

A decorative vertical bar on the left side of the slide, composed of 20 horizontal segments. Each segment is a horizontal bar with a diagonal gradient from top-left to bottom-right, transitioning through a color spectrum from green at the top to orange at the bottom.

# Client360 Power Hour

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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

# Where Are We Going?



## Goal 01

Navigate in Client360.



## Goal 02

Access Self-Service Resources.



## Goal 03

Work an Inquiry.



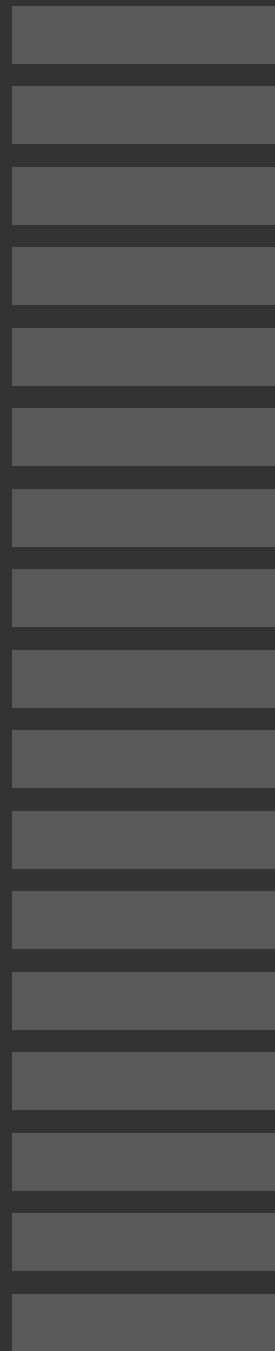
## Goal 04

Manage User Settings.



## Goal 05

Client360 Resources.



# Navigate in Client360



- Homepage Updates
- Quick Access Menu
- Inquiry Dashboard



# 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

The screenshot displays the Client360 homepage with the following elements:

- Header:** Client360, Fiserv Demo Bank NA, Inquiries, Client360 Help
- Search Bar:** Search here to find information and troubleshooting tips. Below it, a search input field with the placeholder text "Begin searching for knowledge, technical documentation or SIG answers" and a search icon.
- Featured Content:** A section titled "Featured" containing three cards:
  - Client360 - How do I get access to Client360? (SEP 01, 2023, KB0200136)
  - Client360 - Feb2024 Release Note (FEB 28, 2024, KB0200482)
  - Client360 - How to create an inquiry (OCT 30, 2023, KB0200803)
- Service Interruptions:** A section titled "Service Interruptions" containing one card: "Incident 1" (SEP 01, 2023).
- Publications:** A section titled "Publications" containing three cards:
  - September 2023 Debit Release (PUB0042901) (SEP 01, 2023, PUB0042901)
  - Revised: 3D Secure One-Time Passcode Enhancement (PUB0042879) (AUG 30, 2023, PUB0042879)
  - 3D Secure One-Time Passcode Enhancement (PUB0042853) (AUG 29, 2023, PUB0042853)
- Inquiries:** A section titled "Inquiries" with a "New Inquiry" link and a "View All" link. Below it, a summary table:

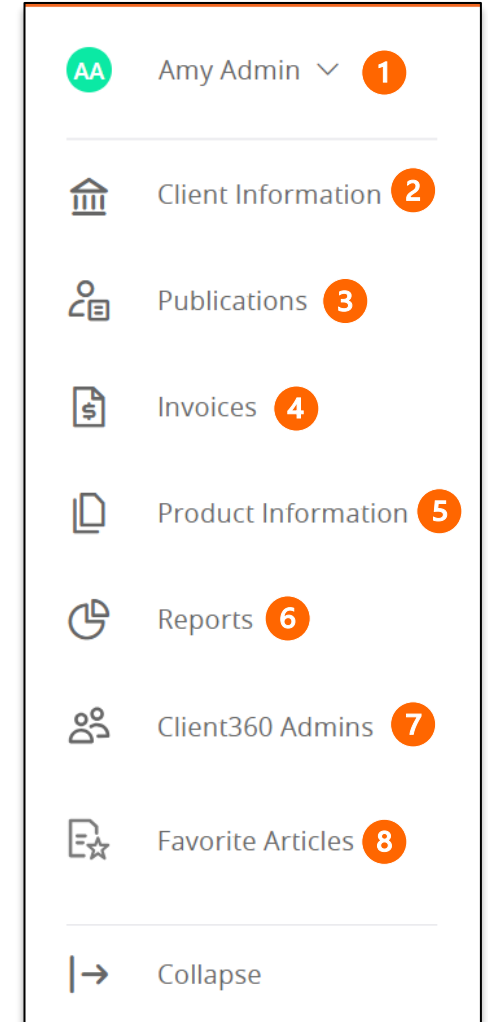
MY INQUIRIES	ALL INQUIRIES
0	0
PENDING ACTION	PENDING CLOSE
1	1
OPEN	UPDATED
0	0
RECENTLY CLOSED	TOTAL
1	



# 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





# Client360 | Inquiry Dashboard

Client360 Fiserv Demo Bank NA **Inquiries** Client360 Help

**Publications** [View All](#)

- September 2023 Debit Release (PUB0042901) SEP 01, 2023 PUB0042901
- Revised: 3D Secure One-Time Passcode Enhancement (PUB0042879) AUG 30, 2023 PUB0042879
- 3D Secure One-Time Passcode Enhancement (PUB0042853) AUG 29, 2023 PUB0042853

**Inquiries** [New Inquiry](#) [View All](#)

MY INQUIRIES ALL INQUIRIES **MY WATCHLIST**

0	0	1	1	0	1
PENDING ACTION	PENDING CLOSE	OPEN	UPDATED	RECENTLY CLOSED	TOTAL

Client360 Fiserv Demo Bank NA **Inquiries** Client360 Help

Home > Inquiries

**Inquiries** [New Inquiry](#)

MY INQUIRIES ALL INQUIRIES **MY WATCHLIST**

Reporting Category: All [Reset to Default](#) Saved filter: No filter selected

Type to search

Sort by: Inquiry Number Order By: Ascending [Export](#)

0	0	1	1	0	1
PENDING ACTION	PENDING CLOSE	OPEN	UPDATED	RECENTLY CLOSED	TOTAL

IP00210354 New

Assigned To:— Updated Date:02/29/2024 09:56:52 AM

\*Client360 TRAINING\* Change BPM Processing Setting Education Services

Created Date:02/29/2024 09:53:43 AM Updated By:Amy Admin (Client)

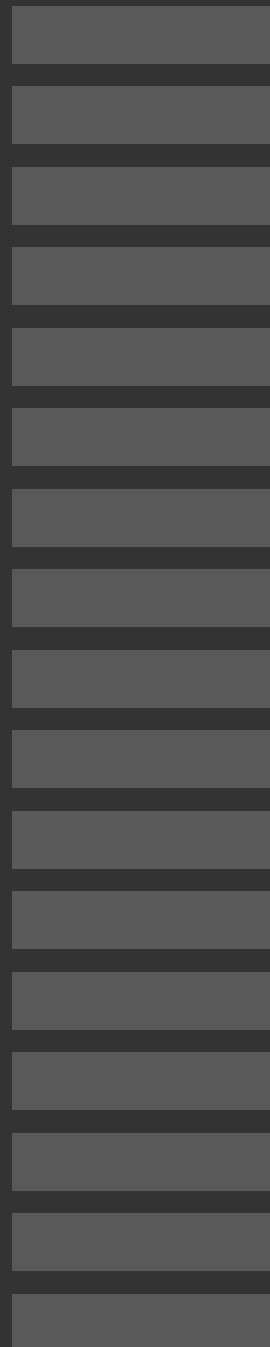
Validation Date:— Client Defined Field:—

Merchant ID:0000000000111111 Merchant Name:—

Marker Bank:—

- ✓ 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.



# Access Self-Service Resources



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





# Client360 | Knowledge Base

Client360 Fiserv Demo Bank NA Inquiries Client360 Help

Search here to find information and troubleshooting tips

Begin searching for knowledge, technical documentation or SIG answers

**Featured**

- Client360 - How do I get access to Client360? (SEP 01, 2023, KB0200136)
- Client360 - Feb2024 Release Note (FEB 28, 2024, KB0208482)
- Client360 - How to create an inquiry (OCT 30, 2023, KB0200803)

**Service Interruptions**

- Incident 1 (SEP 01, 2023)

**Publications** [View All](#)


- September 2023 Debit Release (PUB0042901)
- Revised: 3D Secure One-Time Passcode Enhancement (PUB0042879)
- 3D Secure One-Time Passcode Enhancement (PUB0042853)

## 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**



# Why We Format Knowledge Base Searches

## Reports

### SMS/Contextual Messaging: Admin Tool Reporting

Last Modified:  
04/27/2022

Management Console Reports You can view reports for the Contextual Messaging service...

### Reports: Troubleshooting when Reports Are not Generating

Last Modified:  
04/28/2022

The Fiserv Processing System provides you with statistical and managerial reports through three...

### Commonly Used Reports: VISA Reports

Last Modified:  
04/28/2022

SD-066, Validation Exception Detail Report SD-066 report is the Visa EP-100A/EP-100B,...

### Portico - Reporting Analytics Recommended Knowledge

Last Modified:  
11/29/2022

Goals Change a month end to a daily query Email reports Error logging into Reporting Analytics...

### Portico - reports for web signature envelopes

Last Modified:  
10/06/2022

Goals Are there any reports available for web signatures Are there reports for DocuSign Are the...

## Client360 – How to run a report

### Client360 - How to run a report

Last Modified:  
07/18/2022

Goals Run a report in Client360 Run an admin report in Client360 Run a custom inquiry report i...

### Client360 Admin - How to run an admin report

Last Modified:  
07/18/2022

Goals Run an admin report in Client360 Generate an admin report Export an admin report...

### Client360 - Most Useful Resources

Last Modified:  
12/06/2022

Goals Client360 assistance Using Client360 Resources Client360 Edit your profile Edit inqui...

### Client360 - Release Notes 15Jan2023

Last Modified:  
04/10/2023

Goals What are the new features and updates to Client360 as of 15-January-2023 Environment...

### Client360 Admin - Run a Report for Multiple Clients

Last Modified:  
09/16/2022

Goals Client360 Admin - Run a Report for Multiple Clients How to run a report for multiple client...



# 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.

Client360 Fiserv Demo Bank NA Inquiries Client360 Help Client360 run report

Home > Search Results

Search Results

Filters [Reset](#) [Apply](#)

Type to search product

Product Families

- Bank Platforms - Value Added Solutions
- Cleartouch
- Enterprise Content Management
- Mobile Solutions

Content Type

- Knowledge
- Video
- API
- Guide

KNOWLEDGE TECHNICAL DOCUMENTATION SIG

5422 total results found.

**Client360 - How to run a report** Last Modified: 07/18/2022  
Goals Run a report in Client360 Run an admin report in Client360 Run a custom inquiry report in Client360 Client360 - ...

**Client360 Admin - How to run an admin report** Last Modified: 07/18/2022  
Goals Run an admin report in Client360 Generate an admin report Export an admin report Download an admin report...

**Client360 Admin - Run a Report for Multiple Clients** Last Modified: 09/16/2022  
Goals Client360 Admin - Run a Report for Multiple Clients How to run a report for multiple clients Run report for severa...

**Client360 - Most Useful Resources** Last Modified: 07/18/2022  
Goals Client360 assistance Using Client360 Resources for Client360 Edit your profile Edit Inquiries Mar...

Open in Client360

Open in new tab



# Knowledge Article Elements

Client360 Fiserv Demo Bank NA Inquiries Client360 Help

client360 run report

Home > Search Results > KB0200846 ☆

## Client360 - How to run a report

RELEVANCE: 26% DATE MODIFIED: 07/18/2022

Fiserv External Knowledge Base Client360

Was this information relevant to "client360 run report"?

Attachments

No attachments to display.

**Goals**  
Run a report in Client360  
Run an admin report in Client360  
Run a custom inquiry report in Client360  
Client360 - How to run a report

**Environment**  
UI: Client360  
Platform: All  
Product: Client360  
Audience: External

**Resolution**  
There are two types of reports that you can run in Client360: pre-made admin reports and custom reports.

**Perform the following steps to run an admin report:**  
From the Quick Access menu, select (Reports).  
Select

- ✓ 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.

Was this article helpful?

### Give feedback

Add Feedback

2000 characters left



# Technical Documentation

Client360 Fiserv Demo Bank NA Inquiries Client360 Help

Cleartouch single run report

Home > Search Results

Search Results

Filters Reset Apply

KNOWLEDGE TECHNICAL DOCUMENTATION SIG

2661 total results found.

TECHNICAL DOCUMENTATION - BANK PLATFORMS

2661 results found.

General Ledger for Cleartouch - Reporting - Order Single-Run Reports

Reporting - Order Single-Run Reports The following options are available for this page: Reporting - Order Single-Run...

General Ledger for Cleartouch - Order Single-Run Reports Procedure

Order Single-Run Reports Use this procedure to order reports to be created today. To order a single-run report/report...

General Ledger for Cleartouch - Reporting - Order Single-Run Reports Page...

Reporting - Order Single Run Reports Page Budget Reports Print used to select a printed copy of the report Name nam...

See more result in TECHNICAL DOCUMENTATION - BANK PLATFORMS

Access Technical Documentation from the Knowledge Base.

fiserv.

Library Watchlist My Topics © Amy\_adm N2022

Filter This publication x Search Documentation

General Ledger for Cleartouch

Home > General Ledger for Cleartouch > ... > Order Single-Run Reports

Order Single-Run Reports

Last Updated Jun 07, 2023 | 1 minute read | Bank Platforms Cleartouch Bank Platform General Ledger for Cleartouch + 2 >

Use this procedure to order reports to be created today.

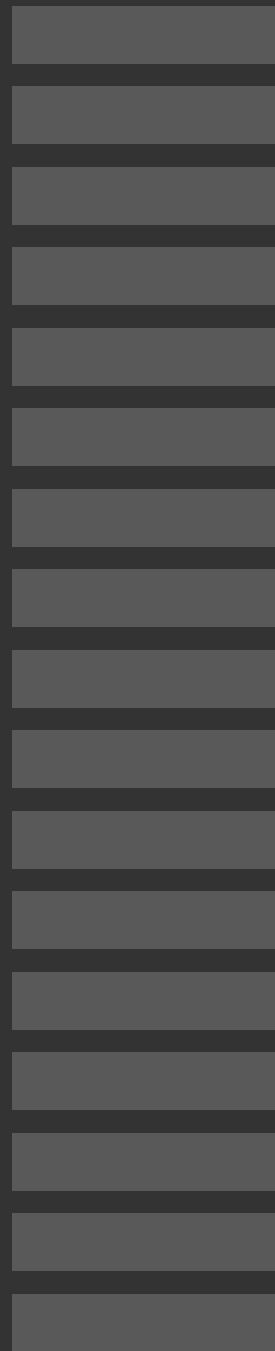
To order a single-run report/reports:

1. From the Tasks menu, select General Ledger.
2. From the Reporting menu, select Order Single-Run Reports to display the Reporting - Order Single-Run Reports page.
3. Select the report(s) to be ordered by checking the checkbox associated with the report(s).

Note:

Some reports have additional settings that must be checked to indicate sorting or additional options that must be selected from drop-down lists.

- ✓ 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](#).



# Work an Inquiry



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



# Create an Inquiry

## New Inquiry

New Inquiry

New Inquiry

CLIENT NAME \*  
Fiserv Demo Bank NA

PRODUCT \*  
General Ledger for Cleartouch

INQUIRY TYPE \*  
Service

INQUIRY URGENCY \*  
4 - Low

SHORT DESCRIPTION \*  
General Ledger - Add a line to the Statement of Condition report

Category

Type to search.

General Ledger

General Ledger

- Account / System Maintenance
  - General Inquiry
  - Product Configuration
- Application Functionality
  - 3rd Party Vendor Inquiry
  - General Inquiry
- Product Request / Question
  - Report Request
  - Custom Work Order
  - Future-Dated Request
  - General Inquiry
  - Publications / Documentation

Cancel Next

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.





# 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.



# 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.

Client360 Fiserv Demo Bank NA **Inquiries** Client360 Help Search for Knowledge, videos or documents

Home > Inquiries

Inquiries [New Inquiry](#)

**MY INQUIRIES** ALL INQUIRIES MY WATCHLIST

Reporting Category: All [Reset to Default](#) Saved filter: No filter selected

Type to search [Sort by: Inquiry Number](#) [Order By: Ascending](#) [Export](#)

0 PENDING ACTION	0 PENDING CLOSE	<b>1</b> OPEN
1 UPDATED	0 RECENTLY CLOSED	1 TOTAL

IP00210354 New  
Assigned To:— Updated Date:02/29/2024 09:56:52 AM  
**\*Client360 TRAINING\* Change BPM Processing Setting** Education Services  
Created Date:02/29/2024 09:53:43 AM Updated By:Amy Admin (Client)  
Validation Date:— Client Defined Field:—  
Merchant ID:0000000000111111 Merchant Name:—  
Marker Bank:—



# 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 x

### 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.

The screenshot shows the Client360 interface for an inquiry with ID IP00210012. The status is 'Resolved'. The inquiry details include 'General Ledger - Add line to Statement of Condition Report'. The 'Comments' tab is selected, showing a resolution note: 'Assisted the client with adding the Report Line Definition and New Account for GL 309'. At the bottom, there is a question 'Was the inquiry resolved?' with 'Yes' and 'No' buttons.

IP00210012 ×

### Inquiry Details

IP00210012 Resolved

General Ledger - Add line to Statement of Condition Report

Details **Comments**<sup>1</sup> Attachments<sup>1</sup> Watchlist >

#### Resolution

RESOLUTION NOTES

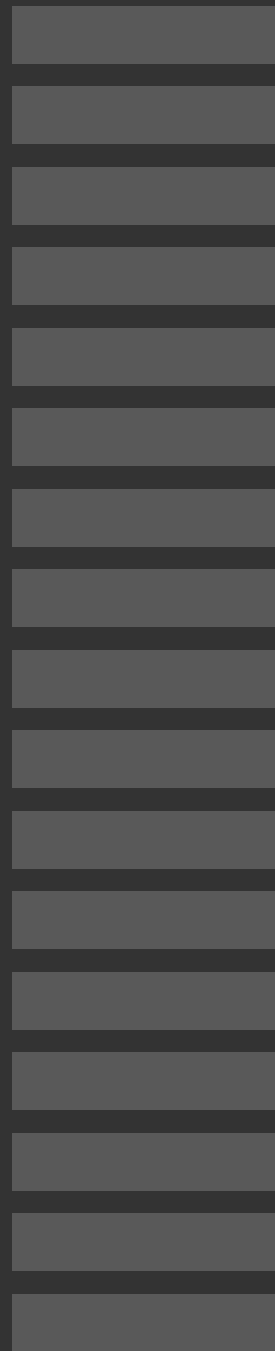
Assisted the client with adding the Report Line Definition and New Account for GL 309

VALIDATION DATE

—

Was the inquiry resolved?

Yes No



# Manage Contact Settings



- General Information
- Portal Information



# Profile Settings and Preferences

Client360 Fiserv Demo Bank NA Inquiries Client360 Help

AA

Admin  
Profile  
Log Out

Search here to find information and troubleshooting tips

Begin

## Personal Profile

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

Featured

Client360 - How do I get started with Client360?  
SEP 01, 2023

How to create an inquiry  
KB0200803

View All

Publications

September 2023 Debit Release (PUB0042901)

Revised: 3D Secure One-Time Passcode Enhancement (PUB0042879)

3D Secure One-Time Passcode Enhancement (PUB0042853)




# 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 documents

AA

### Profile

GENERAL INFORMATION PORTAL INFORMATION

#### General Information [Edit](#)

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



# 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			





# Client360 Resources



- Helpful Knowledge Articles
- Client360 Help Pages



# Helpful Client360 Knowledge Articles

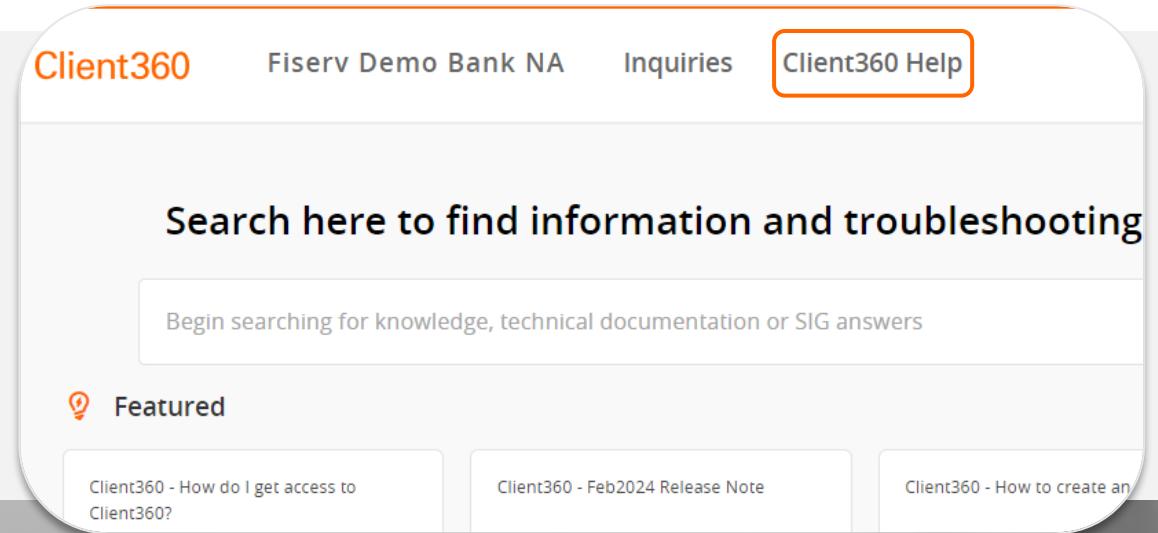
Article #	Short Description
KB0200533	<a href="#">Client360 - How to update your profile and contact preferences for notifications</a>
KB0210090	<a href="#">Client360 - Accessing Compliance Packages</a>
KB0201397	<a href="#">Client360 - How do I reset my password?</a>
KB0200803	<a href="#">Client360 - How to create an inquiry</a>
KB0201474	<a href="#">Client360 - Most Useful Resources</a>
KB0203817	<a href="#">Client360 - How often will my password expire?</a>
KB0202228	<a href="#">Client360 - How to reopen a Pending Close inquiry</a>
KB0201425	<a href="#">Client360 Admin - How to create a new contact</a>
KB0200846	<a href="#">Client360 - How to run a report</a>
KB0200190	<a href="#">Client360 - Where can I learn more about Client360, and how do I get support?</a>



# Additional Resources

## Client360 Resources

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



# Where Are We Now?



01

Navigate in Client360.



04

Manage Contact Settings.



02

Access Self-Service Resources.



05

Client360 Resources.



03

Work an Inquiry.



# Q&A



Thank You!