Client360 Merchant

Your Guide to Opening a BOS Request

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.

Overview

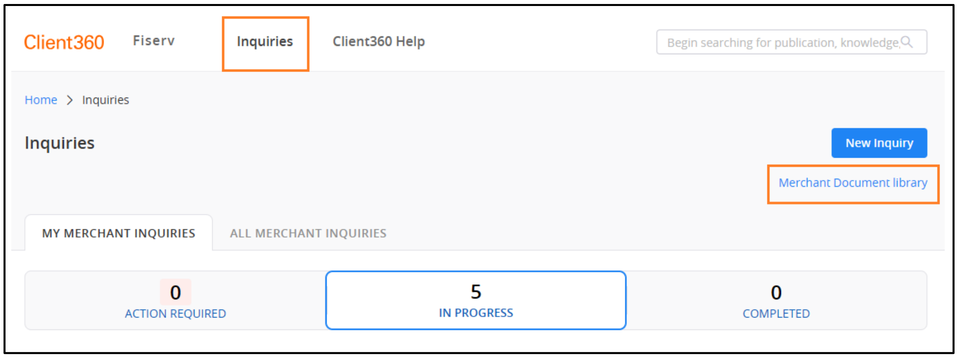
This guide provides information for Fiserv Merchant clients who use Client360 to interact with the Boarding team to submit requests, respond to rejected requests, and to understand the status of pending inquiries.

This Guide complements the Client360 User Guide. Please consult the User Guide for basic Portal usage, such as signing in, searching Knowledge, and managing Inquiries.

How to open a Boarding Operations Systems (BOS) Request

1. Download the appropriate form to submit with your Inquiry.

   a. From the Inquiries page, select **Merchant Document library**.

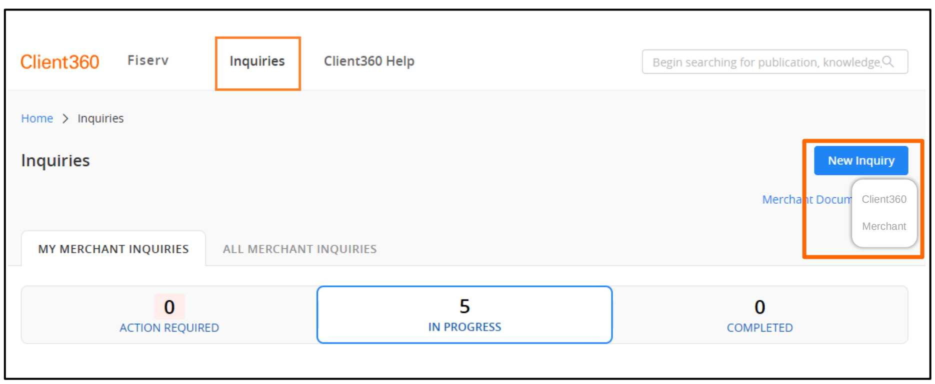


   b. Search for your alliance-related Knowledge Articles within the library.

   c. Download the form needed to fulfill your request, complete, and save the form to a local drive.

   Note: The maximum file size is 25 MB. You may submit up to four forms per inquiry. Total attachment size cannot exceed 100 MB. Accepted file formats are MSG, JPG, JPEG, PNG, TIFF, DOC, DOCX, XLS, XLSX, CSV, MP4 and PDF.

2. From the Inquiries page, select **New Inquiry.**

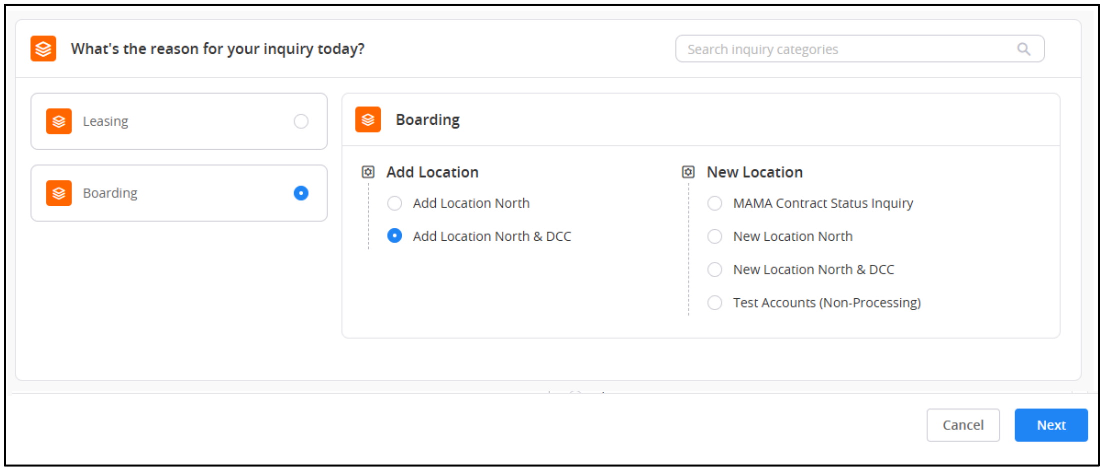


3. If a dropdown menu displays after selecting **New Inquiry**, select **Merchant** and proceed to complete required fields (below). If no dropdown menu displays, proceed to Step 5.

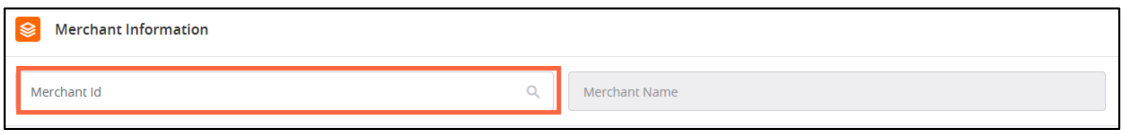
4. Complete required fields:

   a. **Sales Partner** = Alliance
   b. **Acquirer Platform** = front-end processing platform
   c. **Network Fields** = back-end authorization platform
   d. **Inquiry Urgency Level** = Low

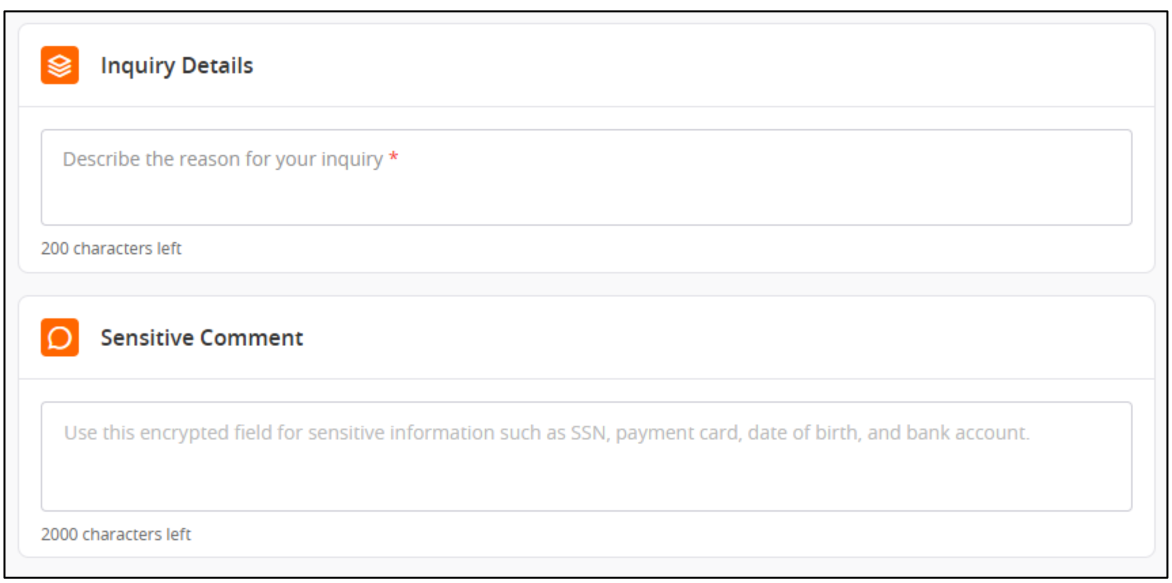
5. Select the Request type on the left, choose the corresponding option on the right that best matches your request need, and select **Next**.



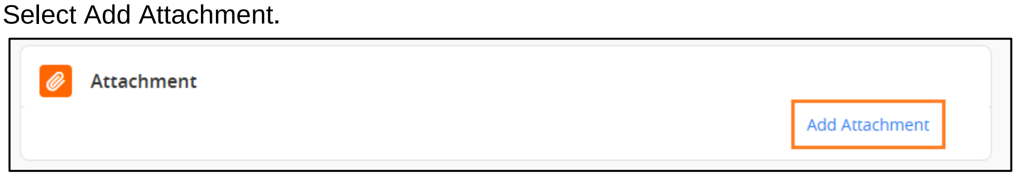
6. Enter the **Merchant Id** for your update request.



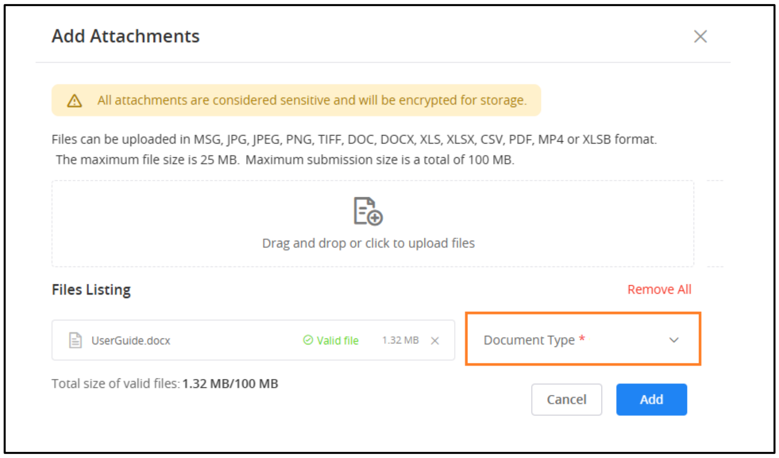
7. Complete the remaining Merchant Information and **Additional Information** fields.
8. In the **Inquiry Details** section, describe the reason for your inquiry. Include any details that should not be visible, such as credit card numbers or authorization codes, in the **Sensitive Comment** section.



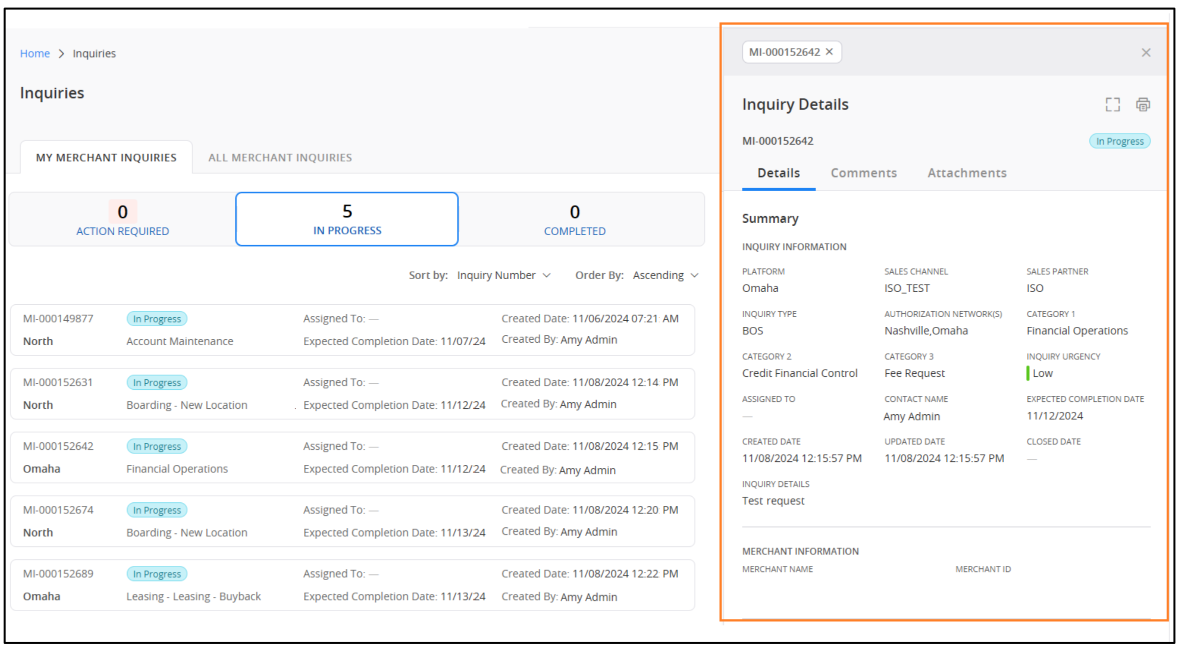
9. Select Add Attachment.



10. Upload the form completed in Step 1.
11. Select the appropriate **Document Type** from the dropdown menu.



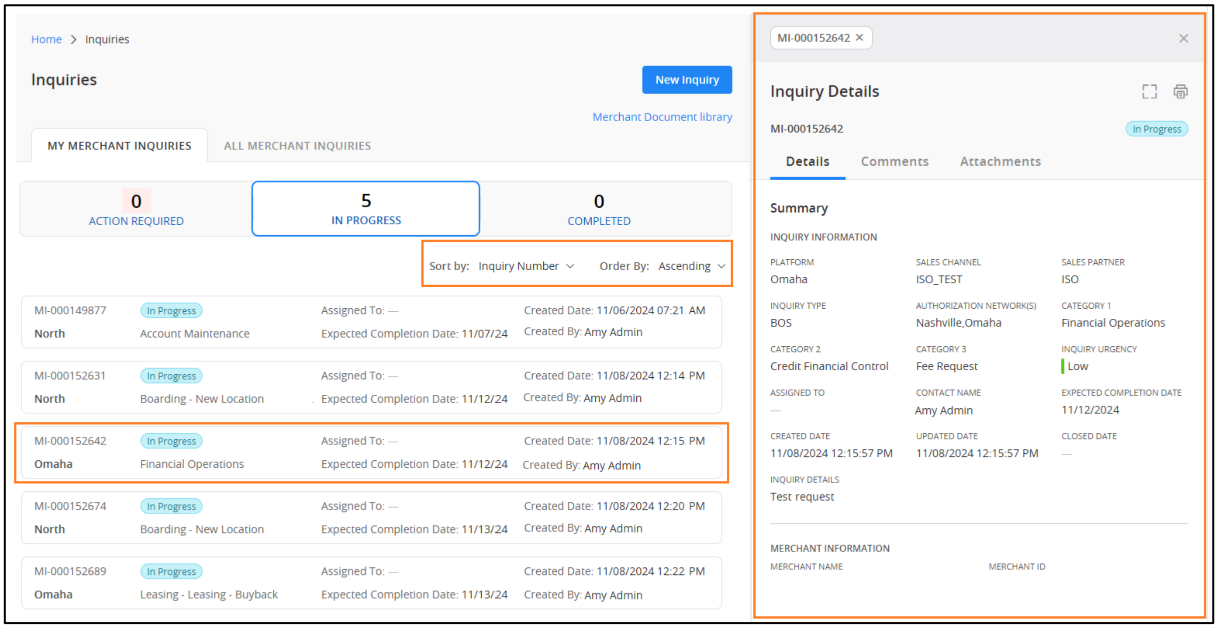
12. Select **Add**.
13. Select **Create Inquiry**.



After you create the inquiry, the **Inquiry Number** and details display to the right and the inquiry appears in the Inquiry Dashboard.

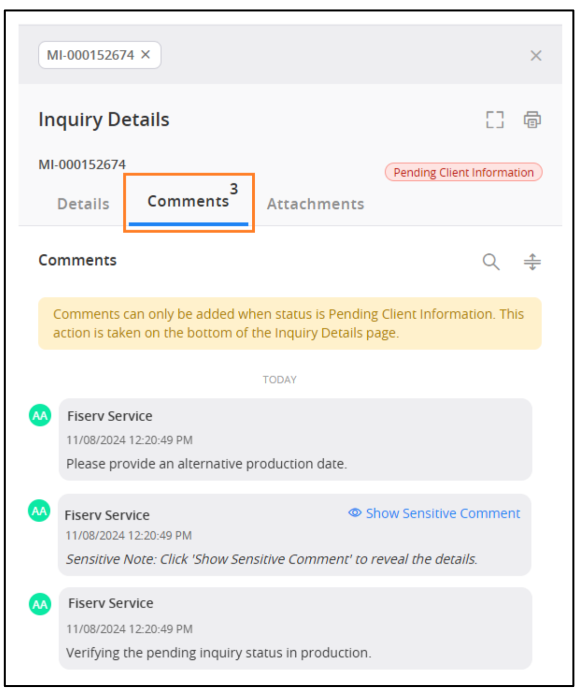
Review a Pending Inquiry

1. From the Inquiry Dashboard, select the **In Progress** tab. Select **Sort by** to sort the inquiries by **Inquiry Number**, **Created Date**, or **State**. Select **Order By** to order the inquiries in ascending or descending order.
2. Locate the Inquiry, select the preview card below the dashboard to open the Inquiry Details.



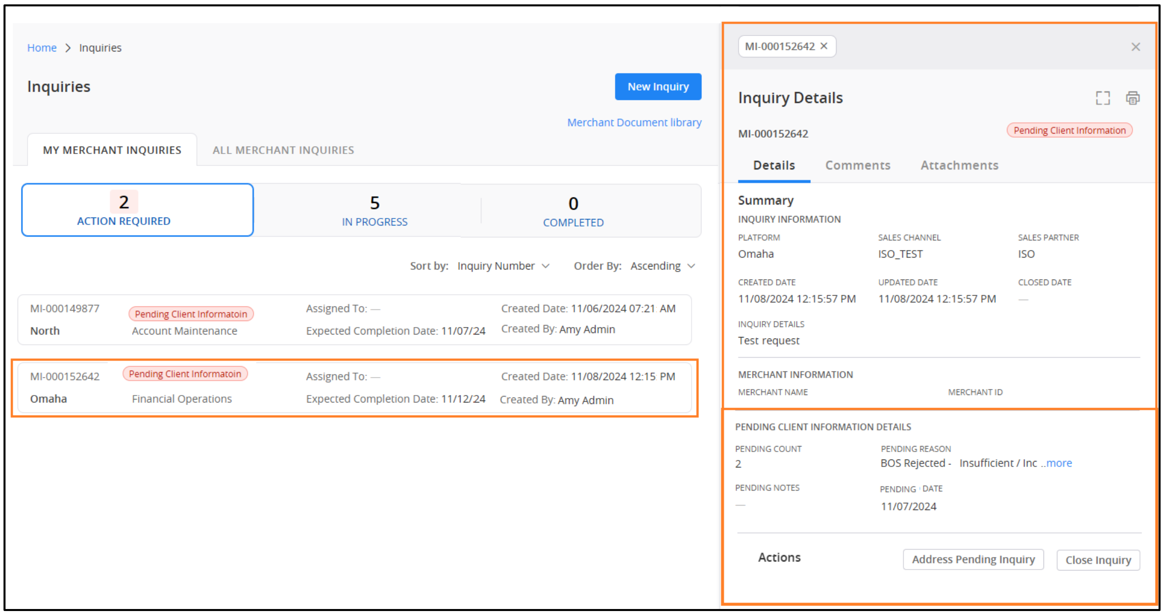
3. Select **Comments** to view any updates on the inquiry.

   Note: You cannot add comments or attachments to an existing inquiry unless the **Pending Code** says **Pending Client Information**.

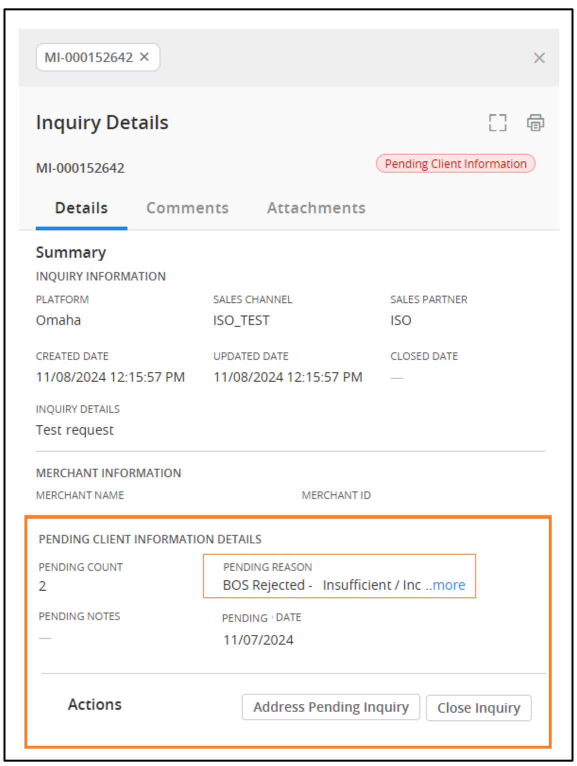


Respond to a Rejected Inquiry or Close Inquiry

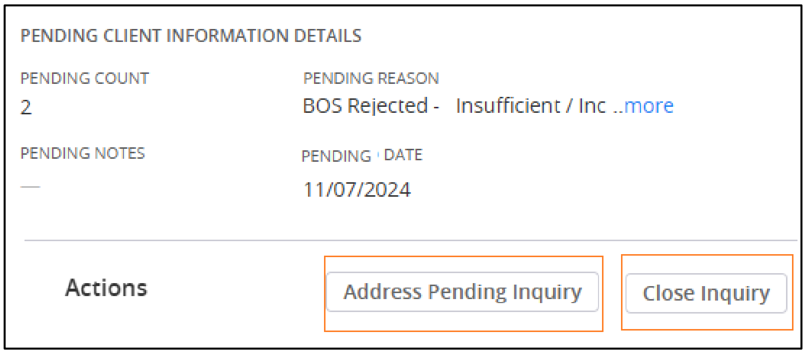
1. From the Inquiry Dashboard, select the **Action Required** tab. Select **Sort by** to sort the inquiries by **Inquiry Number**, **Created Date**, or **State**. Select **Order By** to order the inquiries in ascending or descending order.
2. Locate the Inquiry, then select the preview card below the dashboard to open the **Inquiry Details**.



3. Scroll to the **Pending Client Information Details** section to view the **Pending Reason**. Select **More** to view all details.



4. Respond to the Rejected Inquiry or Close the Inquiry:
   - Select **Address Pending Inquiry** to resubmit the inquiry. Provide a Comment or Attachment that explains the rationale for resubmission.
   - Select **Close Inquiry** to complete the inquiry.



5. Select **Submit**.

Document Updates

Date	Version	Change
12/3/2024	3.0	Document updated per editorial review.
11/8/2024	2.0	Document updated to standard template and to reflect UI changes.
10/28/2024	1.0	Initial publication of the guide.

About the Document Your Guide to Opening a BOS Request

Documentation Version 3.0