

## **Client360**

### **Client360 User Guide EMEA Germany**

September 2025



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## 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 inquiries and replaces the ServicePoint case management 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
- AI-boosted search results based on the client's unique products and specific queries
- New integrated tools to enable account representatives and other service associates on the service teams to provide the highest level of support.

# Getting Started

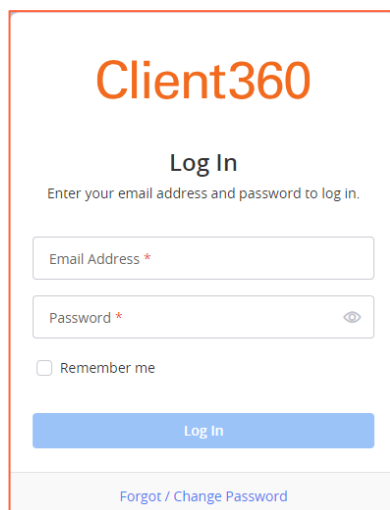
## Technical Requirements

Client360 supports the following browsers, although we recommend that you use Chrome for the best experience.

- Chrome (latest version)
- Edge (latest version)
- Firefox (latest version)
- Safari (latest version, Mac only)

## Log In

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



Client360

Log In

Enter your email address and password to log in.

Email Address \*

Password \*

Remember me

Log In

[Forgot / Change Password](#)

## First Time Users

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

1. Open the invitation/welcome email from Client360 (client360@fiserv.com). This email includes a temporary password and a link for establishing a new password.
2. Select the link to verify the email address and establish a new password.
3. Enter the email address on the subsequent page. This email address must match the email address in the user’s Client360 profile.
  - The user can add additional email addresses and phone numbers to the profile for future verifications after the initial set up is complete.
4. Select **Send Verification Code**.

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

## Multifactor Authentication (MFA)

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

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

## How to Authenticate with MFA

1. After providing Username and Password credentials, Client360 prompts the user 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 can 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 you do not receive a code, try again using the same or a different delivery method. You can attempt to enter the code five times before Client360 locks your account.

## Update MFA Delivery Methods

The screenshot shows the Client360 user profile page for 'ABCD Client'. The 'Profile' section is active, and the 'GENERAL INFORMATION' tab is selected. The 'General Information' section includes fields for First Name (Estachio), Last Name (Caruso), Email (estachio.caruso@abctdbank.com), Title, Client Name (ABCD Client), Primary Client (ABCD Client), Business Phone, Mobile Phone, After Hours Phone, Language (English), and After Hours Contact (No). The 'Time Zone Settings' section shows the time zone as (GMT -5:00) Central Time, Chicago. An 'Edit' button is visible next to the 'General Information' section. On the right, the 'Change History' section shows a list of recent changes, including 'Edited Mobile Phone to' and 'Selected Show all inquiry all contacts Yes'.

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 settings, as necessary to define MFA delivery methods. Client360 prompts the user to select a delivery method during login using fields populated with their contact information from **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 60 days, if Client360 locks the account due to inactivity, if the user has forgotten their password, or if the user is concerned about security.

### How to Reset the Password

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

### Password Requirements

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

### Account Lock Out

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

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

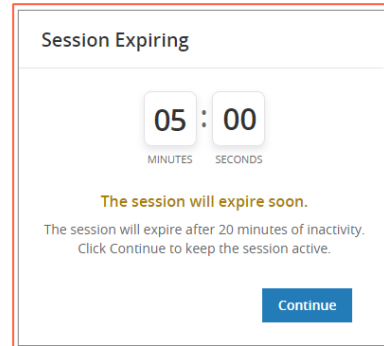
## Session Timeout

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

## Email Notification

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

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



## Navigate the Home Page

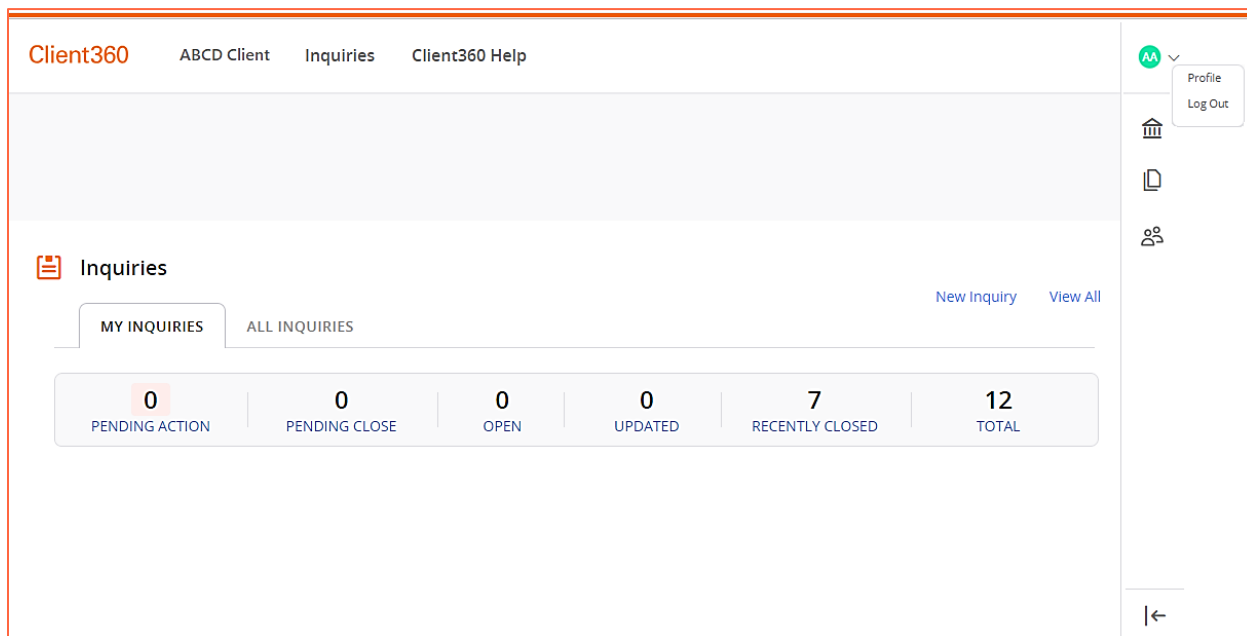
Fiserv designed the Client360 home page for intuitive, efficient navigation. We briefly introduce each section below and document it more fully in terms of pages, fields, and functionality in its own section later in the guide.

A condensed **Inquiry Dashboard** displays in the center of the page with **Activity Tabs** which organize and summarize inquiries by state and activity criteria for the user’s inquiries (My Inquiries) and, if enabled, All Inquiries.

The **Inquiries** page opens when users select any of three areas from the home page: an Activity Tab within the Inquiry Dashboard, the **View All** link above the Inquiry Dashboard, or the **Inquiries** link from the upper banner.

Users can access their **Profile** from the dropdown menu next to their initials in the upper right.

The vertical **Quick Access Menu** displayed to the right provides users with icons to view their client information, a list of products, and a directory of Client360 Administrators configured for the client organization.

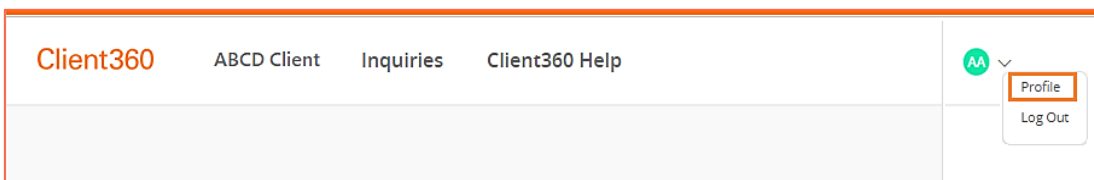


## Personal Profile and Portal Settings

A user's Client360 profile includes contact information and preferences.

The **General Information** tab defines contact information for the user, while the **Portal Information** tab controls notification, inquiry access and product-level access to service interruptions, publications, and inquiry creation. **Change History** for the user profile displays in the panel to the right.

### Update General Information & Portal Information



1. From the upper-right corner, open the **dropdown** next your initials/name.
2. Select **Profile**.
3. Select the appropriate tab for **General Information** or **Portal Information**.
4. Select **Edit**.
5. Update the settings as necessary (see below for additional guidance).
6. Select **Save**.

### General Information

Users can update their contact information by selecting **Edit** from the **General Information** tab.

On the General Information tab, the user can update:

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 -4:00) Eastern Time (US & Canada)		

- 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.

---

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

The user can update **Notifications** after selecting **Edit** from 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 display for **Service Interruptions\***, **Publications\***, **Create Inquiry**, and **Favorite Product**. A green, circled checkmark indicates the option(s) enabled; a black, circled x indicates the option(s) disabled.

The Client360 Administrator can establish an **Admin Lock** setting for each product, for each user.

Users can update **Product Preferences** after selecting **Edit** from the **Portal Information** tab.

If the Admin Lock setting is not checked, the user can update **Service Interruptions\***, **Publications\***, **Create Inquiry**, and **Favorite Product** preferences for the product(s). If the Admin Lock setting is checked, the user cannot update **Service Interruptions\***, **Publications\***, **Create Inquiry**, and **Favorite Product** preferences for the product(s).

\* **Note:** Service Interruptions and Publications are placeholders for future use.

## Manage Information

- **Notifications (Service Interruptions and Publications)**

Selecting the Notifications box allows Client360 to send notifications for publications and service interruptions to the user. If unchecked, the user does not receive notifications 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 the user does not select this box, they 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 the user does not select this box, they cannot see comments or attachments that contain sensitive data.

## Product Preferences

- **Service Interruptions\***

Selecting the **Service Interruptions** box allows the user to receive email notifications related to an outage or type of interruption of service for the product(s).

- **Publications\***

Selecting the **Publications** box allows the user to receive email notification and online access to client communications for the product(s) within the Publications module of Client360.

- **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.

- **Favorite Product**

Selecting this field allows the user to designate the product as a favorite while creating an inquiry.

\* **Note:** **Service Interruptions** and **Publications** are placeholders for future use.

## Inquiries Tab

Users can navigate to the **Inquiries** tab from the Client360 Home page by selecting **Inquiries** from the upper banner, by selecting the **View All** link in the lower right, or by selecting an Activity Tab from the Inquiry Dashboard.

**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** enabled.

**My Watchlist** displays all inquiries in which the user is a member of its 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 someone has added the user to the Watchlist.

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

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

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

The screenshot displays the Client360 Inquiries Dashboard. At the top, there are navigation links for 'Client360', 'ABCD Client', 'Inquiries', and 'Client360 Help'. Below this is a breadcrumb 'Home > Inquiries' and a 'New Inquiry' button. The dashboard features three tabs: 'MY INQUIRIES', 'ALL INQUIRIES', and 'MY WATCHLIST'. A 'Reporting Category' dropdown is set to 'All'. A summary bar shows counts for 'PENDING ACTION' (0), 'PENDING CLOSE' (0), 'OPEN' (1), 'UPDATED' (1), 'RECENTLY CLOSED' (0), and 'TOTAL' (1). Below this is a search bar and sorting options. A table lists an inquiry with ID 'EI00005550', status 'New', and various dates and assigned users.

Reporting Category	PENDING ACTION	PENDING CLOSE	OPEN	UPDATED	RECENTLY CLOSED	TOTAL
All	0	0	1	1	0	1

ID	Status	Assigned To	Created Date	Updated Date	Updated By
EI00005550	New	—	07/15/2024 03:48:4...	07/15/2024 03:48:...	—

## Activity Tabs

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

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

## Inquiry Card

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

MY INQUIRIES
ALL INQUIRIES
MY WATCHLIST

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

0  
PENDING ACTION

0  
PENDING CLOSE

1  
OPEN

1  
UPDATED

0  
RECENTLY CLOSED

1  
TOTAL

Sort by: Inquiry Number
Order By: Ascending

EI00005550	<span style="background-color: #e91e63; color: white; padding: 2px 5px; border-radius: 10px;">New</span>	Assigned To: —	Updated Date: 07/15/2024 03:48:...
ControlID - please advise on con...	ControlID EMEA in Production	Created Date: 07/15/2024 03:48:4...	Updated By: —
Validation Date: —	Client Defined Field: —		

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

## Search and Sort Options

The user can search for inquiries using the search bar and **Sort by** and **Order By** features.

The screenshot displays the FISERV inquiry search interface. At the top, there are three tabs: 'MY INQUIRIES', 'ALL INQUIRIES', and 'MY WATCHLIST'. Below the tabs, the 'Reporting Category' is set to 'All'. To the right, there are links for 'Reset to Default' and 'Saved filter: No filter selected'. A summary bar shows counts for various statuses: 0 PENDING ACTION, 0 PENDING CLOSE, 1 OPEN (highlighted with a blue box), 1 UPDATED, 0 RECENTLY CLOSED, and 1 TOTAL. Below this is a search bar with the placeholder 'Type to search' and a magnifying glass icon. To the right of the search bar are dropdown menus for 'Sort by: Inquiry Number' and 'Order By: Ascending'. At the bottom, a sample inquiry card is shown with details like 'EI00005550', 'ControlID - please advise on con...', 'Assigned To: —', 'Updated Date: 07/15/2024 03:48:...', 'Validation Date: —', 'ControlID EMEA in Production', 'Created Date: 07/15/2024 03:48:4...', and 'Client Defined Field: —'. A 'New' badge is present next to the inquiry number.

### 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

## 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 Fiserv presents the client 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 user selects **No**, the inquiry automatically reopens, and the state changes from **Resolved** to **In Progress**.
- When the user selects **Yes**, the inquiry state changes from **Resolved** to **Closed**.
- If no action occurs 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:** You cannot reopen a closed inquiry.

## 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 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.

The screenshot shows the Client360 interface with the following elements:

- Header:** Client360, ABCD Client, Inquiries, Client360 Help, and a user profile icon (AA).
- Left Sidebar:**
  - Home > Inquiries
  - Inquiries section with tabs: MY INQUIRIES, ALL INQUIRIES, MY WATCHLIST
  - Reporting Category: All
  - Summary cards: 0 PENDING ACTION, 1 UPDATED
  - Search bar: Type to search
  - Inquiry card for EI00005550: Assigned To: —, ControlID - please advise on configuration sett..., Created Date: 07/15/2024 03:48:42 PM, Validation Date: —
- Main Content Area (Inquiry Details):**
  - Header: EI00005550 (with close icon), Inquiry Details (with icons for expand, refresh, print, and share), and a 'New' badge.
  - Text: ControlID - please advise on configuration settings.
  - Tabs: Details (selected), Comments, Attachments, Watchlist, Timeline
  - Summary Section:**
    - GENERAL INFORMATION:**

PRODUCT	CATEGORY 1	CATEGORY 2	CATEGORY 3
ControlID EMEA in Production	ControlID EMEA in Production	Technical Issue	General Inquiry
    - CONTACT NAME:** Amy Admin (with edit icon)
    - INQUIRY URGENCY:** 4 - Low (with edit icon)
    - ASSIGNED TO:** —
    - CREATED DATE:** 07/15/2024 03:48:42 PM
    - CLOSED DATE:** —
    - UPDATED BY:** shannon drake (Fiserv)
    - UPDATED DATE:** 07/15/2024 03:48 PM
    - RESOLVED DATE:** —
    - CLIENT DEFINED FIELD:** — (with edit icon)
    - SUFFIX FIELD:** —
    - REPORTING CATEGORY:** Service
    - REPORTING SUB CATEGORY:** —
    - INQUIRY DETAILS:** Specifically looking for posting order and establishing initial activity fees.
  - Actions:** Close Inquiry

**Inquiry Details** include the following:

- 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 this 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 can use to configure specific categorization or reporting needs. This field appears in 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.
- **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.

## Comments

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

Email replies from the client user appear in the **Comments** tab. Use the magnifying glass icon to search comment history.

Client360 removes sensitive comments and attachments 90 days after closure to maintain PCI regulatory compliance.

## Attachments

The **Attachments** tab is where users can upload and view attachments related to the inquiry. Individual attachments cannot exceed 25 MB, and total attachments cannot exceed 100 MB. The file name cannot contain decimal points other than that which precedes the extension.

See the following table for accepted formats.

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

## Watchlist

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

## Timeline

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

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

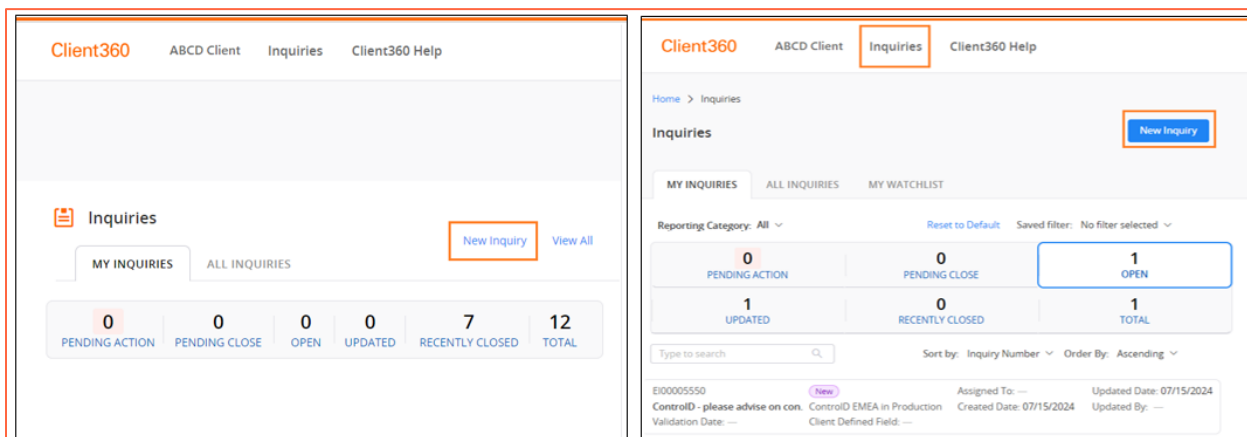
The user can filter and sort the timeline by selecting the search icon and selecting an option to Filter, Sort and Order by. Timeline selections to filter by are:

Accepted Inquiry Resolution	Close Task (manually)	Remove Watchlist Member
Add Comments	Create Inquiry	Reopen Inquiry
Add Inquiry Attachment	Download Inquiry Attachment	Resolve Inquiry
Add Watchlist Member	Reject Inquiry Resolution	Transfer Inquiry
Assign Inquiry	Remove Comments	Update Inquiry Attachment
Close Inquiry (by submitter)	Remove Inquiry Attachment	Category
Close Inquiry (by system)	Remove Sensitive Data	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 page.



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

The screenshot shows a 'New Inquiry' form. At the top left is the Fiserv logo and the text 'New Inquiry'. Below this are three dropdown menus. The first is labeled 'CLIENT NAME \*' and has 'Fiserv Inc' selected. The second is labeled 'Product \*'. The third is labeled 'Inquiry Type \*'. The entire form area is enclosed in a red rectangular border.

3. Select the **Product**.  
The portal settings established on the user profile determine the product selection list. 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 be available but are not sustainable.
  - 4 - Low:** Functionality issues within the production or nonproduction service or application that do not impact business operations.
6. Enter a **Short Description** to reflect a high-level summary of the question or issue.
7. Select **Next**.
8. Select **Category** options that best reflect the question or issue presented.
9. Select **Next**.
10. Complete **Additional Information** fields. The previously selected product and category determine **Additional Information** fields. These fields ensure that Fiserv engages and enables the right teams to achieve the timeliest 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:** Fiserv reserves this field 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. Client360 considers all attachments sensitive and encrypts them.
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** page by selecting **Inquiries** from the upper banner, by selecting the **View All** link in the lower right, or by selecting an Activity Tab from the Inquiry Dashboard.
2. Select the inquiry from **My Inquiries**, **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 body of the email. Client360 captures the message and creates a new comment from the reply.

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

## Close an Inquiry

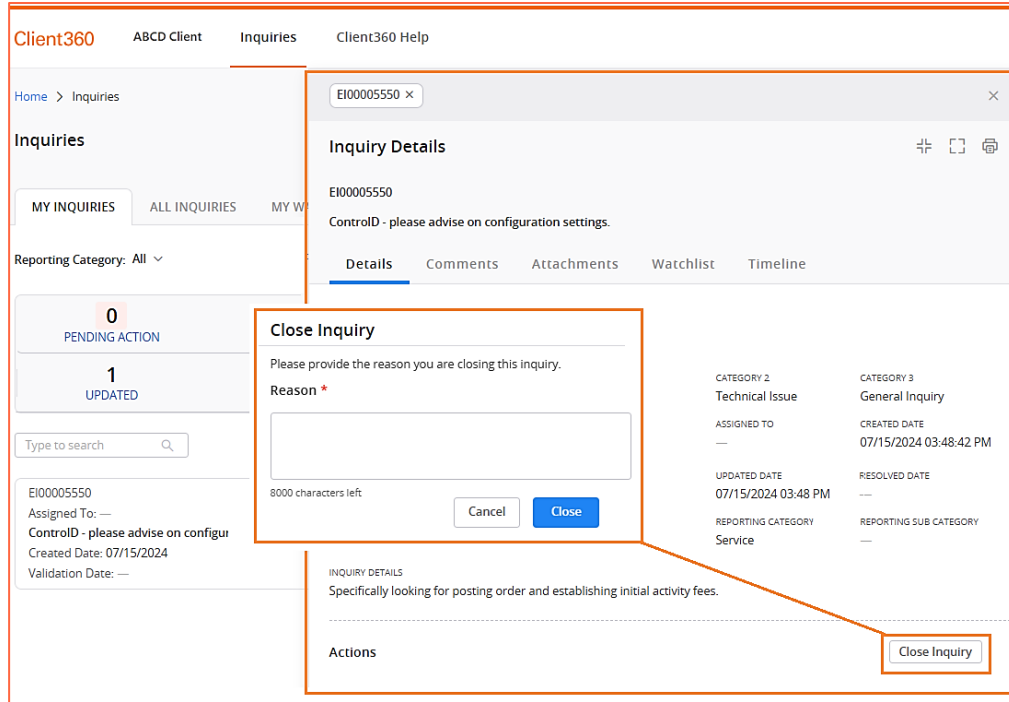
Sometimes a user needs to close an inquiry themselves. Client360 provides this functionality.

### Close an Inquiry without Fiserv Support

1. Navigate to the **Inquiries** tab by selecting **Inquiries** from the top, **View All** in the Inquiry Dashboard, or a dashboard activity tab.
1. Select the inquiry from **My Inquiries**, **All Inquiries**, or **My Watchlist**. The **Details** tab of the **Inquiry Details** pane appears.
2. Scroll to the end of the **Details** tab.
3. Select **Close Inquiry**. The **Close Inquiry** window appears.
4. Provide the reason for closing the inquiry in the **Reason** field and select **Close**.

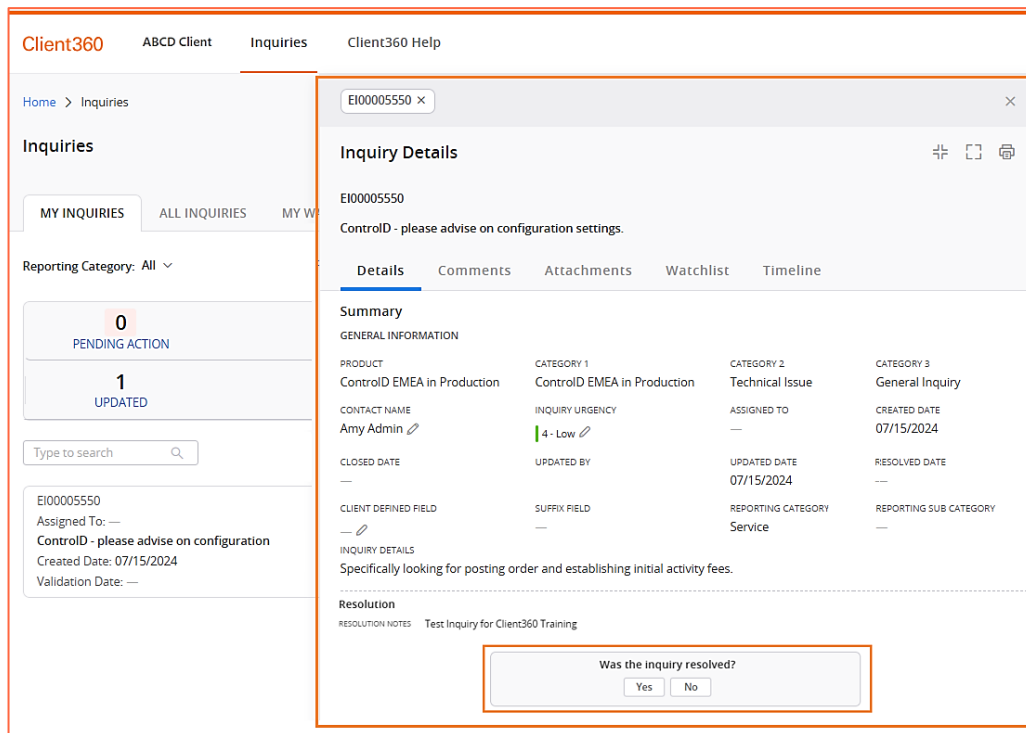
Client360 adds the Close Reason into a new comment and to the **Resolution Notes** field.

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



## Resolve an Inquiry

When Fiserv resolves an inquiry, Client360 changes the status to **Resolved**. The user receives a notification, and the inquiry appears 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.



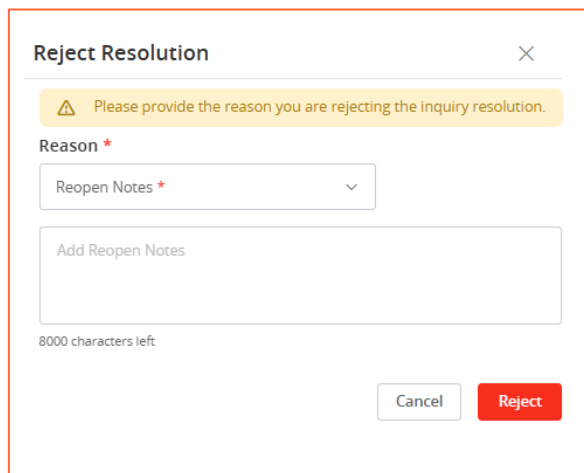
If a user does not act on a Pending Close inquiry within 14 days, it closes automatically. If the user needs additional assistance, they must open a new inquiry.

### Accept a Resolution and Close an Inquiry

1. Locate the inquiry in the **Pending Close** tab of the Inquiry List.
2. Select the inquiry from the inquiry list. The **Details** tab of the Inquiry Details pane appears.
3. Scroll to the end of the **Details** tab.
4. Answer the question, **Was the Inquiry resolved?** by selecting **Yes** to immediately close the inquiry.
5. The inquiry is now complete. The user can now review this inquiry anytime from the **Total Inquiries** list. It no longer appears open or pending.

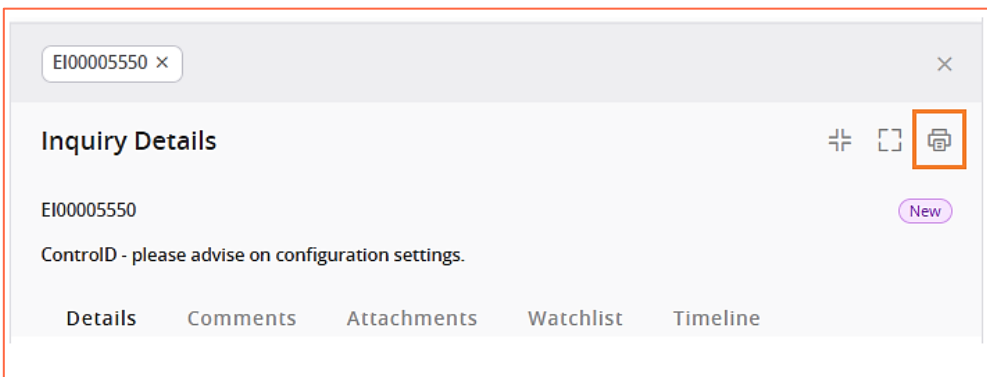
### Reject a Resolution and Keep the Inquiry Open

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 **Reason**.
6. Enter the **Reopen Notes** to provide Fiserv support with complete details regarding why the inquiry remains unresolved.
7. Select **Reject**.






### Print an Inquiry


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

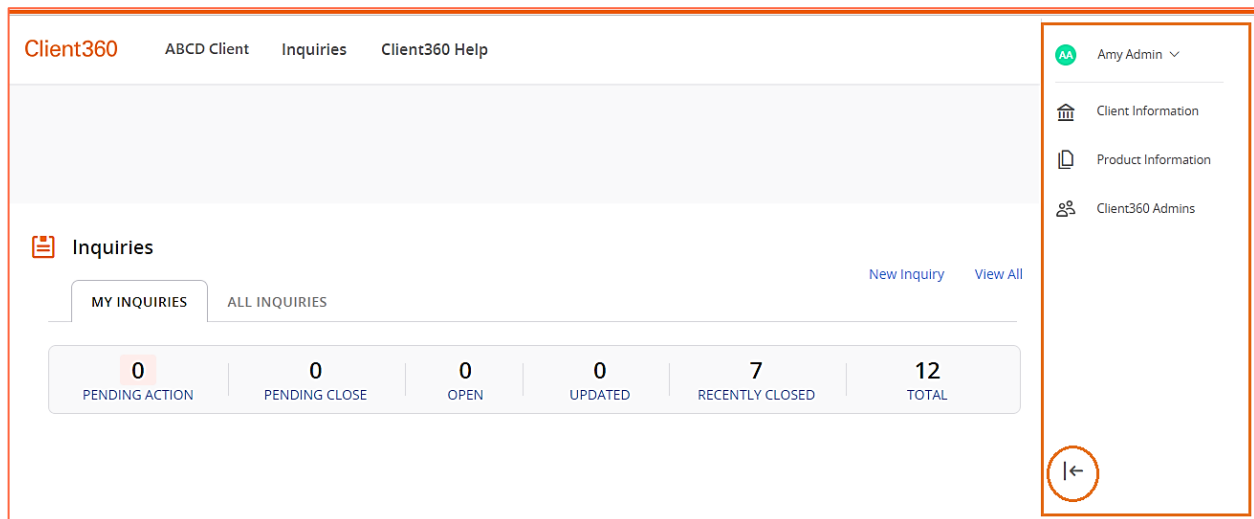


## Quick Access Menu

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

Quick Access Menu Icons	
	The Client Information tab displays your 9-digit Client Identifier.
	The Product Information tab displays a read-only list of Fiserv-licensed products for your organization.
	The Client360 Admins tab displays a list of admins at your financial institution.

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



The screenshot shows the Client360 interface with the following elements:

- Header: Client360, ABCD Client, Inquiries, Client360 Help
- Navigation: Inquiries (selected), New Inquiry, View All
- Filters: MY INQUIRIES (selected), ALL INQUIRIES
- Summary Cards:
  - PENDING ACTION: 0
  - PENDING CLOSE: 0
  - OPEN: 0
  - UPDATED: 0
  - RECENTLY CLOSED: 7
  - TOTAL: 12
- Quick Access Menu (Expanded):
  - Amy Admin (AA) with dropdown arrow
  - Client Information (Bank icon)
  - Product Information (Document icon)
  - Client360 Admins (Group icon)
- Expand Icon: A red circle highlights the expand icon (|←) at the bottom right of the menu.

## 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.

The screenshot displays the Client360 interface. At the top, there are navigation links: Client360, ABCD Client, Inquiries, and Client360 Help. On the right, a user profile for Amy Admin is shown. Below the navigation, a breadcrumb trail indicates the current location: Home > Product Information. The main heading is 'Product Information' with a sub-heading '1 Total'. A search bar is present with the placeholder text 'Type to search'. Below the search bar, a card for 'ABCD Client' is shown, indicating '1 Total' products, with a list item 'ControllID EMEA'. On the right-hand side, a vertical menu contains 'Client Information', 'Product Information' (highlighted with an orange box), and 'Client360 Admins'. An 'Export' button is also visible.

## Document Updates

Date	Version	Change
9/26/2025	3.4	Removed Fiserv relationship team content since this feature is no longer going in.
9/25/2025	3.3	Updated document to reflect new abilities to engage the Fiserv Relationship Team and add products as favorites.
7/24/2025	3.2	Updated document to reflect new Portal Information settings page.
2/13/2025	3.1	Update General Information screenshot to reflect functionality not yet present for Germany.
10/1/2024	3.0	Update Manage Settings – Notification option.
8/16/2024	1.1	Update Password Change window.
7/26/2024	1.0	Initial publication of the guide.

# About the Client360 EMEA Germany User Guide

Documentation Version 3.4