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

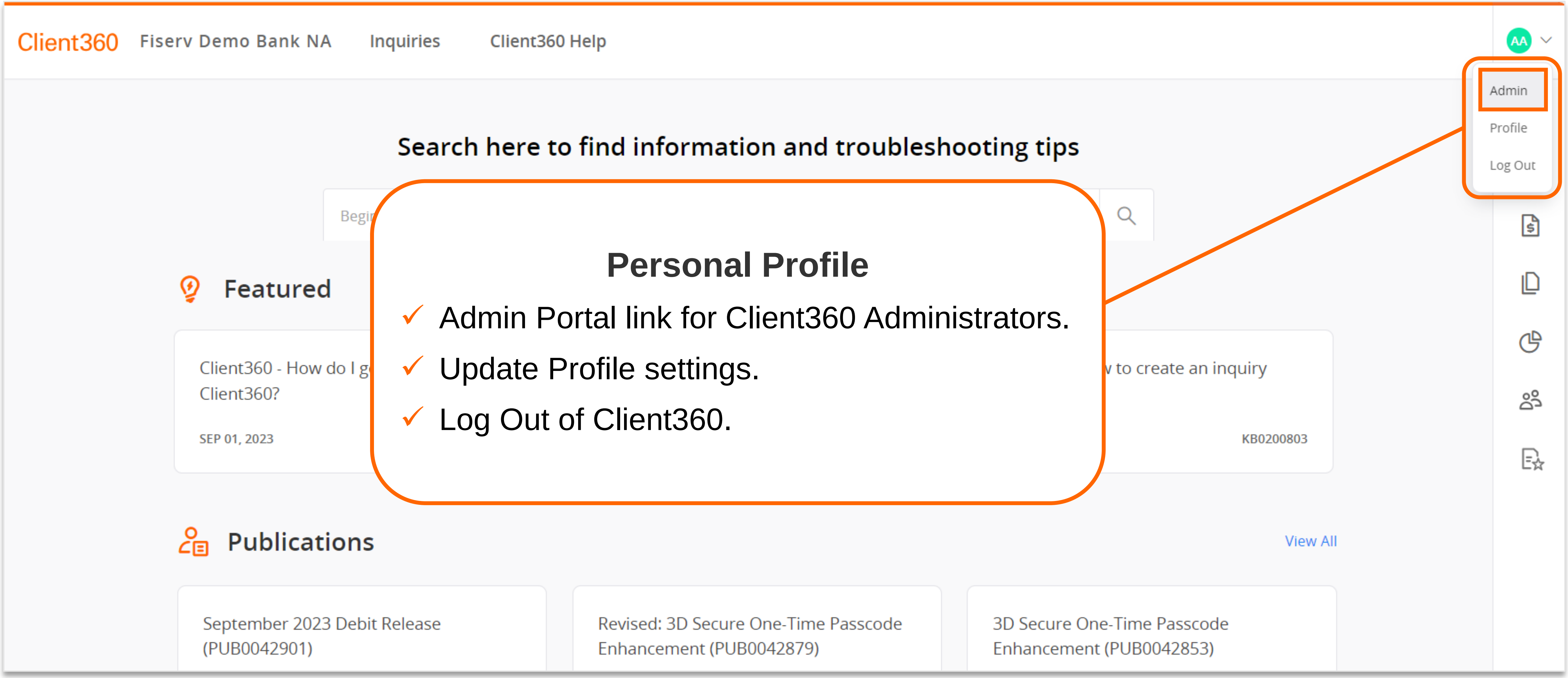
Goal 05

Client360 Admin Resources

Access the Client360 Admin Portal

- The Admin Portal
- Client360 Admins Directory

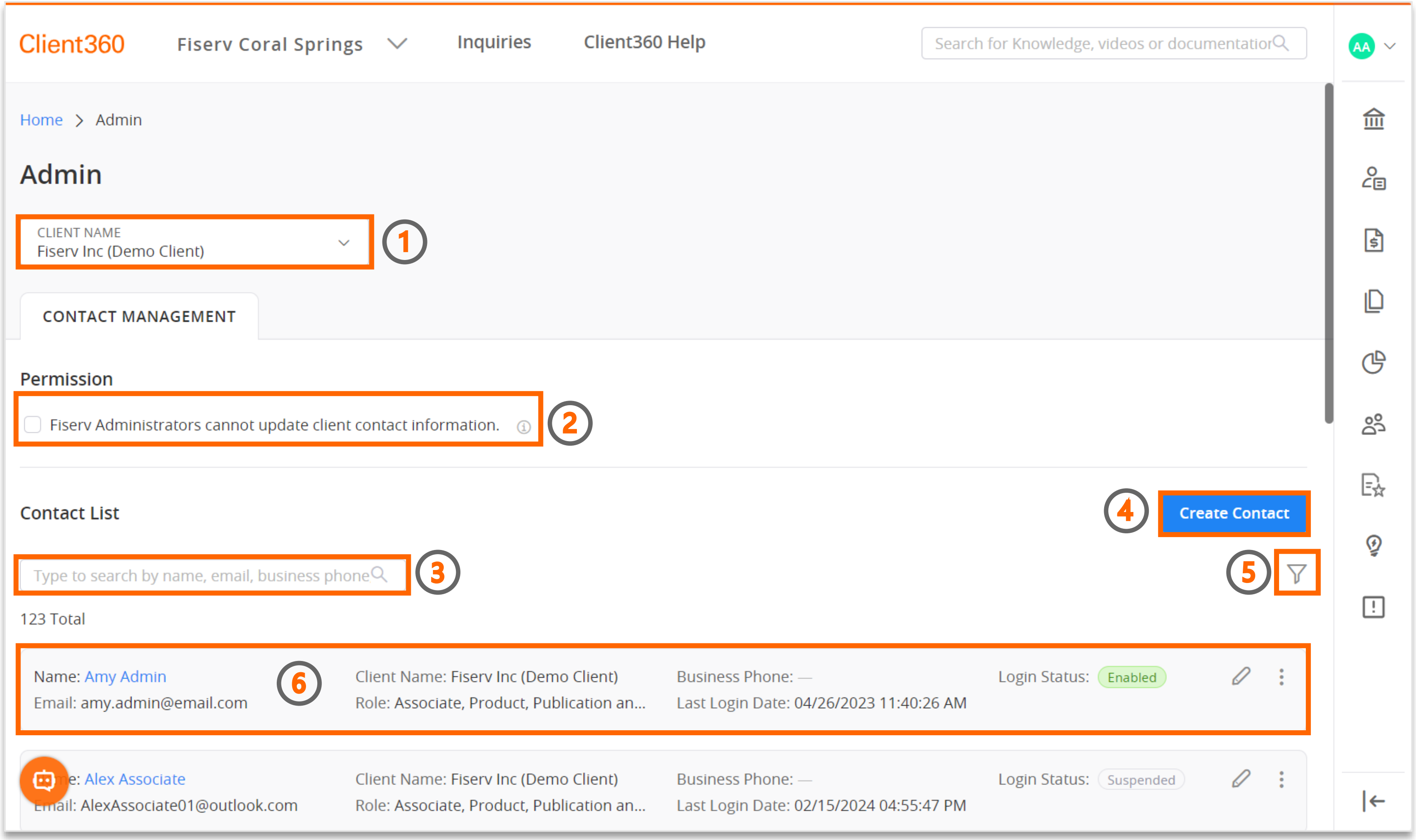
Access the Client360 Admin Portal



Personal Profile

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

Admin Portal



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

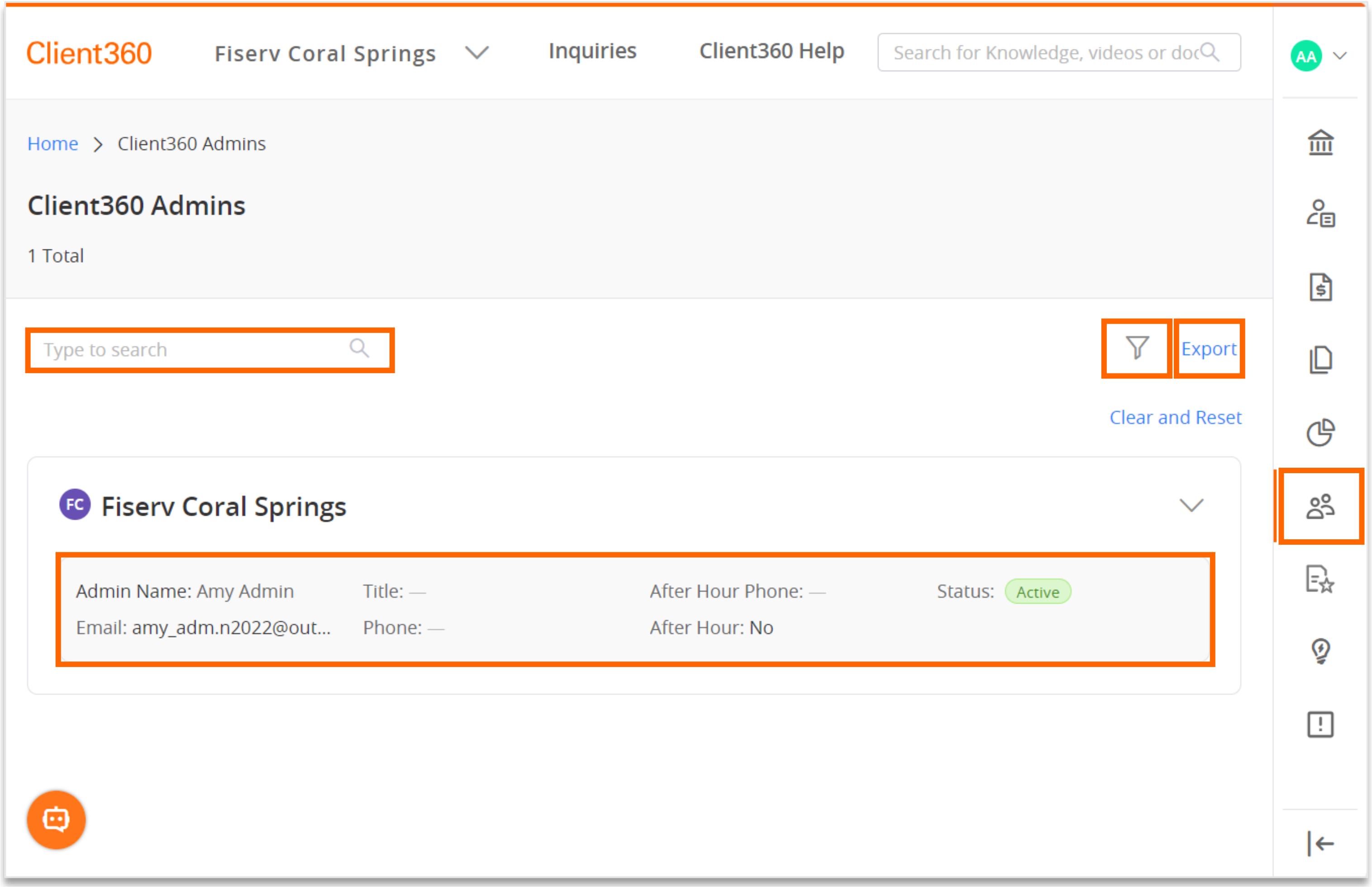
Admin Portal Features:

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.

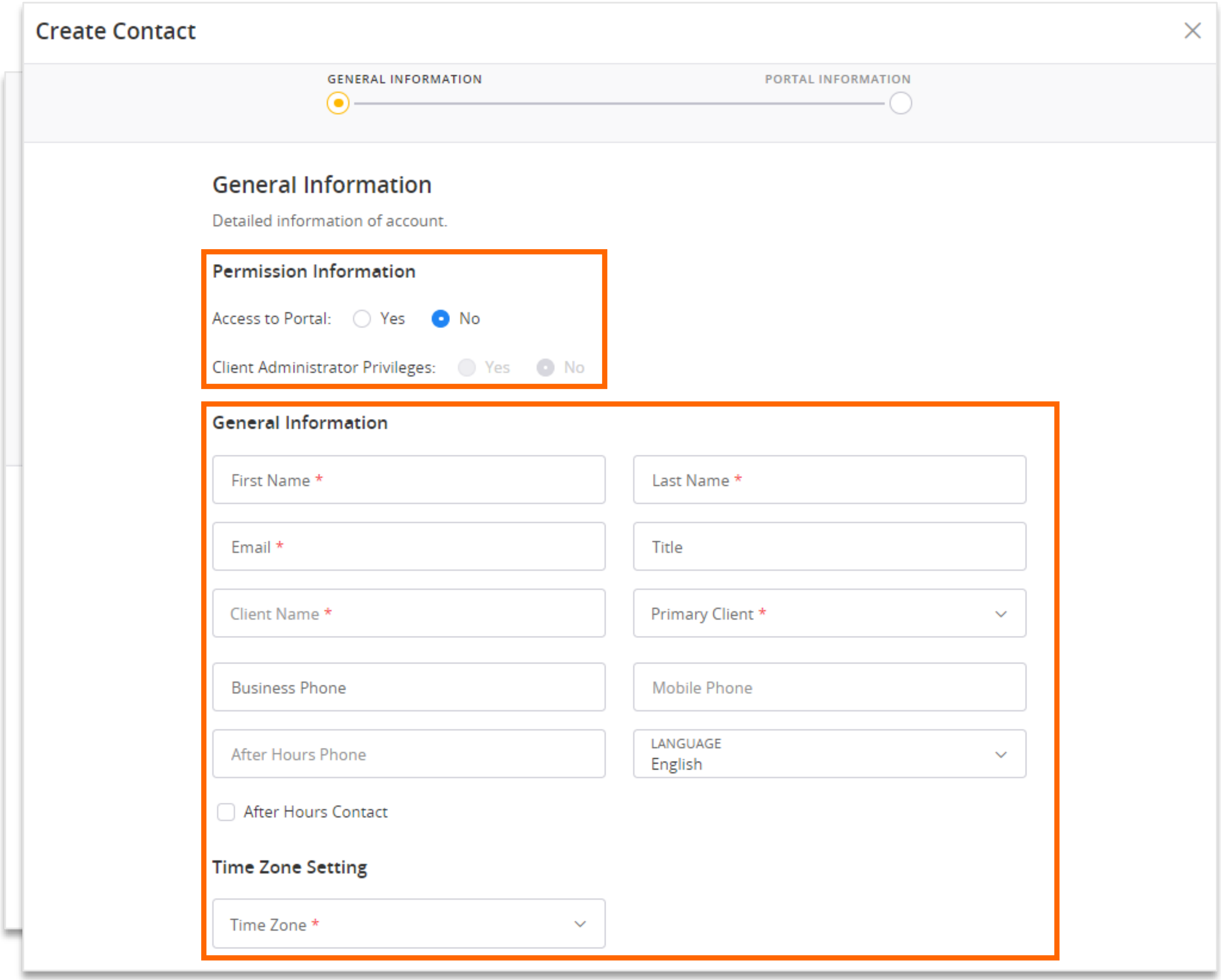
- ✓ **Quick Search**: Locate system admins with ease.
- ✓ **Sorting & Ordering**: Organize admin details effectively.
- ✓ **Export Functionality**: Download admin lists in XLS format.
- ✓ **Contact Information Access**: View titles, names, emails, phone numbers, and status (active/inactive).



Manage Client Contacts and Settings

- Create Client Contacts
  - General Information
  - Profile Information

Create Contact | General Information



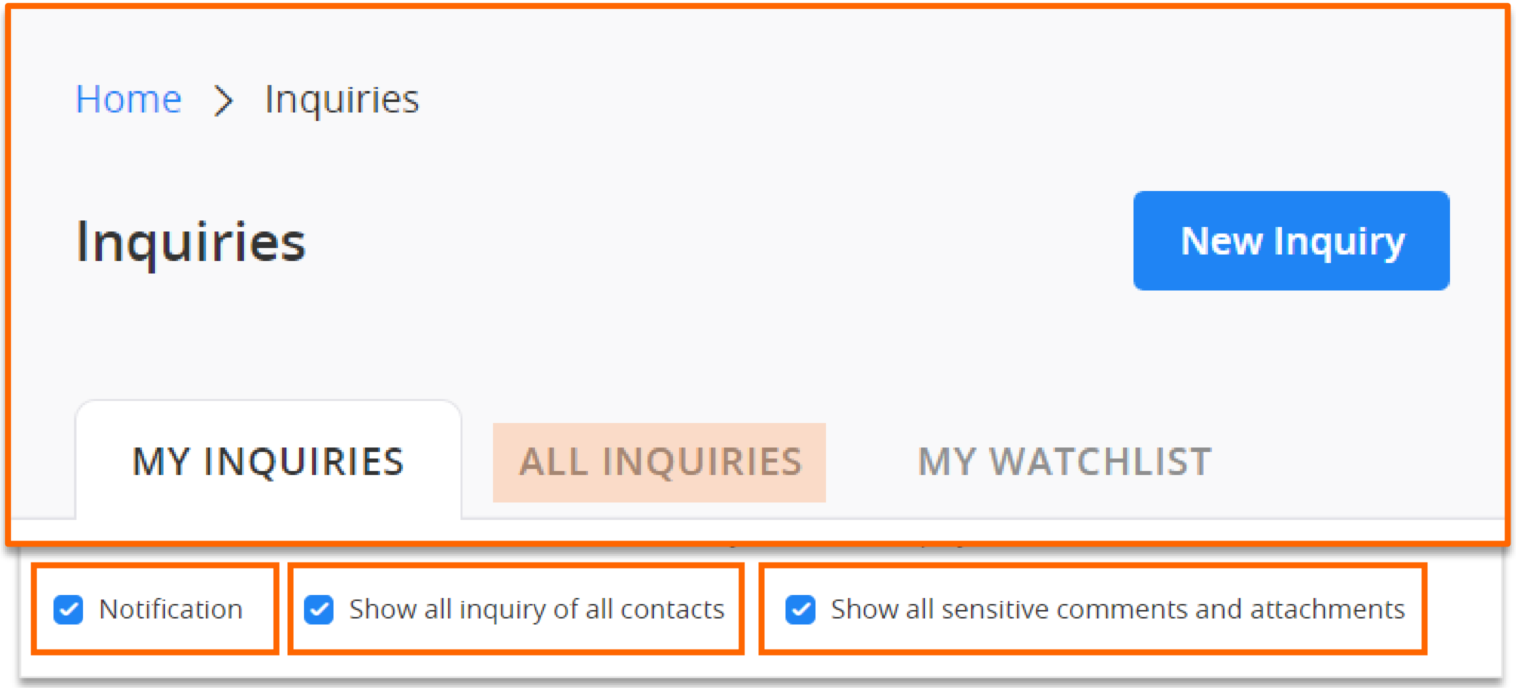
Permission Information:

- ✓ 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



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.

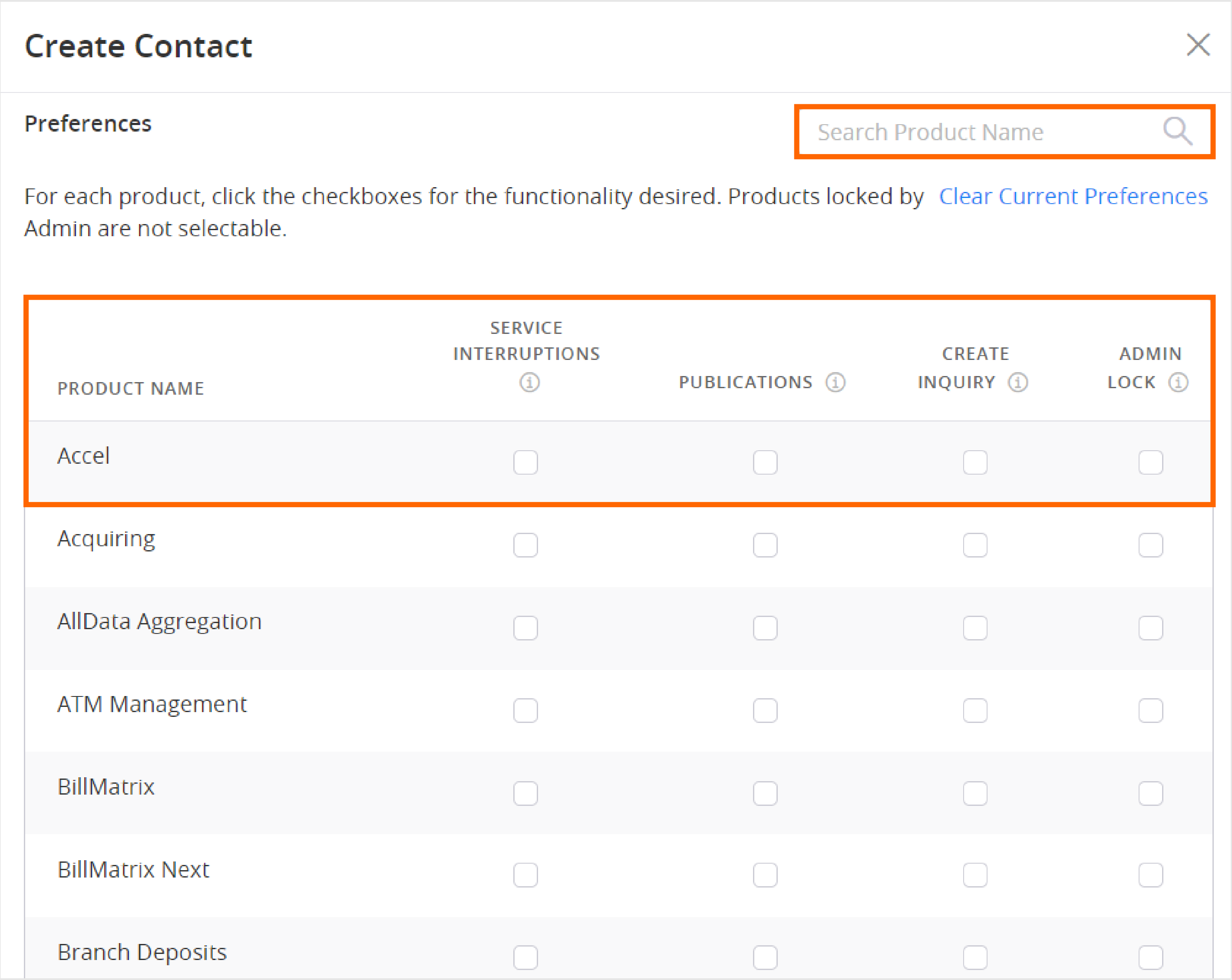
Inquiry Visibility

- ✓ 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



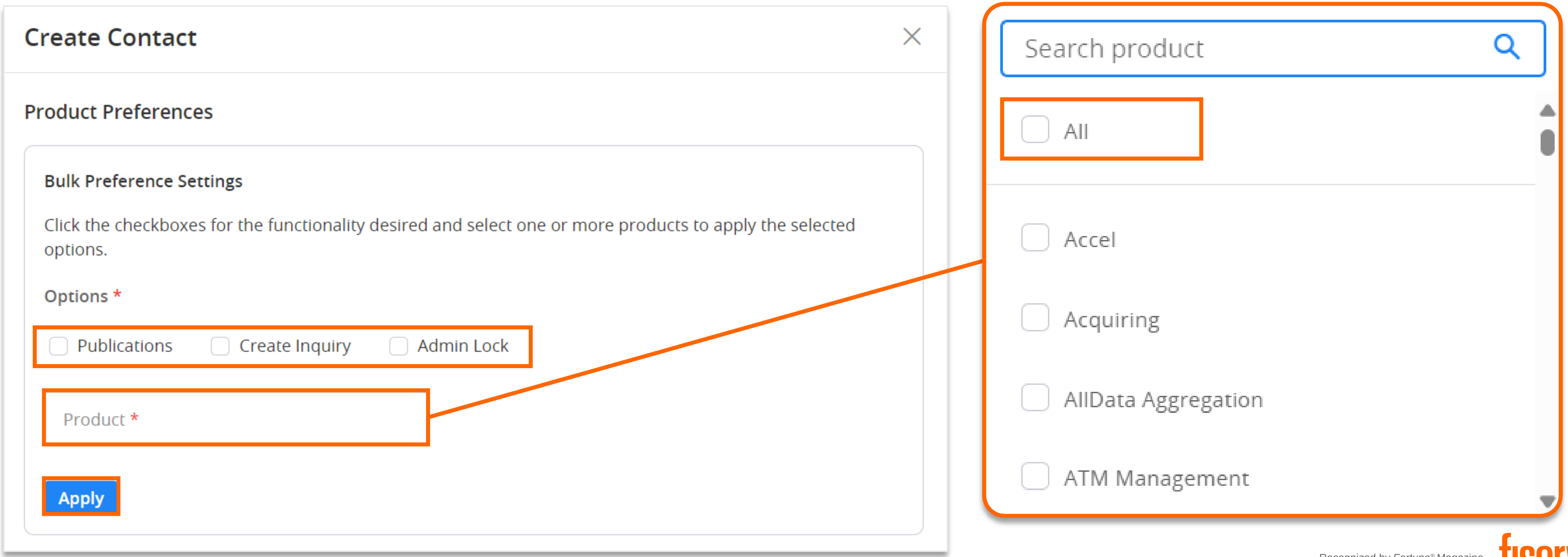
To manage product preferences, locate the product you want to update using the search bar or by scrolling through the product list.

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

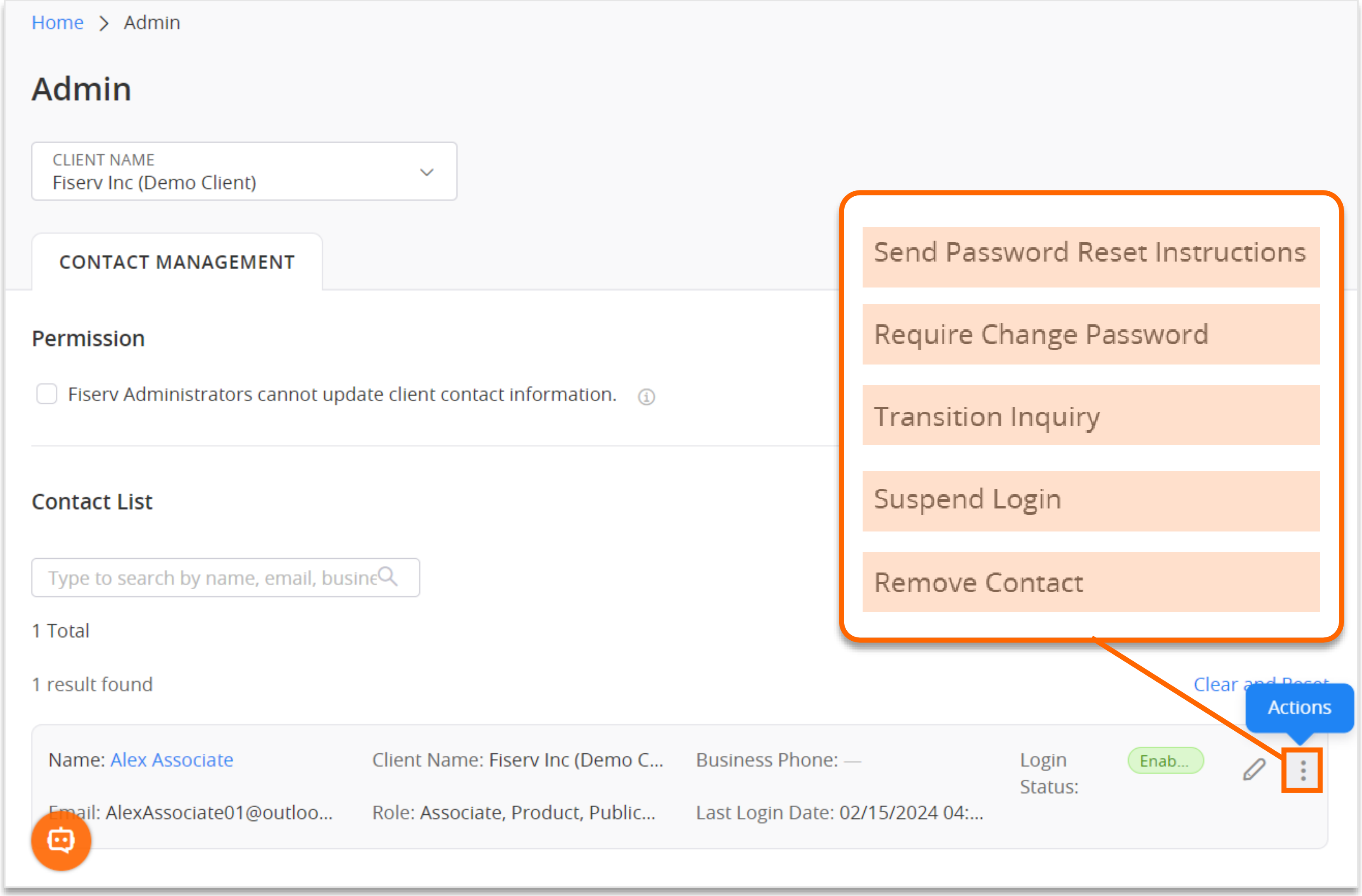
- Under Bulk Preference Settings, select options to reflect your desired options for multiple products at a time.
- Select the product or products you would like to update.
- Select Apply.



Additional Administrative Functions

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

Contact Management Actions



Password Management:

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

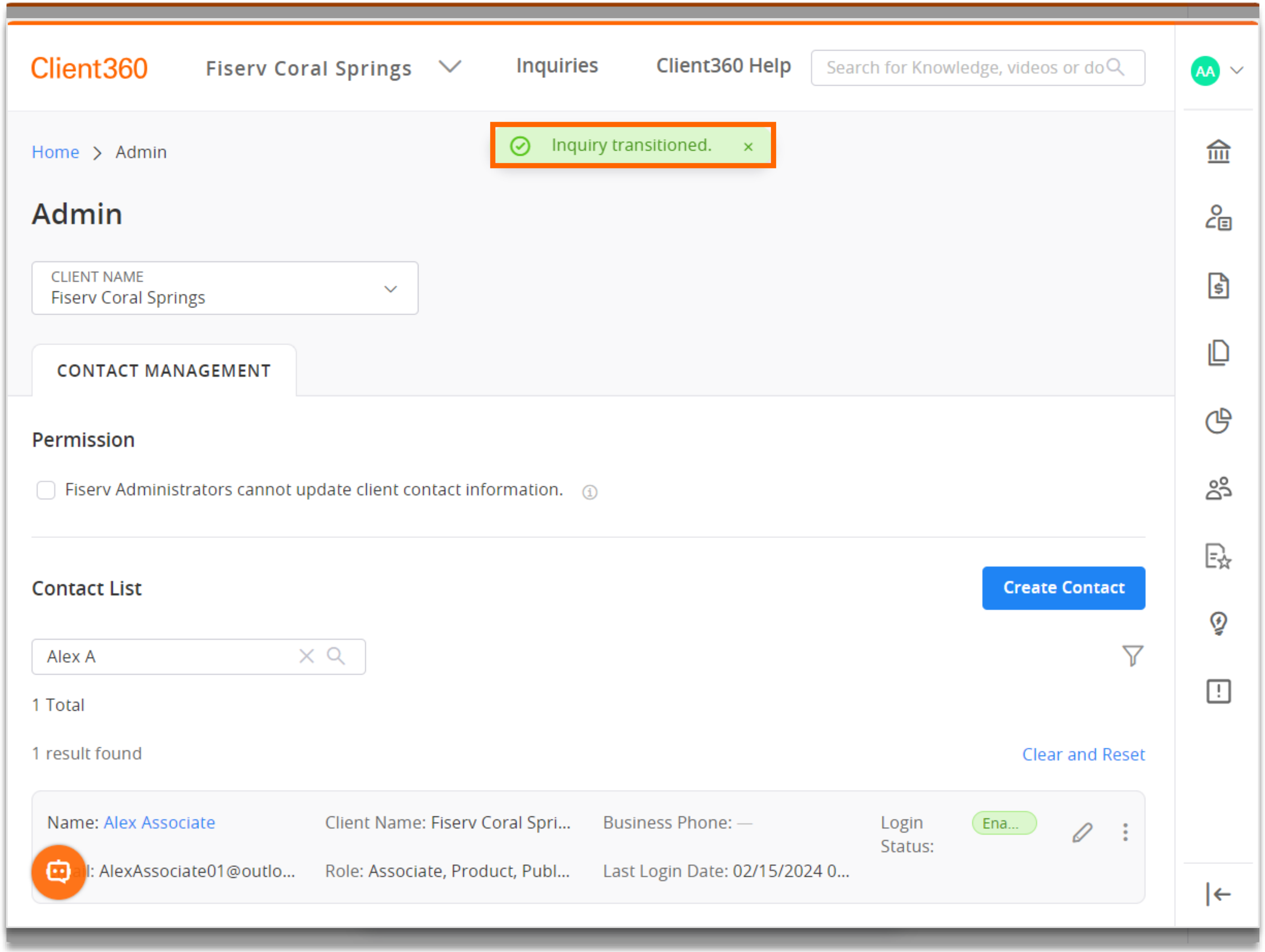
Inquiry Allocation:

- ✓ Reassign inquiries with ‘Transition Inquiry’.

User Access Control:

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

Transition Inquiry



Initiate Inquiry Transition

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

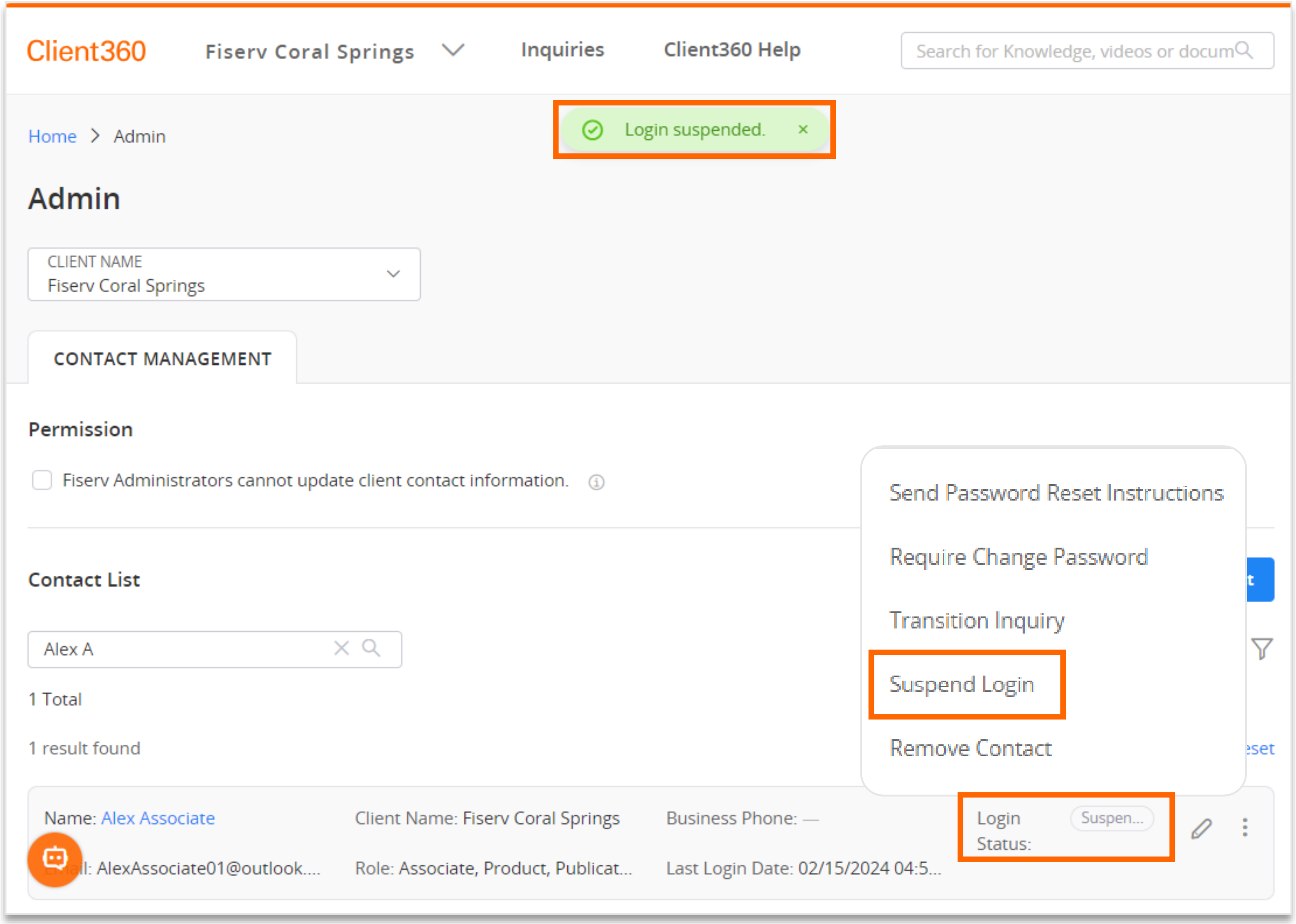
Confirmation of Reassignment

- ✓ 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



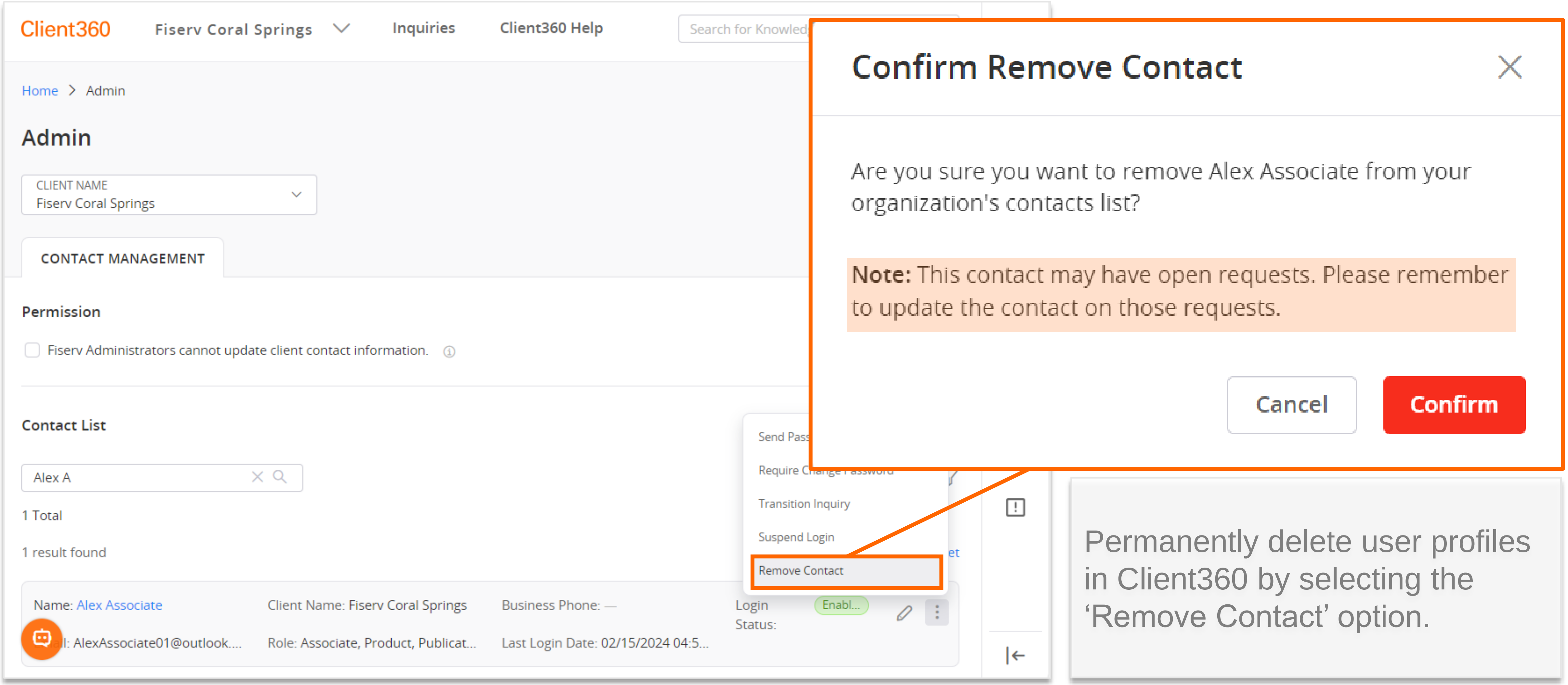
Suspend User Access

- ✓ 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

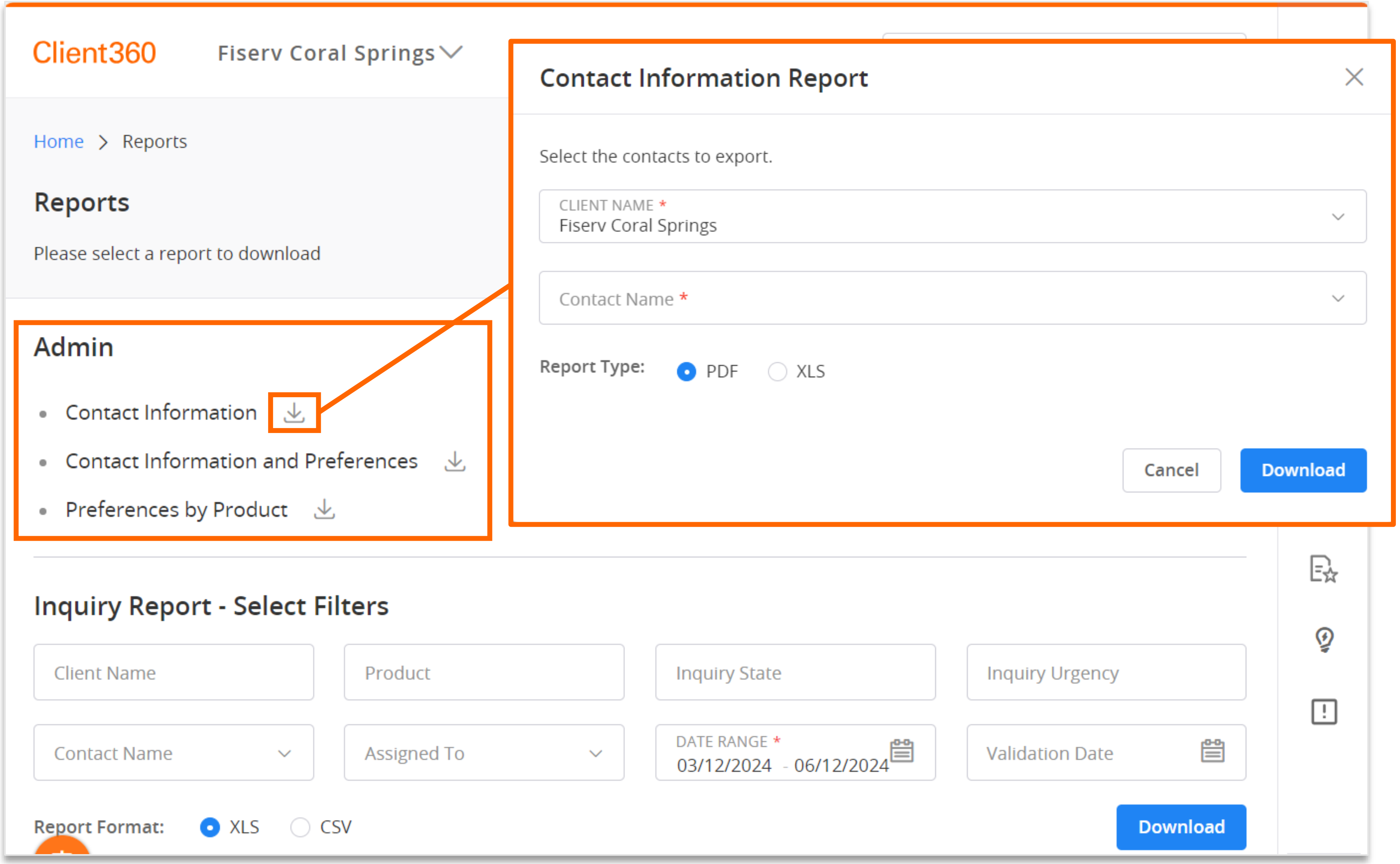


Permanently delete user profiles in Client360 by selecting the 'Remove Contact' option.

Admin Reports

- Access Admin Reports
- Report Examples

Admin Reports



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

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

	A	B	C	D	E	F	G
1	Contact name	Role	Created Date	Date last log in	Client Name	Email	Title
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	

cp_contacts_information

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

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

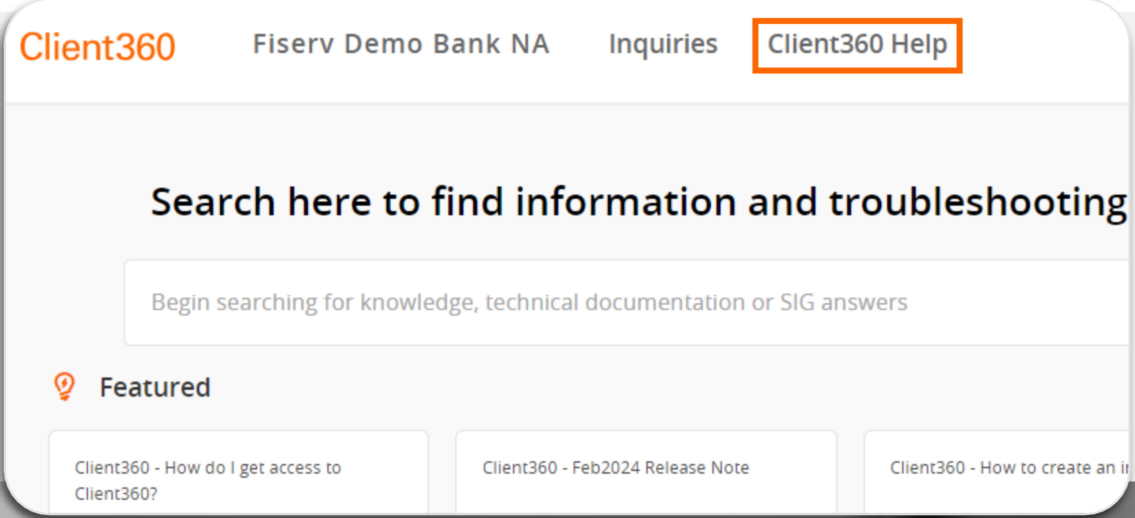
Helpful Client360 Knowledge Articles

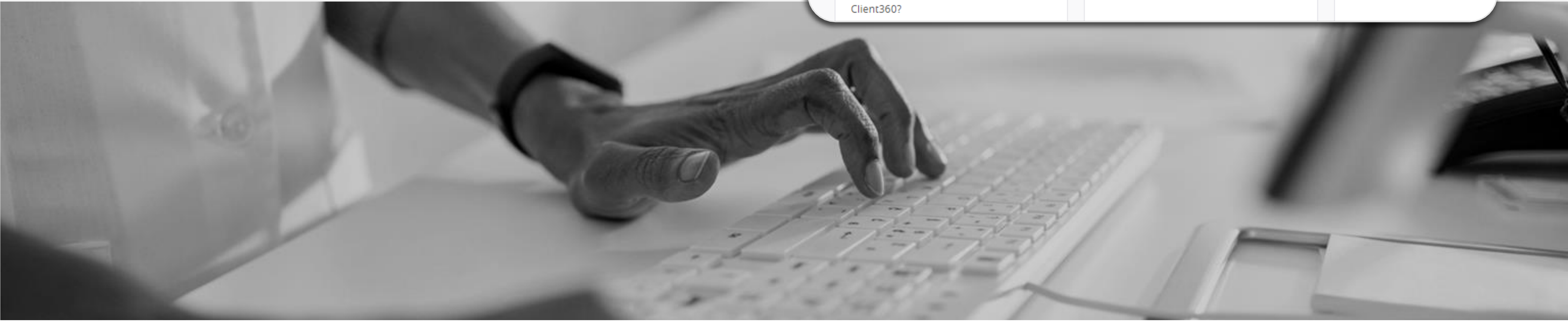
Article #	Short Description
KB0200533	Client360 - How to update your profile and contact preferences for notifications
KB0210090	Client360 - Accessing Compliance Packages
KB0201397	Client360 - How do I reset my password?
KB0200803	Client360 - How to create an inquiry
KB0201474	Client360 - Most Useful Resources
KB0203817	Client360 - How often will my password expire?
KB0202228	Client360 - How to reopen a Pending Close inquiry
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.





Where Are We Now?

01 Access the Client360 Admin Portal

02 Manage Client Contacts and Settings

03 Additional Administrative Functions

04 Admin Reports

05 Client360 Admin Resources

Q&A

Thank You!