacts
KB0204471	Client360 Admin - Manage Access for Multi-Client Contacts
KB0201455	Client360 Admin - How to manage access
KB0201425	Client360 Admin - How to create a new contact
KB0201435	Client360 Admin - How to update contact information
KB0201461	Client360 Admin - How to remove a contact
KB0201472	Client360 Admin - How to run an admin report
KB0204475	Client360 Admin - Run a Report for Multiple Clients
KB0204473	Client360 Admin - View Multiple Clients in Multi-Client Contacts View



Helpful Client360 Knowledge Articles

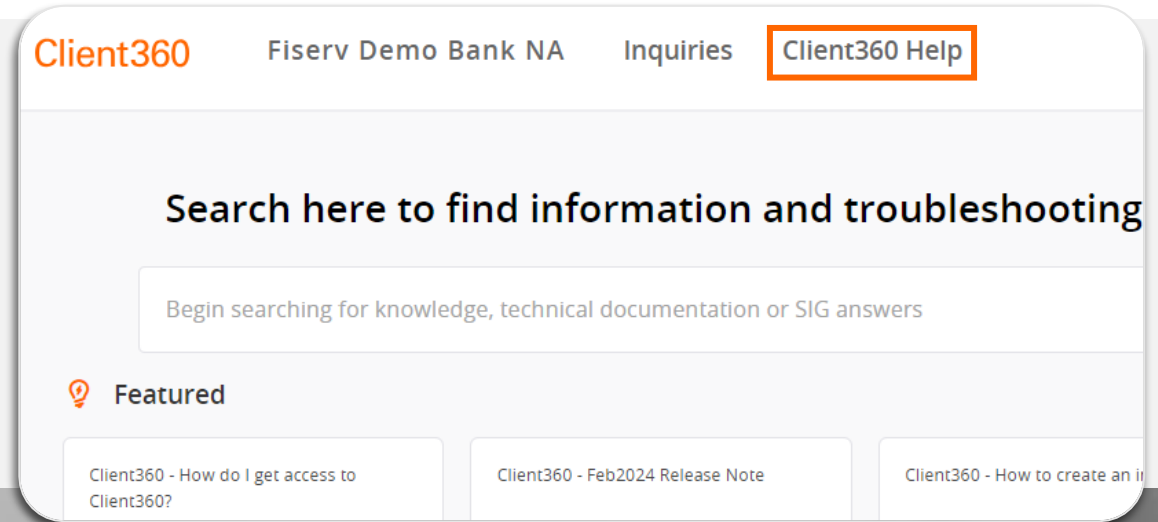
Article #	Short Description
KB0200533	<u>Client360 - How to update your profile and contact preferences for notifications</u>
KB0210090	<u>Client360 - Accessing Compliance Packages</u>
KB0201397	<u>Client360 - How do I reset my password?</u>
KB0200803	<u>Client360 - How to create an inquiry</u>
KB0201474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



Additional Resources

Client360 Resources

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



Where Are We Now?



01

Access the Client360 Admin Portal



04

Admin Reports



02

Manage Client Contacts and Settings



05

Client360 Admin Resources



03

Additional Administrative Functions



Q&A





Thank You!

