



Fiserv
Client360 Training
Learner Guide
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Introduction

Client360 is a new service platform from Fiserv designed to make finding answers and requesting support from Fiserv easier than ever before. With redesigned inquiry flows, built-in AI, and numerous other features, the new service portal will improve your overall experience with getting assistance.

Intended audience

Fiserv clients new to the Client360 service management platform.

Where are we going?



Olivia is an operations manager at ABCD Test Client. She often searches for information related to Fiserv products so that she can complete her regular tasks and service her customers. She also contacts the Fiserv client support team when she needs additional assistance.

We will follow along as Olivia uses Client360 to complete these tasks.



Performance goals






After completing this course, you will be able to:

- Engage Fiserv using the Client360 service management platform.
 - Set up Client360.
 - Access self-service opportunities.
 - Work with Inquiries.

How are we going to get there?

The course uses real-world examples to demonstrate using Client360. You will be able to relate these demonstrations to the work you do on a regular basis. Additionally, your facilitator will equip you with additional resources to continue learning after this session ends.

Icon Key

Icons	What the Icons Represent in the Learner Guide
	Learning goal to achieve
	Stories to illustrate real-life applications
	Important things to remember
	Tips to build proficiency
	Pitfalls to avoid



As we progress through this course, it's important to remember that the use of software features and functions may vary by client. Processing parameters and policies and procedures may determine which features are available for use. Additionally, the interpretation and adherence of government regulations are the responsibility of each client.

Set up Client360



ABCD Test Client just received access to Client360, and Olivia is excited to start using it. She signs in and sets up her profile so that she will receive notifications for the products with which she works. She also explores the Client360 Resources to learn more about the new portal.



Performance statements

After completing this module, you will be able to:

- Review and update your Client360 profile.
- Access the Client360 Resources.



- The first time you sign in to Client360, you will receive your one-time passcode for multifactor authentication to your email address.
 - If you do not receive the passcode email, it's possible your administrator may not have whitelisted the appropriate URLs and emails. Please refer to the Client360 Technical Requirements document.
- If you would like your multifactor authentication passcode sent to your phone for future sign ins, add your phone number to your profile.

Update/Review Profile

Your Client360 profile includes your contact information and controls the notifications that you receive from Fiserv. It also controls the products for which you can open inquiries.



If you do not update the product preferences in your profile, you will not receive communications or be able to open Inquiries for your products.

How to

1. From the upper-right corner of the page, select your **name**.
2. Select **Profile**.
3. Select the **General Information** or **Portal Information** tab.
4. Select **Edit Profile**.
5. Update the settings as necessary.
6. Select **Save**.



Fiserv associates use this data to manage inquiry communications. Keep this information current.

Access Client360 Resources



As she's updating her profile, Olivia wants to set her preferences for several products at the same time. She's not sure how to do this, so she accesses the Client360 Resources.

Client360 includes online resources that empower you to use it effectively. It is similar to help or a digital training guide. You can use it to look up field definitions or how to complete tasks in Client360.

How to

1. To return to the home page, select **Client360**.
2. Select **Explore Client360**.



Client360 Resources open in a separate tab. To return to Client360, close the tab or select the Client360 tab.

3. Search for topics.
or
Navigate to the specific topic in the help menu.



Indicating whether the information was helpful allows Fiserv to improve the Client360 Resources.

Notes

Access self-service opportunities



Olivia needs information to complete a couple of tasks. She uses the Client360 self-service options to complete them without contacting Fiserv support.



Performance Statements

After completing this module, you will be able to:

- Search the Knowledge Base for information related to Fiserv products or services.
- Ask Mave for help finding information about a Fiserv product or service.
- Watch a video tutorial to help complete tasks.

Notes

Search the Knowledge Base





Olivia needs to calculate the interest for the payoff of a mortgage loan with prepaid interest. She's not sure how to do this, so she searches for the information in the Client360 Knowledge Base.


Client360 integrates with the Fiserv Knowledge Base, putting thousands of answers to your product and service questions at your fingertips. You can search the Knowledge Base to find easy answers to many of your questions without contacting Fiserv directly.

How to



1. Enter your search criteria in the Client360 search bar.


 Use natural language to get the best results, such as "How do I...?"

2. Select **Search** (). A new browser window opens.
3. View the list of related articles.

 Client360 sorts search results by relevance.

4. Select **Read Full** to view the entire Knowledge article.
5. You can let us know if this article was helpful by selecting **Yes** or **No** at the bottom of the article.

 • You can view the most popular Knowledge articles by selecting **Most Viewed Articles** () on the Client360 quick access menu.

• You can view documentation specific to your products by selecting **Product Information** () on the Client360 quick access menu.

Notes

Ask Mave for help



Olivia needs to help a customer reset an online banking password. She can't remember where to do this, so she asks Mave through Client360.

Mave is your automated virtual assistant. She can help you locate information from the Knowledge Base, using the same format you might use to instant message a friend with a question.

How to

1. Select **Contact Us**.
2. Select the box beside "I acknowledge..." then select **Submit**.
3. Enter your specific questions about your inquiry into the message field and select **Send**.



Use natural language to get the best results, such as "How do I...?"

4. Our virtual assistance, Mave, will provide knowledge article suggestions that best fit your description.
5. You can let us know if the articles were helpful by selecting **Yes** or **No** at the bottom of the article.


Watch a video tutorial



Olivia needs to activate a dormant savings account. She thinks she knows how to do this but wants to verify she's got the steps right. She watches a short tutorial video on Client360 that walks through the process.

The Client360 Fiserv Answers library gives you access to free tutorial videos related to Fiserv products and services.

How to

1. On the quick access menu, select **Video Links** ().
2. To play a video, select it.

Work with Inquiries



Olivia needs to update a specification to which she does not have access. She uses Client360 to open an inquiry with Fiserv client support.



Performance statements

After completing this module, you will be able to:

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

Notes

Create an Inquiry



Olivia starts by creating the new Inquiry in Client360.

When there are no self-service options available, you can create an Inquiry to engage Fiserv support.

How to

1. Select **New Inquiry**.
2. Select the **Product** and **Inquiry Type**.



Additional fields appear based on the selections you make, because they are different based on the Fiserv products.

3. Select the inquiry option related to your new Inquiry.
4. Select **Next**.
5. Enter a detailed **Inquiry Description**, to provide context and complete information for your inquiry assignee.



The information fields vary based on the options you select for your Inquiry.

6. Select **Submit**.



If you add PCI/PII information outside of the Sensitive Comment field, you will receive an error. To include PCI/PII information in your Inquiry, add it in the **Sensitive Comment** field or as an attachment.

Notes

Update an Inquiry



Olivia receives a notification that Fiserv support added a comment to her Inquiry about the specification change. She locates the Inquiry in Client360 to view the comment and respond accordingly.

One of the benefits of Client360 Inquiries is the ability to track all activity related to the Inquiry in one place. You can view your current and previous Inquiries and add additional information as needed.

How to

1. Locate the inquiry in the **Inquiry** section.



You can use the Inquiry search menu to narrow your list of Inquiries.

2. Select the inquiry from the Inquiry List. The **Details** tab of the Inquiry Details pane appears.
3. View the general information regarding the inquiry.
 - Use the **Comments** tab to communicate with your contact regarding your inquiry.
 - Use the **Attachments** tab to upload supporting documents as necessary.

Notes

Close an Inquiry

Approve or reject a Pending Close Inquiry



Fiserv updated the specification for Olivia and marked the Inquiry as resolved. Olivia received a notification that the Inquiry is resolved, so she closes it in Client360.

When Fiserv support completes an Inquiry, they mark it resolved. Resolved Inquiries show in your **Pending Close Inquiries** and you'll receive a notification. You can either close the Inquiry or reopen it if you need additional assistance.



If you don't take action on a Pending Close Inquiry within 10 days, Client360 closes the Inquiry. If you need further assistance, you will need to open a new Inquiry.

How to

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?"
 - a. Select **Yes** to immediately close the inquiry. You've completed the inquiry!
- b. Select **No** to request to reopen the inquiry. The Reject Resolution window appears.
 - o Select a **Reopen Reason**.
 - o Enter a **Reopen Note** to provide Fiserv support with complete details regarding why you reopened the inquiry.
 - o Select **Reject**.



You can now review this inquiry anytime from the **Total** inquiries list. It no longer appears open or pending.



Client360 sends a notification to Fiserv support, requesting that the inquiry be reopened for the reason detailed in your note.

Close a self-resolved Inquiry



One of Olivia's coworkers opened an Inquiry for the same specification change. Since Fiserv has already resolved Olivia's, she closes the duplicate Inquiry.

There may be instances when you need to close an Inquiry on your own. You can do this directly through Client360 without help from Fiserv support.

How to

1. Locate the Inquiry in the Inquiry section.
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. Select **Close inquiry**. The Close Inquiry window appears.
5. Enter the reason you are closing your inquiry.
6. Select **Close**.
7. Select **Accept** to take the Inquiry Close survey or select **Skip**. If you accept the survey, the Inquiry Survey window appears.
8. Complete the short survey, and then select **Submit**.

Notes

Course summary

Where are we now?



Olivia has successfully completed her daily tasks using Client360 as needed. She completed her initial setup, located helpful information in the Knowledge Base, and worked an Inquiry. She continues to use the Client360 Resources to grow her proficiency.



Performance goals

Now you can:

- Engage Fiserv using the Client360 service management platform.
 - Set up Client360.
 - Access self-service opportunities.
 - Work with Inquiries.

Client360 resources

- Client360 Resources, available through Explore Client360 link on the home page
- Your Fiserv Relationship Team, available through the quick access menu in Client360

Glossary

Closed

You cannot open an Inquiry with a closed status. If you need further assistance, open a new Inquiry.

Inquiry

Sometimes referred to as a case or ticket. A documented request for assistance from Fiserv support.

Resolved/Pending Close

Fiserv support marks an Inquiry with a resolved status, indicating they believe they have completed it. You can close or reopen resolved cases within 10 days. Client360 closes resolved cases automatically after 10 days.

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