Client360

Client360 User Guide

October 2024

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Contents

Introduction 1
Getting Started 3
  Technical Requirements 3
Accessing Client360 3
Log In 3
  First Time Users 3
  Multifactor Authentication (MFA) 4
  How to Authenticate with MFA 4
  Troubleshooting 5
  Update MFA Delivery Methods 5
Account Security 5
  Passwords 5
  How to Reset the Password 6
  Password Requirements 6
  Account Lock Out 6
  Session Timeout 6
  Email Notification 7
Navigate the Home Page 9
Personal Profile and Portal Settings 10
Knowledge Base 13
Search the Knowledge Base 13
Client360 Help 14
Inquiries Tab 15
  Inquiry Dashboard 15
  Activity Tabs 16
  Inquiry Card 16
  Search and Sort Options 17
  Export the Inquiry Dashboard 17
  Inquiry State 18
  Pending Code 18
Inquiry Details 19
  Details Tab: General Information 19
  Details Tab: Activities 20
  Details Tab: Resolution 20
  Comments 21
  Attachments 21

  - Watchlist 21
  - Timeline 21
- Inquiry Management 22
  - Create an Inquiry 22
  - Update an Inquiry 24
  - Close an Inquiry 24
  - Resolve an Inquiry 25
  - Print an Inquiry 26
- Quick Access Menu 27
  - Publications 28
- Product Information 29
- Reports 30
  - Inquiry Reports 30
- Document Updates 31
- About the Client360 User Guide 32

Introduction

Fiserv is pleased to present a service experience designed to make finding answers and getting support for Fiserv solutions easier than ever before. Client360 is the new Service Portal for logging inquires and replaces the ServicePoint Portal as the primary online support tool.

Client360 provides intuitive navigation through a simplified user interface and artificial intelligence (AI) boosted search features. With each Inquiry, Client360 becomes smarter and moves the client, and the service associate supporting the client, more quickly to resolution.

Solution-specific service menus are designed with relevant routing and information-gathering prompts which provide a clear path to open an Inquiry while minimizing the number of times clients need to clarify their request and reducing the number of times an inquiry needs to be reassigned.

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 enable account representatives and other service associates on the service teams to provide the highest level of support.

Getting Started

Technical Requirements

Client360 supports the following browsers:

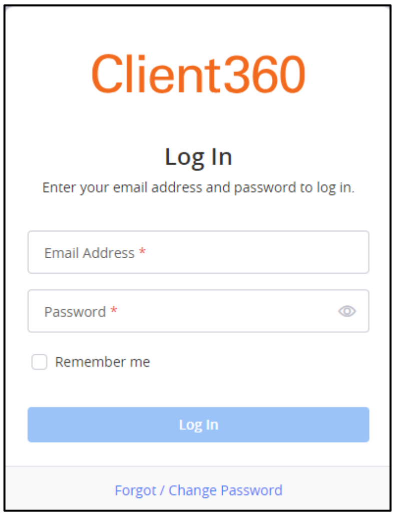
- Chrome (latest version)
- Edge (latest version)
- Firefox (latest version)
- Safari (latest version, Mac only)
- Tablet mobile browser (native Android and iOS)

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.



Enter your email address and password to log in.

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.

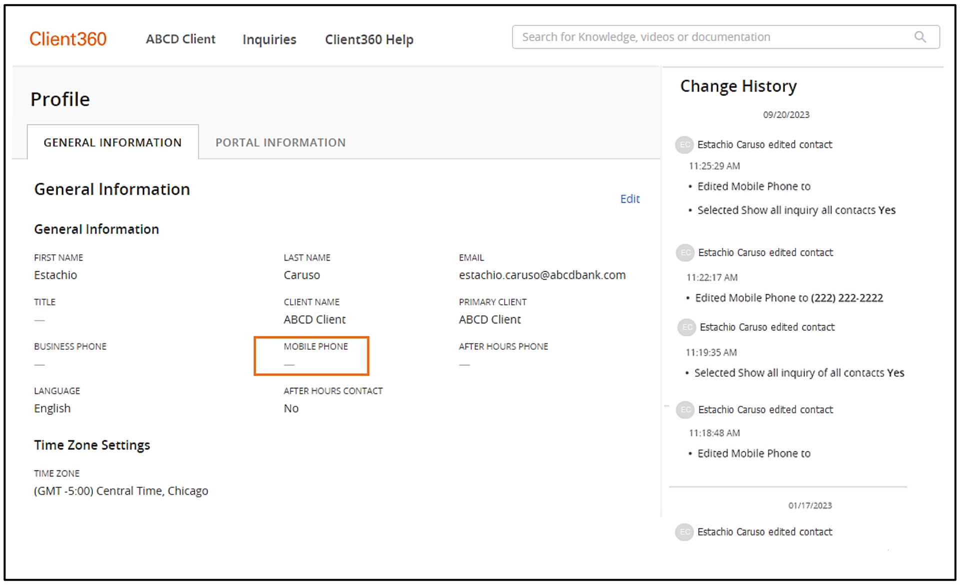
    When appropriate, the user may select the checkbox which allows for MFA to Trust the browser for that device.

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



General Information

General Information

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

Time Zone Settings

TIME ZONE: (GMT -5:00) Central Time, Chicago

Change History

09/20/2023

Estachio Caruso edited contact
11:25:29 AM
- Edited Mobile Phone to
- Selected Show all inquiry all contacts **Yes**

Estachio Caruso edited contact
11:22:17 AM
- Edited Mobile Phone to **(222) 222-2222**

Estachio Caruso edited contact
11:19:35 AM
- Selected Show all inquiry of all contacts **Yes**

Estachio Caruso edited contact
11:18:48 AM
- Edited Mobile Phone to

01/17/2023

Estachio Caruso edited contact

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.

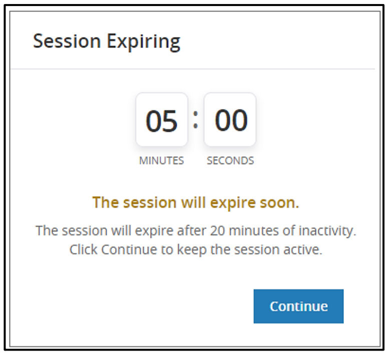
Account Lock Out

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.



Session Expiring

The session will expire soon.

The session will expire after 20 minutes of inactivity. Click Continue to keep the session active.

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

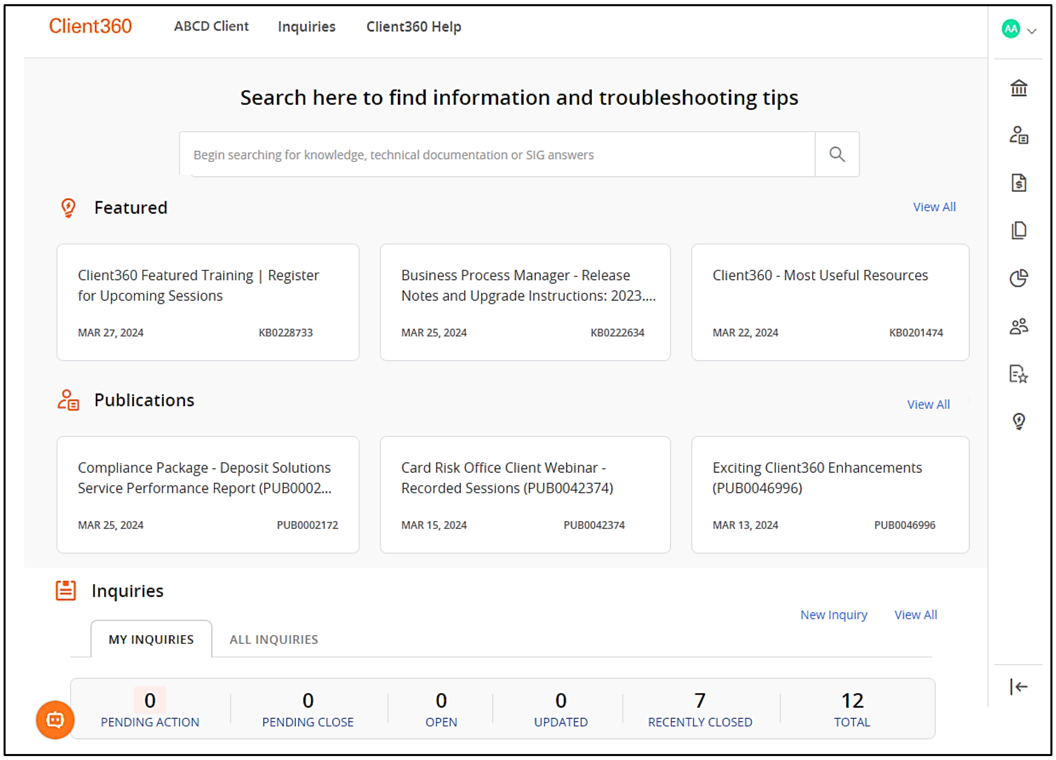
Fiserv designed the Client360 home page for intuitive, efficient navigation. We briefly introduce each section below and document it more fully in terms of pages, fields, and functionality in its own section later in the guide.

Client360 offers a general search and inquiry view embedded in the main page, along with a vertical Quick Access Menu for seamless navigation to 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 Tabs which organize and summarize inquiries by status and activity criteria 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.



Search here to find information and troubleshooting tips

Begin searching for knowledge, technical documentation or SIG answers

Featured

View All

Client360 Featured Training | Register for Upcoming Sessions
MAR 27, 2024 KB0228733

Business Process Manager - Release Notes and Upgrade Instructions: 2023....
MAR 25, 2024 KB0222634

Client360 - Most Useful Resources
MAR 22, 2024 KB0201474

Publications

View All

Compliance Package - Deposit Solutions Service Performance Report (PUB0002...
MAR 25, 2024 PUB0002172

Card Risk Office Client Webinar - Recorded Sessions (PUB0042374)
MAR 15, 2024 PUB0042374

Exciting Client360 Enhancements (PUB0046996)
MAR 13, 2024 PUB0046996

Inquiries

New Inquiry View All

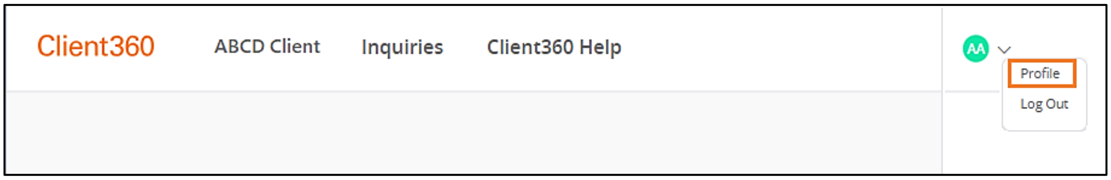
MY INQUIRIES ALL INQUIRIES

0	0	0	0	7	12
PENDING ACTION	PENDING CLOSE	OPEN	UPDATED	RECENTLY CLOSED	TOTAL

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.

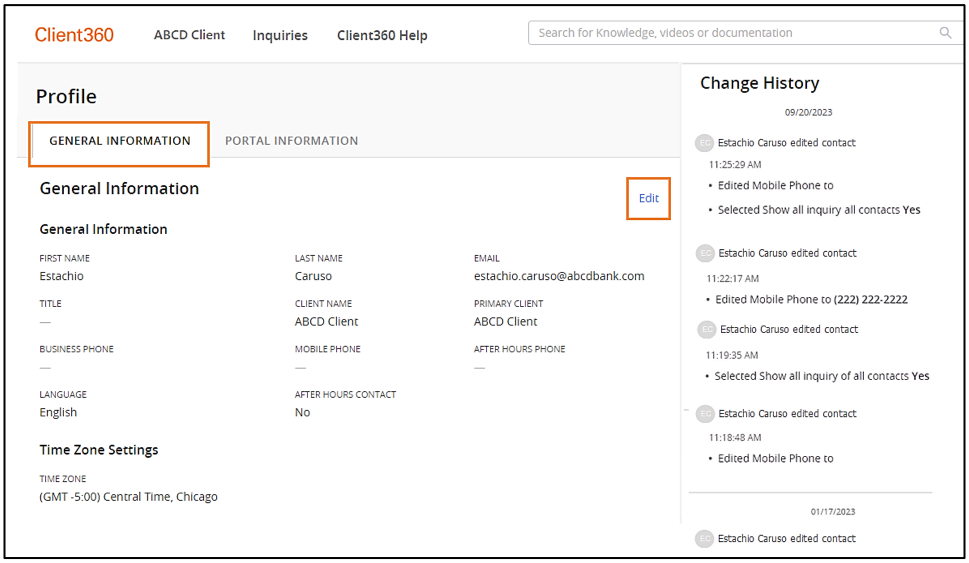
Update General Information & Portal Information


Client360
ABCD Client
Inquiries
Client360 Help
AA
Profile
Log Out

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** from the **General Information** tab.


Client360
ABCD Client
Inquiries
Client360 Help
Search for Knowledge, videos or documentation
Profile
GENERAL INFORMATION
PORTAL INFORMATION
General Information
Edit

General Information

FIRST NAME
Estachio

LAST NAME
Caruso

EMAIL
estachio.caruso@abcdbank.com

TITLE
—

CLIENT NAME
ABCD Client

PRIMARY CLIENT
ABCD Client

BUSINESS PHONE
—

MOBILE PHONE
—

AFTER HOURS PHONE
—

LANGUAGE
English

AFTER HOURS CONTACT
No

Time Zone Settings

TIME ZONE
(GMT -5:00) Central Time, Chicago

Change History

09/20/2023

EC Estachio Caruso edited contact
11:25:29 AM
- Edited Mobile Phone to
- Selected Show all inquiry all contacts Yes

EC Estachio Caruso edited contact
11:22:17 AM
- Edited Mobile Phone to (222) 222-2222

EC Estachio Caruso edited contact
11:19:35 AM
- Selected Show all inquiry of all contacts Yes

EC Estachio Caruso edited contact
11:18:48 AM
- Edited Mobile Phone to

01/17/2023

EC Estachio Caruso edited contact

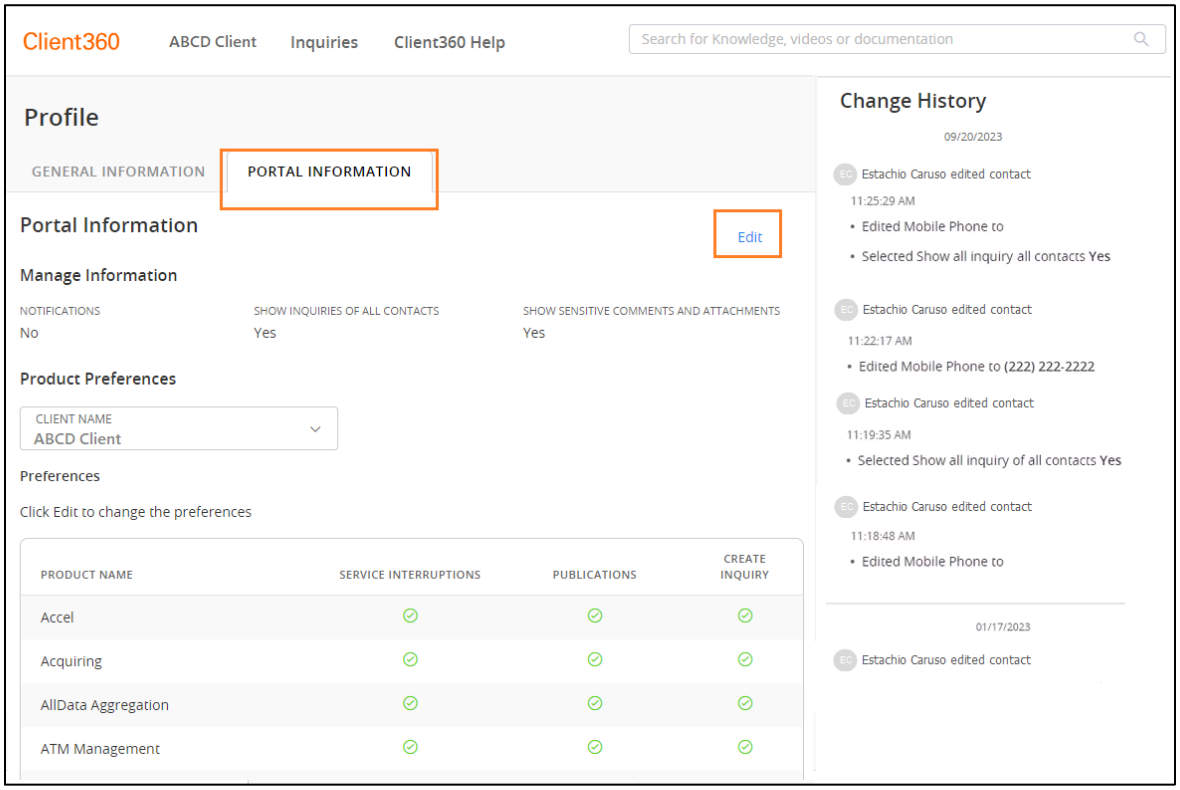
On the General Information tab, the user can update:

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

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.



Profile

Portal Information

Manage Information

NOTIFICATIONS	SHOW INQUIRIES OF ALL CONTACTS	SHOW SENSITIVE COMMENTS AND ATTACHMENTS
No	Yes	Yes

Product Preferences

CLIENT NAME: ABCD Client

Preferences

Click Edit to change the preferences

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

Change History

09/20/2023

Estachio Caruso edited contact

11:25:29 AM

- Edited Mobile Phone to
- Selected Show all inquiry all contacts Yes

Estachio Caruso edited contact

11:22:17 AM

- Edited Mobile Phone to (222) 222-2222

Estachio Caruso edited contact

11:19:35 AM

- Selected Show all inquiry of all contacts Yes

Estachio Caruso edited contact

11:18:48 AM

- Edited Mobile Phone to

01/17/2023

Estachio Caruso edited contact

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).

Manage Information

- **Notifications**

  Selecting the Notifications box allows Client360 to send email notifications for publications and service interruptions to the user. If unchecked, the user does not receive email notification for publication and service interruption updates.

- **Note**: This setting does not impact notifications initiated by Password Reset, Multifactor Authentication, or inquiry emails.

- **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 Amin 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.

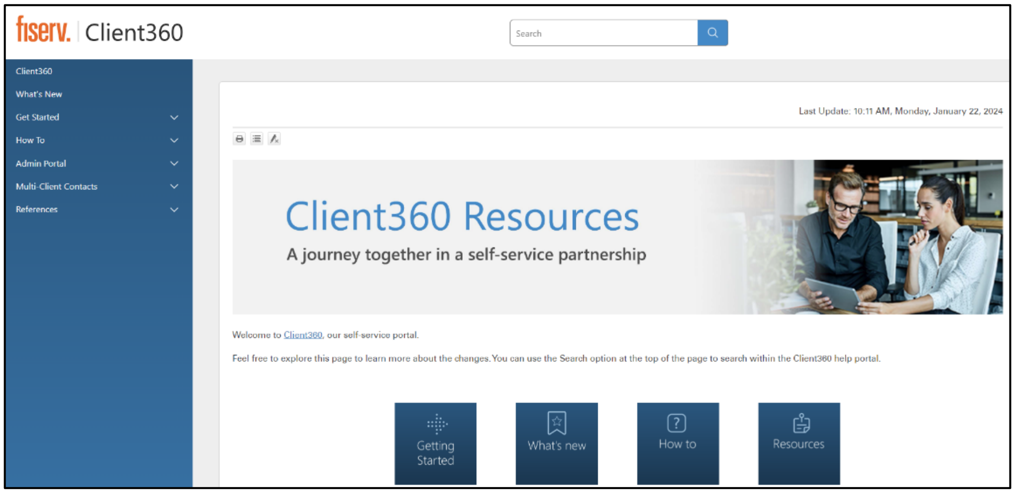
Select **Submit** when finished.

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.


fiserv. Client360
Search
Client360
What's New
Get Started
How To
Admin Portal
Multi-Client Contacts
References
Client360 Resources
A journey together in a self-service partnership
Getting Started
What's new
How to
Resources

Last Update: 10:11 AM, Monday, January 22, 2024

Welcome to Client360, our self-service portal.

Feel free to explore this page to learn more about the changes. You can use the Search option at the top of the page to search within the Client360 help portal.

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, an All Inquiries tab 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.

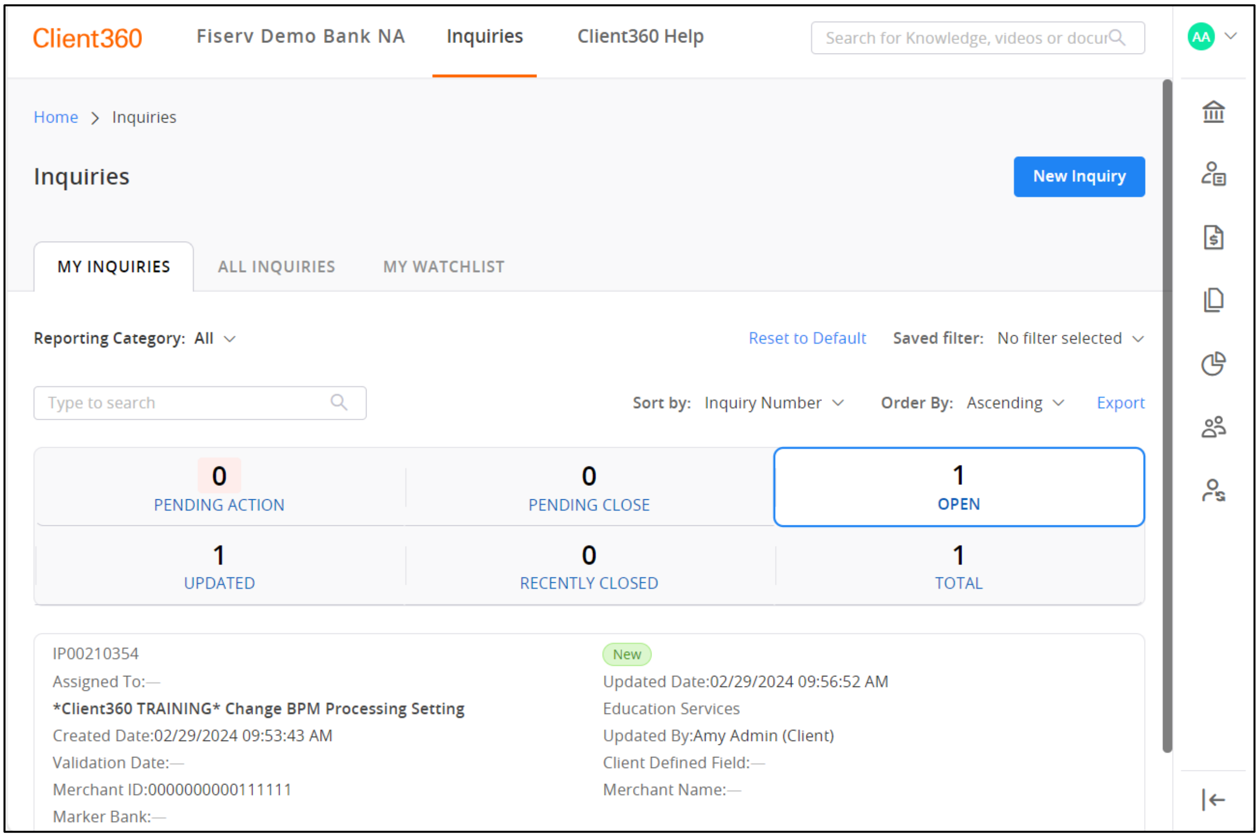
All Inquiries shows all inquiries related to all contacts within the organization.

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.


Client360
Fiserv Demo Bank NA
Inquiries
Client360 Help
Search for Knowledge, videos or docu
AA
Home > Inquiries
Inquiries
New Inquiry
MY INQUIRIES
ALL INQUIRIES
MY WATCHLIST
Reset to Default
Type to search
Export
0 PENDING ACTION
0 PENDING CLOSE
1 OPEN
1 UPDATED
0 RECENTLY CLOSED
1 TOTAL
New

Reporting Category: All

Saved filter: No filter selected

Sort by: Inquiry Number

Order By: Ascending

IP00210354

Assigned To:—

Client360 TRAINING Change BPM Processing Setting

Created Date:02/29/2024 09:53:43 AM

Validation Date:—

Merchant ID:0000000000111111

Marker Bank:—

Updated Date:02/29/2024 09:56:52 AM

Education Services

Updated By:Amy Admin (Client)

Client Defined Field:—

Merchant Name:—

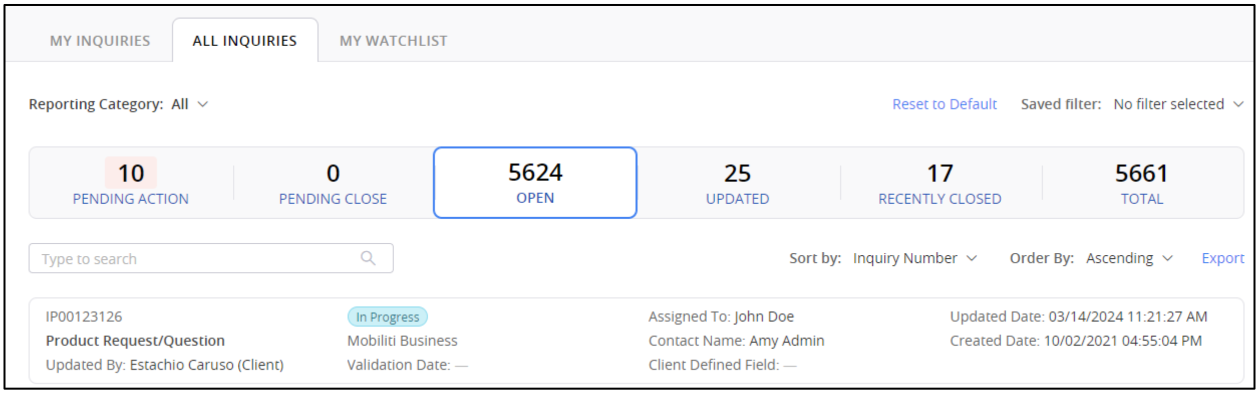
Activity Tabs

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.



Reporting Category: All

Saved filter: No filter selected

10 PENDING ACTION

0 PENDING CLOSE

5624 OPEN

25 UPDATED

17 RECENTLY CLOSED

5661 TOTAL

Sort by: Inquiry Number

Order By: Ascending

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: —

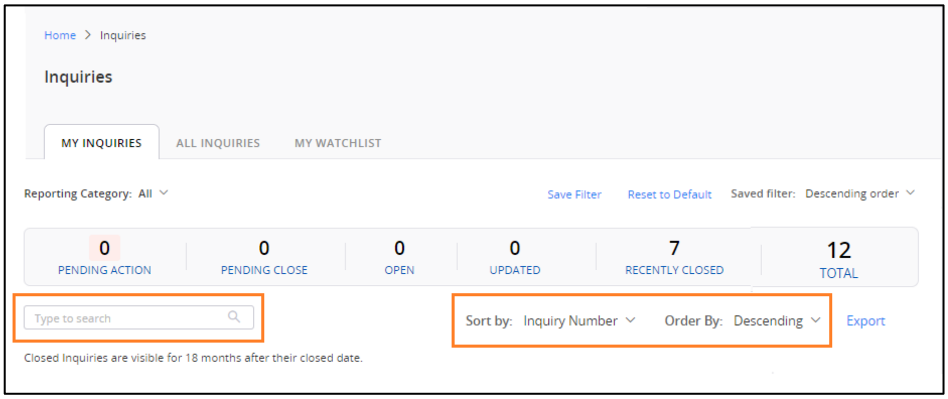
Updated Date: 03/14/2024 11:21:27 AM

Created Date: 10/02/2021 04:55:04 PM

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

Search and Sort Options

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


Home > Inquiries
Inquiries
MY INQUIRIES
ALL INQUIRIES
MY WATCHLIST
Save Filter
Reset to Default
0 PENDING ACTION
0 PENDING CLOSE
0 OPEN
0 UPDATED
7 RECENTLY CLOSED
12 TOTAL
Type to search
Export

Reporting Category: All

Saved filter: Descending order

Sort by: Inquiry Number

Order By: Descending

Closed Inquiries are visible for 18 months after their closed date.

Search options include:

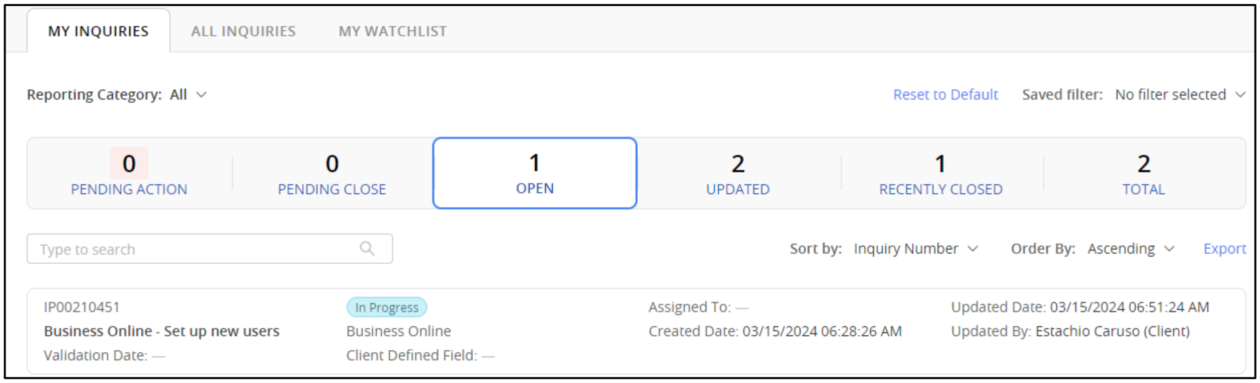
- Assigned To
- Contact Name
- Product
- Inquiry Number
- Short Description
- Client Defined Field

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.


MY INQUIRIES
ALL INQUIRIES
MY WATCHLIST
Reset to Default
0 PENDING ACTION
0 PENDING CLOSE
1 OPEN
2 UPDATED
1 RECENTLY CLOSED
2 TOTAL
Type to search
Export

Reporting Category: All

Saved filter: No filter selected

Sort by: Inquiry Number

Order By: Ascending

IP00210451
Business Online - Set up new users
Validation Date: —

In Progress
Business Online
Client Defined Field: —

Assigned To: —
Created Date: 03/15/2024 06:28:26 AM

Updated Date: 03/15/2024 06:51:24 AM
Updated By: Estachio Caruso (Client)

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.

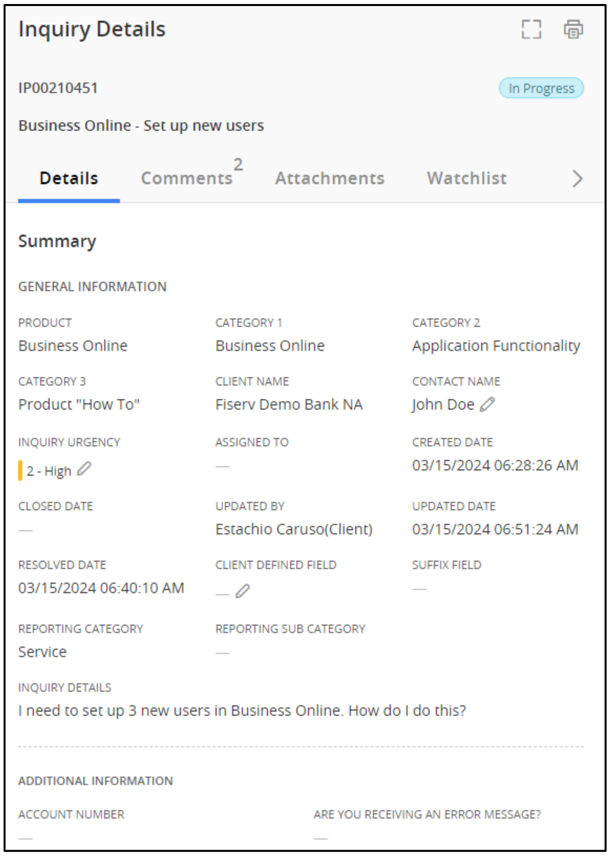
Pending Code

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:



IP00210451

Business Online - Set up new users

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?
—

- 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 with Reporting Category classified as Service, Defect 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
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
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
ZIPX

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:

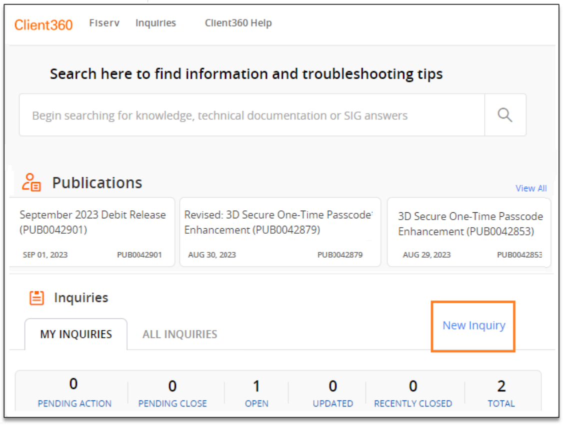
Accepted Inquiry Resolution
Add Comments
Add Inquiry Attachment
Close Task (manually)
Create Inquiry
Download Inquiry Attachment
Remove Watchlist Member
Reopen Inquiry
Resolve Inquiry

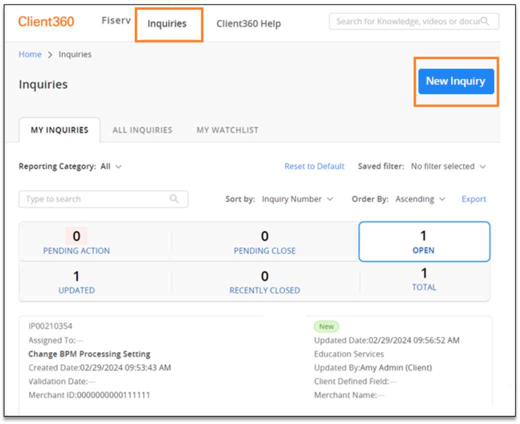
Add Watchlist Member
Assign Inquiry
Close Inquiry (by submitter)
Close Inquiry (by system)
Reject Inquiry Resolution
Remove Comments
Remove Inquiry Attachment
Remove Sensitive Data
Transfer Inquiry
Update Inquiry Attachment Category
Updated Inquiry
Updated Inquiry State

Inquiry Management

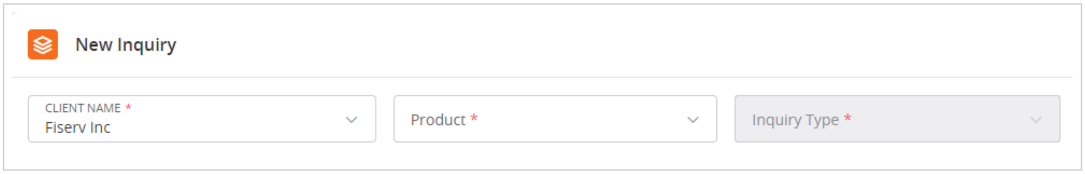
Create an Inquiry

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


Client360
Fiserv
Inquiries
Client360 Help
Search here to find information and troubleshooting tips
Begin searching for knowledge, technical documentation or SIG answers
Publications
View All
September 2023 Debit Release (PUB0042901)
SEP 01, 2023
PUB0042901
Revised: 3D Secure One-Time Passcode Enhancement (PUB0042879)
AUG 30, 2023
PUB0042879
3D Secure One-Time Passcode Enhancement (PUB0042853)
AUG 29, 2023
PUB0042853
Inquiries
MY INQUIRIES
ALL INQUIRIES
New Inquiry
0 PENDING ACTION
0 PENDING CLOSE
1 OPEN
0 UPDATED
0 RECENTLY CLOSED
2 TOTAL


Client360
Fiserv
Inquiries
Client360 Help
Search for Knowledge, videos or docu
Home > Inquiries
Inquiries
New Inquiry
MY INQUIRIES
ALL INQUIRIES
MY WATCHLIST
Reporting Category: All
Reset to Default
Saved filter: No filter selected
Type to search
Sort by: Inquiry Number
Order By: Ascending
Export
0 PENDING ACTION
0 PENDING CLOSE
1 OPEN
1 UPDATED
0 RECENTLY CLOSED
1 TOTAL
IP00210354
New
Assigned To: --
Change BPM Processing Setting
Created Date:02/29/2024 09:53:43 AM
Validation Date: --
Merchant ID:0000000000111111
Updated Date:02/29/2024 09:56:52 AM
Education Services
Updated By:Amy Admin (Client)
Client Defined Field: --
Merchant Name: --

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
Product *
Inquiry Type *

CLIENT NAME *
Fiserv Inc

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:

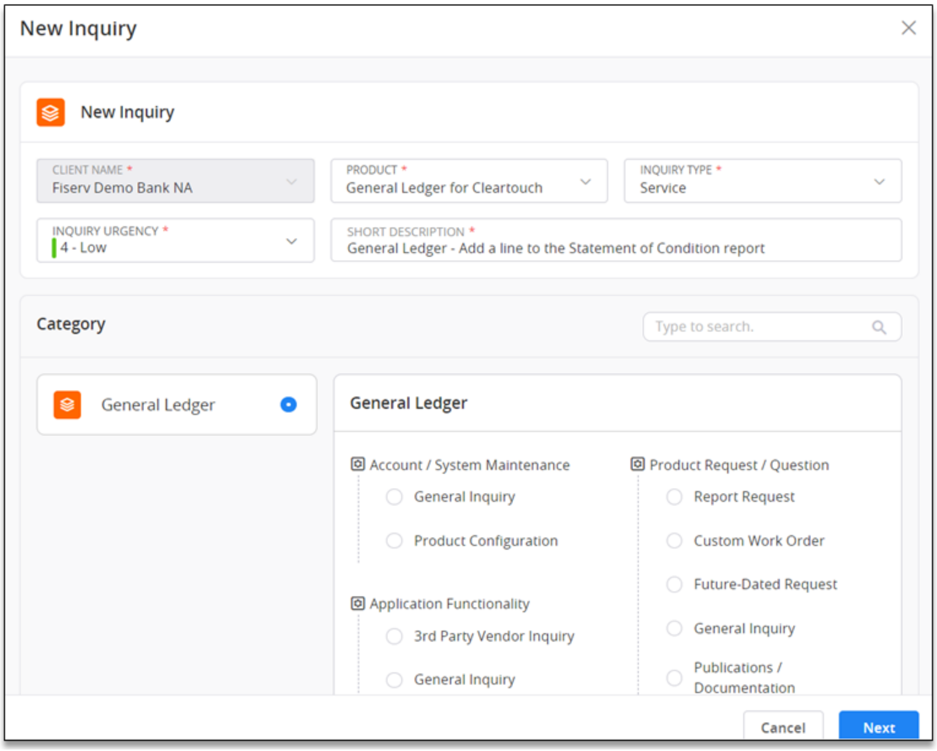
   1- Critical: Complete outage of a production service resulting in a significant impact on client business operations.

   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.



New Inquiry

New Inquiry

CLIENT NAME *: Fiserv Demo Bank NA
PRODUCT *: General Ledger for Cleartouch
INQUIRY TYPE *: Service
INQUIRY URGENCY *: 4 - Low
SHORT DESCRIPTION *: General Ledger - Add a line to the Statement of Condition report

Category

General Ledger ●

General Ledger

Account / System Maintenance
- ○ General Inquiry
- ○ Product Configuration

Application Functionality
- ○ 3rd Party Vendor Inquiry
- ○ General Inquiry

Product Request / Question
- ○ Report Request
- ○ Custom Work Order
- ○ Future-Dated Request
- ○ General Inquiry
- ○ Publications / Documentation

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.

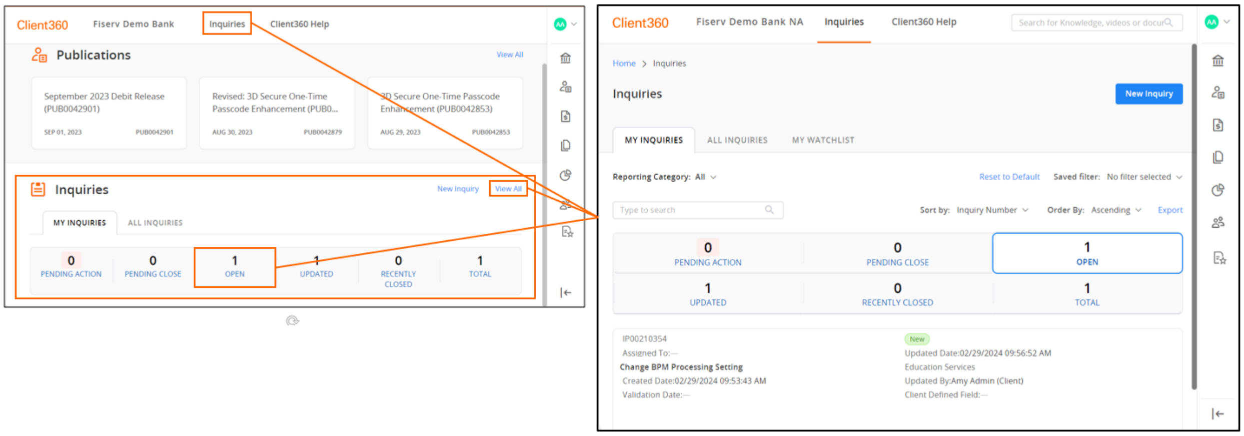
13. Select **Create Inquiry**.

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.


Client360
Fiserv Demo Bank
Inquiries
Client360 Help
Publications
View All
September 2023 Debit Release (PUB0042901)
Revised: 3D Secure One-Time Passcode Enhancement (PUB0...
3D Secure One-Time Passcode Enhancement (PUB0042853)
Inquiries
New Inquiry
View All
MY INQUIRIES
ALL INQUIRIES
0 PENDING ACTION
0 PENDING CLOSE
1 OPEN
1 UPDATED
0 RECENTLY CLOSED
1 TOTAL
Client360
Fiserv Demo Bank NA
Inquiries
Client360 Help
Search for Knowledge, videos or docu
Home > Inquiries
Inquiries
New Inquiry
MY INQUIRIES
ALL INQUIRIES
MY WATCHLIST
Reporting Category: All
Reset to Default
Saved filter: No filter selected
Type to search
Sort by: Inquiry Number
Order By: Ascending
Export
0 PENDING ACTION
0 PENDING CLOSE
1 OPEN
1 UPDATED
0 RECENTLY CLOSED
1 TOTAL
IP00210354
New
Assigned To:--
Change BPM Processing Setting
Created Date:02/29/2024 09:53:43 AM
Validation Date:--
Updated Date:02/29/2024 09:56:52 AM
Education Services
Updated By:Amy Admin (Client)
Client Defined Field:--

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

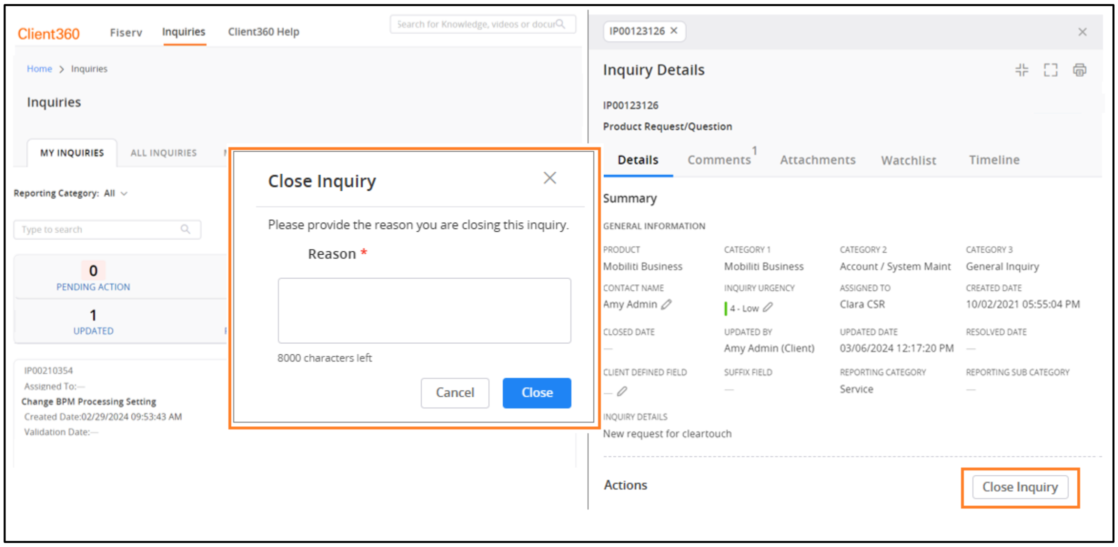
1. Navigate to the Inquiries tab by selecting Inquiries from the top, View All in the Inquiries Dashboard, or a Dashboard Activity tab.

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
Fiserv
Inquiries
Client360 Help
Search for Knowledge, videos or docum
Home > Inquiries
Inquiries
MY INQUIRIES
ALL INQUIRIES
Reporting Category: All
Type to search
0
PENDING ACTION
1
UPDATED
IP00123126 ×
Inquiry Details
Details
Comments
Attachments
Watchlist
Timeline
Summary
GENERAL INFORMATION
Actions
Close Inquiry
Cancel
Close

IP00210354
Assigned To:—
Change BPM Processing Setting
Created Date:02/29/2024 09:53:43 AM
Validation Date:—

Close Inquiry

Please provide the reason you are closing this inquiry.

Reason *

8000 characters left

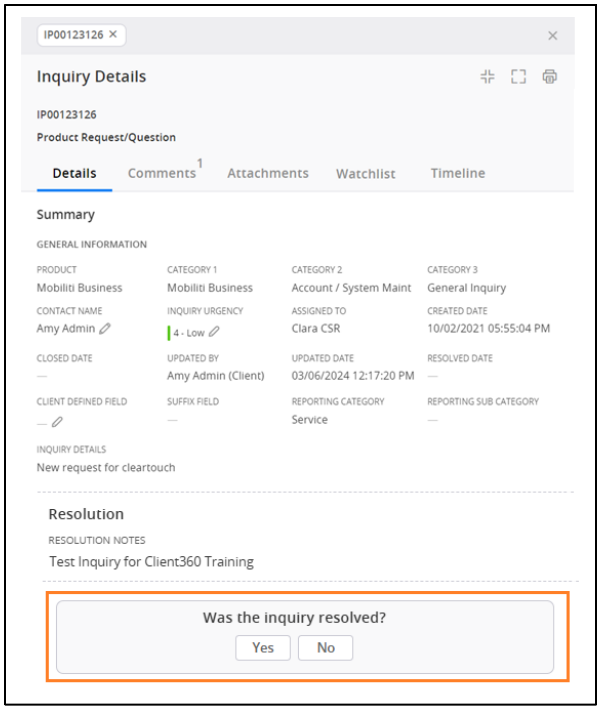
IP00123126
Product Request/Question

PRODUCT: Mobiliti Business
CATEGORY 1: Mobiliti Business
CATEGORY 2: Account / System Maint
CATEGORY 3: General Inquiry
CONTACT NAME: Amy Admin
INQUIRY URGENCY: 4 - Low
ASSIGNED TO: Clara CSR
CREATED DATE: 10/02/2021 05:55:04 PM
CLOSED DATE: —
UPDATED BY: Amy Admin (Client)
UPDATED DATE: 03/06/2024 12:17:20 PM
RESOLVED DATE: —
CLIENT DEFINED FIELD: —
SUFFIX FIELD: —
REPORTING CATEGORY: Service
REPORTING SUB CATEGORY: —
INQUIRY DETAILS: New request for cleartouch

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


IP00123126 ×
Inquiry Details
Details
Comments
Attachments
Watchlist
Timeline
Summary
GENERAL INFORMATION
Resolution
Yes
No

IP00123126
Product Request/Question

PRODUCT: Mobiliti Business
CATEGORY 1: Mobiliti Business
CATEGORY 2: Account / System Maint
CATEGORY 3: General Inquiry
CONTACT NAME: Amy Admin
INQUIRY URGENCY: 4 - Low
ASSIGNED TO: Clara CSR
CREATED DATE: 10/02/2021 05:55:04 PM
CLOSED DATE: —
UPDATED BY: Amy Admin (Client)
UPDATED DATE: 03/06/2024 12:17:20 PM
RESOLVED DATE: —
CLIENT DEFINED FIELD: —
SUFFIX FIELD: —
REPORTING CATEGORY: Service
REPORTING SUB CATEGORY: —
INQUIRY DETAILS: New request for cleartouch

RESOLUTION NOTES: Test Inquiry for Client360 Training

Was the inquiry resolved?

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.

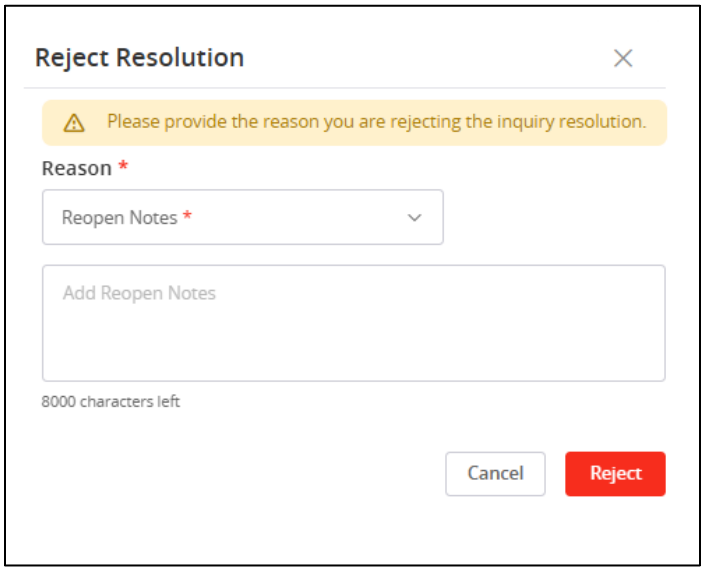
Accept a Resolution and Close an Inquiry

1. Locate the inquiry in the **Pending Close** tab of the Inquiry List.
2. Select the inquiry from the Inquiry List to open the **Inquiry Details**.
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**.



Reject Resolution

Please provide the reason you are rejecting the inquiry resolution.

Reason *

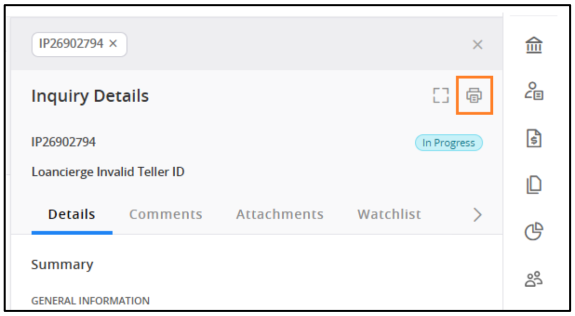
Reopen Notes *

Add Reopen Notes

8000 characters left

Print an Inquiry

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



IP26902794 ×

Inquiry Details

IP26902794

In Progress

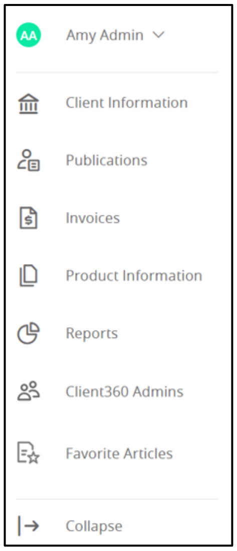
Loancierge Invalid Teller ID

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 displays your 9-digit Client Identifier.
👤	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.



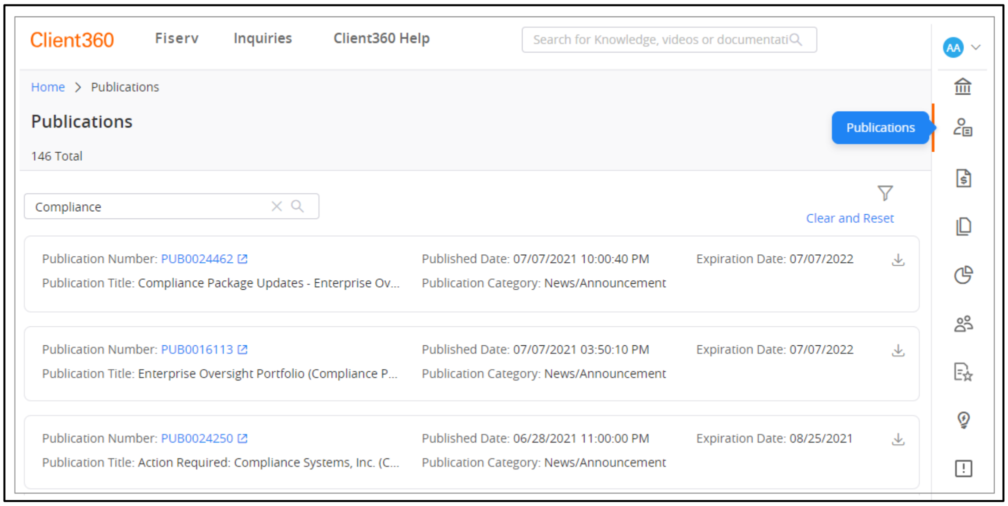
Publications

Publications provide information to users of Fiserv products. Also referred to as targeted communications or client communications, some Publications are of immediate interest and with short shelf-life while others have a continuous life-cycle where clients regularly look for new or updated attachments.

Users subscribe to Publications per product, in Product Preference settings.

Publications offer three primary categories:

- News/Announcements: Save the Date, Reminder, Post Implementation, Scheduled System Maintenance, General Information/Other, Compliance Packages
- 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.


Client360
Fiserv
Inquiries
Client360 Help
Search for Knowledge, videos or documentati
AA
Home > Publications
Publications
Clear and Reset

Publications

146 Total

Compliance

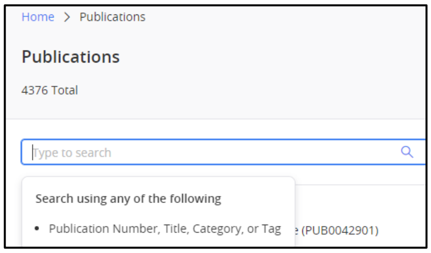
Publication Number: PUB0024462 | Published Date: 07/07/2021 10:00:40 PM | Expiration Date: 07/07/2022
Publication Title: Compliance Package Updates - Enterprise Ov... | Publication Category: News/Announcement

Publication Number: PUB0016113 | Published Date: 07/07/2021 03:50:10 PM | Expiration Date: 07/07/2022
Publication Title: Enterprise Oversight Portfolio (Compliance P... | Publication Category: News/Announcement

Publication Number: PUB0024250 | Published Date: 06/28/2021 11:00:00 PM | Expiration Date: 08/25/2021
Publication Title: Action Required: Compliance Systems, Inc. (C... | Publication Category: News/Announcement

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


Home > Publications
Publications
Type to search

4376 Total

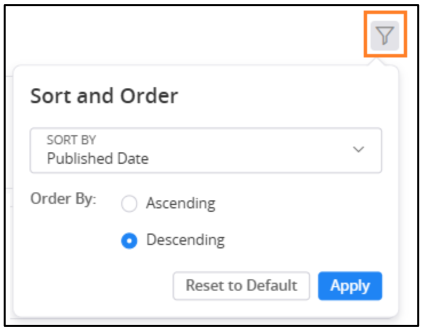
Search using any of the following

- Publication Number, Title, Category, or Tag

(PUB0042901)

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.


Sort and Order
Reset to Default
Apply

SORT BY: Published Date

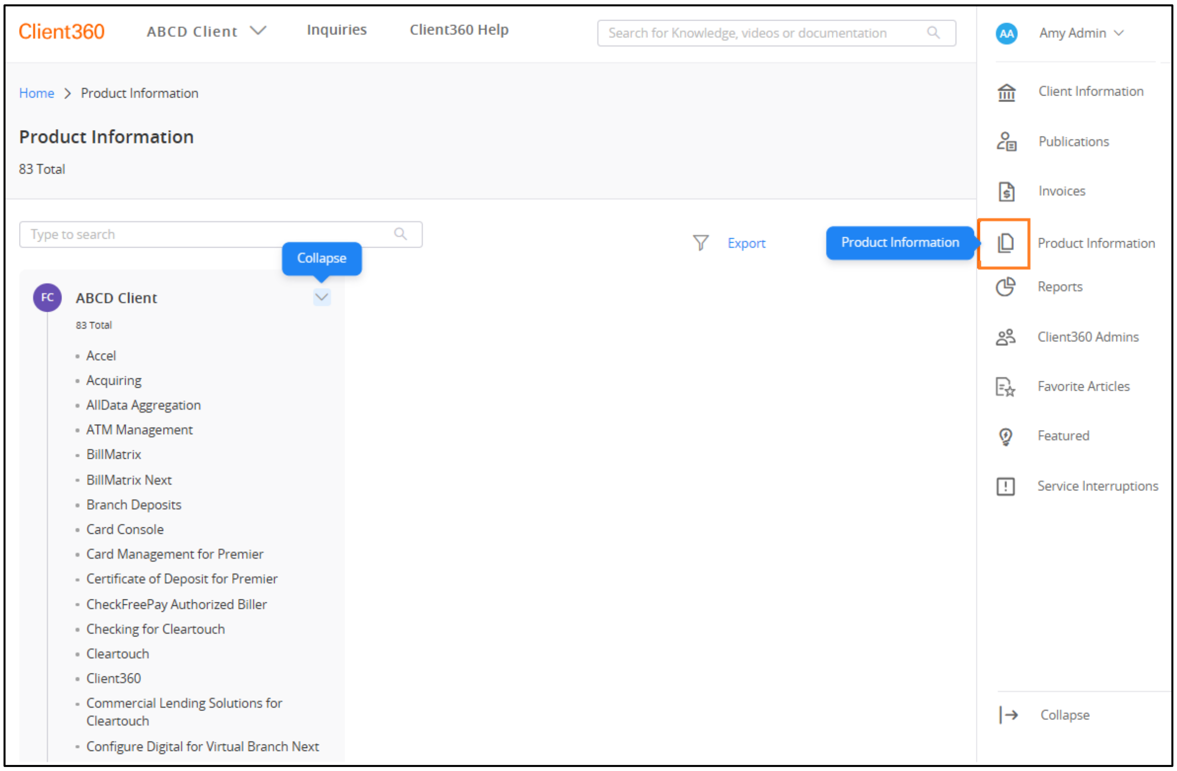
Order By: ○ Ascending ● Descending

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.


Client360
ABCD Client
Inquiries
Client360 Help
Search for Knowledge, videos or documentation
AA
Amy Admin
Home > Product Information
Product Information
83 Total
Type to search
Collapse
Export
Product Information
Client Information
Publications
Invoices
Product Information
Reports
Client360 Admins
Favorite Articles
Featured
Service Interruptions
Collapse
FC

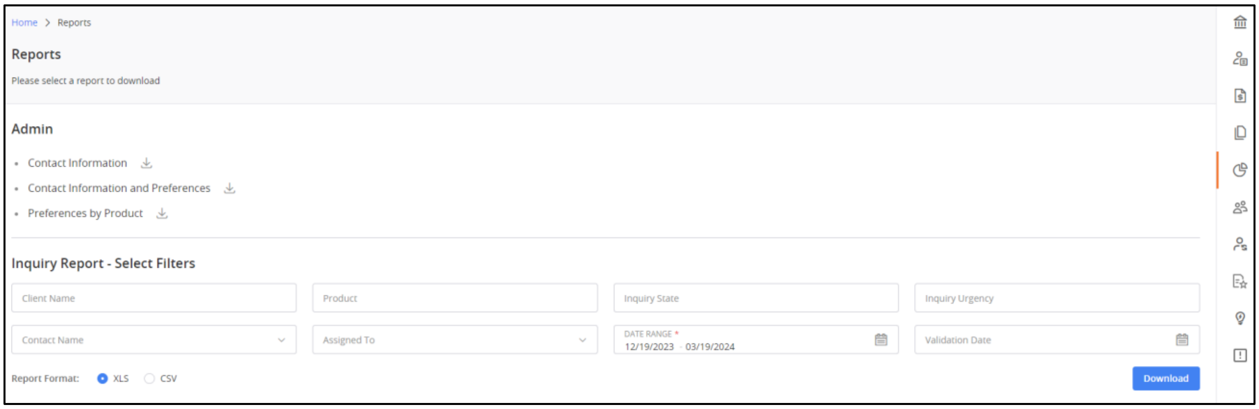
ABCD Client

83 Total

- Accel
- Acquiring
- AllData Aggregation
- ATM Management
- BillMatrix
- BillMatrix Next
- Branch Deposits
- Card Console
- Card Management for Premier
- Certificate of Deposit for Premier
- CheckFreePay Authorized Biller
- Checking for Cleartouch
- Cleartouch
- Client360
- Commercial Lending Solutions for Cleartouch
- Configure Digital for Virtual Branch Next

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.


Home > Reports

Reports

Please select a report to download

Admin

- Contact Information
- Contact Information and Preferences
- Preferences by Product

Inquiry Report - Select Filters

DATE RANGE * 12/19/2023 - 03/19/2024

Report Format: ● XLS ○ CSV

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 with a maximum date range of 3 months and be generated in PDF or XLS format.

Download Inquiry Reports

1. Select **Reports** from the Quick Access Menu.
2. Select the report Criteria.

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

3. Select **Download**.

Document Updates

Date	Version	Change
6/30/2022	1.0	Initial publication of the guide.
5/1/2024	2.0	Document updated to reflect feature enhancements to the user interface.
10/1/2024	3.0	Update Manage Settings – Notification option.

About the Client360 User Guide

Documentation Version 3.0