

Client360

Deposit Solutions Research-Adjustment / Return Item Guide



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Contents

Introduction	1
Deposit Solutions Guide Overview	2
Deposit Solutions Special Processing	2
How to Submit an IP Research / Adjustment Request	3
How to Submit a Return Item Request	7

Version Control Summary

Version	Date	Description (What's added/changed)
1.0	5/6/22	-
1.1	5/31/22	Added link to Return Items Form

Introduction

Fiserv is pleased to announce a new service experience designed to make finding answers and getting support for Fiserv solutions easier than ever before. Client360 is the new service Portal for logging inquires and will replace the ServicePoint Portal as the primary online support tool.

Client360 provides intuitive navigation through a simplified user interface and artificial intelligence (AI) boosted search features. With each Inquiry, Client360 will get smarter and move the client, and the service associate supporting the client, more quickly to resolution. Solution-specific service menus provide a clearer path to create an Inquiry and reduce the number of times the client has to clarify a request.

Client360 Features

- An easy-to-use interface with intuitive navigation and options to get answers quickly
- Access to how-to videos for select products
- An interactive chatbot to quickly provide support
- Al-boosted search results based on the client's unique products and specific queries
- Searchable support documentation, knowledge articles, and more
- New integrated tools to enable account representatives and other associates on the service teams to provide improved support

Overview

This Client360 Guide provides information for Fiserv clients who utilize Deposit Solutions Special Processing such as IP Research / Adjustment Requests and Return Item Forms. This Guide serves as a companion to the Client360 User Guide – please consult the User Guide for information regarding basic usage of the Portal including logging in, searching knowledge, and managing Inquiries.

Deposit Solutions Special Processing

Many clients utilize special processing features for key Deposit Solutions products.

IP Research / Adjustment Requests are submitted for three products:

- Deposit Returns
- Fiserv Clearing Network
- Inclearings Deposits

Return Item Requests are submitted for:

• Outgoing Return Services

The following sections contain detailed steps complete these special processing requests.

How to Submit an IP Research / Adjustment Request

1. Select New Inquiry.



- 2. Select the Product.
 - a. Deposit Returns
 - b. Fiserv Clearing Network
 - c. Inclearings Deposits

Client *	~	Product *	~	Inquiry Type *	~
		Deposit Returns Fiserv Clearing Network Inclearings Deposits			

3. Select IP Research / Adjustment Request under Inquiry Type. A menu will appear below the drop downs.

lient *	10	Product *		Inquiry Type *	
iserv Client	~	Deposit Returns	~	10. 20022	~
				IP Research / Adjustment requ	uest
				Service	

4. Select FRAS Automation, then select Next.

Fiserv Client	~	Product * Deposit Returns	~	Inquiry Type * IP Research / Adjustment re	~
Type to search	٩				
FRAS Automa	tion				_
FRAS Automation					
O FRAS Automatio	n				

5. Complete the on-line form and add any attachments.

Fiserv Client		Product * 🗸 🗸 Deposit Returns	Inquiry Type * IP Research / Adjustment requ	Jest
Category 1 * FRAS Automation	Υ.	Category 2 * FRAS Automation	Category 3 * FRAS Automation	~
Additional Info	rmation			
None	~	·· None ·· ··	·· None ··	~
Transaction Date		Dollar Amount	Check Number	
Primary Item Seq Number		Secondary Item Seq Number	Request For None	~
Rush Request None	Ý	Account Number	Urgency * 4 - Low	~
Willingness to be contacted * None	~			
2027 - 51 173				
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6. Select Create Inquiry.



Note:

After the adjustment is processed by the FRAS system, an email notification will be received and added to the inquiry information as follows:

"Your case was received, processed, and automatically closed. For all inquiries, please contact IP Client Services at 1-800-998-3478 using your Reference Number: *system will provide number*."



How to Submit a Return Item Request

1. Download the Return Item Request form.

The form can be found by through the Client360 Portal by selecting Explore Client360 on the home page and navigating to the References section.

The form can also be accessed directly through the following URL: <u>https://virtualtrainer.fiservapps.com/TrainGuides/Client360/Content/client/ref-guide.htm?tocpath=References%7C_5</u>

Welcome to Client360! As a Resources.	reminder, you can view reco	orded training and explore the new system b	y visiting Client360
How can I help?			
Use this to search for knowledge art	icles about your products.		
Search for answers			٩
Knowledge Base		About Client360	
Find answers and troublesho	poting tips for our products.	Find answers on features and how to	use them.
Browse Knowledge Base		Explore Client360	

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Client360		
Get Started	~	$\Theta \equiv \Lambda$
What's new	~	REFERENCES > USER GUIDES
What's next		Llean eucidee
How to	~	User guides
References	^	We have created several guides that you can download using the following line
Frequently Asked Questions		Training.guide
Inquiry type guidance	~	User guide
Navigate		Add and a
Search for an inquiry		<u>Admin.guide</u>
User guides		Deposit Solutions Research-Adjustment/Return Item Guide
Get In Touch		Return Item Request Form
Admin portal	~	Was this helpful?
		Yes No

Client360 Deposit Solutions Research-Adjustment / Return Item Guide Fiserv Confidential | Intended Only for Fiserv Client Use 2. Complete and save the Return Item Request form.

Returns Item Re	equest Fo	orm			fiserv.
inancial Institution Number:					
nstitution Name (with City and	State):				
	outoj.				
)ate:					
lime:					
Authorized By:					
Additional Returns: Complete the temperature of	he information	below to add or de	lete an item (within 28 days of cur	rent day's processin	g)
ACCOUNT NUMBER	CHECK #	AMOUNT	SEQUENCE NUMBER	POSTING DATE	RETURN REASON
					Select Value
					Select Value
					Select Value
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					Select Value
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3. Select New Inquiry.

How can I help?		
Use this to search for knowledge articles about your products.		
Search for answers		Q
Find answers and troubleshooting tips for our products. Browse Knowledge Base	About Client360 Find answers on features and how to use them. Explore Client360	
		New Inquiry

4. Select Outgoing Return Services under Product.

Client * Fiserv Client	~	Product *	~	Inquiry Type *	~
		ATM Deposits			
		Branch Deposits			
		Merchant Deposits			
		Mobile Deposits			
		Outgoing Return Services			
		Statement Advantage			
		Teller Deposits			
		Transaction Content Manager			

5. Select Service under Inquiry Type.

😂 New Inquiry					
Client * Fiserv Client	~	Product * Outgoing Return Services	~	Inquiry Type * Service	~

6. From the menu, select Submit Return Item Form and then select Next.

Fiserv Client		Outgoing Return Services	Service	~
pe to search	Q			
Service Assistance				+
Submit Return Item Form				-
ubmit Return Item Form O Submit Return Item Form				

7. Fill in inquiry description information and attach the Return Item Form.

1 JOLY CHOIL	Outgoing Return Services	~	Inquiry Type * Service
Category 1 * Submit Return Item Form	Category 2 * Submit Return Item Form	~	Category 3 * Submit Return Item Form
lnquiry Description			
Short Description *			
0 characters left			
Inquiry Description •			
00 characters left			
Sensitive Comment			
OD characters left Attachments			

8. Select Create Inquiry.



The Return Item Form will be reviewed and processed by the service team.

fiserv.

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