Client360 Merchant

Contact Administrator Guide (BOS)

December 2024

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Introduction

Client360 provides intuitive navigation through a simplified user interface and artificial intelligence (AI) boosted search features. With each inquiry, Client360 becomes more intelligent, equipping the clients and service associates to resolutions faster. Product-specific service menus provide a clearer path to inquiry creation and reduce the number of requests for clarification and supporting documentation.

Client360 Features

- A simple user 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 clients' unique products and specific queries.

Getting Started

This Client360 Contact Administrator Guide provides information for administrators about technical requirements (including how-to add trusted sites/domains and whitelist emails), contact creation, and permissions management. This guide complements the How to Open a BOS Request Guide. Please consult the BOS Request Guide for the basics of submitting a request.

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

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)

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

To ensure the security of a user's financial institution information, authentication is mandatory 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).

Network Session

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

Client Contacts and Settings

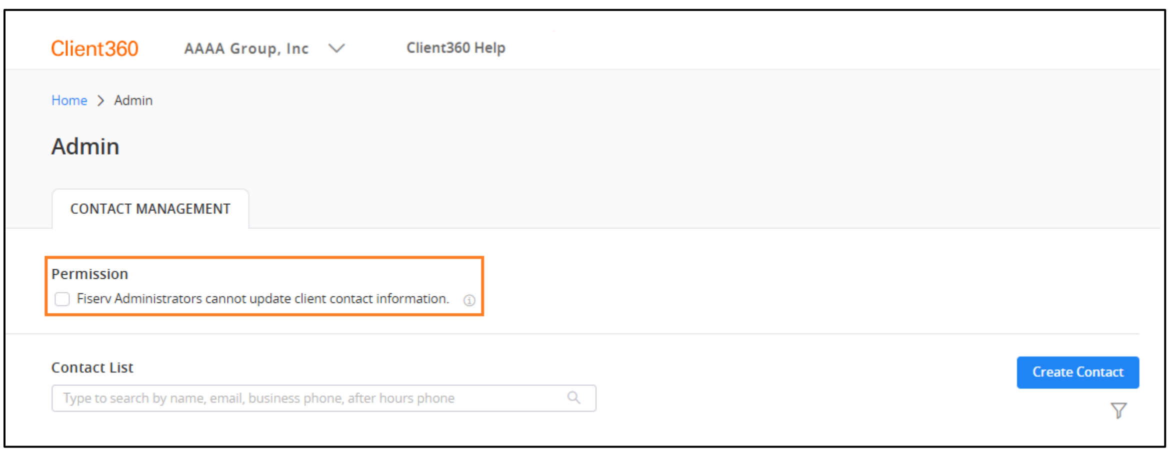
The Client Contact Administrator adds and maintains contacts for the client organization through the Client360 Admin portal.

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

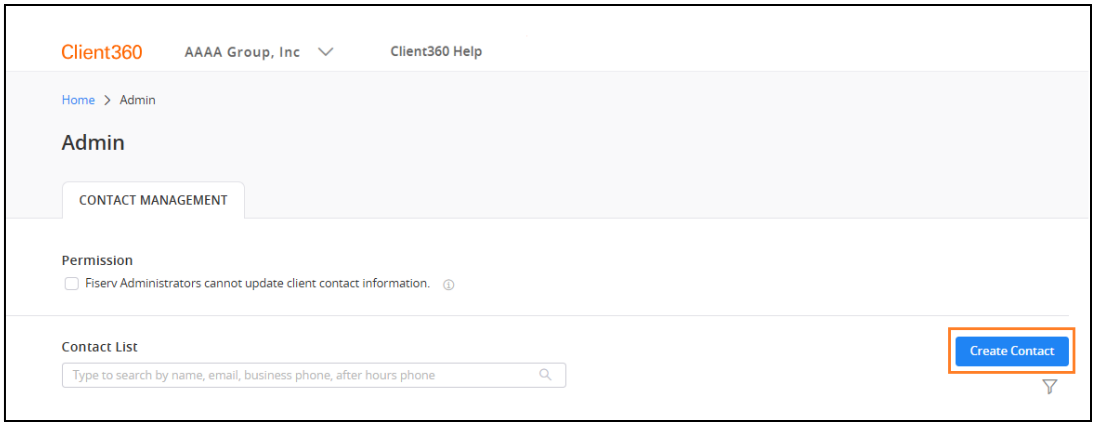
To prevent Fiserv Administrators from updating client contact information and settings, select the checkbox in the **Permission** section.

Deselect the checkbox when a client requires Fiserv Administration assistance.



Creating a New Contact

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

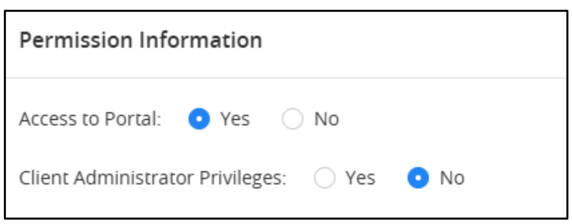


2. Complete the **Permission Information** section. This section contains the following permissions:

   Access to Portal:

   - Selecting **Yes** allows the contact to sign in to Client360 to open inquiries.
   - Choosing **No** blocks the contact from signing in to Client360 to open or view inquiries, but it does permit 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: The contact's first name.

   Last Name: The contact's last name.

   Email: The username for signing in to Client360; also, an option for delivery of MFA codes.

   Title: The contact's role within their organization.

   Client Name: The organizations to which the client needs access. For a Multi-Client Contact, select all organizations to which the client needs access from the **Primary Client** dropdown menu.

   Primary Client: A multi-client contact's primary organization. This determines the contact's default view upon signing in, but the contact still has access to their other clients as required.

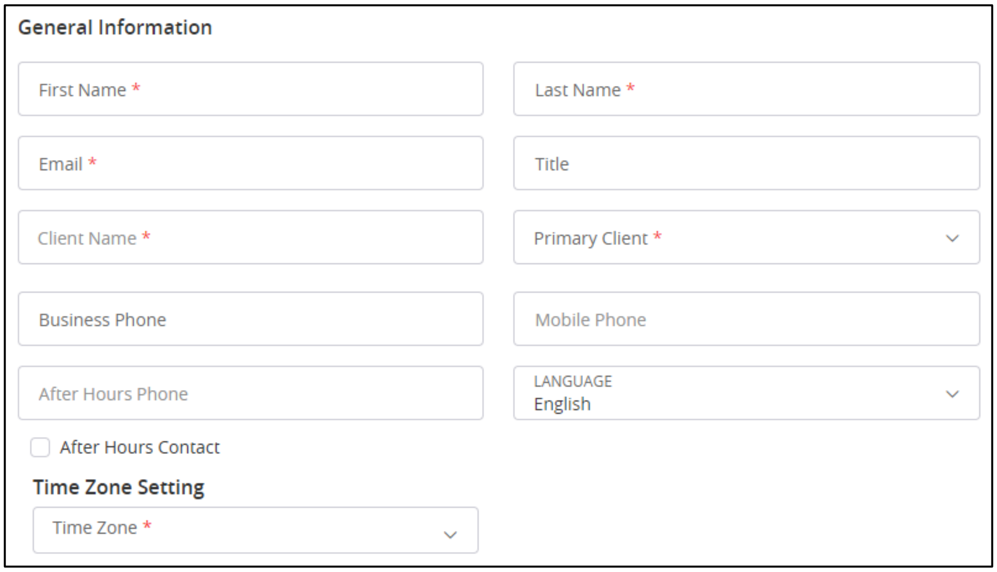
   Business Phone: The client's business phone number.

   Mobile Phone: The client's mobile phone number.

   After Hours Phone: The phone number at which to reach the client after business hours.

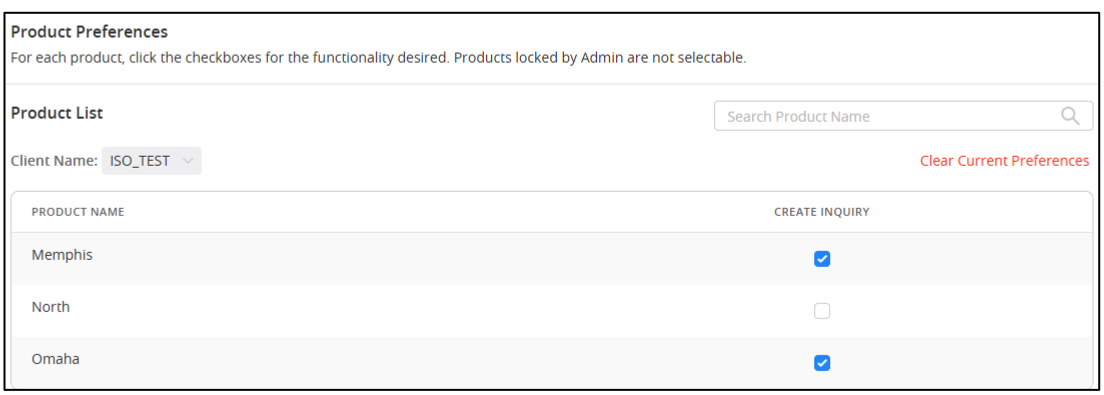
After Hours Contact: Indicates whether the user accepts after-business hours calls. When the **After Hours Contact** box is checked, the **After Hours Phone** is mandatory.

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



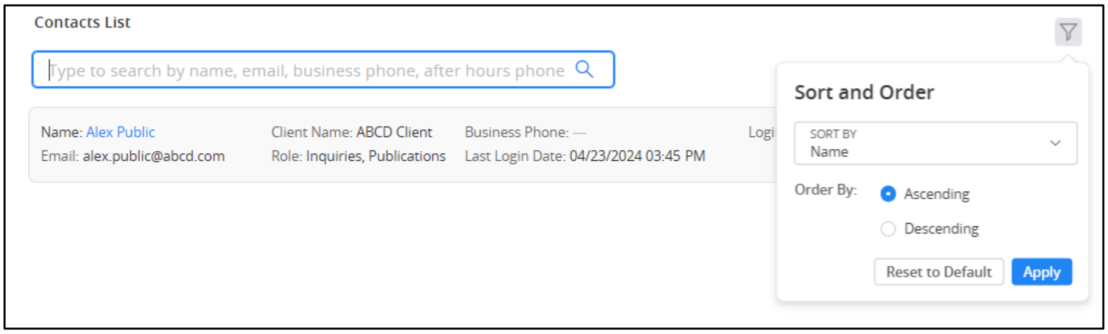
4. Select **Continue.**
5. Complete the information in the **Manage Settings** and **Product Preferences** sections.

   Checking **Show all sensitive comments and attachments** allows the contact to view all comments and attachments classified as Sensitive.
6. In the **Product List**, all items in the **Product Name** field refer to the platforms for which the contact can open an inquiry. To manage this list:
   1. Check the boxes next to each platform you want to enable for that client's inquiries.
   2. Select **Submit**.
   3. For multi-client contacts, repeat this process for each client.

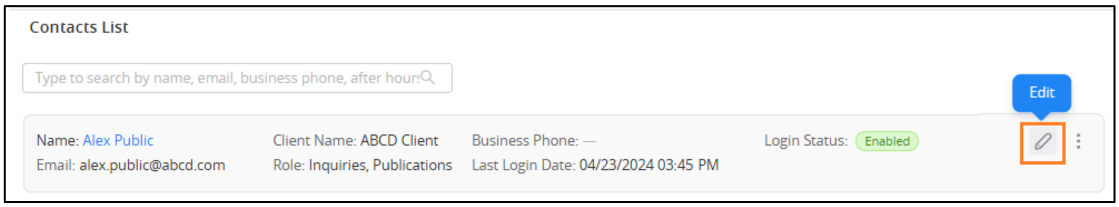


Edit Contact

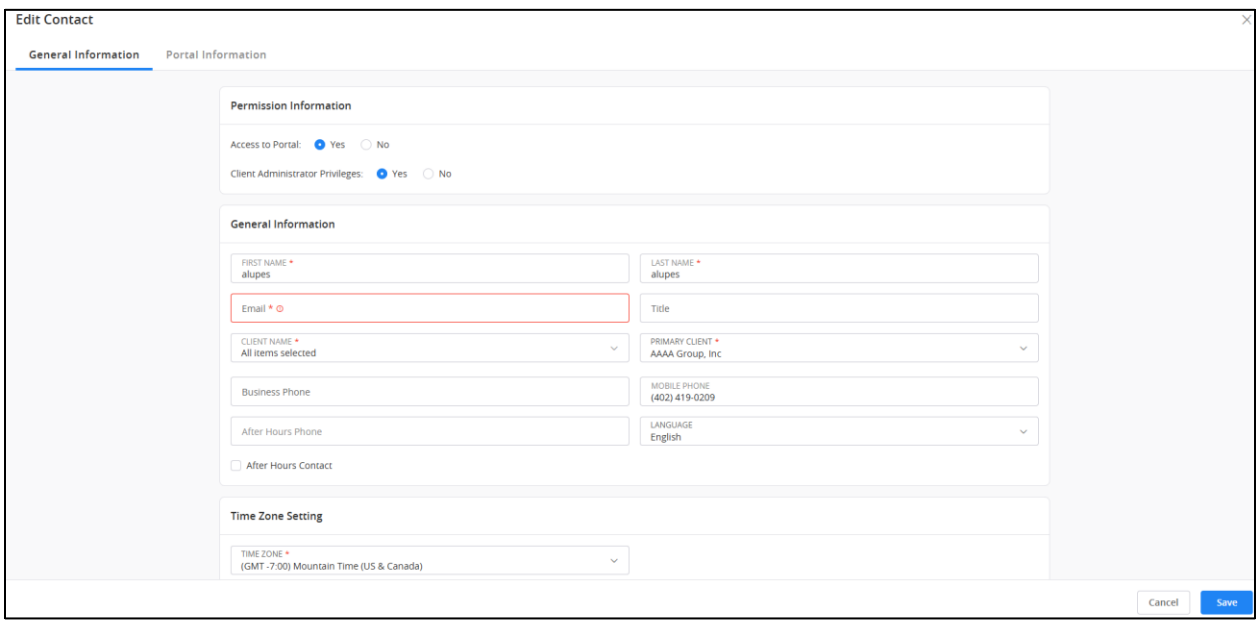
1. To maintain multi-client contacts, select the **Client Name** associated with the contact.
2. Locate the contact by scrolling through the list of contacts. You can also use the **Search** or **Sort and Order** feature.



3. Select the **Edit** icon.



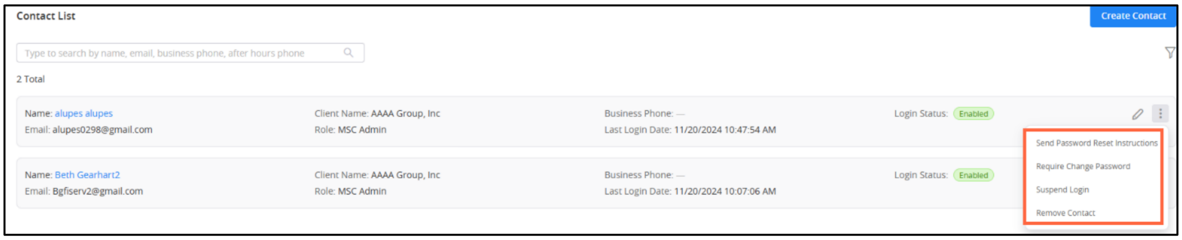
4. Update the **General Information** and **Portal Information** tabs as needed.



5. Select **Save** to keep changes or select **Cancel** and then **Discard Changes** to return to the contact list.

Additional Administrative Functions

The administrator can access additional functions by selecting the vertical ellipsis on the contact card to open the **Actions** menu.



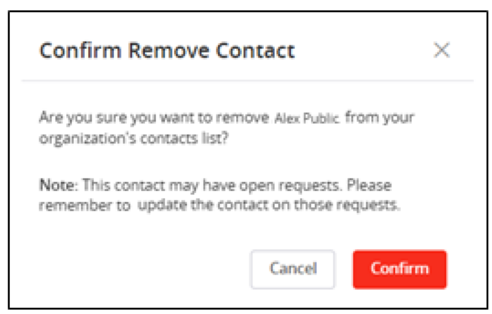
Send Password Reset Instructions: This sends an email with password reset instructions to the user. After selecting the option, the **Password Reset Instructions Sent** banner appears at the top of the page.

Require Change Password: This 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.

Suspend Login: This prevents the user from signing 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** appears 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: This enables the user to allow log in to the Client360 Portal. After selecting the option, the banner **Login Enabled** displays 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: This 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**. An administrator should use the Remove Contact feature after reassigning open inquiries to another contact through the **Edit Contact** feature. After you select **Confirm**, the banner **Contact Removed** appears at the top of the page, and Client360 removes the contact. All inquiries related to the contact are still accessible from the **Inquiries** tab.



Document Updates

Date	Version	Change
12/03/2024	1.0	Initial publication of the guide.

About Client360 Contact Administrator Guide for BOS Merchants

Documentation Version 1.0