Client360 Power Hour

New UI/UX

Client360 is the service management platform from Fiserv.

End users can use self-service resources to discover solutions.

- Knowledge Base
- Technical Documentation
- Client360 Resources
- Create an Inquiry for non-urgent issues

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Where Are We Going?

Goal 01

Navigate in Client360.

Goal 02

Access Self-Service Resources.

Goal 03

Work an Inquiry.

Goal 04

Manage User Settings.

Goal 05

Client360 Resources.

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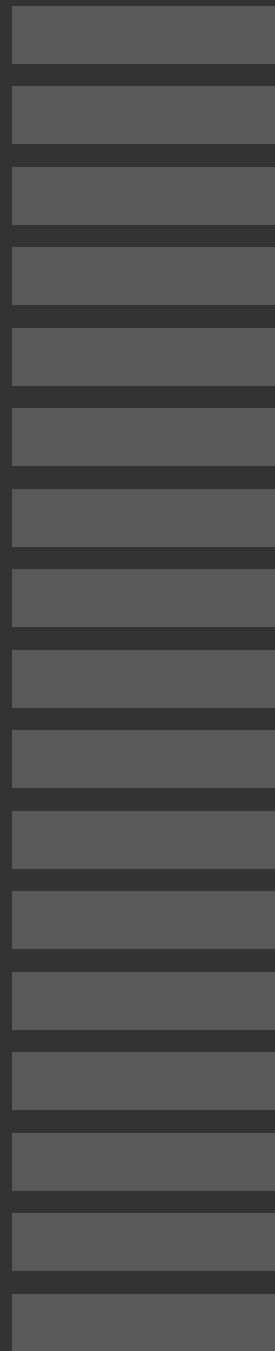
Navigate in Client360

- Homepage Updates
- Quick Access Menu
- Inquiry Dashboard

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Client360 | Revamped Homepage Highlights

New Features:

✓ Search from any page, apply filtering options

✓ Relevant, customized content featured at the top of the page

✓ Access publications directly from the homepage

✓ Enhanced navigation bar, including Favorite Articles

✓ Easily locate Client360 Admins

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Client360 | Quick Access Menu

Descriptions:

1 — Personal Profile: Logout, Profile Settings, Admin Portal (Admin Only)

2 — Client Information

3 — Publications: Searchable list of News/Announcements, Releases, Product Comms

4 — Invoices: Billing information

5 — Product Information: Fiserv products in use by your organization

6 — Reports: Downloadable Inquiry Reports (All Users) and Admin Reports (Admin Only)

7 — Client360 Admins: List of your Client360 Administrators

8 — Favorite Articles: List of your bookmarked Knowledge Articles and SIG Content

Menu (right panel)

- AA Amy Admin ⌄ **1**
- 🏛 Client Information **2**
- Publications **3**
- Invoices **4**
- Product Information **5**
- Reports **6**
- Client360 Admins **7**
- Favorite Articles **8**
- → Collapse

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Client360 | Inquiry Dashboard

✓ Recent activity tabs and counters at the bottom of the homepage.

✓ Review additional Inquiry information:

- Click on "Inquiries" at the top of the homepage.
- Choose "View All" above the recent activity tabs.
- Select the activity tab you wish to review.

Filter, sort, and export Inquiry data from the "Inquiries" page.
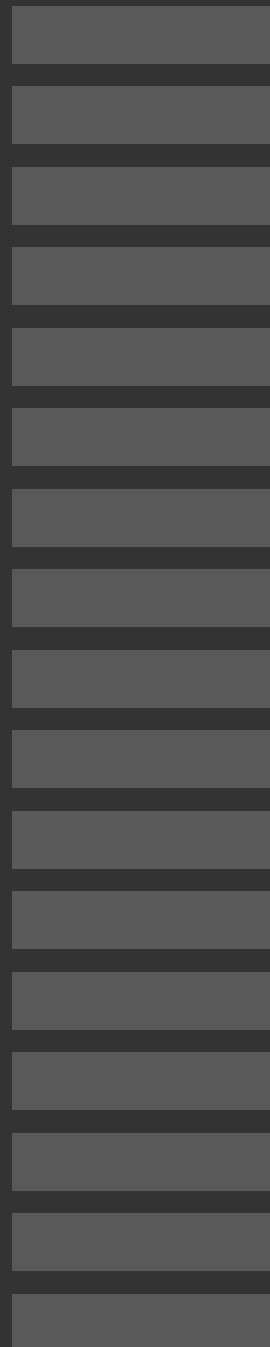
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Access Self-Service Resources

- The Knowledge Base
- Formatting Knowledge Base Searches
- Filtering Search Results
- Retrieving Technical Documentation

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Client360 | Knowledge Base

Client360 Knowledge Base

Access product related information, resources, and support 24/7

Browse the Knowledge Base for:

- Knowledge Articles

- Video tutorials

- Technical documentation

- SIG questionnaire responses

📌 The Knowledge Base does not include Publications or Inquiry information.

Knowledge Base Search Format

Too Many Search Results?

Include the platform or product to your search terms to return more focused results.

Product/Platform – Concise Description of Issue/Topic/Feature

Reports	Client360 – How to run a report

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Why We Format Knowledge Base Searches

Knowledge Base Results & Filters

Further refine your Knowledge Base results with applying filters.

- Select on the Content tabs to view specific content.

- Filter by Product Families and Content Type.

- Select **Apply** to set Product and Content filters.

- Choose to view articles in Client360 or in a new tab.

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Knowledge Article Elements

✓ Favorite articles, videos, and SIG responses for easy access.

✓ Vote thumbs up or down to train the AI on relevance.

✓ Articles include goals, environmental facts, and resolutions.

✓ Provide feedback at the bottom of the page.

Technical Documentation

Access Technical Documentation from the Knowledge Base.

✓ To view select Content filters or Technical Documentation tab. Preview within the Results List.

✓ View full product documentation at Technical Documentation Center.

✓ For more information, visit the help pages – Access Self-Service Resources.

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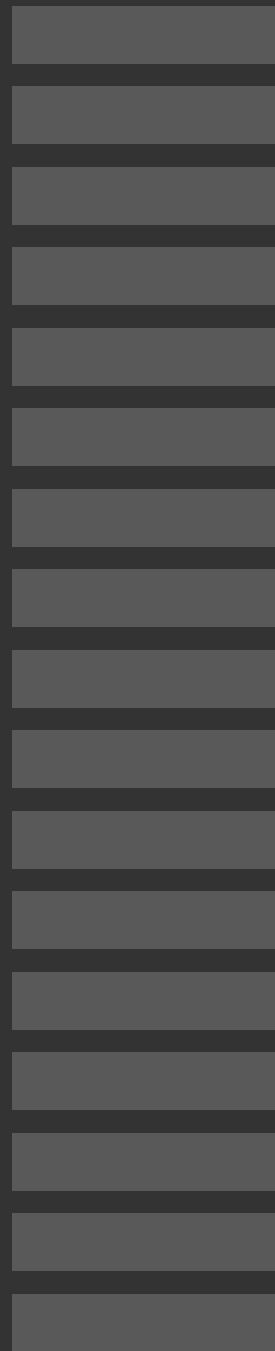
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Work an Inquiry

- Create an Inquiry
- Update an Inquiry
- Close an Inquiry

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Create an Inquiry

Clients can now create Inquiries from two areas on Client360.

Clients can open inquiries from:

✓ **Homepage**: Navigate to the bottom of the page and select "New Inquiry" above the Inquiry activity tabs.

✓ **Inquiries Tab**: Access the new inquiry form via the blue "New Inquiry" button above the Inquiry dashboard.

Benefit of Multiple Access Points:

✓ Enhanced Accessibility: Initiate Inquiries quickly from different sections of the platform, promoting convenience and efficiency.

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New Inquiry Form

New Inquiry   ✕

Additional Information

Alt Inst / Impersonation will be used to review Cleartouch Information

Inquiry Details

Inquiry Details *

8000 characters left

Sensitive Comment

8000 characters left

Attachment

Add Attachment

Watch List

Add Me   Add

Back   Cancel   Create Inquiry

Additional Information: Dynamic section where additional input may be required based on specific Product and Category selections.

Inquiry Details: Include information about the issue's context, preceding steps, and relevant environmental factors.

Sensitive Comment: Reserved for PCI/PII data, like account numbers or card details. Upon inquiry creation, sensitive comments will be encrypted and available in the Comments tab.

Attachments: Attach pertinent screenshots, images, error messages, and software version details relevant to the issue.

Watch List: Add users as watchers to receive updates when the inquiry is modified.

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Locate Inquiries | Inquiries Page

Locate Inquiries by navigating to the Inquiries Page.

✓ Inquiry Dashboard will default to "My Inquiries" tab.

✓ Use the inquiry search bar to narrow down list.

✓ Recent activity tab will default to "Open."

✓ Once located, select the Inquiry card to populate the Inquiry Details Panel.

Update an Inquiry | Inquiry Details Pane

The Inquiry Details pane provides general Inquiry information and enables client updates.

✓ **Details**: Summary of Inquiry information.

✓ **Comments**: Communicate with Fiserv and view shared Knowledge Base resources.

✓ **Attachments**: Upload and download supporting documentation.

✓ **Watchlist**: Keep users informed about the progress of the inquiry

✓ **Timeline**: Track the history of an Inquiry.

IP00123126 ✕

Inquiry Details

IP00123126   In Progress

Product Request/Question

| Details | Comments | Attachments | Watchlist | Timeline |

Summary

GENERAL INFORMATION

PRODUCT	CATEGORY 1	CATEGORY 2	CATEGORY 3
Mobiliti Business	Mobiliti Business	Account / System Maintenance	General Inquiry

CONTACT NAME	INQUIRY URGENCY	ASSIGNED TO	CREATED DATE
Amy Admin ✎	4 - Low ✎	Clara CSR	10/02/2021 05:55:04 PM

CLOSED DATE	UPDATED BY	UPDATED DATE	RESOLVED DATE
—	Amy Admin (Client)	03/06/2024 12:17:20 PM	—

CLIENT DEFINED FIELD	SUFFIX FIELD	REPORTING CATEGORY	REPORTING SUB CATEGORY
— ✎	—	Service	—

INQUIRY DETAILS
New request for cleartouch

ADDITIONAL INFORMATION

ACCOUNT NUMBER   ERROR MESSAGE   ERROR MESSAGE AND NUMBER

Close an Inquiry | Inquiry Resolution

Fiserv sends detailed information to Client360 users upon inquiry resolutions.

- ✓ Review email notification containing resolution details.

- ✓ Review resolution notes in the **Details** and **Comments** tab.

- ✓ Inquiry status transitions from "In Progress" to "Resolved."

- ✓ Respond to the Inquiry resolution at the bottom of the **Details** tab.

- ✓ Fourteen-day window to respond to resolution.

IP00210012 ✕

Inquiry Details

IP00210012   Resolved

General Ledger - Add line to Statement of Condition Report

Details   Comments ¹   Attachments ¹   Watchlist   ›

Resolution

RESOLUTION NOTES
Assisted the client with adding the Report Line Definition and New Account for GL 309

VALIDATION DATE
—

Was the inquiry resolved?

Yes   No
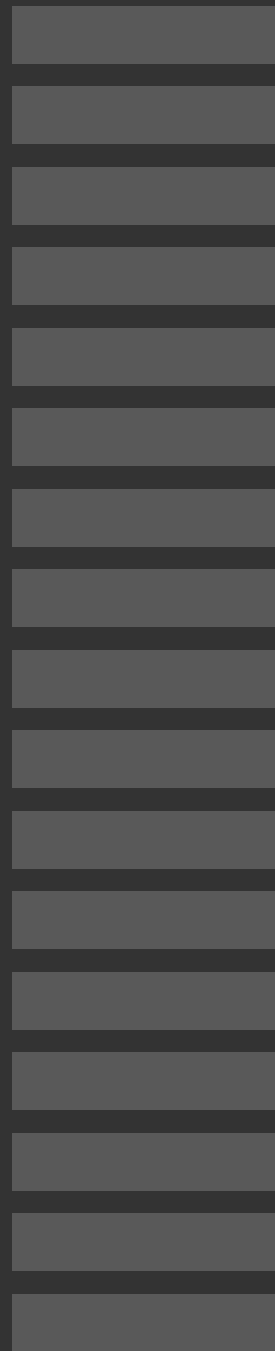
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Manage Contact Settings

- General Information
- Portal Information

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Profile Settings and Preferences

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

General Information

Update basic personal details in the General Information tab.

Users can modify the following information:

- ✓ First and last name
- ✓ Email address
- ✓ Title
- ✓ Business/Mobile Phone #
- ✓ After hours contact details
- ✓ Language preferences
- ✓ Time zone settings

📌 View profile modifications in the Change History panel.

Client360   Fiserv Demo Bank NA   Inquiries   Client360 Help   [Search for Knowledge, videos or docume🔍]   AA ⌄

Profile

| GENERAL INFORMATION | PORTAL INFORMATION |

General Information   Edit

General Information

FIRST NAME	LAST NAME	EMAIL
Amy	Admin	amy.admin@email.com
TITLE	CLIENT NAME	PRIMARY CLIENT
—	Fiserv Demo Bank NA	Fiserv Demo Bank NA
BUSINESS PHONE	MOBILE PHONE	AFTER HOURS PHONE
—	1234567890	—
LANGUAGE	AFTER HOURS CONTACT	
English	No	

Time Zone Settings

TIME ZONE
(GMT -5:00) Eastern Time (US & Canada)

Change History

01/23/2024

AA **Amy Admin** edited contact.
11:42:48 AM
- Edited Mobile Phone to **(123) 456-7890**

EC **Estachio Caruso** created contact.
11:40:26 AM
- Selected , , **Create Inquiry, Client Communications** for iVue Advantage of **Fiserv Demo Bank NA**
- Selected , , **Create Inquiry, Client Communications** for Interest Reporting for Cleartouch of **Fiserv Demo Bank NA**
- Selected , , **Create Inquiry, Client Communications** for New Accounts for Cleartouch of **Fiserv Demo Bank NA**
- Selected , , **Create Inquiry, Client Communications** for Mortgage Lending Solutions for Cleartouch of **Fiserv Demo Bank NA**
- Selected , , **Create Inquiry, Client Communications** for **Portal** for Cleartouch of **Fiserv Demo Bank NA**

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Portal Information

Review and edit Portal and Product Preferences.

- ✓ Manage Information: Admin-managed. Contact system administrators for revisions.

- ✓ Product Preference list: View a full list of products associated with the institution and account.

  - ⊘ = feature enabled.
  - ⊗ = feature disabled.

- ✓ Some users may have the ability to edit product preferences.

- ✓ Can edit in bulk or one by one.

Profile

GENERAL INFORMATION	**PORTAL INFORMATION**

Portal Information   Edit

Manage Information

NOTIFICATIONS	SHOW INQUIRIES OF ALL CONTACTS	SHOW SENSITIVE COMMENTS AND ATTACHMENTS
Yes	Yes	Yes

Product Preferences

Preferences

Click Edit to change the preferences

PRODUCT NAME	SERVICE/OUTAGE NOTIFICATIONS	PUBLICATIONS	CREATE INQUIRY
Account Numbers for Cleartouch	⊘	⊘	⊘
ACH for Cleartouch	⊘	⊘	⊘
Administrator for Cleartouch	⊘	⊘	⊘
Business Online	⊘	⊘	⊘
Card Management for Cleartouch	⊘	⊘	⊘
Check Reconciliation for Cleartouch	⊘	⊘	⊘

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Client360 Resources

- Helpful Knowledge Articles
- Client360 Help Pages

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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
KB0201425	Client360 Admin - How to create a new contact
KB0200846	Client360 - How to run a report
KB0200190	Client360 - Where can I learn more about Client360, and how do I get support?

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Additional Resources

Client360 Resources

Select the [Client360 Help](#) link at the top of the Client360 home page to view additional information.

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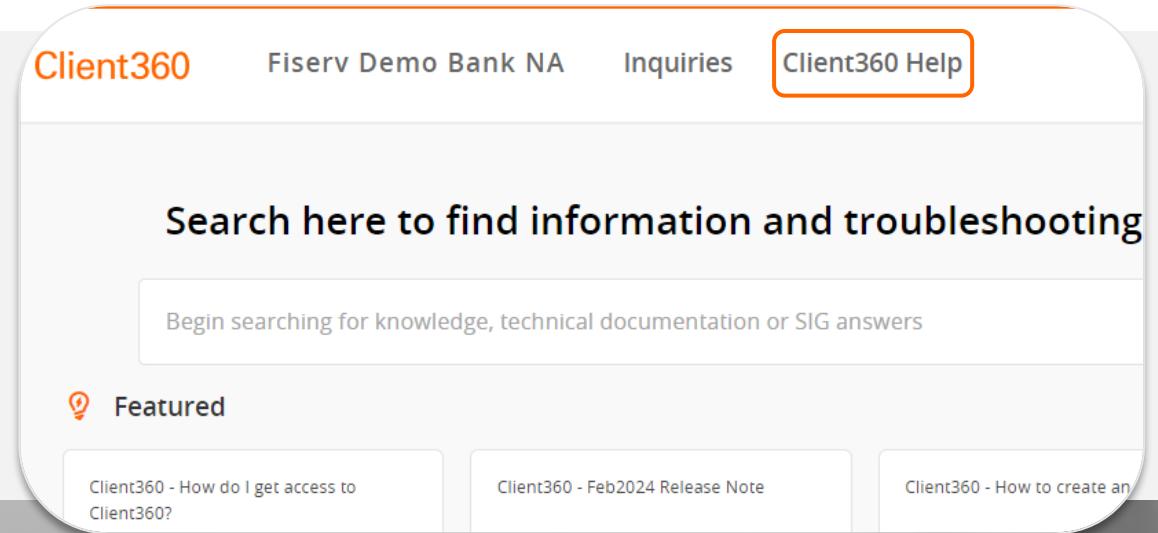
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Q&A

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Thank You!

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