

Client360 Merchant

Your Guide to Opening a BOS Request March 2025



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Contents

Introduction	1
Overview	2
How to submit a Boarding Operations Systems (BOS) Request	4
Review a Pending Inquiry	7
Respond to a Rejected Inquiry or Close Inquiry	8
Document Updates 1	0
About the Client360 How to Open a BOS Request Guide1	1

1

Introduction

Client360 provides intuitive navigation through a simplified user interface and artificial intelligence (AI) boosted search features. With each inquiry, Client360 becomes more intelligent, equipping the clients and service associates to resolutions faster. Product-specific service menus provide a clearer path to inquiry creation and reduce the number of requests for clarification and supporting documentation.

Client360 Features

- A simple user interface with intuitive navigation and options for quick answers.
- Access to how-to videos for select products.
- Contact information for the Fiserv relationship management team on the home page.
- An interactive Chabot for fast support.
- Al-boosted search results based on clients' unique products and specific queries.

Overview

This guide provides information for Fiserv Merchant clients who use Client360 to interact with the Boarding team to submit requests, respond to rejected requests, and to understand the status of pending inquiries.

This Guide complements the Client360 User Guide. Please consult the User Guide for basic Portal usage, such as signing in, searching Knowledge, and managing Inquiries.

How to submit a Boarding Operations Systems (BOS) Request

- 1. Download the appropriate form to submit with your Inquiry.
 - a. From the Inquiries page, select Merchant Document library.

Client360 Fiserv	Inquiries	Client360 Help	Begin searching for publication, knowledge,Q
Home > Inquiries			
Inquiries			New Inquiry Merchant Document library
MY MERCHANT INQUIRIES	ALL MERCHANT	INQUIRIES	
0 ACTION REQUIRED	D	5 IN PROGRESS	0 COMPLETED

- b. Search for your alliance-related Knowledge Articles within the library.
- c. Download the form needed to fulfill your request, complete, and save the form to a local drive.

Note: The maximum file size is 25 MB. You may submit up to four forms per inquiry. Total attachment size cannot exceed 100 MB. Accepted file formats are MSG, JPG, JPEG, PNG, TIFF, DOC, DOCX, XLS, XLSX, CSV, MP4 and PDF.

2. From the Inquiries page, select **New Inquiry.**

		5	0
Home > Inquiries	UIRIES ALL MERCHANT	INQUIRIES	Mercha It Docum Mercha It Docum
	inquiries	Clientsoo Help	Begin searching for publication, knowledge,Q

- 3. If a dropdown menu displays after selecting **New Inquiry**, select **Merchant** and proceed to complete required fields (below). If no dropdown menu displays, proceed to Step 4.
- 4. Complete required fields:
 - a. Sales Partner = Alliance
 - b. Acquirer Platform = front-end processing platform
 - c. Network Fields = back-end authorization platform
 - d. Inquiry Urgency Level = Low

5. Select the Request type on the left, choose the corresponding option on the right that best matches your request need, and select **Next**.

Leasing		Boarding	
Boarding	0	Add Location	New Location
boarding		 Add Location North 	MAMA Contract Status Inquiry
		 Add Location North & DCC 	New Location North
			New Location North & DCC
			Test Accounts (Non-Processing)
			Test Accounts (Non-Processing)

6. Enter the **Merchant Id** for your update request. This also appears on the inquiry card within the Inquiry Dashboard.

S Merchant Information	
Merchant Id Q	Merchant Name

7. Complete the remaining Merchant Information and Additional Information fields.

E.

8. In the **Inquiry Details** section, describe the reason for your inquiry. Include any details that should not be visible, such as credit card numbers or authorization codes, in the **Sensitive Comment** section.

Describe	the reason for your inquiry *
)0 character	rs left
Sen	sitive Comment

10. Select Add Attachment.

Attachment	
	Add Attachment

- 11. Upload the form completed in Step 1.
- 12. Select the appropriate **Document Type** from the dropdown menu.

All attachments are cons	sidered sensitive and will be encryp	ited for storage.
Files can be uploaded in MSG, JP The maximum file size is 25 MB	PG, JPEG, PNG, TIFF, DOC, DOCX, XLS Maximum submission size is a tot	5, XLSX, CSV, PDF, MP4 or XLSB format. tal of 100 MB.
	Drag and drop or click to uploa	ad files
Files Listing		Remove All
Files Listing	⊘ Valid file 1.32 MB ×	Remove All Document Type *

- 13. Select Add.
- 14. Select Create Inquiry.

After you create the inquiry, the **Inquiry Number** and details display to the right and the inquiry appears in the Inquiry Dashboard.

Inquiries						
inquiries				Inquiry Details		C3 4
				MI-000152642		In Progress
MY MERCHAN	T INQUIRIES ALL MERCHAN	NT INQUIRIES		Details Comme	ents Attachments	
ACTIO	0 N REQUIRED	5 IN PROGRESS	0 COMPLETED	Summary		
		Sort by: Ind	quiry Number $ \!$	INQUIRY INFORMATION PLATFORM Omaha	SALES CHANNEL	SALES PARTNER
MI-000149877 North	In Progress Account Maintenance	Assigned To: — Expected Completion Date: 11/07	Created Date: 11/06/2024 07:21: AM /24 Created By: Amy Admin	INQUIRY TYPE BOS	AUTHORIZATION NETWORK(S) Nashville,Omaha	CATEGORY 1 Financial Operations
MI-000152631 North	In Progress Boarding - New Location	Assigned To: — . Expected Completion Date: 11/12	Created Date: 11/08/2024 12:14: PM /24 Created By: Amy Admin	Credit Financial Control	Fee Request CONTACT NAME Amy Admin	EXPECTED COMPLETION DAT
MI-000152642 Omaha	In Progress Financial Operations	Assigned To: — Expected Completion Date: 11/12	Created Date: 11/08/2024 12:15: PM /24 Created By: Amy Admin	CREATED DATE 11/08/2024 12:15:57 PM INQUIRY DETAILS	UPDATED DATE 11/08/2024 12:15:57 PM	CLOSED DATE
MI-000152674 North	In Progress Boarding - New Location	Assigned To: — Expected Completion Date: 11/13	Created Date: 11/08/2024 12:20 PM /24 Created By: Amy Admin	Test request		
MI-000152689	In Progress	Assigned To: —	Created Date: 11/08/2024 12:22 PM	MERCHANT INFORMATION MERCHANT NAME	MERCHANT ID	

Review a Pending Inquiry

- 1. From the Inquiry Dashboard, select the **In Progress** tab. Select **Sort by** to sort the inquiries by **Inquiry Number**, **Created Date**, or **State**. Select **Order By** to order the inquiries in ascending or descending order.
- 2. Locate the Inquiry, select the preview card below the dashboard to open the Inquiry Details.

Home > Inquiries					MI-000149877 ×		×
Inquiries				New Inquiry	Inquiry Details		C @
				Merchant Document library	MI-000149877		(In Progress
MY MERCHANT INQUIRIES ALL MERCHANT IN	QUIRIES				Details Comme	ents Attachments	
1 ACTION REQUIRED	49 IN PROGR	tess		1 COMPLETED	Summary		
Type to search Q			Sort by: Inc	quiry Number $ arsigma $ Order By: Ascending $ arsigma $	PLATFORM North INQUIRY TYPE	SALES CHANNEL ISO_TEST AUTHORIZATION NETWORK(S)	SALES PARTNER ISO CATEGORY 1
MI-000149877 (in Progre North Account Merchant Id:	a) A: Iaintenance - Banking, Funding Ex	ssigned To: — xpected Completion Date: 11	1/07/2024	Created Date: 11/06/2024 08:21:40 PM Created By: alupes alupes	BOS CATEGORY 2 Banking, Fundingmore	Cardnet CATEGORY 3 ACH Reject	Account Maintenance
MI-000152631 In Progre North Boarding Merchant Id:	s) A: New Location - New Location E)	ssigned To: — xpected Completion Date: 11	1/12/2024	Created Date: 11/09/2024 01:14:24 AM Created By: alupes alupes	ASSIGNED TO CREATED DATE 11/06/2024 08:21:40 PM	CONTACT NAME alupes alupes UPDATED DATE 11/06/2024 08:21:40 PM	EXPECTED COMPLETION DATE 11/07/2024 CLOSED DATE
MI-000152642. In Progre Omaha Financial Merchant Id:	s) As Operations - Credit Financial C Es	ssigned To: — xpected Completion Date: 11	1/12/2024	Created Date: 11/09/2024 01:15:57 AM Created By: alupes alupes	INQUIRY DETAILS Test MERCHANT INFORMATION		
MI-000152674 In Progree North Boarding	8 A: New Location - New Location E	ssigned To: — xpected Completion Date: 11	1/13/2024	Created Date: 11/09/2024 01:20:48 AM Created By: alupes alupes	MERCHANT NAME	MERCHANT ID	

3. Select **Comments** to view any updates on the inquiry.

Note: You cannot add comments or attachments to an existing inquiry unless the **Pending Code** says **Pending Client Information**.

MI-00015267	74 X		×
Inquiry D	etails		0 6
MI-000152674	ł		Pending Client Information
Details	Comments ³	Attachments	
Comments			Q 🔹
Comments action is tak	can only be added wh en on the bottom of i	ten status is Pending the Inquiry Details pa TODAY	; Client Information. This age.
Fiserv Ser 11/08/2024 Please pro	rvice I 12:20:49 PM ovide an alternative p	roduction date.	
Fiserv Ser 11/08/2024 Sensitive	vice 12:20:49 PM Note: Click 'Show Sen	St sitive Comment' to r	now Sensitive Comment
Fiserv Se 11/08/2024 Verifying	rvice 12:20:49 PM the pending inquiry s	tatus in production.	

Respond to a Rejected Inquiry or Close Inquiry

- 1. From the Inquiry Dashboard, select the Action Required tab. Select Sort by to sort the inquiries by Inquiry Number, Created Date, or State. Select Order By to order the inquiries in ascending or descending order.
- 2. Locate the Inquiry, then select the preview card below the dashboard to open the **Inquiry**. **Details**.

Home > Inquiries		MI-000154771 ×	MI-000149877 ×
Inquiries		New Inquiry Inquiry Detail	ls [] @
		MI-000154/71	omments Attachments
	TINQUIRIES	tet	
1 ACTION REQUIRED	49 IN PROGRESS	1 COMPLETED MERCHANT INFORMAT	10N
Type to search Q		Sort by: Inquiry Number V Order By: Ascending V	MERCHANT ID
MI-000154771 Pend Memphis Accou Merchant Id:—	Ing Clerc Information. Assigned To: Int Maintenance - Banking, Funding Expected Completion Date	Created Date: 11/15/2024 10:20:51 AM 11/20/2024 Created By: hoal Nguyen Aperia NumBR of Locations 1 Takear completion on 11/20/2024	TION COPY TO EMME hola.nguyen@aperia.com ITE
		PENDING CLIENT INFO PENDING COUNT 1 PENDING NOTES Test	RMATION DETAILS PENDING REASON BOS Credit Rejected
٥		ectomic BY	PERDING DATE 02/14/2025 13:46:08 PM Address Pending Inquiry Close Inquiry

3. Scroll to the **Pending Client Information Details** section to view the **Pending Reason**. Select **More** to view all details.

	lans				
MI-000152642				Pending Client In	formation
Details	Comme	nts Attachment		s	
Summary					
INQUIRY INFORM	IATION				
PLATFORM		SALES CHANNEL		SALES PARTNER	
Uniana		ISO_TEST		150	
CREATED DATE		UPDATED DATE		CLOSED DATE	
11/08/2024 12:	15:57 PM	11/08/	2024 12:15:57 PN	1 —	
INQUIRY DETAILS					
Test request					
MERCHANT INFO	RMATION				
MERCHANT NAME		MERCHANTID			
PENDING CLIEN	INFORMATIO	N DETAIL	.S		
PENDING COUNT		PENDING REASON]
2		BOS Rejected - Insufficient / Incmore			
PENDING NOTES		PENDING DATE			
		11/0	7/2024		

- 4. Respond to the Rejected Inquiry or Close the Inquiry.
 - Select Address Pending Inquiry to resubmit the inquiry. Provide a Comment or Attachment that explains the rationale for resubmission.
 - Select **Close Inquiry** to complete the inquiry.

PENDING CLIENT INFORMATION	I DETAILS			
PENDING COUNT	PENDING REASON BOS Rejected - Insufficient / Incmore			
PENDING NOTES	PENDING · DATE 11/07/2024			
Actions	Address Pending Inquiry Close Inquiry			

5. Select Submit.

Document Updates

Date	Version	Change
3/27/2025	4.0	Updated screenshots to reflect search option within Inquiry Dashboard.
12/3/2024	3.0	Document updated to reflect BOS-only use of Client360.
11/8/2024	2.0	Document updated to standard template and to reflect UI changes.
10/28/2024	1.0	Initial publication of the guide.

About the Client360 How to Open a BOS Request Guide

Documentation Version 4.0