InquiryPoint

User Guide

June, 2024

Contents

Version Control Summary

Version	Date	Description of Changes
1.0	4/28/22	-
1.1	5/9/22	New Sections • Important Reminders • Deposit Solutions Special Processing • Additional Client Conversion Information • Client360 Portal for Clients (includes downloadable client guides) Updated Sections • How to Tag an Inquiry • Inquiry State definitions • Minor edits throughout
2.12	6/2024	Updated all sections to reflect current User Interface, Features and Functionality.

Introduction

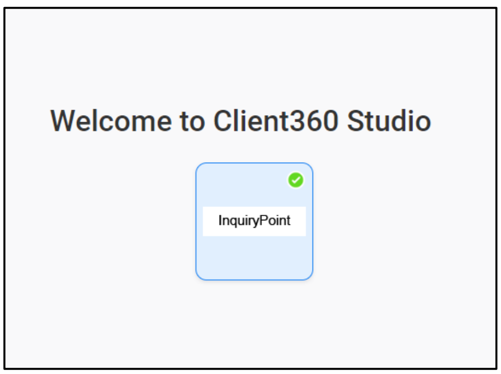
Client360 is the Fiserv service platform designed to make it easy for our clients to find answers and request support. The Client360 platform is comprised of the client-facing Client360 Portal and the associate-facing InquiryPoint application. With carefully designed inquiry flows, built-in artificial intelligence (AI), and numerous other features, Client360 elevates the overall client experience with receiving solutions and support.

InquiryPoint is the internal side of the Client360 platform where associates record details of support interactions with our clients. InquiryPoint is designed with a streamlined and user-friendly interface that combines all resources and client inquiry information in a single tool. With access to tutorial videos, technical documentation, a Knowledge Base, and Inquiry management dashboards, associates can manage their workload and resolve client inquiries easily and efficiently.

Signing in to InquiryPoint

Navigate to InquiryPoint from FUEL.

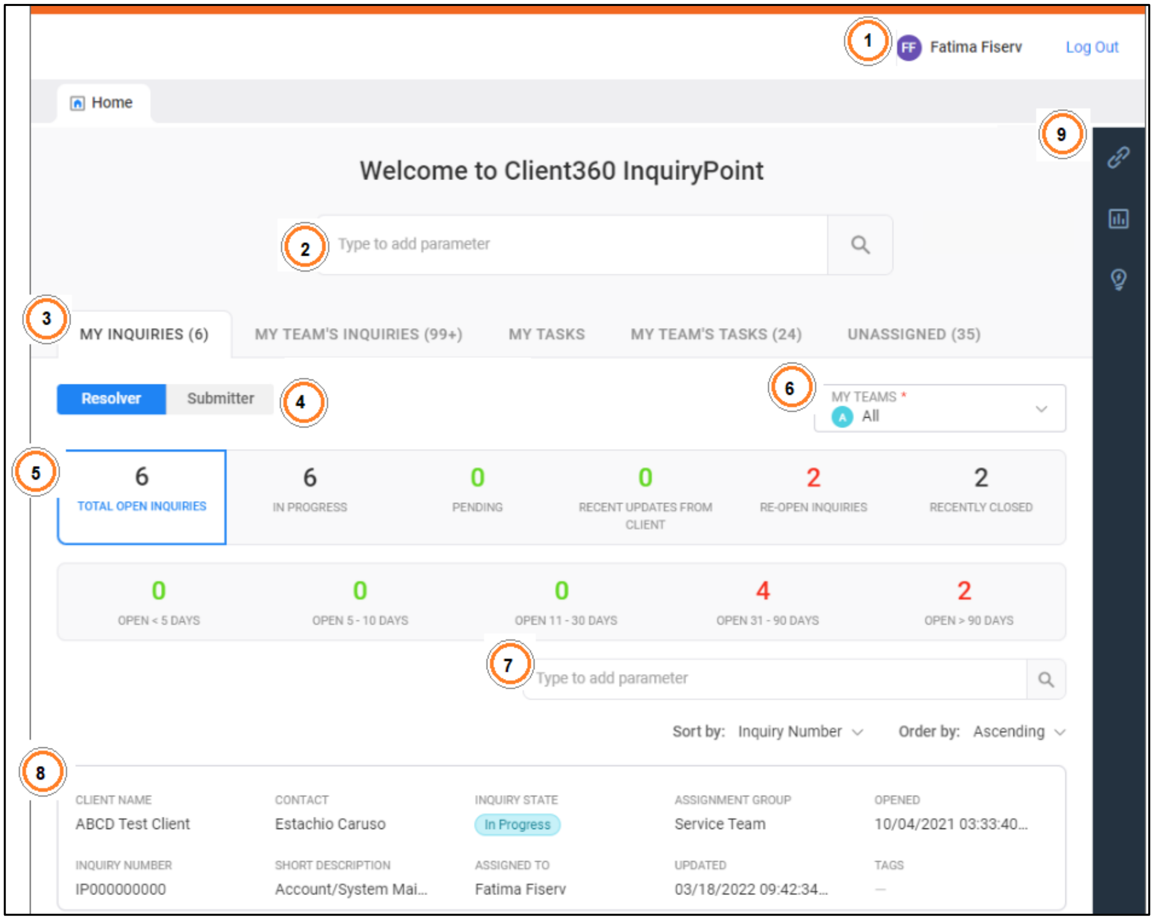
1. From FUEL, navigate to the Client360 / InquiryPoint tile.
2. Enter your FUEL credentials and select Log In.
3. In the Welcome to Client360 Studio page, select the InquiryPoint tile.



Navigate the Home Tab

Home tab sections:

- **Personal Profile**
- **Parameter Search**
- **Assignment Tabs**
- **Resolver/Submitter**
- **Inquiry Dashboard**
- **My Teams**
- **Inquiry Search**
- **Dashboard Cards**
- **Quick Access Menu**



Personal Profile (1)

The associate name displays in the upper right of the page. Select the drop-down icon to view General Information about the InquiryPoint profile, update Time Zone Settings, or Logout.

Parameter Search (2)

The **Parameter Search** feature enables functionality to search InquiryPoint from a central location within a variety of fields (Parameters). You can include multiple parameters in a search, and a new tab opens to display search results.

By default, the search uses ‘Starts with’ logic. If needed, InquiryPoint supports wildcard searching for all parameters except **Created Date**, **Priority**, **Assigned To**, and **Assignment Group**. Wildcards are special characters that can stand in for unknown characters in a string of text.

Wildcards:

Asterisk (*) wildcard followed by a text string searches for all items containing the text string. Example: Client Name: *Nation

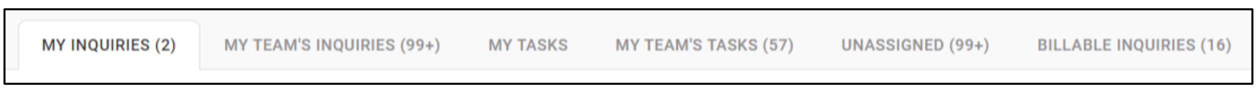
Equals sign (=) followed by a text string searches for items that match the text string exactly. Example: City: =Tyler

Search parameters:

- **Assigned To**
- **Assignment Group**
- **Billable Inquiry**
- **Business Unit**
- **City**
- **Client Defined Field**
- **Client ID**
- **Client Name**
- **Contact Name**
- **Created Date**
- **Email**
- **Inquiry Comments**
- **Inquiry Created By**
- **Inquiry Details**
- **Inquiry Number**
- **Inquiry Priority**
- **Inquiry State**
- **Inquiry Tag**
- **Inquiry Urgency**
- **Internal Inquiry**
- **Marker Bank**
- **Merchant ID**
- **Merchant Name**
- **Pending Code**
- **Product Name**
- **Reference Entity Number**
- **Reference Entity Type**
- **Resolved By**
- **Short Description**
- **State**
- **Street**
- **Task Created By**
- **Task Number**
- **Task Short Description**
- **Task State**
- **Task Tag**
- **Task Type**
- **Updated By**
- **Validation Date**
- **Watchlist Member Email**
- **Watchlist Member Name**
- **Work Notes**

Assignment Tabs (3)

InquiryPoint includes a dashboard with high-level overviews of inquiries and their statuses. Dashboard tabs make it easy to navigate within inquiries and tasks actively worked by the associate and his/her team members, **Unassigned Inquiries** routed to teams the user belongs to, and **Billable Inquiries** (when present).



Resolver/Submitter (4)

This feature allows the associate to toggle between open inquiries/tasks currently assigned to the associate (**Resolver**) and inquiries/tasks created by and no longer assigned to the associate (**Submitter**).

Dashboard (5)

The Dashboard includes tab tiles by state and age for inquiries and tasks assigned to or created by the associate and/or members of his/her teams. Inquiry cards displayed under the Dashboard filter by the selected tab. See below for tab definitions:

State:

Total Open Inquiries:	Inquiries that are currently open
In Progress	Inquiries in an In-Progress state
Pending	Inquiries pending next steps
Recent Updates from Client	Inquiries that have been updated within the last 48 hours
Re-Open Inquiries	Inquiries that have been reopened
Escalated Inquiries	Inquiries that have been escalated
Resolved and Recently Closed	Inquiries that have closed within the last 90 days

Age:

Open > 7 Days, not updated in 3 Days	Inquiries aged more than 7 days and not updated in 3 days
Open 5-10 Days	Inquiries aged between 5-10 calendar days
Open 11-30 Days	Inquiries aged between 11-30 calendar days
Open 31-90 Days	Inquiries aged between 31-90 calendar days
Open > 90 Days	Inquiries aged greater than 90 calendar days

My Teams (6)

Associates are often members of multiple Assignment Groups. The **My Teams** feature displays all Assignment Groups the associate belongs to and defaults to **All**. Dashboard counters and related inquiry cards change to reflect the team selected in **My Teams**.

Inquiry Search (7)

The Inquiry Search leverages parameter search functionality within the pool of inquiries associated with the **Inquiry** tab, **Resolver/Submitter**, and **Dashboard** tab selection at the time of the search. You can use one or more search parameters.

InquiryPoint supports wildcard searching for all parameters except **Created Date**, **Inquiry Priority**, **Assignment Group**, **Inquiry State**, and **Updated Date**. Wildcards are special characters that can stand in for unknown characters in a string of text.

Wildcards:

Asterisk (*) wildcard followed by a text string searches for all items containing the text string. Example: Client Name: *Nation

Equals sign (=) followed by a text string searches for items that match the text string exactly. Example: City: =Tyler

Search parameters:

- **Assigned To**
- **Billable Inquiry**
- **Business Unit**
- **Client Defined Field**
- **Client Name**
- **Contact Name**
- **Created By**
- **Created Date**
- **Inquiry Comments**
- **Inquiry Details**
- **Inquiry Number**
- **Inquiry Priority**
- **Inquiry State**
- **Inquiry Tag**
- **Inquiry Urgency**
- **Marker Bank**
- **Merchant ID**
- **Merchant Name**
- **Product Name**
- **Resolved By**
- **Short Description**
- **Updated By**
- **Updated Date**
- **Validation Date**
- **Work Notes**

Inquiry Cards (8)

Inquiry cards, displayed under the dashboard, include 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.

Inquiry card preview fields

- **Client Name**
- **Inquiry Number**
- **Inquiry Urgency**
- **Contact Name**
- **Short Description**
- **Validation Date**
- **Inquiry State**
- **Assigned To**
- **Assignment Group**
- **Updated Date**
- **Updated By**
- **Tags**
- **Created Date**
- **Client Defined Field**

Sort by, **Order by**, and **Export** functions appear to the upper right of the inquiry cards, under the **Inquiry Search** field. **Sort By** and **Order By** settings do not reset after the user signs out of InquiryPoint.

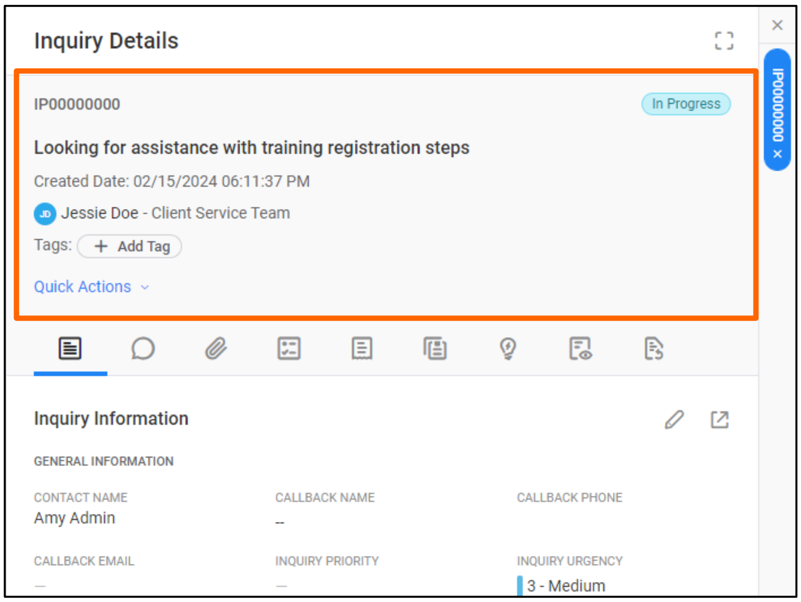
When you select an inquiry card, inquiry details display to the right of the Quick Access Menu.

Quick Access Menu (9)

The vertical Quick Access Menu contains icons for navigation to **Quick Links** defined for your division, the **Reports** module, **Federated Search**, and **Defects** in Bank Jira.

Inquiry Details

To view an inquiry in full, select an Inquiry Card from the **Home** tab or from the **Client** tab.



Inquiry Details

The uppermost header of the inquiry is configured for efficiency with its display of high-level, relevant fields, the Tags feature, and Quick Action menu.

Inquiry Number

Short Description

Created Date

Inquiry State

Assigned To & Assignment Group

Tags (Display Existing, Add New)

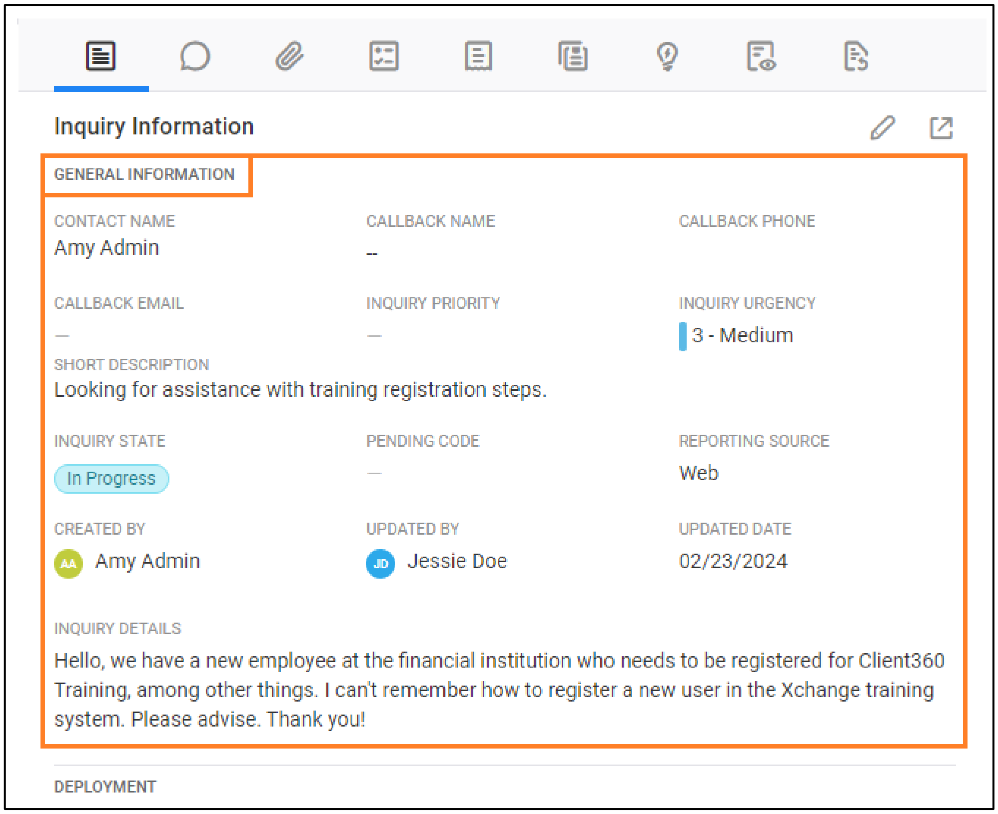
Quick Actions

- **Assign to Me**
- **Resolve Inquiry**
- **Show AI Assist**
- **Watch Client Communication**
- **Watch Work Notes**

Under Inquiry Details are tabs where information about the inquiry is organized:

- **Inquiry Information**
- **Notes**
- **Attachments**
- **Tasks**
- **Billing Record**
- **Similar Inquiry List**
- **Linked Resources**
- **Watchlist**
- **Timeline**

Inquiry Information Tab - General Information



Select the **Edit** icon any time before resolution or closure, to make changes to field and selection options in the **Inquiry Information** tab.

The following fields display on the **Inquiry Information** tab in the **General Information** section:

Contact Name: identifies the client contact associated with the inquiry. A Client360 administrator can change the inquiry contact to another contact as needed.

Callback Name: identifies the name by which to refer to the client contact when calling them regarding the inquiry.

Callback Phone: the phone number at which to reach the client contact.

Callback Email: the client contact's email address.

Inquiry Priority: An internal field which allows Fiserv to prioritize an Inquiry from the Fiserv perspective. Not a required field and no default priority level. Values are **1-Critical**; **2-High**; **3-Medium**; **4-Low**; **5-Low/Planning**

Inquiry Urgency: identifies the severity of the inquiry, selected while opening the inquiry.

> 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 be available but not sustainable.
>
> 4-Low: Functionality issues within the production or nonproduction service or application that do not impact business operations.

Short Description: a concise description of the issue the client is experiencing. The recommended format of Short Description is **Product - Concise description**.

Inquiry State: Updates automatically as Fiserv reviews and works the inquiry.

New: Inquiry has been assigned to a team

In Progress; Inquiry has been assigned to an agent

Pending: the inquiry is pending next steps and the Pending Code reflects the action and responsible participant. Pending Code options are determined by the Reporting Category.

- **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

Resolved: Fiserv has resolved the inquiry and prompted the client to validate resolution during a 14-day window after the resolution date. The inquiry automatically closes if no action occurs within the 14-day resolution window.

Closed: Inquiry has closed in one of three ways: the client closed the inquiry; the client accepted the resolution proposed by Fiserv; the client did not respond to the resolution proposed by Fiserv within the 14-day resolution window.

Reporting Source: Identifies the way Fiserv received the inquiry (**Phone**, **Email**, **Internal**; **Chat**; **Web**)

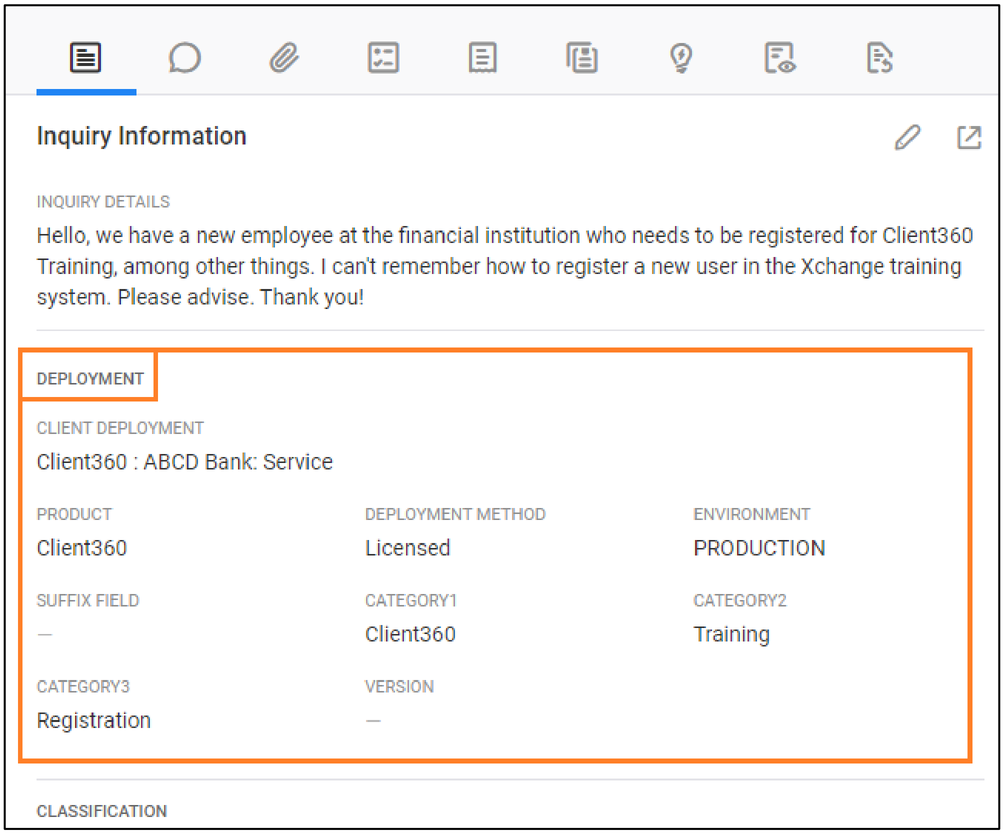
Created By: the user who opened the inquiry.

Updated By: the user who updated the inquiry most recently.

Updated Date: the date of the most recent update to the inquiry.

Inquiry Details: descriptive clarification of the question or issue presented. Includes details needed for resolution, such as (not limited to) error messages, timing/dates/amounts, steps to reproduce, times encountered, and other relevant details.

Inquiry Information Tab - Deployment



The following fields display on the **Inquiry Information** tab in the **Deployment** section:

Client Deployment: selected while opening the inquiry to reflect the focus of the inquiry and determines subsequent menu and template options and routing. Fiserv can change this as needed during research.

Product: the name of the deployed product, populated from the **Client Deployment** selection.

Deployment Method: options depend on how the product is licensed and related stage of implementation, impacts routing.

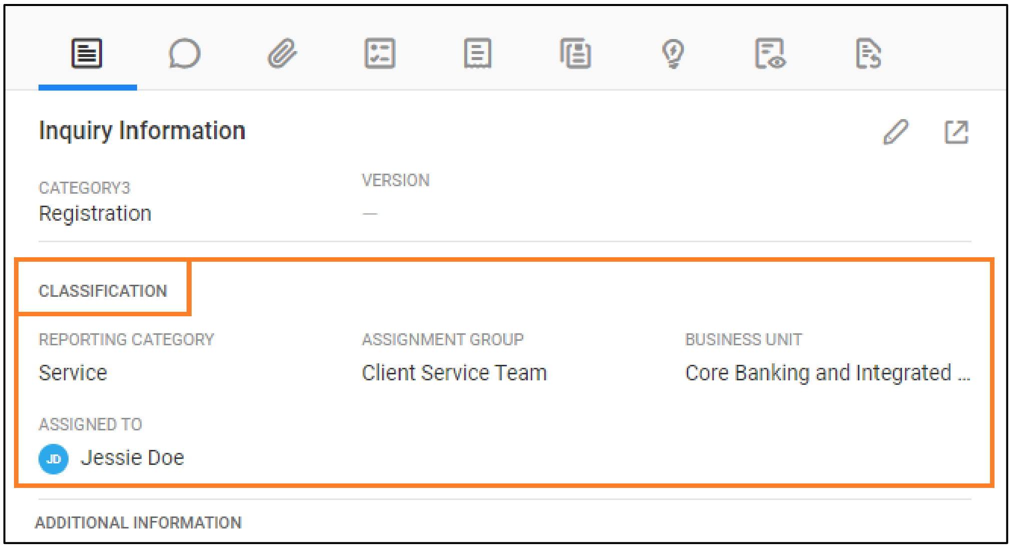
Environment: pre-populated from the Client Deployment selection.

Suffix: applicable to Project / Implementation inquiries, Suffix identifies the environment for which the Project / Implementation Inquiry applies.

Category1 - **Category3**: classifies the nature of the inquiry and determines subsequent menu and template options and routing. Fiserv can change this as needed during research.

Version: applicable to Project / Implementation inquiries, Version may be entered when the inquiry relates to a distinct version.

Inquiry Information Tab - Classification



The following fields display on the **Inquiry Information** tab in the **Classification** section:

Reporting Category: classifies/defines the nature of the inquiry, updated appropriately as Fiserv researches and further clarifies the inquiry:

- **Service**: submitted for assistance from Fiserv regarding a product, module, or service. The nature of the inquiry might 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. InquiryPoint does not include implementation inquiries in auto-closure process.
- **Defect**: identifies the primary inquiry related to an issue requiring software or system modification to address the issue. InquiryPoint classifies related inquiries to the primary (defect) with Reporting Category **Service** and Subcategory **Break/Fix Issue**.
- **Enhancement**: identifies the inquiry as related to software working as designed with a request to improve process, quality, or functionality of the application, product, or module.

Reporting Sub-category: applicable with reporting categories **Implementation** and **Maintenance**, Reporting Sub-category is used to further classify the Inquiry.

Implementation Sub-category options:

- **Defect**
- **Delivery - Custom**
- **Delivery – Standard**
- **Enhancement**
- **Implementation Tasks**
- **Issue**
- **Product General Assistance Question**
- **Project Communication**

Inquiry Assignment: applicable with Reporting Category **Implementation**, Inquiry Assignment is used to identify timing of the inquiry as having been received before or after the “Go Live” date.

Maintenance Sub-category options:

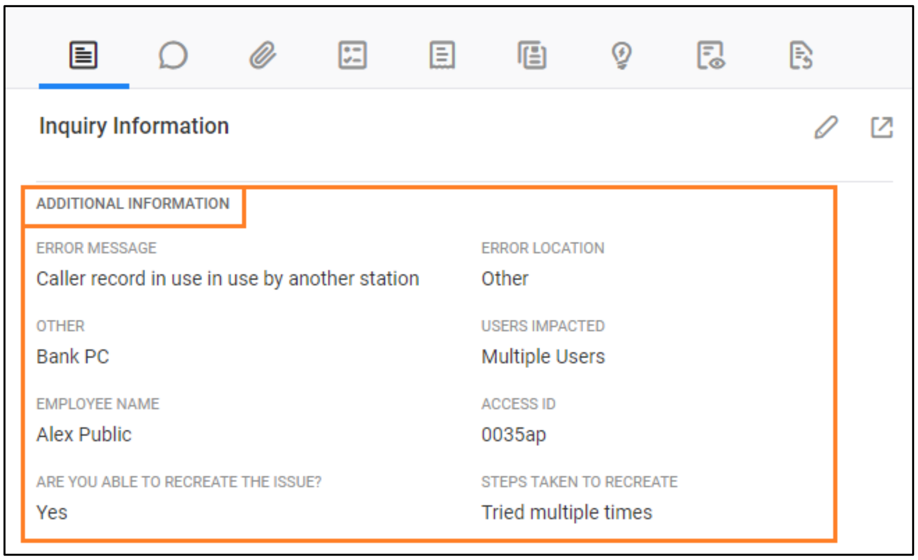
- **Audit Penetration Testing**
- **Certificate Renewal**
- **Disaster Recovery**
- **Future-Dated Request**
- **Release/Upgrade Install**
- **System Configuration**

Assignment Group: Identifies the group in which assignee candidates are members. Initially populated per routing rules driven by field selections during new inquiry creation. Fiserv can override this.

Assigned To: the Fiserv associate handling/working the inquiry.

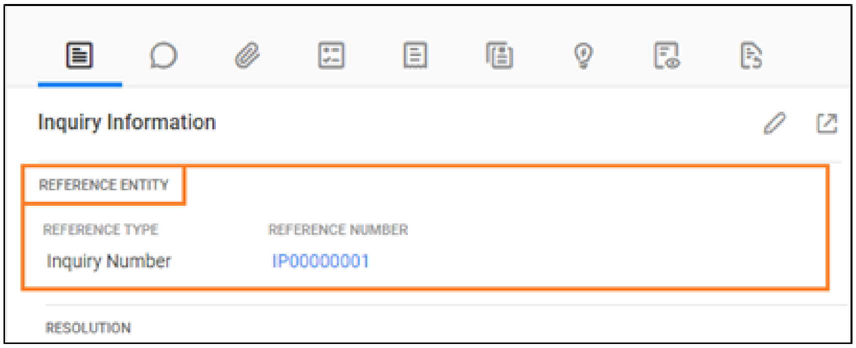
Business Unit: Auto populated from the Assignment Group.

Inquiry Information Tab - Additional Information



Product and Category menu selections made during inquiry creation determine **Additional Information** fields. We designed **Additional information** fields and selection options to assist with the thorough gathering of fundamental and relevant information during creation of the new inquiry. After the Inquiry has been created, Additional Information fields are view-only.

Inquiry Information Tab - Reference Entity



The following fields display on the **Inquiry Information** tab in the **Reference Entity** section:

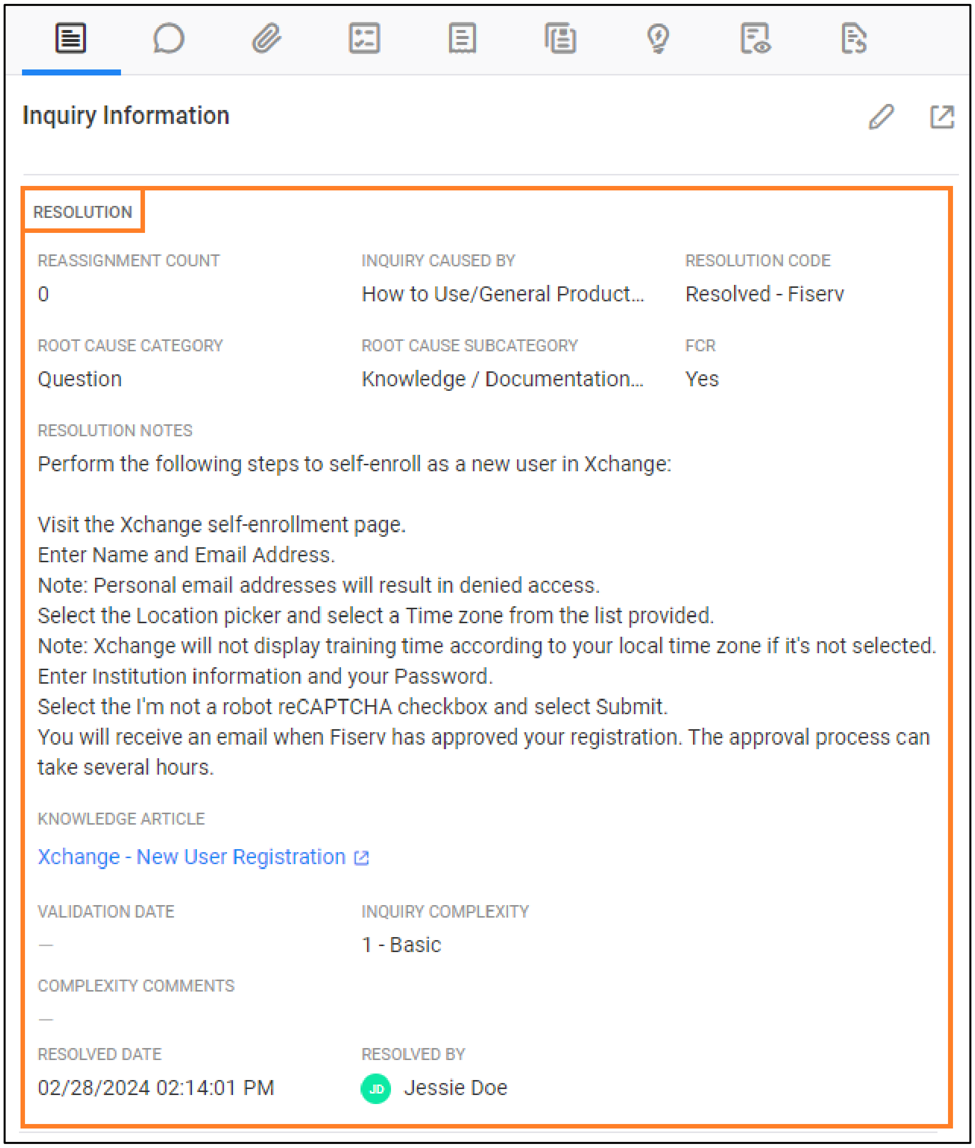
Reference Type: identifies the system in which a related record exists for the Inquiry. We defined Reference Types below in Reference Types and Functionality.

Reference Number: the identifier for the related inquiry, JIRA, Incident, Service Request

Reference Types and functionality:

- **Defect**: the item is related to an existing defect in Jira, and when selected from **View Inquiry**, the defect opens to the left of the Quick Access menu. Related Reference Number displays as follows: IPDEFECT-00000000.
- **External Ticket**: multi-purpose reference with related Reference Number. No formatting required.
- **Incident**: initiates integration call to ServiceNow and auto-creates a new Incident and expected Incident Management protocol begins. The auto-created incident number is returned to populate the **Reference Number** field. When a valid incident number is entered with Reference Types **External Ticket**, **Jira Ticket**, **Service Center** or **Service Point Defect**, the **Reference Type** changes to **Incident**.
- **Inquiry Number**: identifies a related inquiry and when saved, creates an **Inquiry Number** Reference Entity on the related Inquiry. When selected, the related inquiry opens in a new tab/pinned tab. Requires a valid inquiry number.
- **Jira Ticket**: Identifies the appropriate record in Jira, the tool Fiserv uses to record the software development life cycle (SDLC).
- **Service Catalog**: opens a new tab to the ServiceNow Service Catalog, where the user proceeds to open the appropriate request. After they submit the request, the user copies the RITM then returns to the **Inquiry** tab to paste the RITM into the **Reference Number** field where it saves as a hyperlink to the request.
- **Service Center**: identifies a related multi-purpose reference with related Reference Number. No formatting required and Service Center entries are view-only.
- **ServicePoint Defect**: identifies a related item recorded in ServiceNow.

Inquiry Information Tab - Resolution



The following fields display on the **Inquiry Information** tab in the **Resolution** section:

Reassignment Count: the number of times an associate has reassigned the inquiry.

Inquiry Caused By is an internal field the associate selects upon resolution to classify its origin, used in subsequent data analysis. Options are:

- **Client transaction processing / account maintenance**
- **How to use / general product platform question**
- **Outage / incident issue**
- **Post implementation issue**
- **Post release issue**
- **Other** (use only when no other cause fits)

Resolution Code is an internal field that classifies how resolution occurred, used in subsequent data analysis. Options are:

- **Resolved - Fiserv**
- **Resolved - Client/Other**
- **Unresolved - Non-Inquiry Resolution**
- **Unresolved - No Response**

Root Cause Category and **Root Cause Subcategory** fields classify the root cause of the inquiry used in subsequent data analysis. The **Root Cause Category** determines **Root Cause Subcategory** options, and we define them as follows:

Root Cause Category	Root Cause Subcategory	Definition
Question	**Knowledge / Documentation Available**	The answer to the client's question is available to the client via knowledge or documentation. Associates should link the resource to the inquiry before resolution.
	Create Knowledge / Documentation	The answer to the client's question is not currently available. We need to create knowledge or documentation about this Inquiry. The Resolution Notes should be thorough and detailed to assist in creating the new resource.
Issue	**Fiserv Caused**	Something Fiserv did caused the issue.
	Fiserv Outage / Incident	The issue was the result of a Fiserv outage / incident.
	Client Caused	A client self-inflicted change (e.g. environment / technology change) caused the issue.
	Third-Party / Vendor Caused	The issue was a third-party or vendor issue.
	Implementation Related	The issue was related to a recent implementation.
	Release Related	The issue was related to a release.
	Other	
Request	**Knowledge / Documentation Available**	The steps to complete the request are accessible to the client and within the client's ability (e.g. password reset, update transaction, change parameter / setting, etc.). Associates should link the resource to the inquiry before resolution.
	Create Knowledge / Documentation	The client can complete the request on their own, but there is no knowledge or documentation currently available to assist them. We need to create knowledge or documentation about this inquiry. The Resolution Notes should be thorough and detailed to assist in creating the new resource.
	Enhancement Request	Completing the request requires an enhancement to the system.
	Project Required (Implementation / Professional Services)	Completing the request requires a project to be created (such as for an implementation or professional service request).

FCR: button indicates if associate resolved an inquiry on the first call or the first contact.

Resolution Notes: a detailed description of the resolution to the inquiry.

Linked Content: any documentation linked to the inquiry.

Inquiry Complexity: to identify how complicated this issue was to resolve. Options include:

1 - Basic: Takes 30 minutes or less to resolve, including any time spent with the client.

2 - Medium: Takes 30+ minutes over 1-2 days due to additional research or multiple sessions needed with the client.

3 - Complex: Requires multiple parties and multiple troubleshooting sessions over an extended period of time.

Complexity Comments: to provide more information about the complexity to resolve.

Resolved Date: the date that an associate resolved the inquiry.

Resolved By: the associate who resolved the inquiry.

Validation Date: for implementation inquiries. Fiserv updated the "Validation Date" with a date on which the resolution can be validated by the client. Considerations for this field are described below:

- If the inquiry can be validated immediately, the Validation Date should equal the current date (today).
- If the inquiry is dependent on an event in the future, the validation date should equal the event date. Examples of milestone events are next data cut, month-end, year-end, certification of an interface is complete, restart of a project that is on hold, application of a system update or new software release.

Upon completion of client testing, the client clicks either the 'Yes' or 'No' button in the "Was the inquiry resolved?" box at the bottom of the Inquiry Details page.

When presenting the Accept Yes / No option to the client, Client360 also displays the Validation Date to the client.

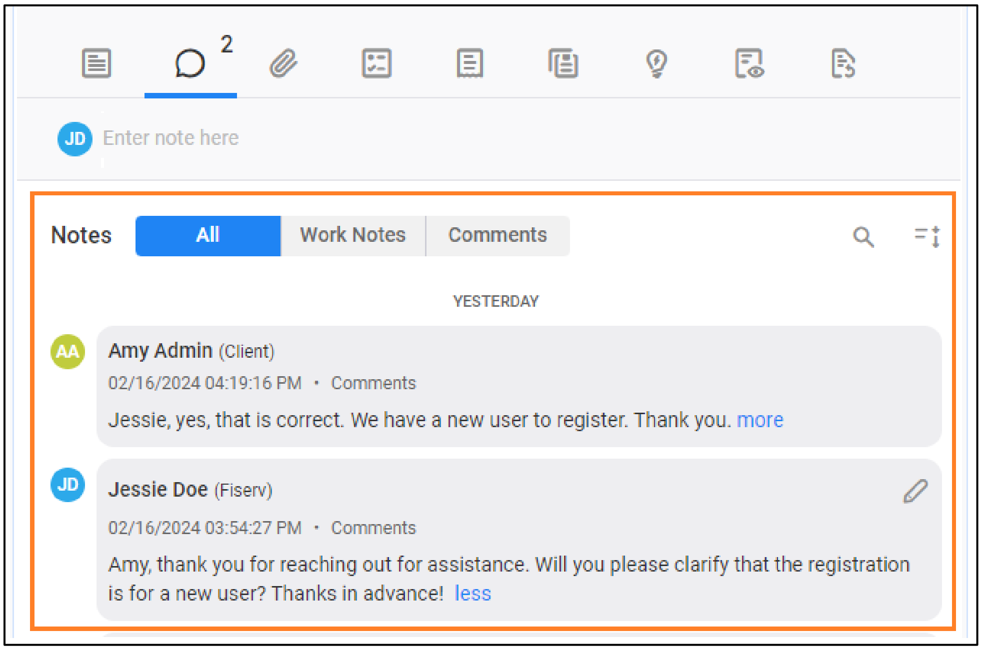
If the client selects 'Yes' and the Validation Date < today, the client is offered the opportunity to skip or provide survey feedback as part of the inquiry closure process.

If the client selects 'Yes' and the Validation Date > today, the warning message "Are you sure you want to resolve this case before the validation date? Yes / No" is displayed. If the client decides to proceed and selects 'Yes', the client is offered the opportunity to skip or provide survey feedback as part of the inquiry closure process.

If the client selects 'No', a pop-up window appears. The client must select a Reason from the dropdown list as well as provide a detailed description of why the resolution is rejected before they can select Submit. The inquiry is returned to a State of either Assigned or In Progress based on the condition of the inquiry.

If the date of validation is unknown, the inquiry should NOT be resolved.

Notes Tab



The Notes tab is where you record activities related to the inquiry. Activity includes the exchange in conversation between the client and Fiserv, the documentation of research and results, contact attempts, and status updates among other things.

Work Notes are internal and not visible to the client. **Comments** are visible to the client. The client, Fiserv and watchers receive email notifications appropriately when an associate adds a new **Work Note** or **Comment**. (i.e. Clients do not receive a notification when an associate adds information in **Work Notes**).

The **All**, **Work Notes**, and **Comments** buttons are toggles to filter the Notes display appropriately. Search functionality within notes is accessible using the **Search** icon.

If sensitive information is within the message body, the **Work Note** or **Comment** will include the label “Sensitive” above the entry date. InquiryPoint encrypts Sensitive notes and does not include the message body in email notifications. The system removes Sensitive notes 90 days after the Inquiry close date for compliance purposes. The Fiserv System Account adds a client visible comment to the inquiry that says “Sensitive attachments and notes have been removed; Inquiry closed for 90 days.”

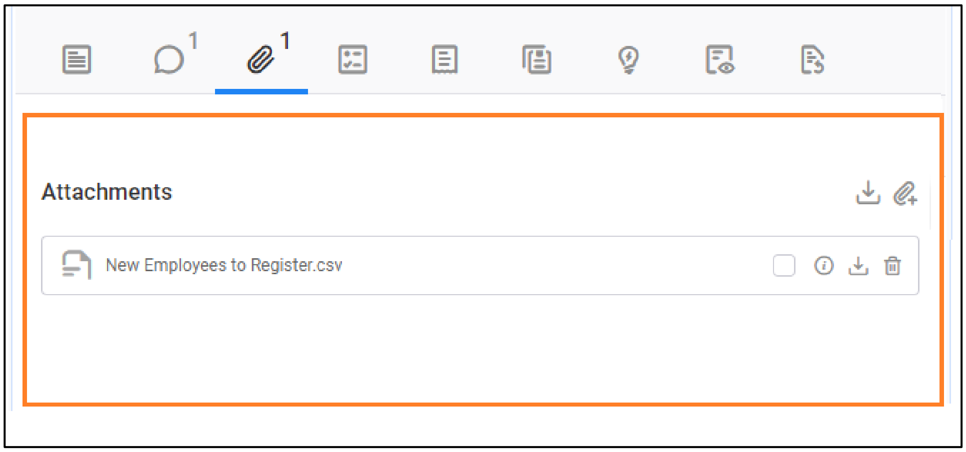
The **Edit** functionality is available to Fiserv to change Fiserv-created **Work Notes** or **Comments** from internal to client-facing and vice versa. No one can change the message text.

When an associate links a Knowledge Article to the inquiry, InquiryPoint adds a link to the article as a **Comment** if the client has access to the article (External Knowledge Base and Published), otherwise the system adds the link as a **Work Note**.

You can add notes by placing the cursor in the text “Enter note here”, at which time the message entry box opens and displays the options to designate **Work Notes** or **Comments**.

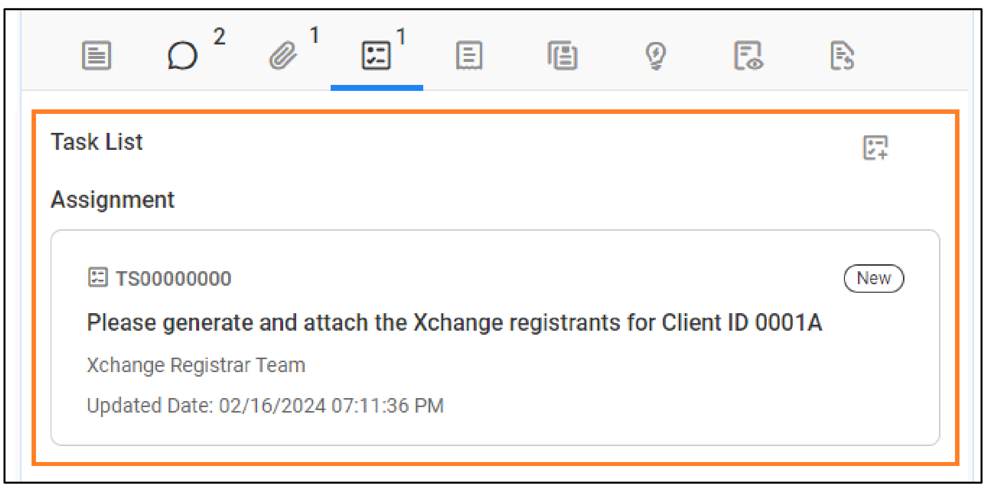
Do not use “@” in a client facing comment. It is not necessary, as the purpose of using @ is to reference the person in the note, and adding a comment already sends an email to the inquiry contact. Additionally, this is an internal function, and it will generate an internal email to the client. If you want others to receive the comment, utilize the watch list.

Attachments Tab



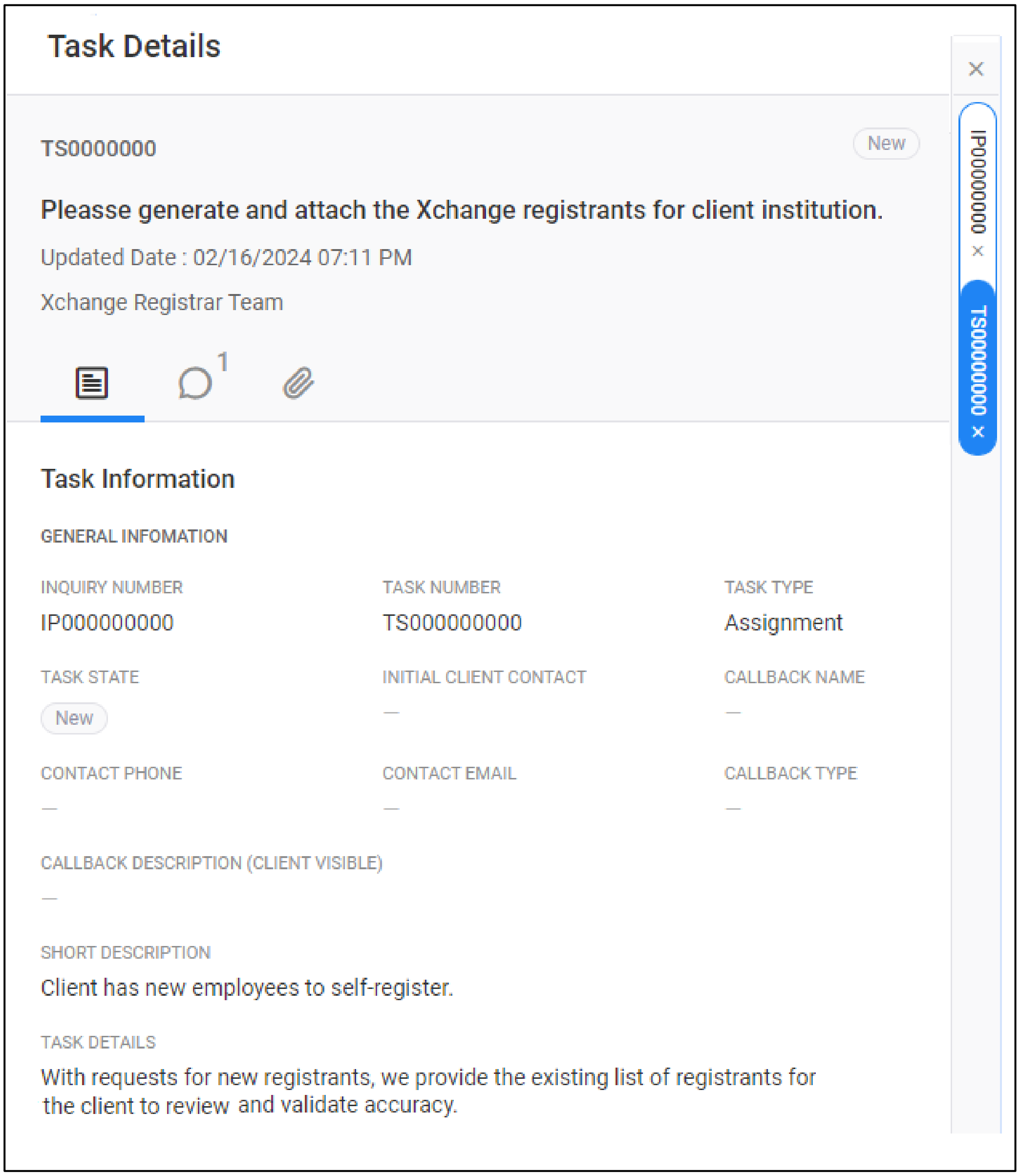
The Attachments tab is where attachments related to the inquiry appear. From the Attachments tab, the client and Fiserv can add attachments ( ), download existing attachments ( ), view information about an existing attachment ( ), delete an attachment ( ), and change the visibility of an attachment ( ) to be internal or client visible.

Tasks Tab



The **Tasks** tab is where tasks for the inquiry display in preview mode. InquiryPoint classifies tasks as **Assignment**, **Call Back**, or **Reminde**r. Associates can view details by selecting the task preview or opening a new task ( ). If there are attachments on the task, the ( ) icon appears next to the **State** field.

Task Details



Select the Task preview card to display **Task Details**. In **Task Details**, you can view and update the **Task Information**, **Notes**, and **Attachments**. Return to the inquiry by selecting the appropriate IP tab pinned to the right.

Task State fields are **Open** and **Closed**, and you must update them as the task moves through its lifecycle (not updated automatically).

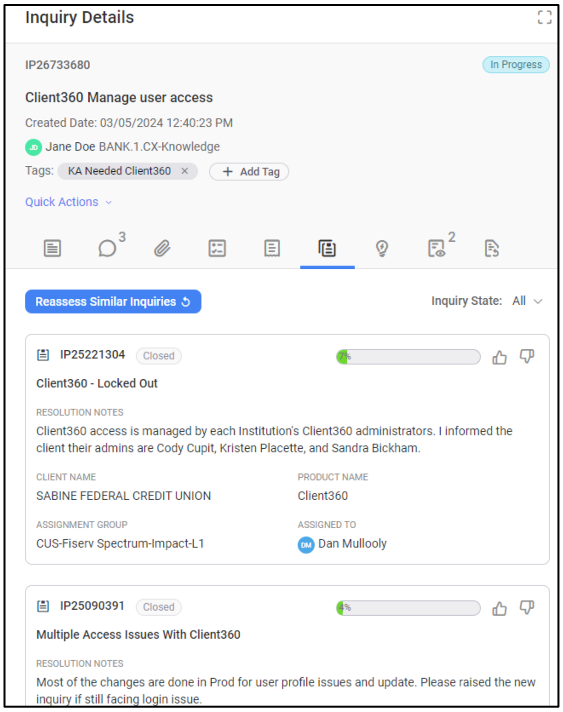
Tasks are not client facing.

Billing Record Tab

The **Billing Record** tab is where billable tasks for the inquiry appear in preview mode. Fiserv can view details by selecting the task preview or open a new task ( ). Billing permissions are required.

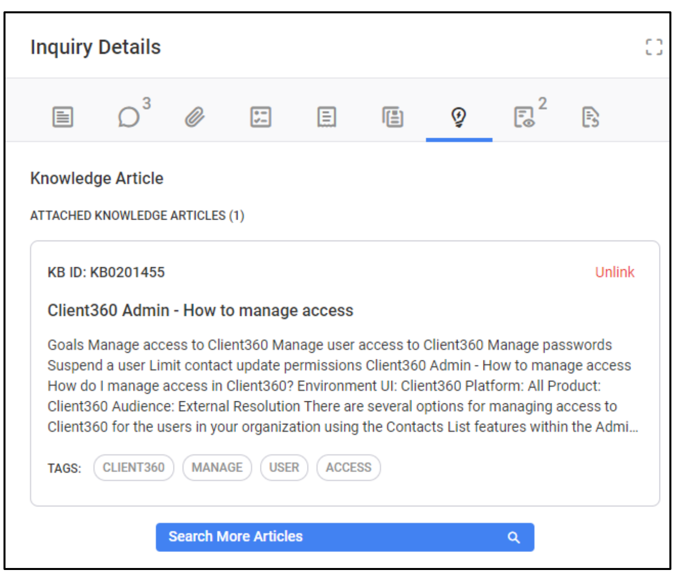
Similar Inquiry List Tab

The **Similar Inquiry List** tab is where inquiries with similar characteristics, driven by Artificial Intelligence (AI), appear. InquiryPoint ranks similar inquiries by relevance, with the intent to display information useful for the associate to resolve the inquiry.

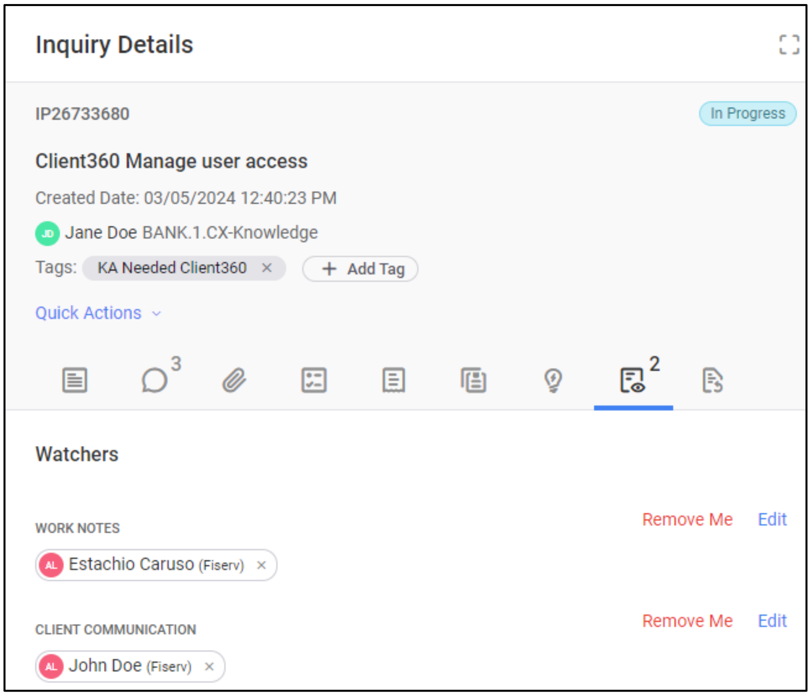


Knowledge Articles Tab

The **Knowledge Articles** tab is where Knowledge Articles appear with candidate articles containing information about 'How to' complete questions or troubleshoot 'Issues' relevant to the inquiry. InquiryPoint ranks the presented articles by relevance. This tab also includes any Knowledge Articles linked to the inquiry. From this view, Fiserv has the option to 'Search More Articles'.

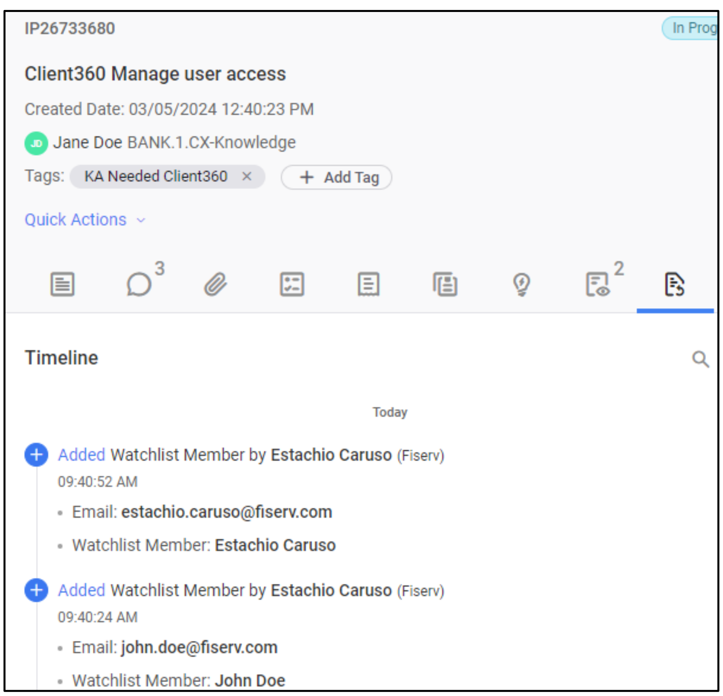


Watchlist Tab



The **Watchlist** tab is where an associate has designated client and Fiserv users, other than the Contact and Assignee, to receive email notifications for inquiry activity.

Timeline Tab



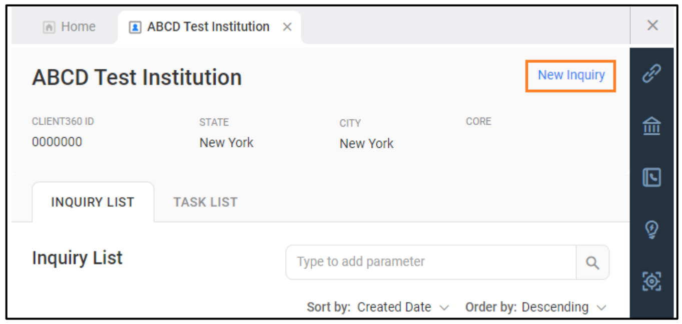
The **Timeline** tab is where to view the history of actions taken on an inquiry during its lifecycle. Some entries in the Timeline are visible to clients, while some are visible only to associates. Search functionality within the timeline is accessible using the **Search** icon. Expand / collapse functionality within the timeline is accessible using the **Expand / Collapse** icon. You can expand Timeline entries individually as needed.

Create a New Inquiry

Inquiry creation from the InquiryPoint user interface starts from the **Client** tab, where three **New Inquiry** links appear in areas most conducive to the action:

Client Tab, left of Quick Access Menu.

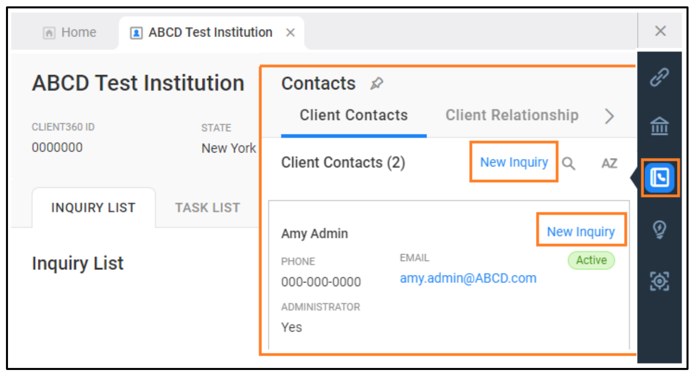
This option does not populate the new inquiry with a **Contact Name**. The associate will select a from the list of contact names during new inquiry creation.



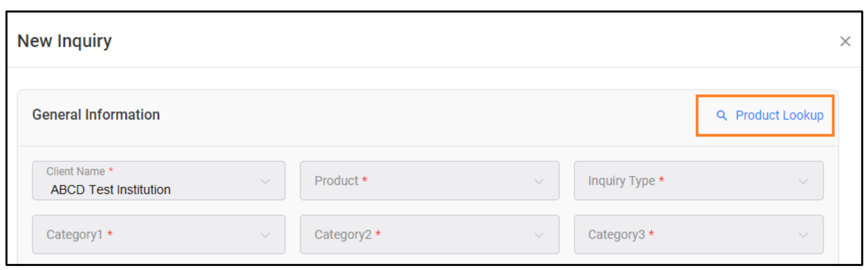
Client Contacts, from Quick Access Menu.

General: Upper right in **Contacts** List. This option populates the new inquiry with **Contact Not Found** in the **Contact Name** field.

Contact-Specific: Right of **Contact Name**. This option populates the new inquiry **Contact Name** field with the **Contact Name** from which the user selected **New Inquiry**.



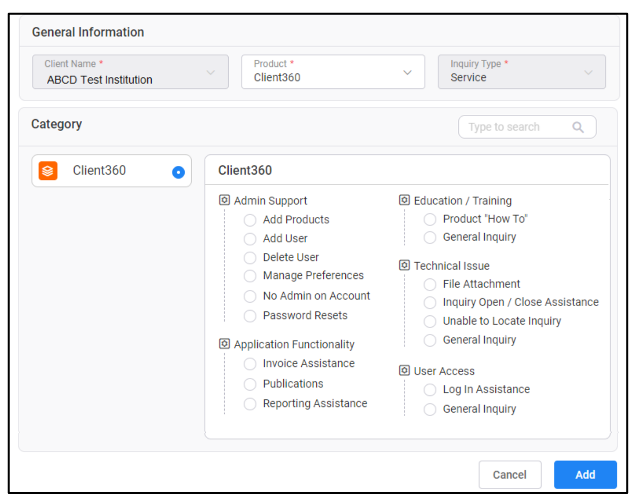
From the New Inquiry page, select the **Product Lookup** link for a list of the client's products.



After selecting a product, category selection options appear, which populate fields **Category1**, **Category2**, and **Category3**.

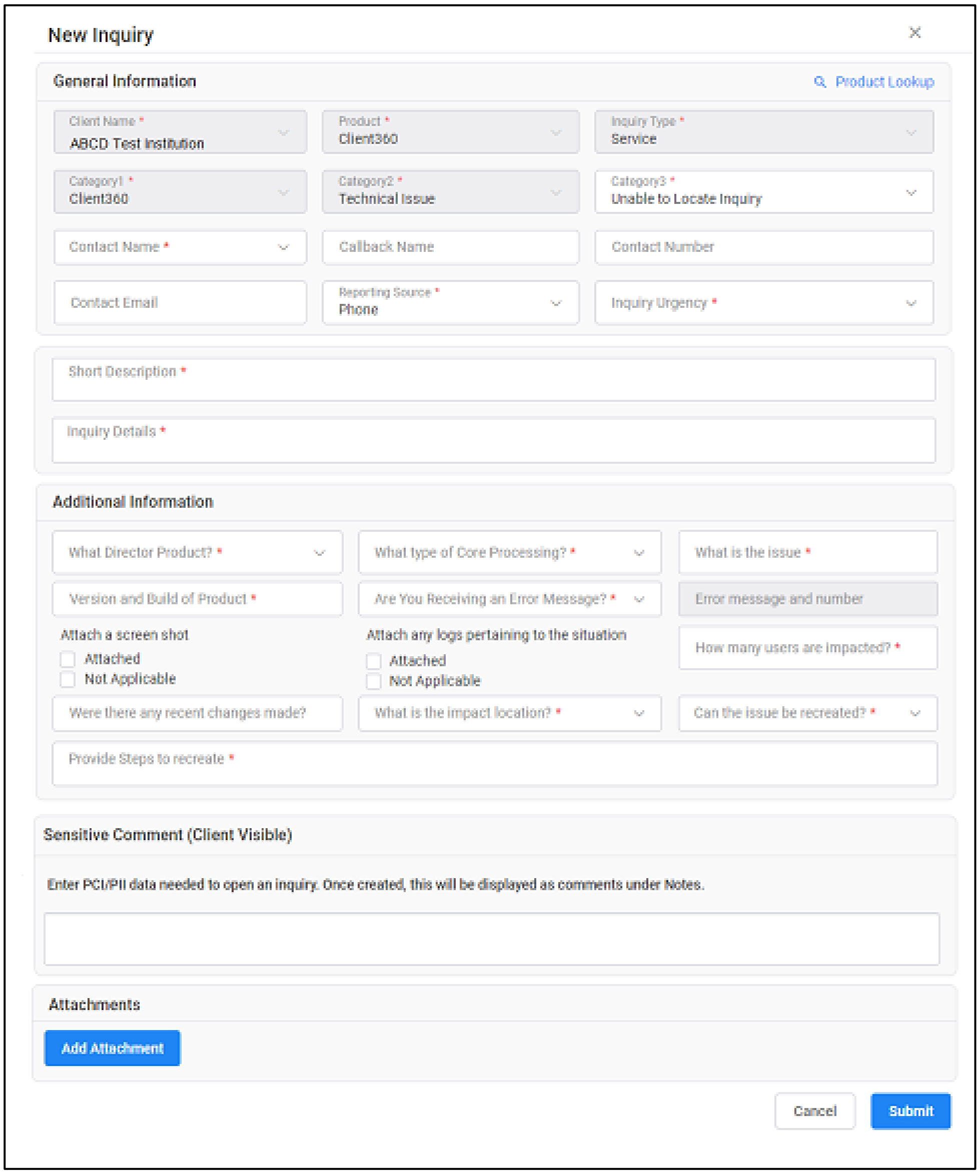
Category options vary per product and classify the inquiry for use in data analysis.

It is important that you select options with accuracy.



After Category selections are complete, proceed to complete:

- Selection options in **General Information.**
- Descriptive and clarifying information in **Short Description** and **Inquiry Details**.
- **Additional Information** relevant to the **Product** and **Category** options previously selected
- **Sensitive Information**
- **Add Attachments** (you can add attachments at any time)



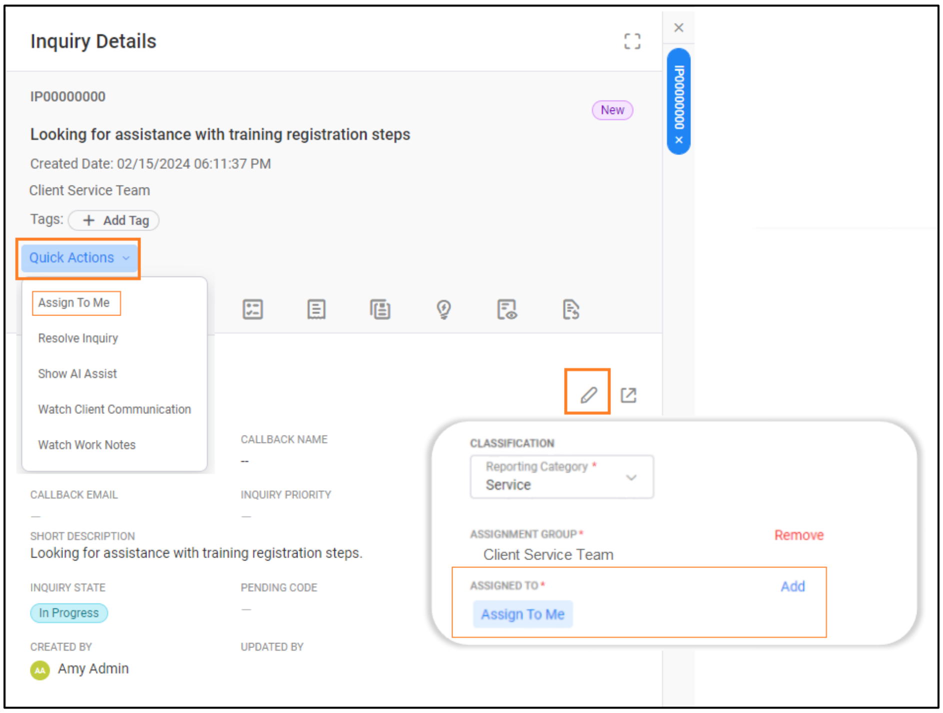
Assign and Reassign an Inquiry

Upon creation, routing rules based on product and category selection options determine an **Assignment Group** for the Inquiry. Before Fiserv assigns an agent, the **Inquiry State** is **New**.

After Fiserv assigns the inquiry to an agent, the **Inquiry State** changes to **In Progress**.

Inquiry assignment ‘to myself’ can take place with the **Assign To Me** feature from either the **Quick Actions** menu or from the **Edit Inquiry** page in the **Classification** section.

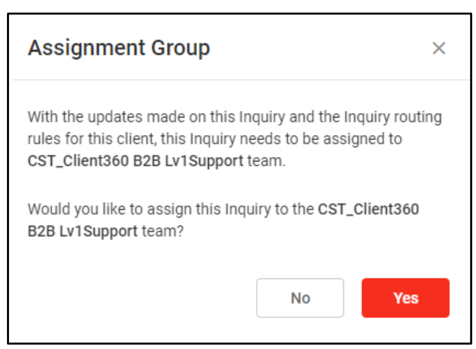
Inquiry assignment to another agent can take place from the **Edit Inquiry** page in the **Classification** section or in the **Unassigned** tab.



The assignee must be a member of the **Assignment Group**.

The **Product** determines **Assignment Group** designation. If the agent is not a member of the inquiry’s designated Assignment Group, validate the **Product** selection is accurate. Remove the **Assignment Group** before updating the **Product** and allow the routing rules to reset the **Assignment Group**.

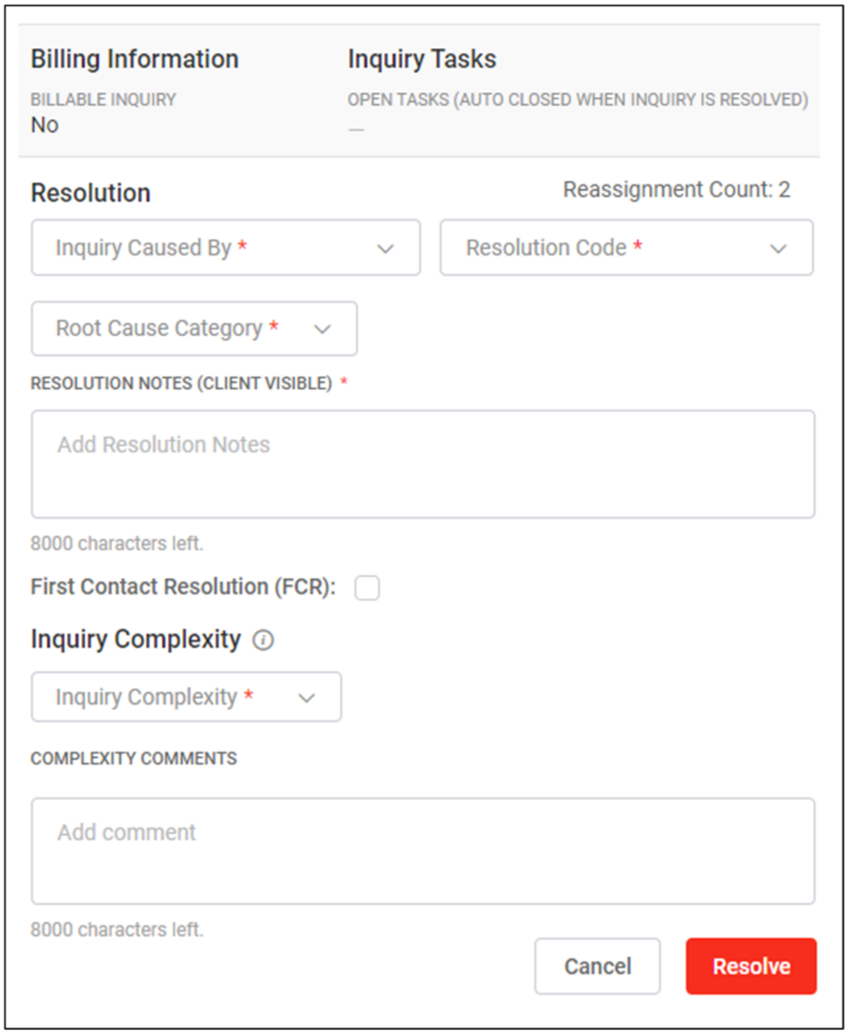
If a user does not update the product and changes the **Assignment Group** and **Assigned To** from the original value or values that do not align with routing rules, InquiryPoint displays a message to ask them to use the routing rules for **Assignment Group** selection.



Resolve an Inquiry

From the **Quick Actions** menu, select **Resolve Inquiry**.

Refer to the **Resolution** section in the **Inquiry Information** tab for more information about **Resolution Code** selection options and related resolution fields.



Regulatory Process

The internal regulatory flag supports the corporate process for tracking issues related to Consumer Financial Protection Bureau (CFPB). Detailed information is needed to track each reported instance of a potential regulatory violation to determine if the reported issue is a Federal Regulatory or Consumer Regulator, or Compliance issue.

The associated potential severity and its priority for remediation will be determined during this process. A detailed and thorough investigation and gathering of all the facts is required in each Inquiry to make the correct determination, and create executive reporting associated with those items.

Inquiry Level Flag

The regulatory flag is set by Fiserv associates who are working on the Inquiry. This flag is internal, and not set by or viewed by the client. This flag is a checkbox. If the client indicates that the issue related to the Inquiry is regulatory in nature, the flag should be checked for tracking and reporting purposes.

If the status changes and the Inquiry is determined to not be regulatory in nature, the flag can be unchecked.

Tags

A **Tag** is an identifier that allows associates to tag inquiries as their business units regard them.

InquiryPoint allows the associate to tag inquiries for internal tracking and reporting purposes. Tags are not visible to clients.

New tags appear in a drop-down list where the associate can select tags that Fiserv has previously assigned to other inquiries.

The Inquiry Card preview includes tags.

Reports

You can create, view, and export different types of reports in InquiryPoint. These reports provide a comprehensive view of all inquiries.

When you select the **Reports** tab, you will see any reports that you have created. You can sort the list by **Report Name**, **Report Type**, **Created Date**, or **Last Updated**, in ascending or descending order.

To create a new report:

1. Select **Create Report**.
2. In the **Report Type** drop-down, select the type of report to create from the following report types:
    - **Open Inquiry** – all inquiries currently in the **Open** state.
    - **Closed Inquiry** – all inquiries currently in the **Closed** state.
    - **Inquiry During Date Range** – all inquiries created within a specified date range.
    - **Reopen Inquiry** – all inquiries that an associate has reopened.
    - **Inquiry Activity** – all activity that has taken place within an inquiry.
    - **Inquiry Transfer** – all inquiries transferred to another associate.
    - **Billable Inquiry** – all inquiries that warrant billing the client.
    - **Unassigned Inquiry** – all inquiries not assigned to a specific associate.
    - **Inquiry Tasks** – all tasks related to resolving an inquiry.
    - **Inquiry Billing Records** – all billing records related to an inquiry.
    - **ServiceCenter Billing** – all billing records from the Fiserv Service Center related to an inquiry.
    - **Internal Inquiry** – all inquiries available for associate viewing only.
    - **Outgoing Return Services Report**
    - **Resolved Inquiry** – all inquiries currently in the **Resolved** state.
    - **Defect Inquiry** – all inquiries related to defects.
3. Select and configure filters for the report.
4. Select **Save Report** to save the report to your Reports dashboard within InquiryPoint. In the **Save Report** dialog box, enter a name for the report and select **Save**.
5. To export the report as an Excel or CSV file, select **Generate Report** and then the **Export** button at the top of the dialog box. Select the type of file you want for your export. The report will automatically download.

Implementations

This section covers the general flow of an implementation inquiry and highlights functionality specific to its resolution process. Fiserv uses implementation inquiries for tracking and correspondence during the lifecycle of a project.

Fiserv identifies implementation inquiries by the **Inquiry Type** Project / Implementation.

Product selection determines routing and additional **Environment** selection options:

- **QA**: routes to Transition team
- **UAT**: routes inquiry to Implementations team.

Upon assignment, the associate must select the appropriate options to identify the inquiry as **Received Before Go Live** or **Received After Go-Live**. This designation is important to identify inquiries to include in management reporting. Management reports on inquiries **Received After Go Live**.

Associates must classify implementation inquiries with appropriate **Reporting Sub-Category** options per the table below.

Sub-Category	Sub-Category Definition
Defect	Features or functionality that the product was to provide is not working as designed and requires code development. System defect that Fiserv must correct before the client can/will go live with the product. **Note**: if not required for go live, reporting category should be Defect.
Delivery - Custom	Delivery of a contracted professional service requiring customization or modification. Includes nonstandard deconversion activities.
Delivery - Standard	Standard – Delivery of a standard contracted product such as a data mapping, product parameter change. Client initiated work being done with or for a client to establish contracted products, modules, or services.
Enhancement	Enhancement request that must be available before the client can/will go live.
Implementation Tasks	Fiserv initiated cases to establish contracted products, modules, or services (e.g. Fiserv set up and/or installation or workflow tasks).
Issue	This value defaults when a client opens a ‘Project/Implementation’ case on the portal. The Fiserv team updates to the appropriate subcategory based on triage.
Project Communication	Used to track a case that Fiserv uses for overarching communications regarding an implementation. The primary use of the case is to facilitate client communication instead of sending emails.
Product General Assistance / Question	Providing general assistance for a client in the process of an implementation.
Release/Upgrade Install	Related to or a result of an upcoming or recent auto upgrade/ release of existing product installation – does not require an install date.
Future-Dated Request	Requests for information, reporting, or other deliverables that will be available at a future date.
System Configuration	Maintenance-oriented items, such as updates needed to the environment, network, or another group.

The assigned associate/team proceeds to track the project, using Pending codes appropriately, until resolution.

Implementation inquiries, except for inquiries with the Sub-Category **Project Communication**, bypass the auto-close functionality of service inquiries.

Please refer to the table below for guidance on disposition, associate action, and client/system action.

Disposition	Field(s)	Client/System Action	Comments
Reporting Sub-Category: Project Communication			
Associate resolves inquiry.	State changes to **Resolved**.	Client accepts or rejects resolution.	Auto-close functionality initiated if no accept or reject activity detected within 14 days after resolution.
Reporting Sub-Category: All Other (not Project Communication)			
Associate resolves inquiry, client is to validate at time of resolution.	State changes to **Resolved**.	Client accepts or rejects resolution.	Auto-close functionality **is not** initiated. Inquiry stays in **Resolved** state indefinitely until client accepts or rejects resolution.
Associate resolves inquiry, client is to validate on or after date entered in the field "Implementation Event Date".	State changes to **Resolved**. **Implementation Event Date** is visible in Inquiry Dashboards for filtering purposes.	Client accepts or rejects resolution.	Auto-close functionality **is not** initiated. Inquiry stays in **Resolved** state indefinitely until client accepts or rejects resolution.
Associate is unable to proceed with or resolve until action is fulfilled by the client, another team, or vendor.	Pending Code set to reflect who owns next action: ▪ **Pending Client Information** ▪ **Pending Development** ▪ **Pending Client Vendor / 3rd Party.**		Enhancement request that must be available before the client can/will go live.

Implementation Root Cause Category and Root Cause Sub-Category

Root Cause Category	Root Cause Sub-Category
Client Deferral – Client has requested deferment to a future date.	• **Delivery Implementation** - Client requests the delivery to be deferred to a future date. • **Delivery PS Services** - Client requests the delivery to be deferred to a future date.
Configuration - Related to configuration of the system. Configurable items are system features or options that function differently depending on their set up/configuration.	• **Build/Promote** - Build/code did not migrate properly; dropped code in build, code promote defect or error in the retrofit process. • **Client Error/New Request** - Client provided inaccurate/incomplete information or added a new request. • **Environmental** - Server or network problems; misconfigured server or network. Upgrades incorrect/incompatible, dual core CPU MS code behaves differently depending upon hardware devices, hardware failures. • **Fiserv Error** - Fiserv set up the configuration/parameters incorrectly and/or did not follow client instructions. • **Install Error** - Install does not work or run or release packaging.
Data Conversion - Related to data conversion; improper formatting, mapping, or coding of data converted to a Fiserv system.	• **Formatting** - Data not formatted correctly; data integrity issue (ex: dates/account numbers). • **Mapping** - Data not mapped correctly, data conversion balancing, data cleaning (ex: account types, mapped current balance vs principal balance). • **Programming** - Human error with conversion programming.
Development - Defects in Fiserv code, interface, integration, or security. Product Development or Professional Services custom/development changes.	• **New Code** - Code development does not follow the design or does not work when designed properly. • **New Interface/Integration** - Development of the user interface, interface file, and/or integration does not follow the design. Does not work when designed properly. • **Preexisting Code** - Defect is inherent in the system or application and has been in the application time prior to the current project's change. Does not work when designed properly. • **Preexisting Interface/Integration** - Defect is inherent in the system or application. The defect has been in the application for a period prior to the current project's change. Does not work when designed properly.
Documentation - Issues resulting from incomplete or inaccurate documentation	**Documentation** - Documentation change is needed to correct inaccurate information or to enhance the documentation to avoid issues.
Enhancement - Enhancements identified that may or may not be on the roadmap	• **Future Roadmap** - Client wants something requiring an enhancement currently on the roadmap. • **Requirements – Oversold** - Client perspective is product or process was oversold or viewed as a minimum viable product feature.
No Change - Business as usual implementation work. Research determined a non-Fiserv issue or duplicate.	• **Duplicate** - Issue is a duplicate issue, already reported. • **No Issue** - Standard implementation task where other Fiserv group processes require a ticket to perform the work. • **Non-Fiserv Issue** - Issue is related to the client or client's vendor/non-Fiserv 3rd party.

Root Cause Category	Root Cause Sub-Category
Requirements/Design - related to a system feature functional design. Can also be a feature the client feels should exist in the system. It does not relate to a commitment made during the sales process.	• **Insufficient - Not Available** - Requirements are ambiguous, incomplete/not identified or considered, incorrect or not adequately documented. Functionality the client expected was missing. This is not missed expectations from the sales to delivery. For that issue, see **Insufficient – Sales Expectation**. • **Insufficient - Sales Expectation** – Miscommunication/ lack of communication from sales to the delivery team. • **Network/Capacity** - Network deficiencies requiring greater bandwidth to support transaction volumes. Insufficient capacity causing network failures, and/or system availability.
Training - Client required additional knowledge.	• **Client Knowledge/Understanding** - Client lacks knowledge of the product or how to research/resolve their issues. **Example**: functionality questions, user understanding, or client questions.

Technical Details

Application Time Out

There is no application timeout in InquiryPoint.

Attachment Limitations

File size limitation is 100 MB.

- Per File: 25MB
- Per Inquiry: 100MB

File Extension Restrictions

There are restrictions on attaching documents with certain extensions for security purposes. See below for the list of compatible file types and sizes.

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

Key Technical Details

Function	Capability
Activities per Inquiry	Unlimited
Tasks per Inquiry	Unlimited
Field Character Limit: **Comments** **Complexity Comments** **Inquiry Details** **Resolution Notes** **Sensitive Comments** **Task Comments** **Task Details** **Work Notes**	8,000 characters
Field Character Limit: **Short Description**	150 characters
Encryption	User Interface detects attempts to enter PCI/PII information, prompts with error when not entered in **Sensitive Comments** field. InquiryPoint encrypts sensitive comments and attachments, and they require specific permissions to be viewed in UI.
Retention Policy	7 years (standard corporate policy)

Sensitive Comments

To maintain PCI regulatory compliance, InquiryPoint removes all sensitive notes and attachments from cases 90 days after their closure date.

Auto-generated emails for Inquiry activity

Auto-generated Emails to clients

Activity	Comments
Welcome to Portal	Welcome to Fiserv Client360! Client360 makes it easy for you to learn about Fiserv products and get help when you need it. Your administrator has created a new account for you. To complete the registration process, you need to create a new password. Your temporary password is: ( ) To create your personal password, visit Client360 and complete the on-screen instructions.

Activity	Comments
	Your temporary password is available for 48 hours. After that time, please use password reset to obtain another temporary password. After setting your password, you can access the system at Client360.
Password Reset	
Profile Updated	
Inquiry Creation	Upon associate-created inquiry via InquiryPoint.
Associate Adds Comment	▪ Subject: Inquiry IP# has been updated ▪ Comment is included in message body.
Associate Adds Sensitive Comment or Attachment	▪ Subject: Inquiry IP# has been updated ▪ Informs client an associate has added a sensitive note or attachment to the inquiry with a link to view the note/attachment via Client360
Inquiry Resolution	
Inquiry Closed	
Comment State Changed	▪ When an associate makes a note not visible to the client, Client360 sends a notification to inform the client that an associate has updated a previously viewable comment, and it is no longer visible. ▪ When an associate changes an attachment from not visible to the client to client viewable, Client360 sends a notification to inform the client with the note included in the message body.
Attachment State Changed	▪ When an associate makes an attachment not visible to the client, Client360 sends a message to inform the client that an associate has updated an attachment previously viewable on this inquiry, and it is no longer viewable. ▪ When an associate changes an attachment from not visible to the client to client-viewable, Client360 sends a notification to inform the client that an associate has added a sensitive note or attachment to the inquiry with a link to view the note/attachment via Client360

Auto-generated Emails to Associates

Activity	Comments
Inquiry Creation	▪ If the client opens an inquiry, the initial assignment group to which the inquiry is routed receives email notification. ▪ When an associate opens an inquiry, the assignment group to which the inquiry is assigned receives email notification.
Work Notes	

Activity	Comments
Client Adds Comment	
Client Adds Attachment	
Inquiry Assigned	
Inquiry Re-Opened	InquiryPoint generates an email when the client reopens an inquiry, not when the associate reopens it.
Associate Adds Comment	If the **Assigned To** is blank, email to assignment group. If the associate updating the inquiry is not the **Assigned To**, **Assigned To** will receive email.
Associate Adds Sensitive Comment or Attachment	If the **Assigned To** is blank, email to assignment group. If the associate updating the inquiry is not the **Assigned To**, **Assigned To** will receive email
Inquiry Closed	If client closes inquiry from Client Portal.

Auto-generated emails for Task activity

Activity	Client Email	Comments
Task Assigned	No	Notification sent to Assignment Group if the Assignee is blank, otherwise InquiryPoint sends notification to the Assignee.
Work Note Added		Yes
Task Reminder Date		Yes
Past Due Task		Yes
Task Closed		Yes
First Task Escalation		InquiryPoint sends notification to the Assignee & the Assignment Group Manager
Second Task Escalation		InquiryPoint sends notification to the associate, the manager of the Assignment Group, & the associate's manager.

Working with ServiceNow

Client360 replaces the ServiceNow, Service Center, and the FDIS Internal Inquiry Management tool.

Associates will use ServiceNow for internal IT Service Management (ITSM) functions, such as Incident, Problem, Change, Configuration, Facilities, Human Resources or Service-Request Management, Publications, and Knowledge.

Associates will continue to use ServicePoint as follows:

- Foundation Data: client foundation data, including client to product to deployment mapping, resides in ServicePoint, and ServiceNow Division Administrators manage it.
- Service Catalog: Service Requests for fulfillment of various types of requests across Fiserv.
- Incidents: If handling an inquiry warrants an incident, the associate initiates Incident creation from the **Reference Entity** section within the inquiry.
- Change, Problem: if a change or problem is the outcome from handling an inquiry, the associate initiates the change to ServiceNow and initiates the problem / defect per business unit procedures / system environment, with the transition to enterprise Jira planned for future state.
- Publications, Service Interruption notifications: The Publications module in ServiceNow generates client communications and service interruption notifications. The client-facing hyperlink and client access point for Publications is from Client360. Associates access ServiceNow for Publications.
- Knowledge: Associates create, review, publish, update, and retire Knowledge Articles in ServiceNow. Knowledge Articles are made available to clients and associates via API to Federated Search. ServicePoint cycles updated article content to each interface (InquiryPoint and Client360) every 30 minutes, to ensure the information is as up-to-date as possible.

Self-Help Resources

InquiryPoint Online Help Resources

https://virtualtrainer.fiservapps.com/TrainGuides/Client360/InquiryPoint/Content/Home.htm

Client360 Online Help Resources

https://virtualtrainer.fiservapps.com/TrainGuides/Client360/Content/home.htm

Client360 Training Resources

Bi-weekly instructor-led Client360 training is available, and upcoming dates are accessible from the Client360 Online Help Resources from the **Get Started** section named **Client360 Training**.

Self-paced training options are also available in the **Get Started** section, including the full instructor-led training in addition to recorded brief Power Hour training sessions with various themes.

The Knowledge Training team announces Power Hour training sessions focused on various aspects of Client360 feature/functionality throughout the year with Client Communications (Publications). At that time, the team updates the **Get Started** section with registration information for upcoming Power Hour sessions.