

Client360

Client360 User Guide

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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 gets smarter and moves 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 must 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.
- Contact information for the Fiserv relationship management team from the home page.
- An interactive chatbot to quickly provide support.
- AI-boosted search results based on the client's unique products and specific queries.
- Searchable support documentation, Knowledge Articles, and more
- New integrated tools to allow account representatives and other associates on the service teams to provide improved support.

Getting Started

Technical Requirements

Client360 supports the following browsers:

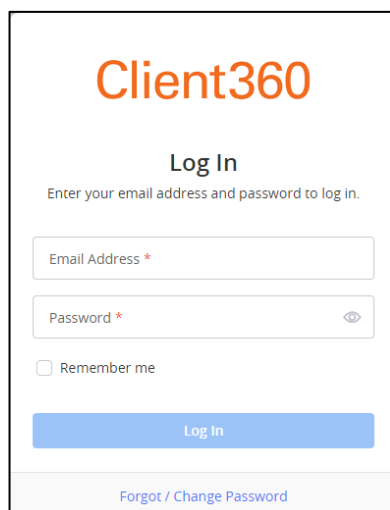
- Chrome (latest version)
- Edge (latest version)
- Firefox (latest version)
- Safari (latest version, Mac only)
- Tablet mobile browser (native Android and iOS)

Accessing Client360

After establishing the initial username and password, users can access Client360 at <https://client360.fiservapps.com/Client360/>

Log In

Users must authenticate upon every sign in to confirm their identity, since all users have access to information specific to their financial institution such as contacts, inquiries, and sensitive notes/attachments.




Client360

Log In

Enter your email address and password to log in.

Email Address *

Password * 

Remember me

Log In

[Forgot / Change Password](#)

First Time Users

Client360 sends new users a “Welcome to Client360” email notification with an initial, temporary password and link to create a new password. The initial, temporary password is available for 48 hours. When first accessing the Client360 Portal, please use the link in the email and follow the below steps to create a new personal password.

1. Open the invitation/welcome email from Client360 (client360@fiserv.com). This email includes a temporary password and a link for establishing a new password.
2. Select the link to verify the email address and establish a new password.
3. Enter the email address on the subsequent page. This email address must match the email address in the user’s Client360 profile.

- The user can add additional email addresses and phone numbers to the profile for future verifications after the initial set up is complete.
4. Select **Send Verification Code**.
 5. The user receives an email from (DoNotReply@transactionverify.com), which includes a 6-digit verification code. This code is valid for five minutes.
 6. Enter this verification code and select **Verify**.
 - If the user does not receive the verification email, select **Send new code** to send a new message.
 - If the user still does not receive the verification email, this might indicate a client whitelisting issue with the DoNotReply@transactionverify.com address. The user should contact their Client Contact Administrator or their IT department for assistance.
 7. After verifying their email address, the user must establish a new password meeting the password complexity requirements as follows:
 - 9–16 characters, meeting the following criteria:
 - lowercase characters
 - uppercase characters
 - numerical digits (0-9)
 - Special characters, i.e., @ # \$ % ^ & * - _ + = [] { } | \ : ' , ? / ` ~ “ ()
 - No more than two identical characters in a row
 8. After the initial setup, the user can sign in using their email address and new password.

Multifactor Authentication (MFA)

Users must authenticate upon every sign-in to confirm their identity, since all users have access to information specific to their financial institution such as contacts, inquiries, and sensitive notes/attachments. Users can receive an email, phone call, or SMS text message for multifactor authentication.

Note: The initial sign-in requires authentication through the email address entered by the user's Client Contact Administrator.

How to Authenticate with MFA

1. After providing Username and Password credentials, the user will be prompted to select the preferred method for delivery of the one-time code when the user profile is configured with more than one method of delivery.
 - Email
 - Mobile phone
 - Business phone
 - After hours phone
2. Enter the verification code received and select Verify.

When appropriate, the user may select the checkbox which allows for MFA to Trust the browser for that device.

Troubleshooting

How to Troubleshoot Multifactor Authentication

- Confirm the phone number is not using call forwarding or an extension.
- Confirm the phone has the latest update installed.
- Restart the phone, if authenticating through mobile.
- Resend the code – If they do not receive a code, the user can try again using the same or a different delivery method. The user can attempt to enter the code five times before Client360 locks the account.

Update MFA Delivery Methods

The screenshot displays the Client360 user profile interface. At the top, there are navigation links for 'Client360', 'ABCD Client', 'Inquiries', and 'Client360 Help', along with a search bar. The main content area is divided into two tabs: 'GENERAL INFORMATION' (selected) and 'PORTAL INFORMATION'. Under 'General Information', there is an 'Edit' link. The profile details include:

FIRST NAME Estachio	LAST NAME Caruso	EMAIL estachio.caruso@abccbank.com
TITLE —	CLIENT NAME ABCD Client	PRIMARY CLIENT ABCD Client
BUSINESS PHONE —	MOBILE PHONE —	AFTER HOURS PHONE —
LANGUAGE English	AFTER HOURS CONTACT No	

Below the profile details is the 'Time Zone Settings' section, showing the time zone as '(GMT -5:00) Central Time, Chicago'. On the right side, the 'Change History' section shows a list of updates to the contact information, with the 'MOBILE PHONE' field highlighted in orange in the original image.

1. From the upper-right corner of the page, select the user's name.
2. Select **Profile**.
3. Select the **General Information** tab.
4. Select **Edit**.
5. Update the settings, as necessary. MFA Delivery Methods are defined by entry of mobile phone or email in the fields Business Phone, Mobile Phone, After Hours Phone and Email.
Note: Updating the email address also updates the user's sign-in credentials.
6. Select **Save**.

Account Security

To protect the account, Client360 has a variety of security features in place.

Passwords

Users must reset their password every 90 days, if Client360 locks the account due to inactivity, if the user has forgotten their password, or if the user is concerned about security.

How to Reset the Password

1. Select the **Forgot / Change Password** link on the login screen.
2. Enter the email address on the subsequent page. This email address must match the email address in the Client360 profile.
3. Select **Next**.
4. Users receive an email from (DoNotReply@transactionverify.com), which includes a 6-digit verification code. This code is valid for five minutes.
5. Enter this verification code and select **Verify**.
 - If you do not receive the verification email, select **Send New Code** to send a new email.
 - If you still do not receive the verification email, this might indicate a client whitelisting concern with the DoNotReply@transactionverify.com address. Contact your IT department for assistance.
6. Enter the new password.
7. Enter the new password a second time to confirm.
8. Select **Reset Password**.
9. Sign in using the new password.

Password Requirements

- 9–16 characters, meeting the following criteria:
 - lowercase characters
 - uppercase characters
 - numerical digits (0-9)
 - Special characters, i.e., @ # \$ % ^ & * - _ + = [] { } | \ : ' , ? / ` ~ " ()
- No more than two identical characters in a row
- Client360 remembers the 14 most recent passwords, and you cannot reuse them.

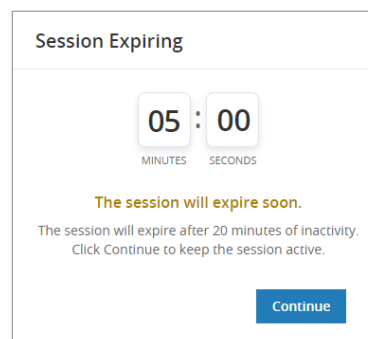
Account Lock Out

The account locks after five consecutive failed login attempts. The user can try to log in again after 15 minutes. If the user is still unable to log in, they should contact their Administrator.

The account also locks after 90 days of inactivity. At this time, Client360 asks the user to change their password before they can sign in.

Session Timeout

The session inactivity timeout period is 20 minutes of inactivity. The user receives a warning after 15 minutes. If the user does not select **Continue**, Client360 signs them out at 20 minutes of inactivity.



Email Notification

Client360 sends notifications to ensure the user is up to date on activity. In addition to the initial welcome email, the user receives regular email notifications for the following activities:

- Administrative Notifications
 - Welcome Email
 - Password Reset Request
 - Profile Update
- Inquiry Notifications
 - Inquiry Creation by Fiserv Associate
 - Comment Added to Inquiry
 - Sensitive Comment Added to Inquiry
 - Resolution of Inquiry
 - Closure of Inquiry
 - Comment Removed
 - Attachment Removed

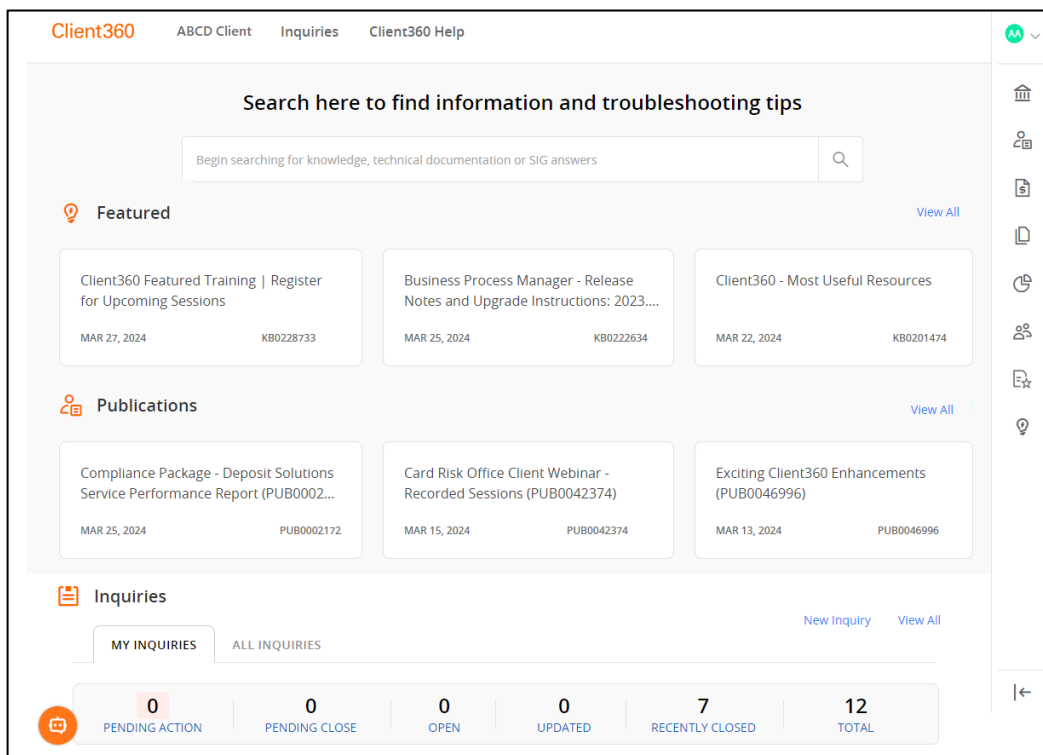
Navigate the Home Page

Client360 offers a general search and inquiry view embedded in the main page, along with a vertical Quick Access Menu for quick access to common information.

The user can start at the home page to begin a knowledge search, to browse Featured Items and Publications.

The home page includes a condensed inquiry dashboard with activity tab counters by status for the user's inquiries (My Inquiries) and, if enabled, All Inquiries.

The user can access their profile and portal settings from the dropdown menu to the right of their initials in the upper right corner of the page.



Personal Profile and Portal Settings

The user's Client360 profile includes contact information and preferences. The General Information tab contains the user's personal contact information, while the Portal Information tab controls notification, inquiry access and product-level access to service interruptions, publications, and inquiry creation. Change History for the profile displays on the right side of the page.

Update General Information & Portal Information

1. From the upper-right corner of the page, select the user's name.
2. Select **Profile**.
3. Select the **General Information** or **Portal Information** tab.
4. Select **Edit**.
5. Update the settings as necessary (see below for additional guidance).
6. Select **Save**.

General Information

The user can update their contact information by selecting **Edit** in the upper-right corner of the **General Information** tab.

The screenshot displays the Client360 user profile interface. At the top, there is a navigation bar with 'Client360', 'ABCD Client', 'Inquiries', and 'Client360 Help', along with a search bar. The main content area is divided into two tabs: 'GENERAL INFORMATION' (highlighted with an orange box) and 'PORTAL INFORMATION'. Under the 'GENERAL INFORMATION' tab, there is a table of user details and an 'Edit' button (also highlighted with an orange box). To the right, a 'Change History' section shows a list of updates made by 'Estachio Caruso' on various dates, including '09/20/2023' and '01/17/2023'.

General Information		
FIRST NAME	LAST NAME	EMAIL
Estachio	Caruso	estachio.caruso@abcbank.com
TITLE	CLIENT NAME	PRIMARY CLIENT
—	ABCD Client	ABCD Client
BUSINESS PHONE	MOBILE PHONE	AFTER HOURS PHONE
—	—	—
LANGUAGE	AFTER HOURS CONTACT	
English	No	
Time Zone Settings		
TIME ZONE		
(GMT -5:00) Central Time, Chicago		

On the General Information tab, the user can update:

- Name
- Email Address
- Title
- Business Phone
- Mobile Phone
- After Hours Phone
- Language
- Time Zone

The default time zone for Client360 is Eastern (US and Canada).

Note: Updating the personal time zone in settings does not update the time stamps displayed on inquiries.

Portal Information

Portal Information settings are accessible in the Portal Information tab.

Under Manage Information, preferences are displayed for **Notifications**, **Show Inquiries of All Contacts** and **Show Sensitive Comments and Attachments**.

The user can update **Notifications** after selecting **Edit** from the upper right of the Portal Information tab. The Client360 Administrator can update **Show Inquiries of All Contacts** and **Show Sensitive Comments and Attachments** for each user.

Under Product Preferences, product-level settings are displayed for **Service Interruptions**, **Publications** and **Create Inquiry**. A green, circled checkmark indicates the option(s) enabled, a black, circled x indicates the option(s) disabled.

The Client360 Administrator establishes an **Admin Lock** setting for each product, for each user. Product Preferences may be updated after selecting **Edit** from the upper right of the Portal Information tab.

If the Admin Lock setting is not checked, the user is not restricted from making changes to **Service Interruptions**, **Publications** and **Create Inquiry** preferences for the product(s). If the Admin Lock setting is checked, the user is restricted from making changes to **Service Interruptions**, **Publications** and **Create Inquiry** preferences for the product(s).

The screenshot displays the Client360 user profile interface. At the top, there is a navigation bar with 'Client360', 'ABCD Client', 'Inquiries', and 'Client360 Help'. A search bar is located on the right. The main content area is divided into two columns. The left column contains the 'Profile' section with tabs for 'GENERAL INFORMATION' and 'PORTAL INFORMATION'. The 'PORTAL INFORMATION' tab is active and contains a 'Portal Information' section with an 'Edit' button. Below this is the 'Manage Information' section with three toggle switches: 'NOTIFICATIONS' (No), 'SHOW INQUIRIES OF ALL CONTACTS' (Yes), and 'SHOW SENSITIVE COMMENTS AND ATTACHMENTS' (Yes). The 'Product Preferences' section shows a dropdown for 'CLIENT NAME' set to 'ABCD Client'. Below this is a table of product preferences.

PRODUCT NAME	SERVICE INTERRUPTIONS	PUBLICATIONS	CREATE INQUIRY
Accel	⊙	⊙	⊙
Acquiring	⊙	⊙	⊙
AllData Aggregation	⊙	⊙	⊙
ATM Management	⊙	⊙	⊙

The right column contains the 'Change History' section, which lists several updates made by 'Estachio Caruso' on 09/20/2023 and 01/17/2023. The updates include editing contact information and selecting 'Show all inquiry all contacts Yes'.

Manage Information

■ Notifications

Selecting the Notifications box allows Client360 to send email notifications for inquiries to the user. If you do not select this box, the user does not receive email notifications for inquiry updates.

Note: This setting does not impact notifications initiated by Password Reset, Multi-Factor Authentication, Service Interruptions or Publications.

- **Show Inquiries of All Contacts**

Selecting the **Show Inquiries of All Contacts** box allows access to Inquiries related to any contact in the client organization. If you do not select this box, the user can only access inquiries in which they are the inquiry contact.

- **Show Sensitive Comments and Attachments**

Selecting the **Show Sensitive Comments and Attachments** box allows the user to view sensitive comments and attachments, such as card numbers and other PII information. If you do not select this box, the user cannot see comments or attachments that contain sensitive data.

Product Preferences

- **Bulk Preference Settings**

Use Bulk Preference Settings to set preferences for one or many products at the same time.

Note: Products with the Admin Lock setting unchecked may be selected. Products with the Admin Lock setting checked cannot be selected from the product drop-down list.

1. Select preferences for Publications and Create Inquiries.
2. Select the **Select All** button or individually choose the products to apply the settings to from the dropdown.
3. Select **Apply**. The boxes populate automatically, but the user can still individually update them.
4. Select **Save**.

- **Service Interruptions**

Selecting the Service Interruptions box allows the user to receive email notifications about Service Interruptions for selected products. If Service Interruptions is not checked, the user does not receive email notifications about Service Interruptions.

- **Publications**

Selecting the Publications box allows the user to view Publications in the Publications Module and receive Publications by email for selected products. If Publications is not checked, the user cannot access Publications for the product within the Publications Module or by email.

- **Create Inquiry**

Selecting the Create Inquiry box allows the product to appear in the New Inquiry Product list. If Create Inquiry is not checked, the user cannot select the product when creating a new inquiry.

- **Admin Lock**

If Admin Lock is checked, the user's Contact Administrator has restricted the user from making changes to their own product preferences.

Knowledge Base

Client360 integrates with the Fiserv Knowledge Base, a library of resources that includes Knowledge Articles (KA), Technical Documentation (product manuals and guides), Video Tutorials and SIG content. The Knowledge Base provides you with access to information, resources, and support whenever you need it.

Search the Knowledge Base

Search the Knowledge Base using a KA number or by entering a search phrase. When searching, format the search phrase to begin with the product or platform, followed by a description of the issue, topic, or feature for the most relevant search results.

Perform the following steps to search the Knowledge Base:

1. Enter the search criteria in the Client360 search bar, starting with the product or platform name followed by the question or issue (example: "dispute expert status ...").
2. Select the Search icon or press **Enter** to launch a new tab with search results.
3. View the results list. Client360 groups results by content type in tabs: Knowledge (which includes Knowledge Articles and videos), Technical Documentation, and SIG.
4. Select a preview card to view the content in entirety. You can select whether you want to view the content in Client360 or in a new tab.

Provide Feedback

You can provide your feedback within the body of the Knowledge Article to share how the content was helpful for you or what we can change to make it more helpful in the future.

Select the thumbs up (relevant) or the thumbs down (not relevant) within the Was this information relevant tab to tell us whether the information in the article was relevant to your search.

Select **Yes** or **No** in the **Was this article helpful?** tab to tell us whether the article helped you resolve your issue.

In the **Give feedback** tab, you can provide detailed feedback about how the article helped you or how we can improve it.

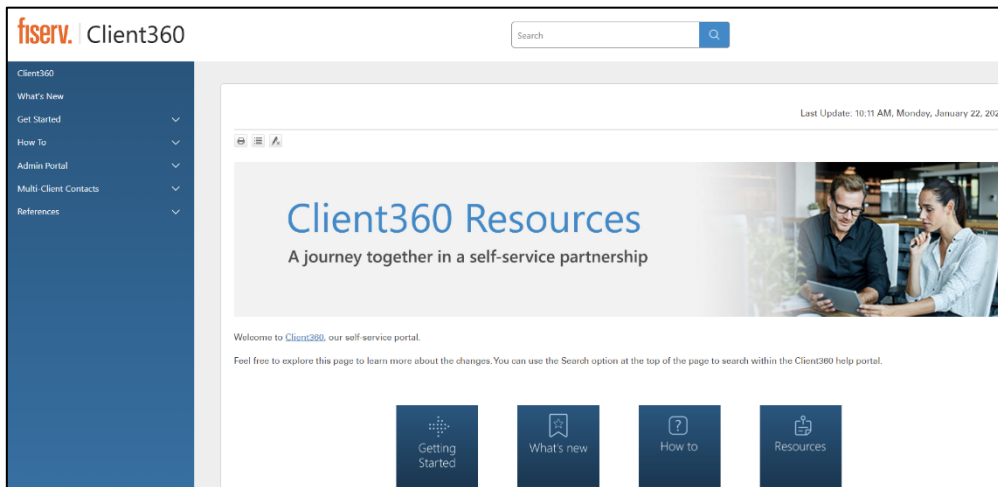
Select **Submit** when finished.

Client360 Help

Client360 Help acts as a digital training guide, an online resource to assist with the navigation and use of the tool.

How to Explore Client360 Help

1. Select **Client360 Help**.
2. Client360 Resources opens in a new tab.
3. Search for topics in the Search field at the top of the page or browse within the navigation panel to the left.



Inquiries Tab

Users can navigate to the Inquiries tab from the Client360 Home page by selecting the Inquiries tab directly, by selecting the View All link in the lower right, or by selecting any of the activity tab counters from the condensed dashboard at the lower area of the page.

Inquiries includes a tab for the User’s inquiries and, if enabled, a tab for All Inquiries and a Watchlist tab. **My Inquiries** displays all inquiries for the user. **All Inquiries** displays all inquiries for all contacts within the client organization, and is present for users with **Show Inquiries of All Contacts** checked (enabled). **My Watchlist** displays all inquiries where the user has been added to the watchlist.

Inquiry Dashboard

The Inquiry dashboard includes three tabs related to inquiries: **My Inquiries**, **All Inquiries**, and **My Watchlist**.

My Inquiries shows all inquiries related to the user.

All Inquiries shows all inquiries related to all contacts within the organization.

My Watchlist shows all inquiries for which the user has been added to the watchlist.

Each user is configured with an option to enable or disable the All Inquiries tab. If the the All Inquiries tab is present, the **Show All Inquiries of All Contacts** box is checked. If the All Inquiries tab is not present, the **Show All Inquiries of All Contacts** box is not checked.

Note: The Client360 Contact Administrator has rights to enable or disable Show All Inquiries of All Contacts.

Within My Inquiries, All Inquiries and My Watchlist, Client360 groups and displays the number of inquiries by activity, allowing the user to filter the dashboard and view inquiries by activity type.

The screenshot shows the Client360 Inquiries dashboard. At the top, there are navigation links for Home, Inquiries, and Client360 Help. A search bar is available for knowledge, videos, or documents. The main section is titled 'Inquiries' and features a 'New Inquiry' button. Below this, there are three tabs: 'MY INQUIRIES' (selected), 'ALL INQUIRIES', and 'MY WATCHLIST'. A 'Reporting Category' dropdown is set to 'All'. A search bar is present with the placeholder 'Type to search'. Sorting options are 'Sort by: Inquiry Number' and 'Order By: Ascending'. An 'Export' link is also visible. A summary table shows the following counts:

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

Below the summary table, a list of inquiries is displayed. The first inquiry is IP00210354, marked as 'New'. It was assigned to '---' and updated on 02/29/2024 at 09:56:52 AM. The inquiry title is '*Client360 TRAINING* Change BPM Processing Setting'. Other details include the creation date (02/29/2024 09:53:43 AM), validation date (---), merchant ID (000000000011111), and marker bank (---).

Activity Tabs

Select any of the recent activity tabs to filter the list of inquiries.

Activity Tab	Includes
Pending Action	Inquiries pending an action, update, or confirmation by the client. Inquiries in Pending Action appear in the Open activity tab.
Pending Close	Fiserv-resolved inquiries within the 14-day window during which the client is presented with the request to accept the proposed resolution.
Open	Inquiries that Fiserv is currently working.
Updated	Open inquiries with recent activities. The Inquiry Timeline reflects the activity.
Recently Closed	Inquiries closed within the most recent 90 days.
Total	All Inquiries for your organization. Note: Client360 retains closed inquiries for 18 months after closure.

Inquiry Card

Inquiry cards are displayed under the Dashboard and reflect the Activity Tab selected. Inquiry cards are a preview of fields from the Inquiry. To view all fields and other related details, select an inquiry card and the details display to the right.

MY INQUIRIES | ALL INQUIRIES | MY WATCHLIST

Reporting Category: All Reset to Default Saved filter: No filter selected

10 PENDING ACTION	0 PENDING CLOSE	5624 OPEN	25 UPDATED	17 RECENTLY CLOSED	5661 TOTAL
----------------------	--------------------	--------------	---------------	-----------------------	---------------

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

IP00123126 Product Request/Question Updated By: Estachio Caruso (Client)	In Progress Mobiliti Business Validation Date: —	Assigned To: John Doe Contact Name: Amy Admin Client Defined Field: —	Updated Date: 03/14/2024 11:21:27 AM Created Date: 10/02/2021 04:55:04 PM
--	--	---	--

- Inquiry ID
- Inquiry State
- Assigned To
- Updated Date
- Short Description
- Product
- Contact Name
- Created Date
- Updated By
- Validation Date
- Client Defined Field

Search and Sort Options

The user can search for Inquiries using the Search and Sort and Order features.

The screenshot shows the 'Inquiries' dashboard with the following elements:

- Navigation: Home > Inquiries
- Section: Inquiries
- Tabs: MY INQUIRIES (selected), ALL INQUIRIES, MY WATCHLIST
- Reporting Category: All (dropdown)
- Filters: Save Filter, Reset to Default, Saved filter: Descending order (dropdown)
- Summary Cards:
 - PENDING ACTION: 0
 - PENDING CLOSE: 0
 - OPEN: 0
 - UPDATED: 0
 - RECENTLY CLOSED: 7
 - TOTAL: 12
- Search: Type to search (input field)
- Sort and Order: Sort by: Inquiry Number (dropdown), Order By: Descending (dropdown), Export (link)
- Footer: Closed Inquiries are visible for 18 months after their closed date.

Search options include:

- Assigned To
- Contact Name
- Product
- Inquiry Number
- Short Description
- Client Defined Field

Sort by and Order by options include:

- Inquiry Number
- Created Date
- Product
- State
- Updated Date

Export the Inquiry Dashboard

The Client360 Inquiry Dashboard includes an Export feature that allows the user to download any of the Inquiry Dashboard views into Excel. The export includes the last 12 months of closed inquiry data. Select the desired Activity tab and select the Export link. The report automatically downloads.

The screenshot shows the 'Inquiries' dashboard with the following elements:

- Navigation: MY INQUIRIES (selected), ALL INQUIRIES, MY WATCHLIST
- Reporting Category: All (dropdown)
- Filters: Reset to Default, Saved filter: No filter selected (dropdown)
- Summary Cards:
 - PENDING ACTION: 0
 - PENDING CLOSE: 0
 - OPEN: 1 (highlighted with a blue box)
 - UPDATED: 2
 - RECENTLY CLOSED: 1
 - TOTAL: 2
- Search: Type to search (input field)
- Sort and Order: Sort by: Inquiry Number (dropdown), Order By: Ascending (dropdown), Export (link)
- Table:

IP00210451	In Progress	Assigned To: —	Updated Date: 03/15/2024 06:51:24 AM
Business Online - Set up new users	Business Online	Created Date: 03/15/2024 06:28:26 AM	Updated By: Estachio Caruso (Client)
Validation Date: —	Client Defined Field: —		

Fields exported:

- Inquiry Number
- Product
- Short Description
- Resolved By
- Suffix Field
- Created Date
- Client Name
- Inquiry State
- Inquiry Details
- Resolution Notes
- Reporting Source
- Updated Date
- Client ID
- Inquiry Urgency
- Resolved Date
- Created By
- Reporting Category
- Updated By
- Client Defined Field
- Pending Code
- Validation Date
- Assigned To
- Reporting Subcategory
- Closed Date

Inquiry State

State reflects progress toward resolution during the inquiry life cycle. See state value definitions below.

New: the inquiry is open and assigned to a Fiserv team.

In Progress: the inquiry is open and assigned to a Fiserv associate.

Pending: the inquiry is pending next steps and the Pending Code reflects the action and responsible participant.

Resolved: Fiserv has proposed a resolution to the inquiry. Resolved inquiries have a 14-day window in which the client is presented with options to accept the proposed resolution or reopen the inquiry:

Inquiry details include a prompt for the client to validate the resolution (Yes) or reject it (No).

- When the client selects **No**, the inquiry is reopened and the state changes from Resolved to In Progress.
- When the client selects **Yes**, the inquiry state changes from Resolved to Closed.
- If no action is taken within the 14-day window, the inquiry state changes from Resolved to Closed.

Closed: Closure results from one of the following:

- Client selects Close Inquiry.
- Client selects Yes to validate resolution proposed by Fiserv.
- No action takes place within 14 business days after Fiserv proposes a resolution.

Note: Closed inquiries may not be reopened.

Pending Code

The Pending Code reflects next steps and responsible participant.

- Pending Change: waiting for change request to complete.
- Pending Client Information: waiting for client to answer a question, provide feedback, additional documentation, etc.
- Pending Client Validation: waiting for client to validate a software release, outcome of recommended steps, or other confirmation for a solution.
- Pending Development: waiting for Fiserv development to provide a solution for the inquiry or request.
- Pending Fiserv Assistance – Non-Development: waiting for a Fiserv associate to provide information.
- Pending Release: waiting on a change request to be complete.
- Pending Technical Research: waiting for Fiserv technical resources to provide information.
- Pending Vendor Action: waiting for a third-party vendor to complete a response or activity.

Inquiry Details

From the Inquiry Dashboard, select an Inquiry Card to display Inquiry Details. Inquiry Details provide in-depth information about the question or issue. Inquiry Details include the following:

Inquiry Details 🗑️ 📄

IP00210451 In Progress

Business Online - Set up new users

Details Comments ² Attachments Watchlist >

Summary

GENERAL INFORMATION

PRODUCT Business Online	CATEGORY 1 Business Online	CATEGORY 2 Application Functionality
CATEGORY 3 Product "How To"	CLIENT NAME Fiserv Demo Bank NA	CONTACT NAME John Doe 🔗
INQUIRY URGENCY 2 - High 🔗	ASSIGNED TO —	CREATED DATE 03/15/2024 06:28:26 AM
CLOSED DATE —	UPDATED BY Estachio Caruso(Client)	UPDATED DATE 03/15/2024 06:51:24 AM
RESOLVED DATE 03/15/2024 06:40:10 AM	CLIENT DEFINED FIELD — 🔗	SUFFIX FIELD —
REPORTING CATEGORY Service	REPORTING SUB CATEGORY —	

INQUIRY DETAILS
I need to set up 3 new users in Business Online. How do I do this?

ADDITIONAL INFORMATION

ACCOUNT NUMBER —	ARE YOU RECEIVING AN ERROR MESSAGE? —
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- Creation date
- Inquiry categories
- Assigned team and agent
- Comments
- Attachments
- Watchlist membership
- Timeline view of activity

Details Tab: General Information

The following fields appear in the Summary - General Information area of the Details tab:

- **Product:** selected while opening the inquiry, Fiserv can change during research.
- **Category 1, Category 2, Category 3:** clarification fields selected when opening the inquiry.
- **Client Name:** identifies the client associated with the inquiry.
- **Contact Name:** identifies the client contact associated with the inquiry. A Client360 Administrator can change the contact.
- **Inquiry Urgency:** identifies the severity of the inquiry. See values below:
 - 1- **Critical:** Complete outage of a production service resulting in a significant impact on client business operations.
 - 2- **High:** Partial outage of a production service or significant degradation of performance resulting in serious impact on client business operations.
 - 3- **Medium:** Loss of functionality within a production or nonproduction service or moderate degradation of performance resulting in some impact to business operations. Short-term workarounds might exist but are not sustainable.
 - 4 **Low:** Functionality issues within the production or nonproduction service or application that do not impact business operations.

- Assigned To: identifies the Fiserv associate managing the inquiry.
- Created Date: the date the inquiry opened.
- Closed Date: the date the inquiry closed.
- Updated By: the user who most recently updated the inquiry.
- Updated Date: the date of the most recent inquiry update.
- Resolved Date: the inquiry resolution date.
- Client Defined Field: a multi-purpose editable freeform field that clients may use to configure specific categorization or reporting needs. This field appears in the report and export output and the Inquiry Search feature.
- Suffix Field: for use with Implementation inquiry type for products with multiple implementation projects. The Suffix identifies to which implementation project the inquiry applies.
- Reporting Category: classifies/defines the nature of the inquiry.

Service: inquiry a client submits requiring assistance from Fiserv regarding a product, module, or service. The nature of the inquiry can be 'how to,' related to delivery of files or data, or a report of something 'not working' as expected.

Maintenance: submitted to Fiserv for completion/delivery/fulfillment.

Implementation: submitted to reflect/track project work for the implementation of new products, modules, or services.

Defect: identifies the primary inquiry that requires software or system modification to address the issue. Related inquiries to the primary (defect) classify as Reporting Category Service and Subcategory Break/Fix Issue.

Enhancement: identifies the inquiry as working-as-designed software with a request to improve process, quality, or functionality of the application, product, or module.

- Reporting Subcategory: identifies values that clarify Implementation and Maintenance inquiries. Not applicable for inquiries classified as Service, Implementation, or Enhancement.
- Inquiry Details: descriptive clarification for the question or issue. This includes resolution details, such as (not limited to) error messages, timing/dates/amounts, steps to reproduce, occurrences, and other relevant details.
- Additional Information: clarifying/supporting information gathered during inquiry creation. Product and Category menu selections determine Additional Information templates to assist Fiserv with resolution expedition.

Details Tab: Activities

The lower Details tab area includes an Actions section for unresolved or closed inquiries. The Actions section displays the option "Close Inquiry." For additional information on closing an Inquiry, visit the Close an Inquiry section.

Details Tab: Resolution

The lower Details tab area includes Resolution sections for unresolved or closed inquiries. The Resolution section includes Resolution Notes. Implementation inquiries contain an additional field named Validation Date.

For Fiserv-resolved inquiries, the Resolution section displays "Was this Inquiry Resolved" with options "Yes" and "No." Client360 displays options to validate resolution during a 14-day period following the resolution date. For additional information on resolving an inquiry, visit the Resolve an Inquiry section.

For Closed inquiries, the Resolution section displays the option “Take Survey.” The option to take a survey displays for the inquiry contact for 14 days after the Inquiry closes. Closed inquiries cannot be reopened.

Comments

The Comments tab is an electronic space where the clients and Fiserv associates can interact with one another electronically and includes all the interaction history between the client and Fiserv related to the inquiry. Newly added comments initiate email notification to Fiserv and related users enabled with the inquiry Notification preference.

Email replies from the client user are appended to the Comments tab. Use the magnifying glass icon to search comment history.

Sensitive comments and attachments are removed 90 days after closure to maintain PCI regulatory compliance.

Attachments

The Attachments tab is where attachments related to the inquiry are uploaded and viewed Individual attachments 25 MB, and total attachments cannot exceed 100 MB. The file name cannot contain have decimal points other than that which precedes the extension.

See the following table for accepted formats

ACH	CERT	CTX	DOC	FCO	MSG	PMS	QFX	SAV	TRC	XLSX
ACS	CFG	DAT	DOCX	FFP	P12	PNG	RAR	SMT	TRP	XML
ASCII	CMP	DB	EPS	FLS	P7B	PPT	RF0	SQL	TXT	XPS
AUD	CRT	DB2	EVT	FMT	PCAP	PPTX	RF1	T01	VSD	ZIP
BAK	CSS	DEF	EVTX	FTP	PCAPNG	PRN	RPT	TIF	XLS	ZIPX
BMP	CSV	DIS	EXP	GIF	PDF	QBO	RTF	TIFF	XLSM	

Watchlist

The Watchlist tab sends email notifications to keep others in the client organization informed about actions and activities during an inquiry. The User can select Add Me to become a member of the watchlist, or select Add to to include others from the client organization as watchers.

Timeline

The Timeline tab displays chronological activities and actions throughout the life cycle of an inquiry. Timeline actions include creation, assignment, comment activity, attachments, and Inquiry status updates. Users can search, collapse, and expand the timeline.

The user can expand all activity details by selecting the Expand icon from the upper right of the Timeline section, or by individually selecting the expand arrow to the right of a collapsed timeline activity.

The user can Filter and Sort the Timeline by selecting the Search icon and selecting an option to Filter, Sort and Order by. Timeline selections to filter by are:

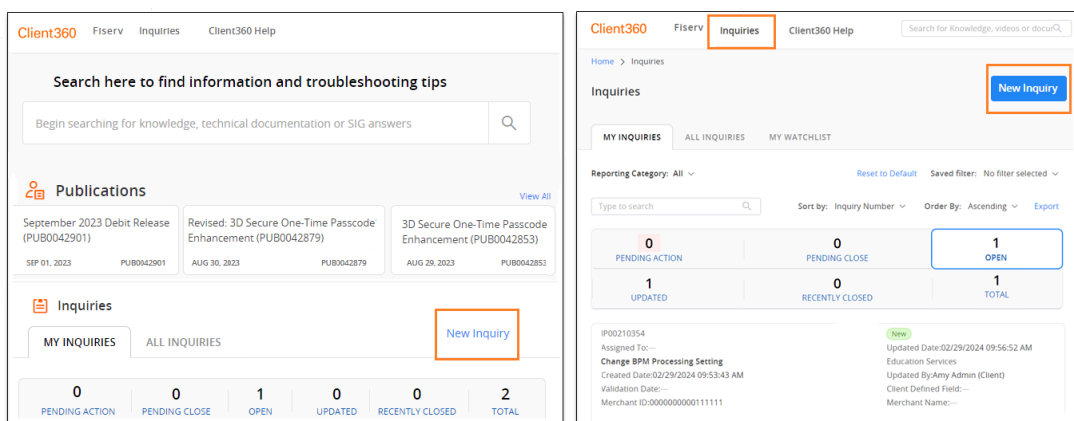
Accepted Inquiry Resolution	Close Task (manually)	Remove Watchlist Member
Add Comments	Create Inquiry	Reopen Inquiry
Add Inquiry Attachment	Download Inquiry Attachment	Resolve Inquiry

Add Watchlist Member	Reject Inquiry Resolution	Transfer Inquiry
Assign Inquiry	Remove Comments	Update Inquiry Attachment Category
Close Inquiry (by submitter)	Remove Inquiry Attachment	Updated Inquiry
Close Inquiry (by system)	Remove Sensitive Data	Updated Inquiry State

Inquiry Management

Create an Inquiry

1. Select the **New Inquiry** button from the inquiry dashboard section of the Home Page or from within the Inquiries tab.



2. Select the **Client Name**. Client Name populates automatically for most users. Multiclient contact users select the organization for which the Inquiry is related to from the Client Name drop-down list.

New Inquiry

CLIENT NAME *
Fiserv Inc

Product *

Inquiry Type *

3. Select the **Product**. The product selection list is determined by Portal Settings established on the user profile. Refer to Personal Profile and Portal Settings for information about updating products in the New Inquiry Product selection list.
4. Select **Inquiry Type**, if appropriate. The most common Inquiry Type is Service.
5. Select **Urgency**. The Urgency field identifies the severity of the inquiry. Values are:
 - 1- Critical: Complete outage of a production service resulting in a significant impact on client business operations.
 - 2- High: Partial outage of a production service or significant degradation of performance resulting in serious impact on client business operations.
 - 3- Medium: Loss of functionality within a production or nonproduction service or moderate degradation of performance resulting in some impact to business operations. Short-term

workarounds might exist be available but are not sustainable.

4 Low: Functionality issues within the production or nonproduction service or application that do not impact business operations.

6. Enter a **Short Description** to reflect a high level summary of the question or issue.
7. Select **Next**.
8. Select **Category** options that best reflect the question or issue presented.

9. Select **Next**.
10. Complete **Additional Information** fields. Additional Information fields are determined by previously selected Product and Category selections, carefully designed to ensure the right teams are engaged and enabled to achieve the most timely resolution.
11. Complete **Inquiry Details** to expand on the Short Description, clarifying the issue or question with messages, steps to reproduce, date or steps taken and results.
12. Complete remaining fields as appropriate:

Sensitive Comments: This field is reserved for Payment Card Industry (PCI) and/or Personally Identifiable Information (PII) data. When a user enters PCI/PII data into the description fields instead of in Sensitive Comments, Client360 displays the message “This field doesn’t allow PCI/PII sensitive data”. Client360 encrypts information entered in the Sensitive Comments field. Users configured with the Portal Setting “Show all sensitive comments and attachments” can view Sensitive Comments.

Attachments: Upload supporting documentation to the Inquiry. All attachments are considered

sensitive and are encrypted.

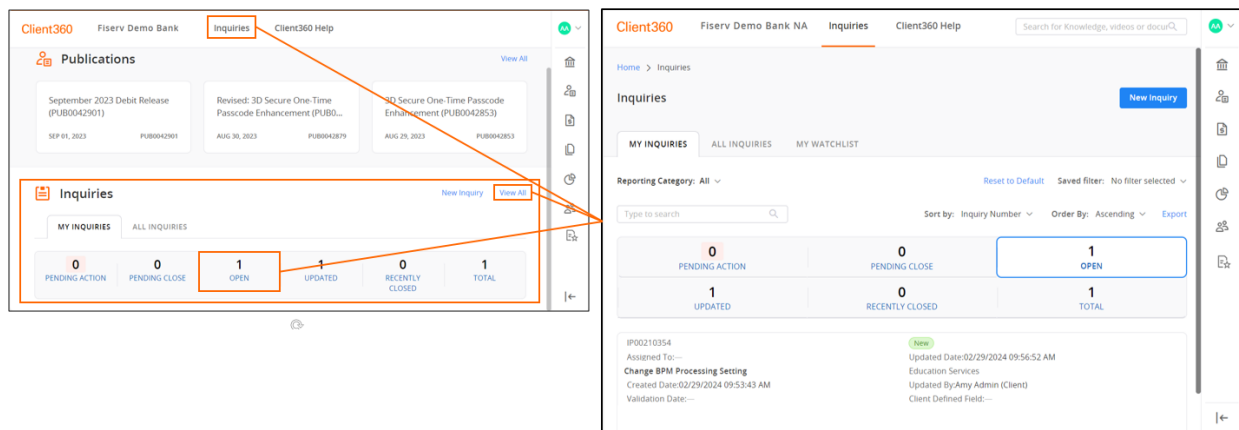
13. Select **Create Inquiry**.

Update an Inquiry

Client360 allows users to track all activity related to the inquiry in one place. The user can view current and previous inquiries and add information as needed.

Update an Inquiry in Client360

1. Navigate to the Inquiries tab by selecting Inquiries from the top, View All in the Inquiries Dashboard, or a Dashboard Activity tab.



2. Select the Inquiry from My Inquiries or All Inquiries or My Watchlist. The Details tab of the Inquiry Details pane appears.
3. View the general information regarding the Inquiry.
4. Use the **Comments** tab to communicate with Fiserv regarding the Inquiry.
5. Use the **Attachments** tab to upload supporting documents, as necessary.

Update an Inquiry by Email

From the email notification regarding the Inquiry, select Reply and include your update in the message of the reply. Client360 captures the message and creates a new Comment from the reply.

Note: If a user's email system encrypts outbound messages, Client360 will not receive the reply.

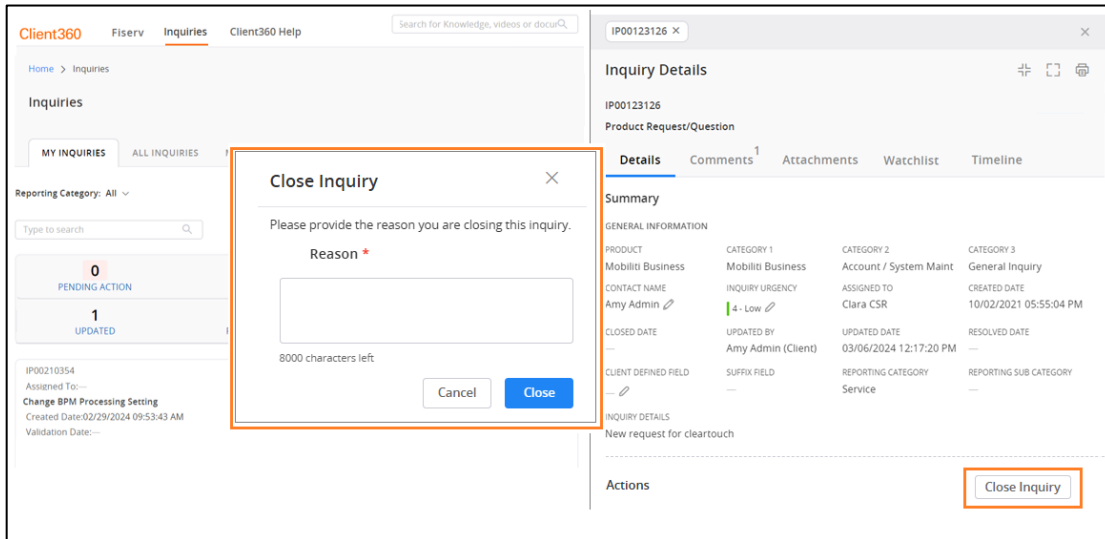
Close an Inquiry

Sometimes a user needs to close an inquiry themselves. Client360 provides this functionality.

Close an Inquiry without Fiserv support

1. Navigate to the Inquiries tab by selecting Inquiries from the top, View All in the Inquiries Dashboard, or a Dashboard Activity tab.
1. Select the Inquiry from My Inquiries or All Inquiries or My Watchlist. The Details tab of the Inquiry Details pane appears.
2. Scroll to the end of the **Details** tab.

3. Select **Close Inquiry**. The Close Inquiry window appears.
4. Provide the reason for closing the inquiry in the **Reason** field and select **Close**.



Client360 adds the Close Reason into a new Comment and to the Resolution Notes field. Client360 may offer the Inquiry Contact an opportunity to take a survey during a 14-day is window after closure. Select **Accept** to take the survey or select **Skip**.

Note: Closed inquiries cannot reopen. If the issue does not resolve or recurs, please follow the customary support process with Fiserv to receive assistance.

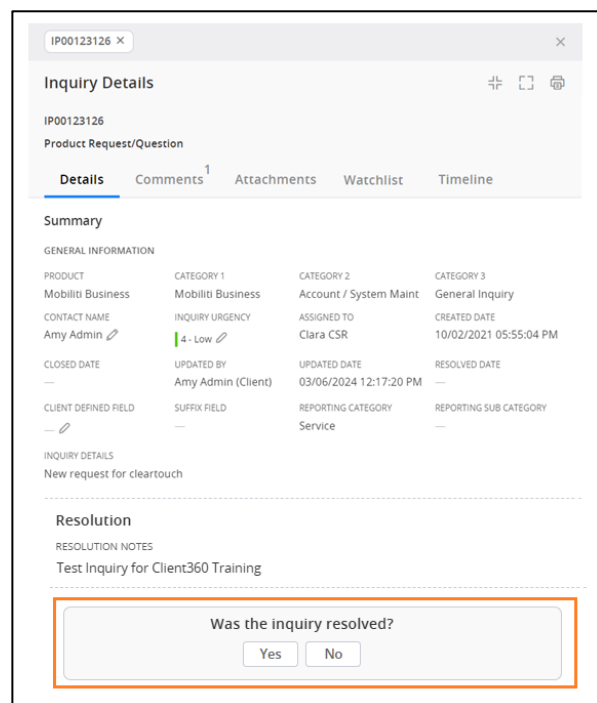
Resolve an Inquiry

When Fiserv resolves an inquiry, Client360 changes the status to Resolved. The user receives a notification, and the inquiry is included in the Dashboard activity tab named Pending Close. The user can either accept the resolution to close the inquiry or reject the resolution to keep the inquiry open for additional assistance.

If a user does not act on a Pending Close inquiry within 10 days, it closes automatically. If the user needs additional assistance, they must open a new inquiry.

Accept a Resolution and Close an Inquiry

1. Locate the inquiry in the **Pending Close** tab of the Inquiry List.
2. Select the inquiry from the Inquiry List. The **Details** tab of the Inquiry Details pane appears.
3. Scroll to the end of the **Details** tab.



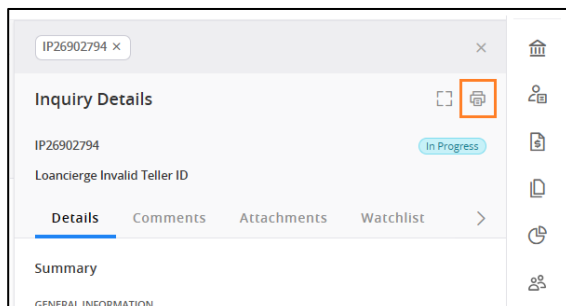
4. Answer the question, "Was the Inquiry resolved?" by selecting **Yes** to immediately close the inquiry.
5. The inquiry is now complete. The user can now review this inquiry anytime from the Total Inquiries list. It no longer appears open or pending.
6. The user can take a survey. Select **Accept** to take the survey or select **Skip**. If the user accepts the survey, the Inquiry Survey window appears. The survey will be available for 14 days after inquiry closure.

Reject a Resolution and Keep the Inquiry Open

1. Locate the inquiry in the **Pending Close** tab.
2. Select the inquiry from the Inquiry List. The **Details** tab of the Inquiry Details pane appears.
3. Scroll to the end of the **Details** tab.
4. Answer the question, "Was the Inquiry resolved?" by selecting **No** to keep the Inquiry open. The Reject Resolution window appears.
5. Select the **Rejection Reason**.
6. Enter the **Reopen Notes** to provide Fiserv support with complete details regarding why the inquiry remains unresolved.
7. Select **Reject**.









Print an Inquiry


From the Inquiry Details section, the user can select the printer icon in the upper-right corner to print.

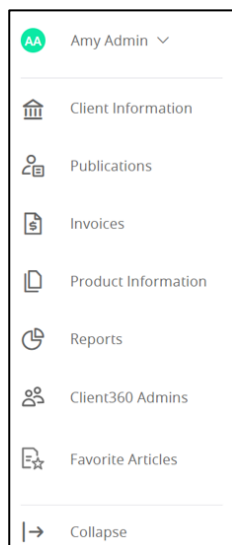


Quick Access Menu

The vertical Quick Access Menu contains informational icons about Client/Fiserv relationship teams, Client Organization Identifiers, the Publications module, an organization's Fiserv-licensed products, and the Reports module.

Quick Access Menu Icons	
	The Client Information tab includes your 9-digit client telephone identifier for contacting service teams.
	The Publications tab contains publications related to your organization's products. Your publication list includes various communications such as announcements, required action notices, release notes, and compliance packages. The Publications module contains Search and Filter functionality.
	When turned on, the Invoice tab displays invoices for the designated invoice contacts.
	The Product Information tab displays a read-only list of Fiserv-licensed products for your organization.
	The Reports tab includes filter and download functionality for reviewing your organization's inquiries. Client360 provides Administrators with access to admin reports for reviewing contact and product preference settings for contacts and users established in their organizations.
	The Client360 Admins tab displays a list of admins at your financial institution.
	The Favorite Articles tab displays a list of your bookmarked Knowledge Articles.
	The Featured tab displays a list of relevant, customized content related to your products.

Select  (Expand) to make the window larger. This displays the full name of each module/tab.



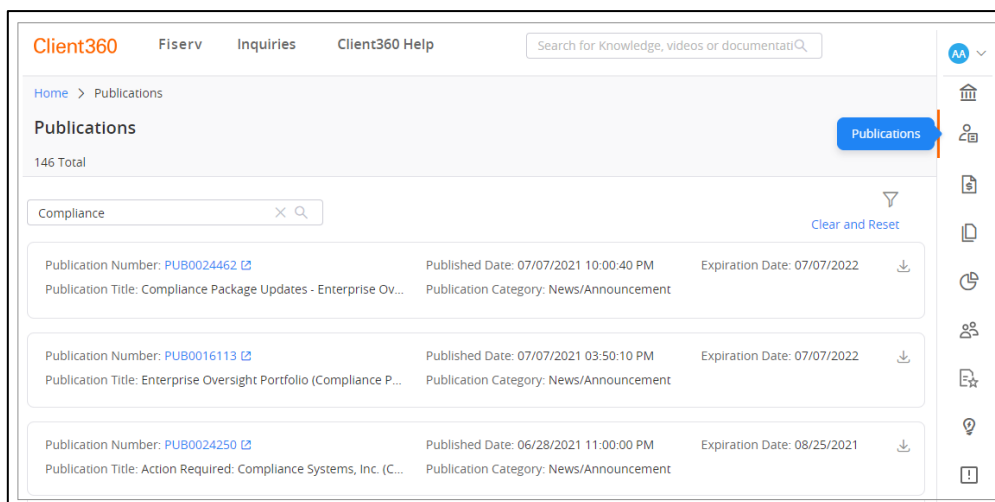
Publications

This section lists publications for the subscribed products issued in the last five days. Publications provide information to Fiserv product users. Also referred to as *targeted communications* or *client communications*, these items are often of immediate interest and short shelf-life.

Like other notifications, users must subscribe to product Publications in their product preference settings.

Publications offer three primary categories:

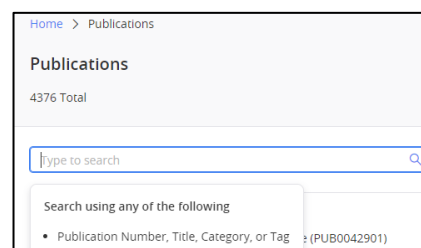
- **News/Announcements:** Save the Date, Reminder, Post Implementation, Scheduled System Maintenance, General Information/Other
- **Release Notes:** Release Notes/Upgrade Instructions
- **Product Information:** New product announcements, End of Service (sunset) product notifications, Product Release Schedule (PRS), Product pricing information, etc.



Access Publications through the Portal with Publication reference numbers or titles.

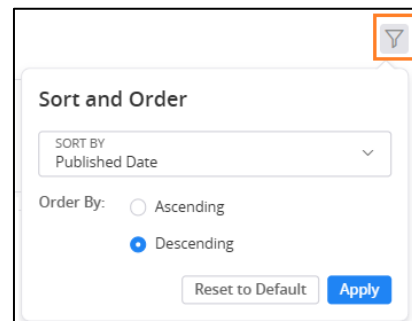
Search

The Search feature allows the use of various keywords and numeric values to filter the section and is located to the left above the list of Publications



Sort and Order

The Sort and Order feature allows results of the page to sort by ascending or descending order and is located to the right above the list of Publications.

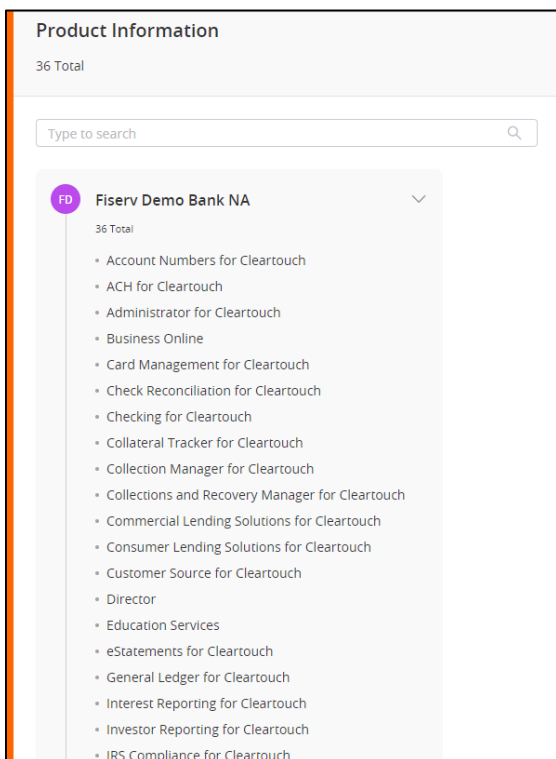


Product Information

This section contains a list of Fiserv products applicable to the user's organization.

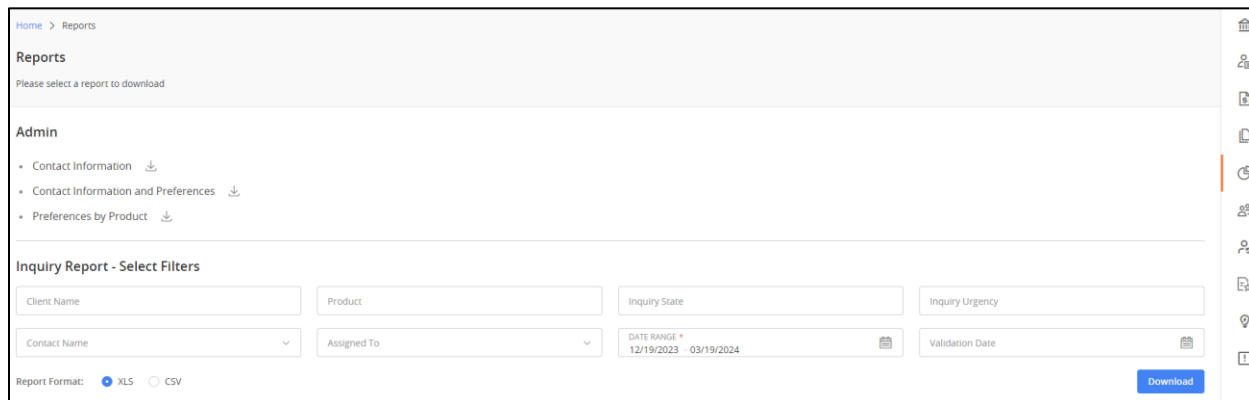
Access Product Information

1. Select **Product Information** from the Quick Access Menu.
2. Select the arrow next to the client's name to display the list of products.



Reports

This section allows the user to run custom inquiry reports for their organization. The user can run inquiry reports for the last three months of data.



The screenshot shows the 'Reports' section of a web application. At the top, there is a breadcrumb 'Home > Reports' and a title 'Reports'. Below the title, a message says 'Please select a report to download'. Underneath, there is an 'Admin' section with three expandable items: 'Contact Information', 'Contact Information and Preferences', and 'Preferences by Product'. Below this is the 'Inquiry Report - Select Filters' section, which contains several input fields: 'Client Name', 'Product', 'Inquiry State', 'Inquiry Urgency', 'Contact Name' (a dropdown menu), 'Assigned To' (a dropdown menu), 'DATE RANGE' (with a calendar icon and the text '12/19/2023 - 03/19/2024'), and 'Validation Date' (with a calendar icon). At the bottom left, there is a 'Report Format' section with radio buttons for 'XLS' (selected) and 'CSV'. At the bottom right, there is a blue 'Download' button. On the far right, there is a vertical sidebar with several icons.

Inquiry Reports

Inquiry Reports contain information regarding the Inquiries for the organization. Users can filter Inquiry Reports with the following values:

- Client Name
- Product
- Inquiry State
- Inquiry Urgency
- Contact Name
- Assigned To
- Date Range
- Validation Date

Users can run reports for the previous three months and export them with PDF or Excel file formats.

Download Inquiry Reports

1. Select **Reports** from the Quick Access Menu.
2. Select the Report Type to run under Inquiry Reports.
3. Select the report Criteria.
 - Client Name
 - Product
 - Inquiry State
 - Inquiry Urgency

- Contact Name
 - Assigned To
 - Date Range
 - Validation Date
 - Report Format
4. Select **Download**.