

Client360 Merchant

Contact Administrator Guide (BOS)

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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.
- Al-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 <u>Trusted Sites</u> 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.

Client360 AAAA Gro	ap, Inc 🗸 Client360 Help		
Inquiries			New Inquiry Log Merchant Document library
MY MERCHANT INQUIRIES	ALL MERCHANT INQUIRIES		
		E@	
		No inquiry to display.	

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.

Home > Admin	
Admin	
CONTACT MANAGEMENT	
Permission	
Piserv Administrators cannot update client contact information.	
	Create Con
Contact List	create con

Creating a New Contact

1. From the Admin portal, select Create Contact.

	i de la construcción de la constru	
Home > Admin		
Admin		
CONTACT MANAGEMEN	т	
Permission		
Fiserv Administrators ca	not update client contact information. ①	
Contact List		Create Cor
Turner to second burners of		

- 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.

Permission Information
Access to Portal: • Yes O No
Client Administrator Privileges: 🔷 Yes 💿 No

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.

General Information	
First Name *	Last Name *
Email *	Title
Client Name *	Primary Client * ~
Business Phone	Mobile Phone
After Hours Phone	LANGUAGE English
After Hours Contact	
Time Zone Setting	
Time Zone *	

- 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.

Product Preferences For each product, click the checkboxes for the functionality desired. Products	locked by Admin are not selectable.	
Product List	Search Product Name C	ર
Client Name: ISO_TEST \vee	Clear Current Preferen	ices
PRODUCT NAME	CREATE INQUIRY	
Memphis		
North		
Omaha		

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.

Type to search by name, e	email, business phone, afte	r hours phone Q		Sort and	Order	
Name: Alex Public	Client Name: ABCD Client	Business Phone:	Logi	SORT BY Name	Order	~
anan alex.public@abcu.com	Kole. Inquiries, i doitadons	Last Login Date: 04/25/2024 05.45 Hit		Order By:	 Ascending Descending 	
					Reset to Default	Apply

3. Select the Edit icon.

Contacts List				
Type to search by name, email, b	usiness phone, after hour:Q			Edit
Name: Alex Public Email: alex.public@abcd.com	Client Name: ABCD Client Role: Inquiries, Publications	Business Phone: — Last Login Date: 04/23/2024 03:45 PM	Login Status: Enabled	0:

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

Edit Contact			
General Information Portal I	information		
	Permission Information		
	Access to Portal: • Yes No Client Administrator Privileges: • Yes No		
	General Information		
	FIRST NAME • alupes	LAST NAME * alupes	
	Email * O	Title	
	CUENT NAME *	PRIMARY CLIENT * AAAA Group, Inc	
	Business Phone	MOBILE PHONE (402) 419-0209	
	After Hours Phone	LANGUAGE English	
	After Hours Contact		
	Time Zone Setting		
	TIME 20NE * (GMT -7:00) Mountain Time (US & Canada)		
			Cancel

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.

Contact List				Create Contact
Type to search by name, email, business phone, after hours phone 2 Total	ne Q			Y
Name: alupes alupes Email: alupes0298@gmail.com	Client Name: AAAA Group, Inc Role: MSC Admin	Business Phone: — Last Login Date: 11/20/2024 10:47:54 AM	Login Status: Enabled	Send Password Reset Instructions
Name: Beth Gearhart2. Email: Bgfiserv2@gmail.com	Client Name: AAAA Group, Inc Role: MSC Admin	Business Phone: — Last Login Date: 11/20/2024 10:07:06 AM	Login Status: Enabled	Require Change Password Suspend Login
				Remove Contact

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.

Confirm Remove	Contact	×
Are you sure you want to organization's contacts li	o remove Alex Public from st?	n your
Note: This contact may h remember to update the	ave open requests. Plea e contact on those requ	ase ests.
	Cancel	Confirm

Document Updates

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

About Client360 Contact Administrator Guide for BOS Merchants

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