FIS Client Portal User Guide

November 2021

Contents

Introduction

Welcome

Welcome to the FIS Client Portal – a resource that expands your support options using the Web. The Client Portal provides a self-service, secure environment to access product information that is specific to your organization. Benefits include:

- Secure on-line alternative to telephone, e-mail, and fax communication with FIS
- Real-time updates available on issues
- Available 24x7

About this Guide

This guide is an introduction to the FIS Client Portal for new users. It is geared toward general users as well as Portal Administrators. Sections only applicable to Administrators are clearly labeled.

The **Client Portal Features** section of this guide is organized to mirror the left navigation menu available in the Portal. If you see a menu item described in this guide that you do not see in the Portal, that feature is either not available for your Product (or Products), or it is not enabled for your account.

General Information

Getting Started

FIS Client Portal access is either granted by FIS (as in the case of a new system implementation or during a conversion) or by your own organization's Client Portal Administrator. In either case, you will receive a username (usually your FirstName.LastName or email address) and a first-time temporary password (to be changed on first login).

Here is some important information for new users:

- The new FIS Client Portal is available at https://my.fisglobal.com
- This site is optimized for the latest version of Edge and Google Chrome.
- The login screen will ask for your Entity ID or Client ID of your organization and Username, and then for your temporary password on the next screen
- The first time you access the system, you will be prompted to change your password
- The password must contain at least 10 characters from at least three of the following four categories:
  - English Uppercase (A-Z)
  - English Lowercase (a-z)
  - Base Digits (0-9)
  - Non-Alphanumeric (e.g.: $, #, %)
- FIS takes your security very seriously. As such, you may be prompted to enable MFA (Multi-Factor Authentication) to access the Client Portal

Forgot Username

If you don't know your Portal username, please contact a Portal Administrator at your institution. If you are unable to reach or get assistance from an Administrator, call the IdP Global Help Desk at 1-844-6 FIS NOW (844-634-7669) and say "Client Portal" at the product prompt.

Password Help

If you forgot your Portal password or Username, you can use the **'Trouble Signing In?'** feature available on the login screen to get help around multiple login issues. When you log in with the temporary credential, the system will prompt you to create a new password.

*You must know your email address or Username on file with FIS to use this feature. If you are unable to use this help feature, please contact your **Client Portal Administrator** or call the help desk at 1-844-6 FIS NOW (844-634-7669), provide your Entity ID number, and say "Client Portal" at the product prompt.*

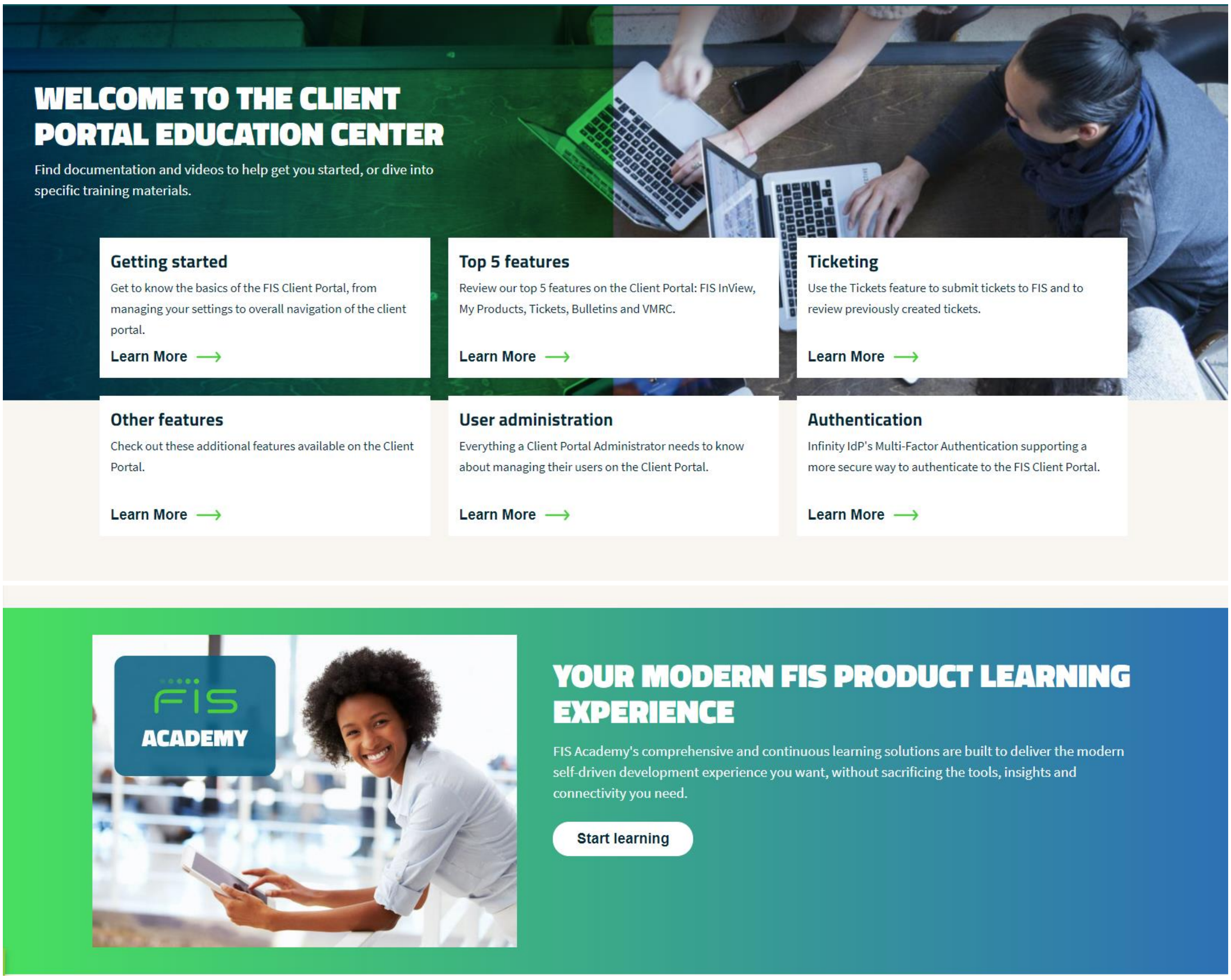
Client Portal Features

Welcome Bar

The Welcome Bar contains a 'Greeting' message with your Username. Next to that, you will see 3 items:

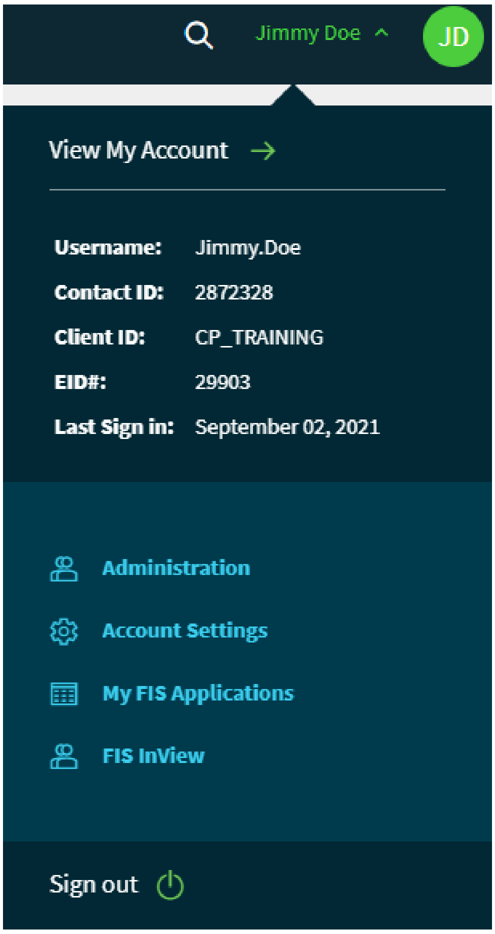
- Emulate Field: To view content and submit tickets for related institutions (Holding companies etc.)
- Global Search: To search for anything on the Client Portal.
- Username Dropdown: To view My Account Settings, My FIS Applications, FIS InView, and Administration for Client Portal Administrators.

When you log in for the first time, you will be directed to the Education Center homepage with eLearning video tutorials and user documentation. https://my.fisglobal.com/education-center



Username Dropdown

When a user clicks on his name appearing on at the top right corner, a dropdown will appear as shown below:

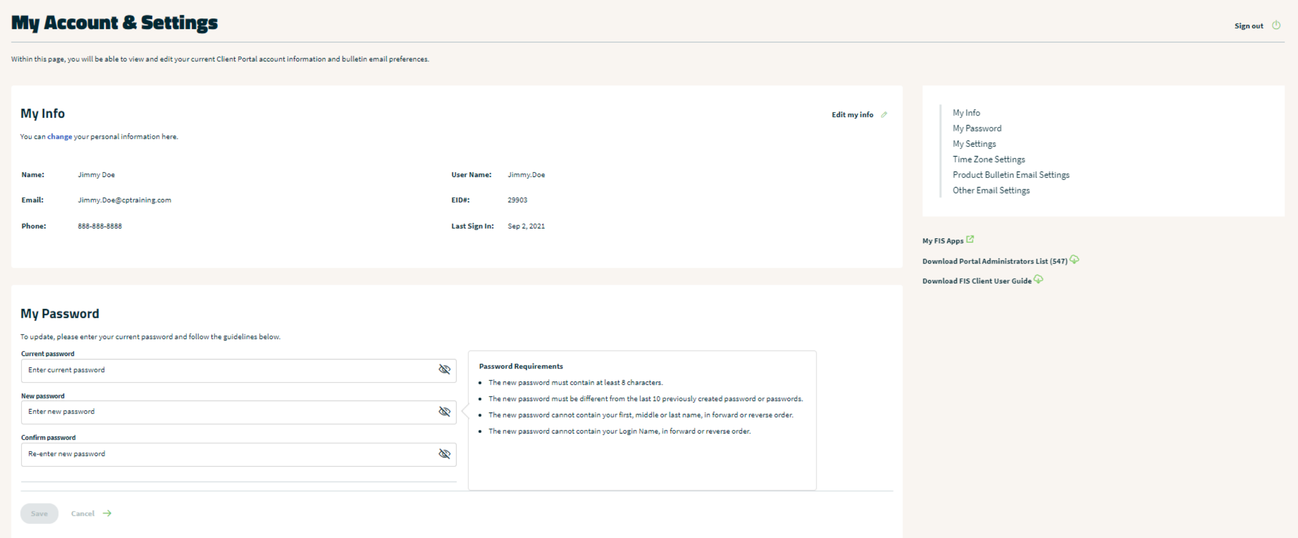


Here you will see details such as a link to “View My Account” which will take you to the “My Account & Settings” page, your Username, Contact ID, Client ID, EID# and Last Sign in information.

Followed by links for Administration (if you are a Client Portal Administrator), Account Settings, My FIS Applications, FIS InView, and a Sign Out option.

My Account & Settings

Within this page, you will be able to view and edit your current Client Portal account information and bulletin email preferences.



My Info

Under "My Info" you can view your Name, Email, Phone, User Name, EID# (entity id number), and Last Sign In. If your information is incorrect, you have the option to "Edit my info" by clicking on the link in the top right corner "Edit my info".

Only Client Portal Administrators can edit their User Name under My Info.

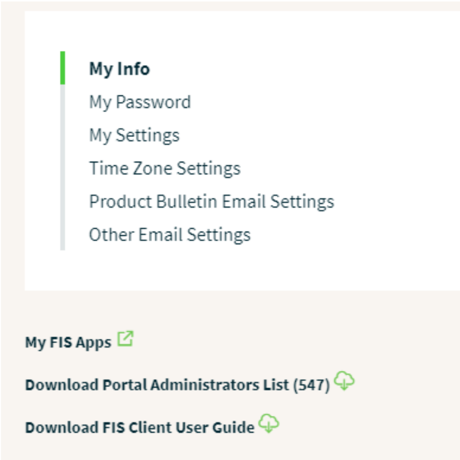
My Password

You can update your password in the "My Password" section. To update, please enter your current password and follow the guidelines for password requirements.

Side Navigation Menu

Within the right-side navigation menu, you will be able to navigate quickly to the other areas within "My Account & Settings". In addition, you can access the following areas:

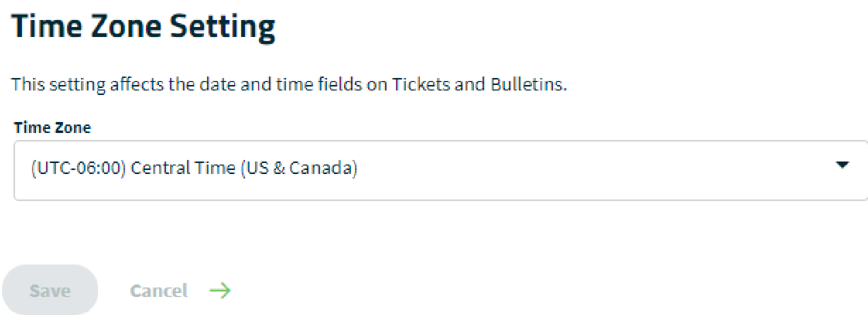
- My FIS Apps
- Download your Client Portal Administrators list
- View and download the FIS Client Portal User Guide



My Settings

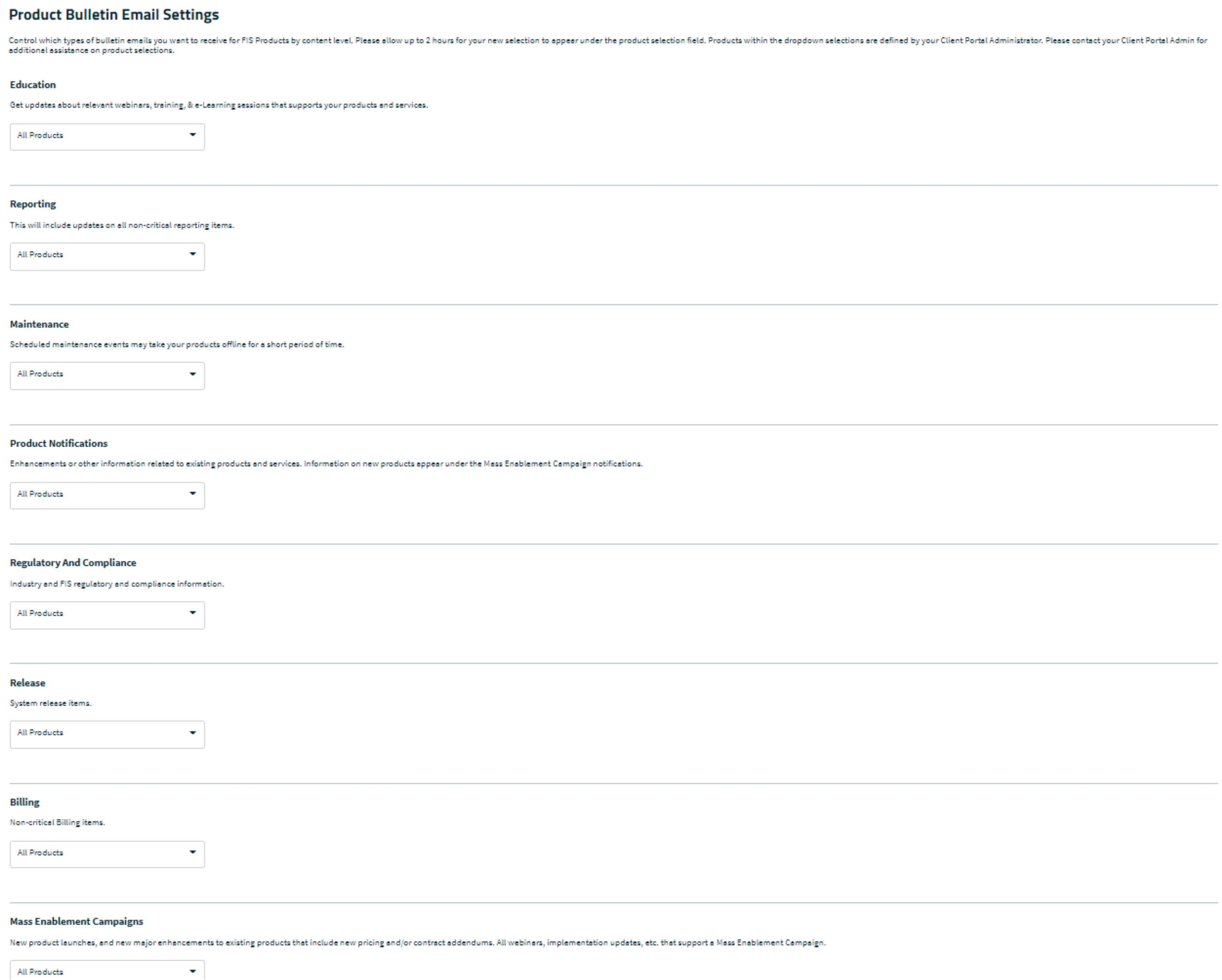
Time Zone Setting

Under “My Settings”, you will be able to adjust your time zone. Keep in mind, this setting affects the date and time fields on Tickets and Bulletins.



Product Bulletin Email Settings

Here you can manage your Bulletins’ email preferences at a general user level.

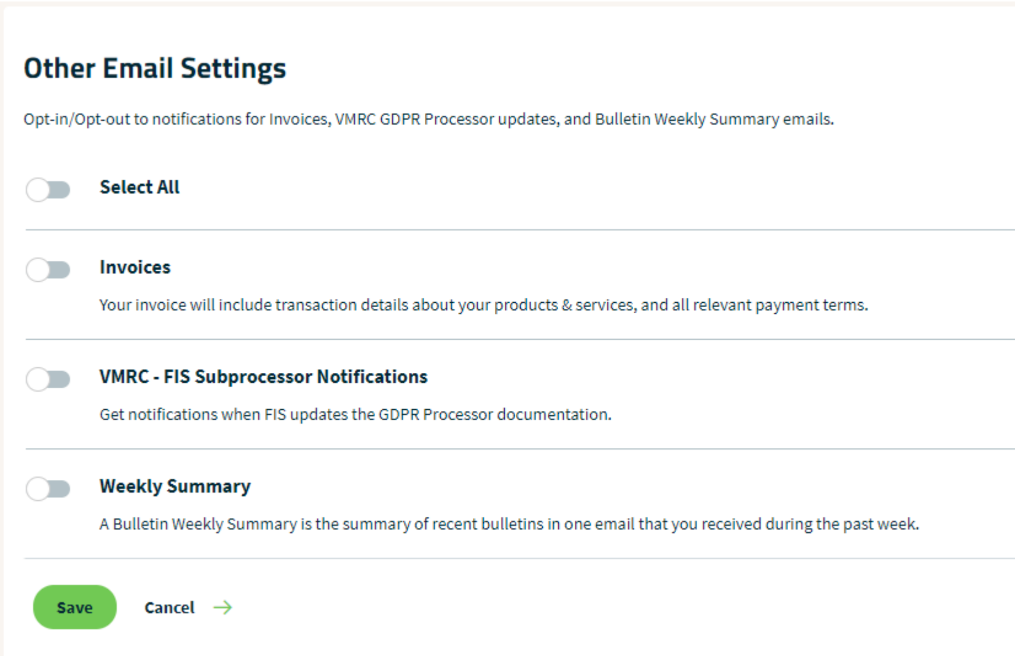


You can choose the type of bulletins you want to receive via email by content level. Simple as this is, there are a few things you need to know to properly set your preferences:

- Controlling your preferences for **individual** content types
  - You will now see products by individual content types. You will be able to select a specific product, multiple products, or all products for a specific content type.
- Mass Enablement Campaign
  - Within this content type, you can manage your Bulletin preferences related to Mass Enablement Campaigns such as new product launches, new major enhancements to existing products that include new pricing and/or contract addendums. All webinars, implementation updates, etc. that support a Mass Enablement Campaign

Other Email Settings

- **Invoice Email Preferences**
  - Click on Invoice Email Preferences to manage your invoice notifications at a general user level. From here you can now choose whether you would like to receive invoice email notifications by clicking on the on/off toggle button.
  - Please note, there are a few things that need to be associated with your account before this option becomes available under your preferences.
    - Your institution must have the Billing feature assigned to it by FIS.
    - Your Client Portal Admin must assign the ‘Billing Profile’ to your user account.
    - Your Client Portal Admin can also subscribe you for invoice notifications.
- **VMRC Preferences**
  - Opt-in/Opt-out to notifications when FIS updates the GDPR Processor documentation.
- **Bulletin Weekly Summary**
  - A Bulletin Weekly Summary is the summary of recent bulletins in one email that you received during the past week. This setting does not affect Individual Bulletin emails. You must have portal access to view these bulletins on the Client Portal.



Navigation Menu

The navigation menu includes links to access the different sections of the client portal.

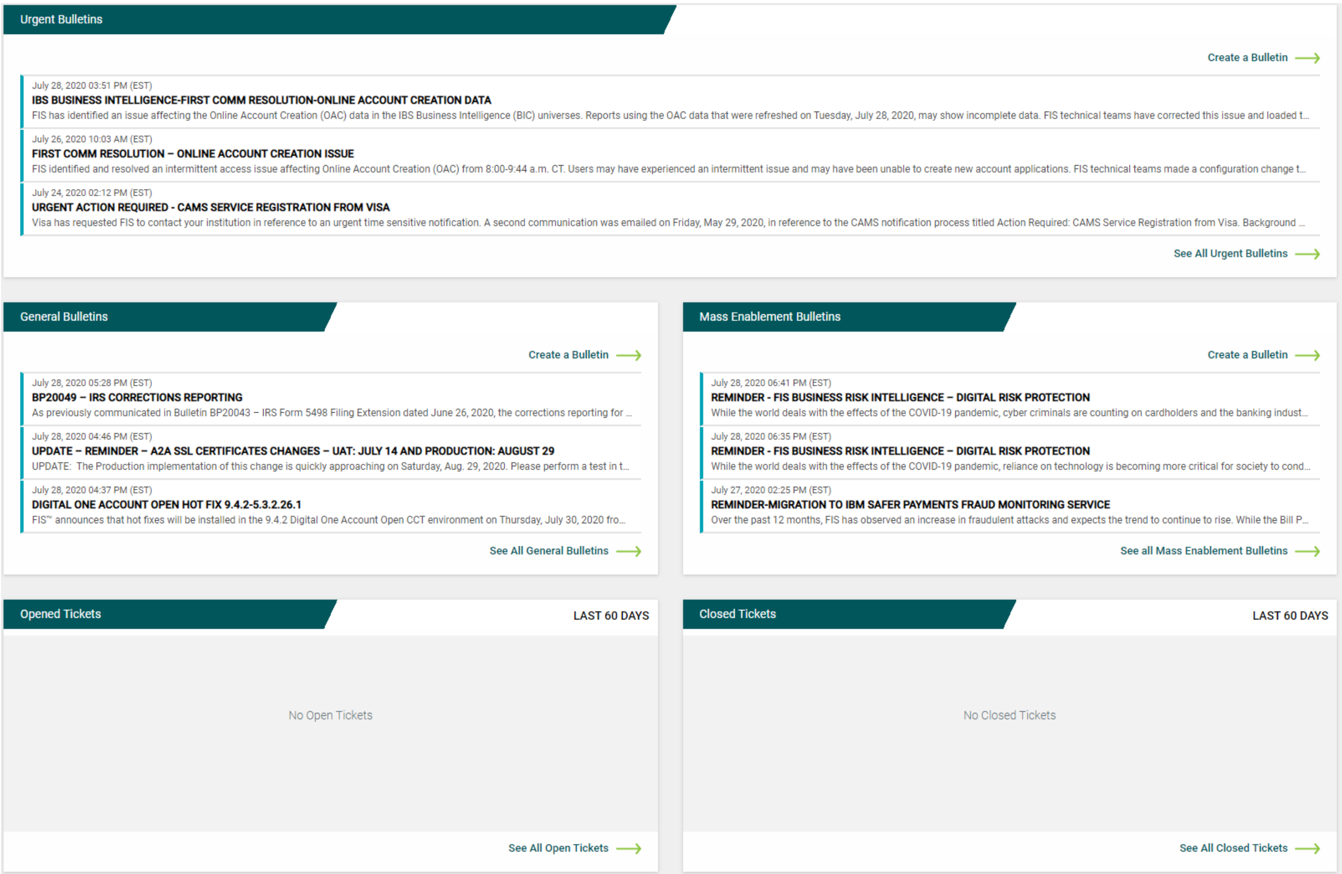
Dashboard	Access to the Client Portal main page
Tickets	Access to review tickets and to create new support tickets or client requests
My Products	Access to the institution's FIS products
Bulletins	Access to communications from FIS Support Groups
Community	Access to collaboration with client groups
Vendor Management	Access to Vendor Management Resource Center for audit materials
Invoices	Access to invoices and billing customer service
Reports	Access to a variety of reports specific to the organization
Education Center	Access to the FIS Client Portal Education Center for portal training
Support	Access to support features for each product
myFIStore™	Access to myFIStore™ for new FIS products and offerings
Administration	Access to administration cards to manage portal users

Dashboard

This page includes a welcome message, a navigation menu (on the left), the FIS Banner in the middle and a Bulletins and Tickets Section below followed by Marketplace and the FIS RISE section.

The **Bulletins and Tickets** section gives you at a quick look at the latest Bulletins and Support Tickets for your organization.

These sections also contain quick links to **Create a Ticket** and the Bulletins and Tickets' search pages.



Client Portal Company Relationships

Company Relationships (i.e. Parent/Child relationships) are for organizations with relationships to other organizations (Holding Company, League, Partner, etc.), where users access the Portal with a Single Sign-On and can use the Emulate feature to view content and submit tickets for related institutions.

This feature, if available to your institution, displays on the Dashboard in the upper-left section above the Banner, as shown below.

Please keep in mind, the emulate feature will only appear at the Holding Company level of the organization.

Tickets

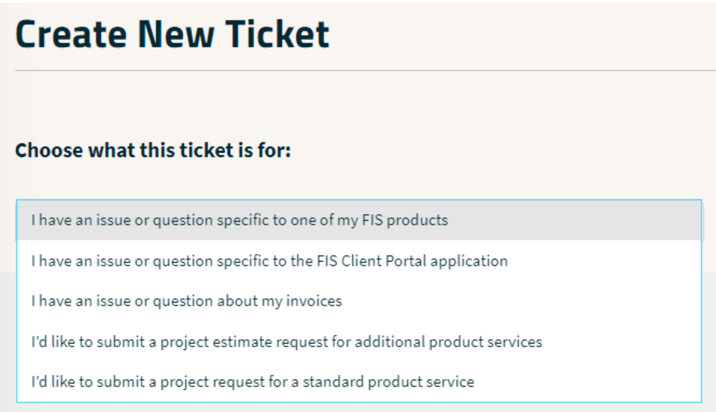
Please note, for FIS Capital Markets product support please raise tickets via the current support ticketing system (e.g. TeamSupport or SNOW). For Banking products, please follow the instructions below. If you're not sure of your account type, please check with your FIS Account Manager or Product Support Team.

Use the **Tickets** feature to submit tickets to FIS and to review previously created tickets. There are three ways you can access the Tickets feature:

- Click on **Tickets** on the left navigation menu
- Click on **See All Open Tickets** or **See All Closed Tickets** under the Opened Tickets and Closed Tickets section on the Dashboard page
- Navigate to the **Support** section on the left navigation menu and select a product, click on **My Support Tickets**

Creating a New Ticket

When you access the **Create New Ticket** button, five distinct options are available for opening a ticket.



Here is a quick breakdown of what each choice means:

1. **I have an issue or question specific to one of my FIS products** – These tickets should be created only if you have issues with an FIS product application other than the FIS Client Portal.

2. **I have an issue or question specific to the FIS Client Portal application** – These tickets should be created for troubles or enhancement requests for the FIS Client Portal application only.

3. **I have an issue or question about my invoices**– These tickets should be opened for questions around FIS billing and/or invoices. (Please note, you must have the billing profile to see this option)

4. **I'd like to submit a project estimate request for additional product services** - Select this option if you'd like to request an estimate for additional services related to an existing FIS product, application, or service. You can request work to be performed under a pre-approved budget amount or a customer credit. For additional information, please watch the Client Request Life Cycle eLearning tutorial.

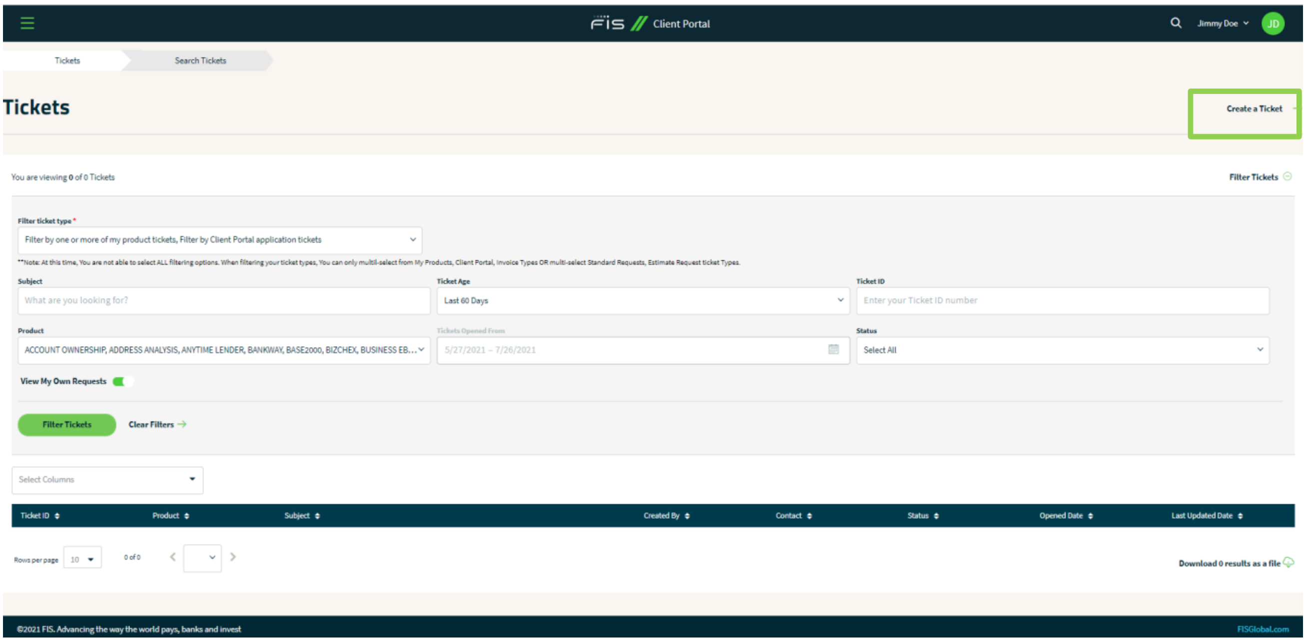
5. **I'd like to submit a project request for a standard product service -** Select this option if you'd like to request a project or service that has been identified by FIS product owners to be a predefined scope and cost. Standard Requests have a fixed scope and price. Examples include 40 Hours of

consulting for assistance with Code Connect or implementation of Single Sign On for HORIZON. For additional information, please watch the [Client Request Life Cycle] eLearning tutorial.

Depending on your Firm's settings, not all portal users will see these five ticketing options.

Choosing the right option is important so that your ticket routes to the right team. This helps us to engage and work to a resolution much quicker.

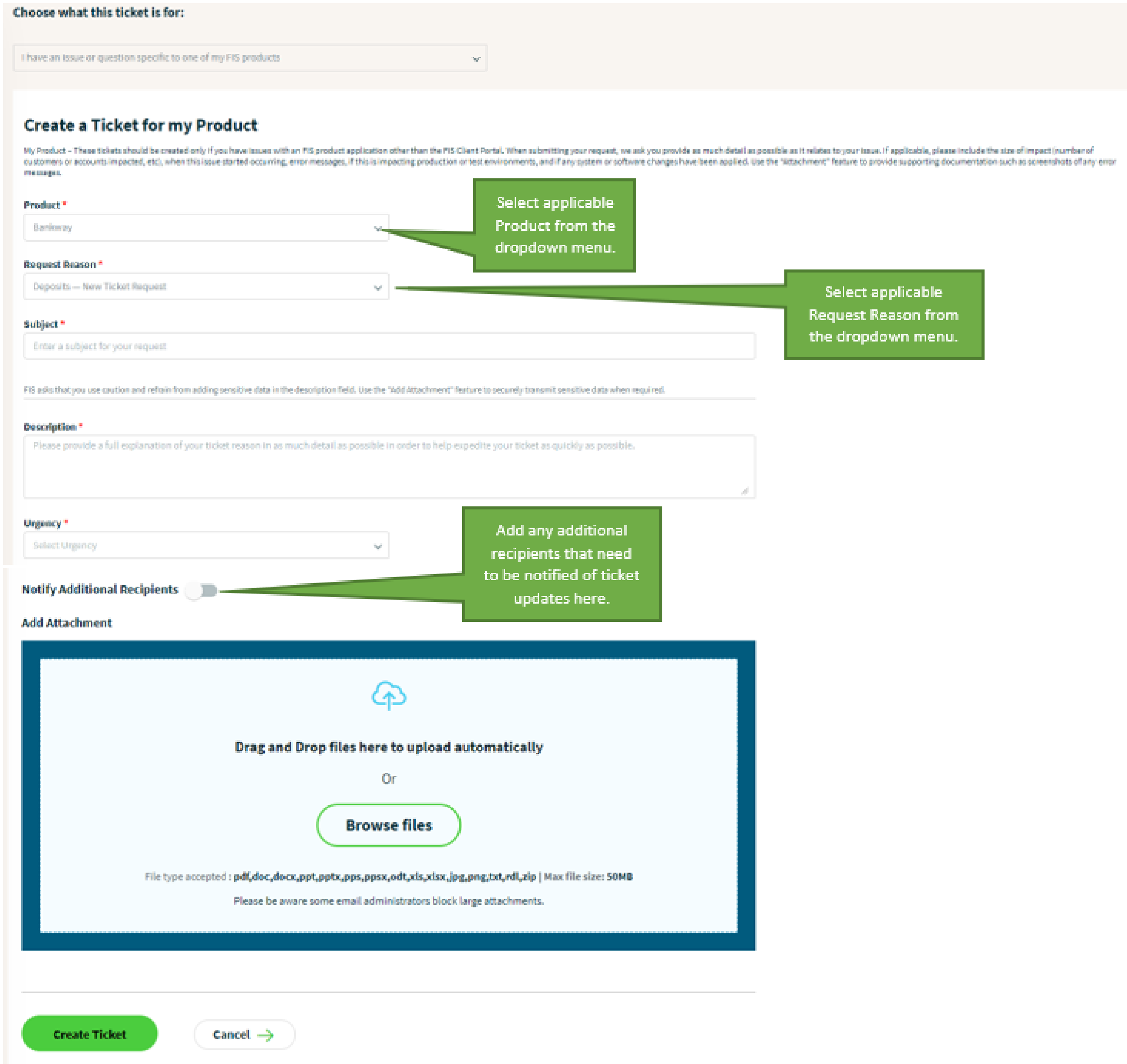
To submit a new ticket, click **Create a Ticket** (as shown below) from the Tickets Page.



Select I have an issue or question specific to one of my FIS products

These tickets should be created only if you have issues with an FIS product application other than the FIS Client Portal. This ticket will be sent to the FIS Product Support Team.

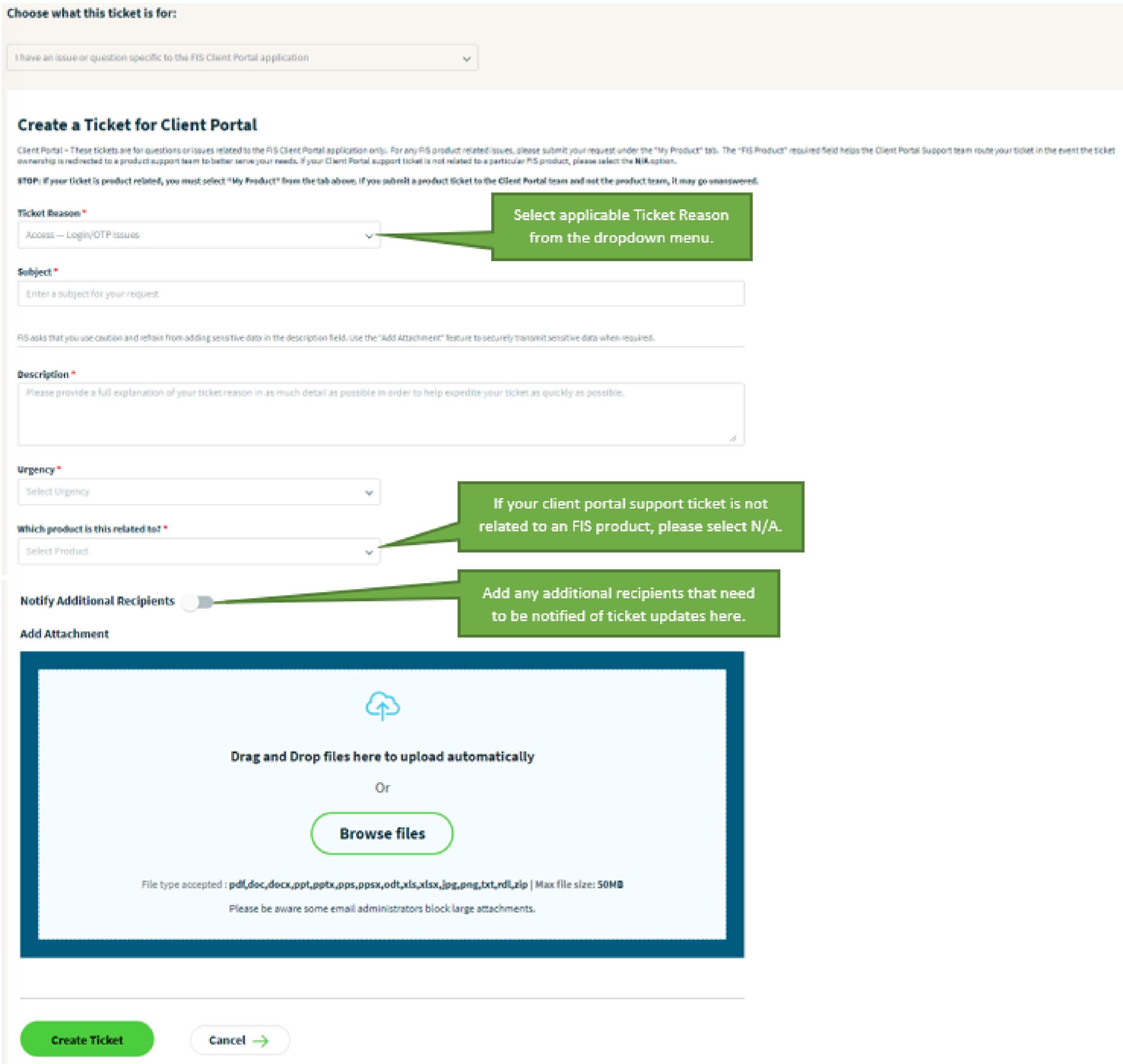
Here is an example of a new **My Product** ticket form:



Select I have an issue or question specific to the FIS Client Portal application

These tickets are for questions or issues related to the **FIS Client Portal Application Only**. If you are submitting a ticket related to any other FIS Product here, it may not be addressed, as these tickets funnel to the FIS Client Portal Team only. For any FIS product related issues, please submit your request under the "My Product" tab. The “FIS Product” required field helps the Client Portal Support team route your ticket in the event the ticket ownership is redirected to a product support team to better serve your needs. If your Client Portal support ticket is not related to a FIS product, please select the **N/A** option.

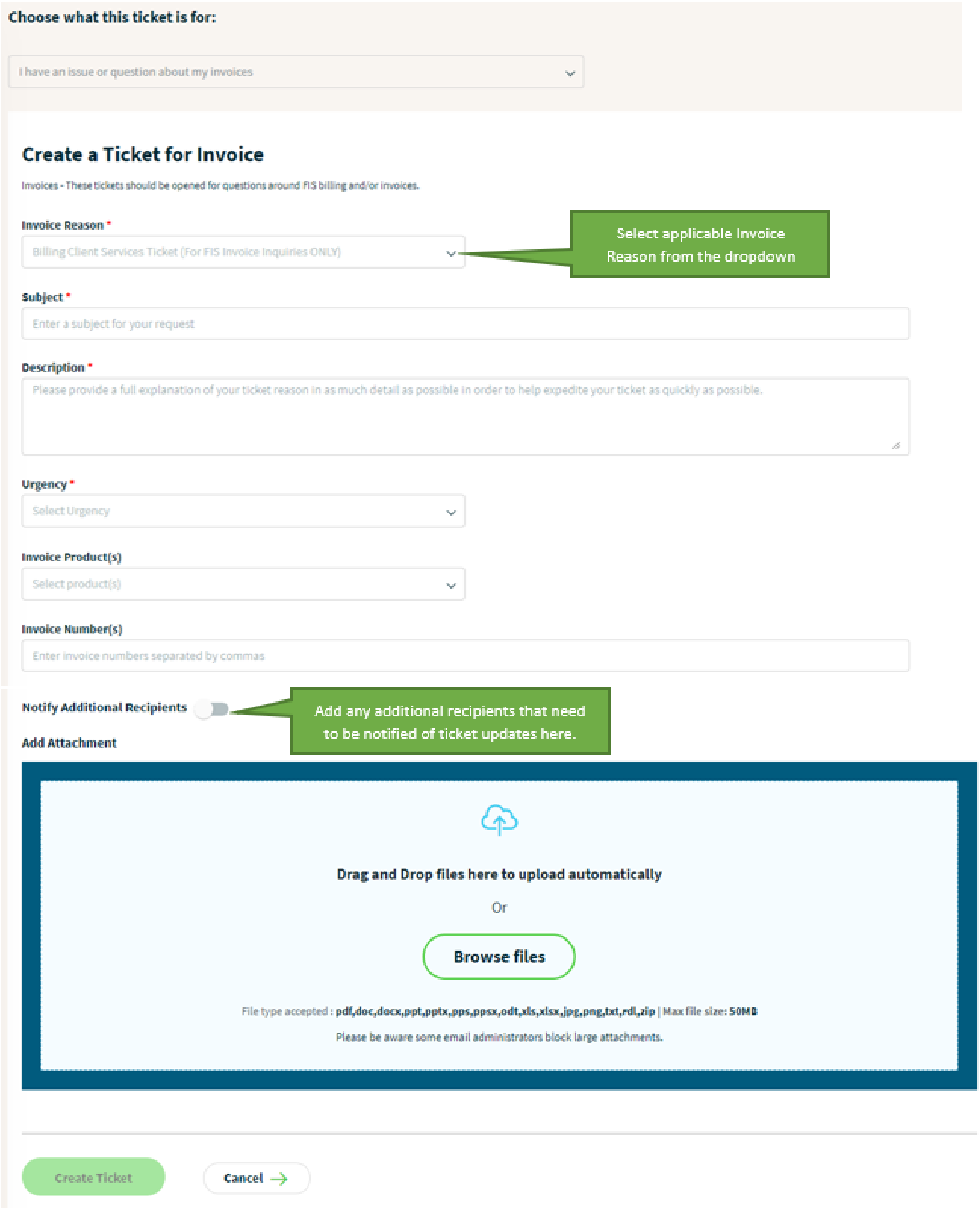
Here is an example of a new **Client Portal** ticket form:



Select I have an issue or question about my invoices

These tickets should be opened for questions around FIS billing and/or invoices. This ticket will be sent to the Billing Support Team.

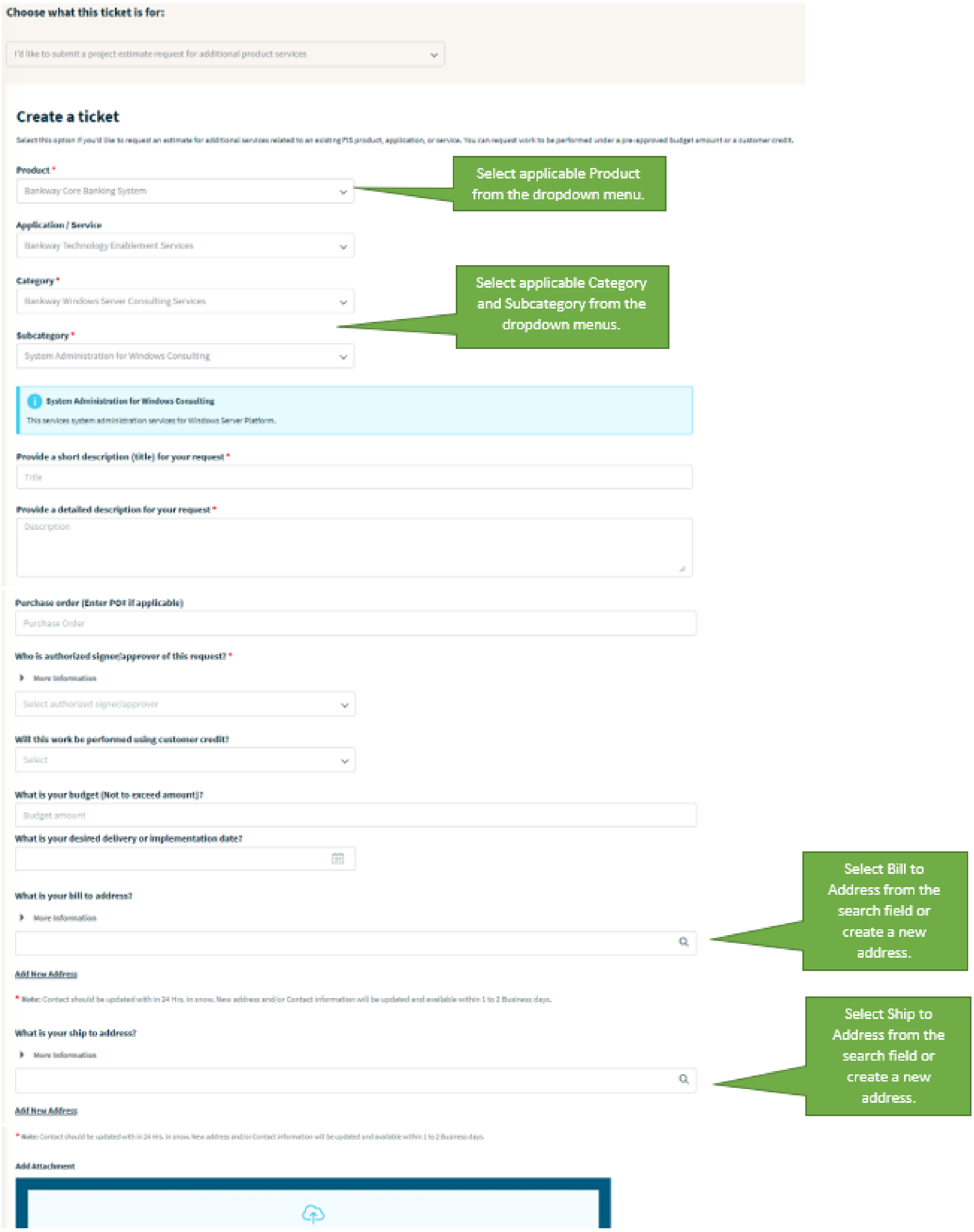
Here is an example of a new **Invoices** ticket form:



Select I'd like to submit a project estimate request for additional product services

Select this option if you'd like to request an estimate for additional services related to an existing FIS product, application, or service. You can request work to be performed under a pre-approved budget amount or a customer credit. These tickets will be completed by the FIS Fulfillment Team.

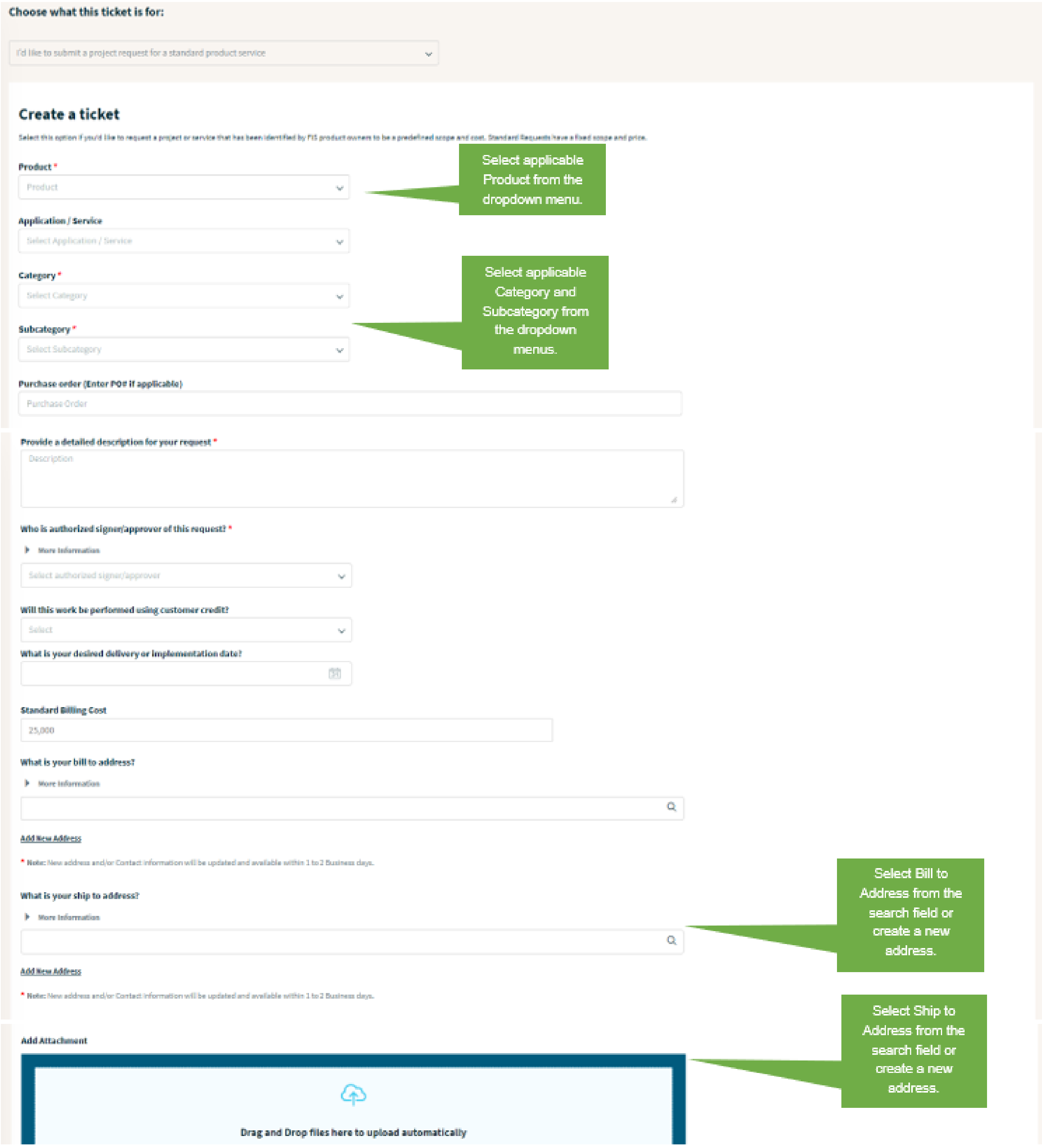
Here is an example of a new **Request an Estimate** ticket form:



Select I'd like to submit a project request for a standard product service

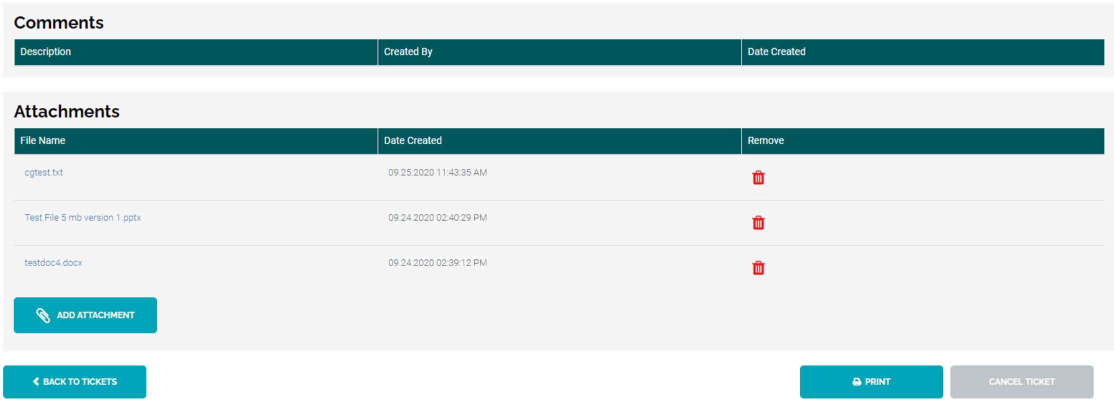
Select this option if you'd like to request a repeatable project or services from FIS. Standard Requests have a fixed scope and price defined by the product owners. Examples include 40 Hours of consulting for assistance with Code Connect or implementation of Single Sign On for HORIZON.

Here is an example of a new **Standard Request** ticket form:



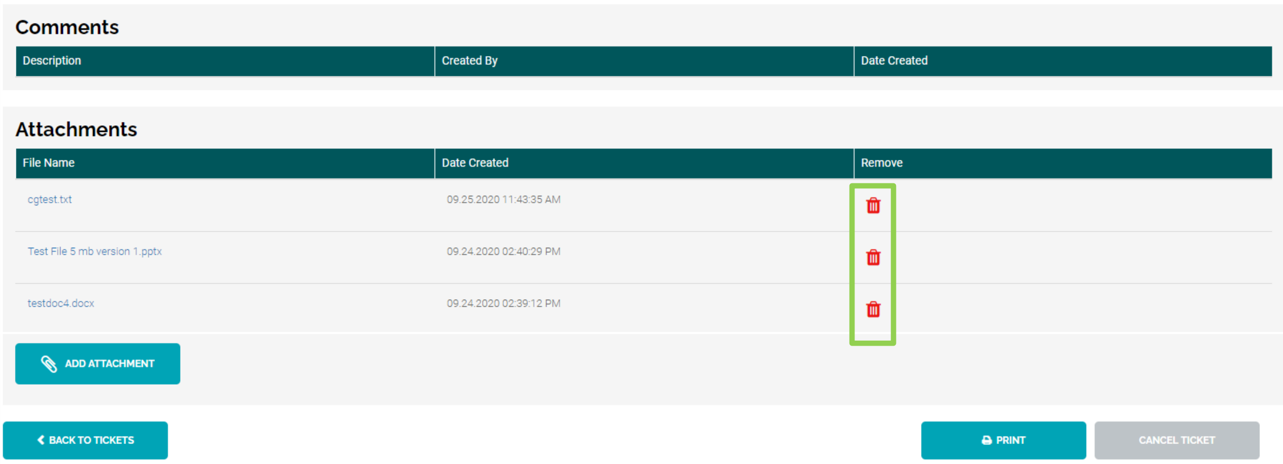
Adding or Deleting Comments & Attachments

Once a ticket has been created, you can add additional comments and attachments. Note all comments and attached files will be available for FIS to review.

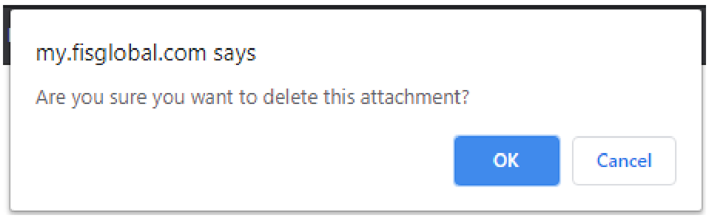


Popup blockers may need to be unenabled to view attachments.

If necessary, you can delete attachments that you have added by clicking on the red " " icon associated to the attachment within the Ticket Detail page. Please note, you cannot delete attachments added to the ticket by FIS.



Once you click on the red " " icon, you will receive a popup to confirm your request. Click on Ok to complete your request.

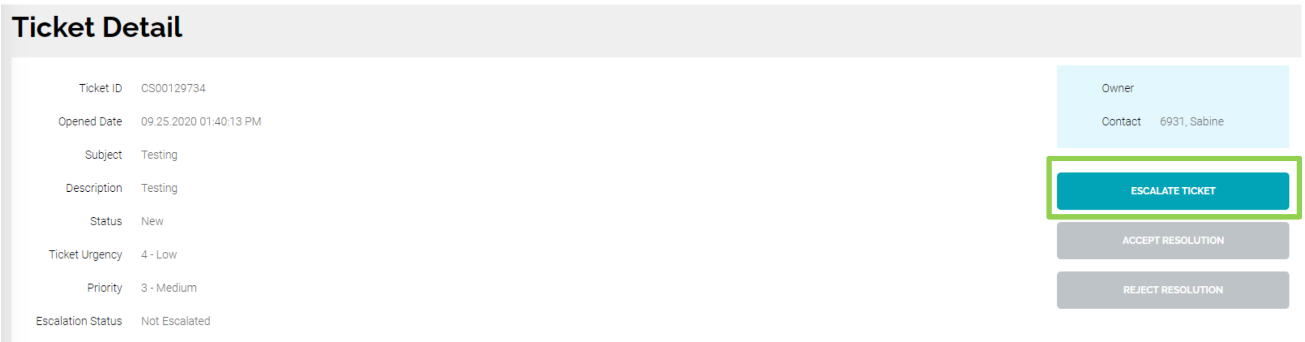


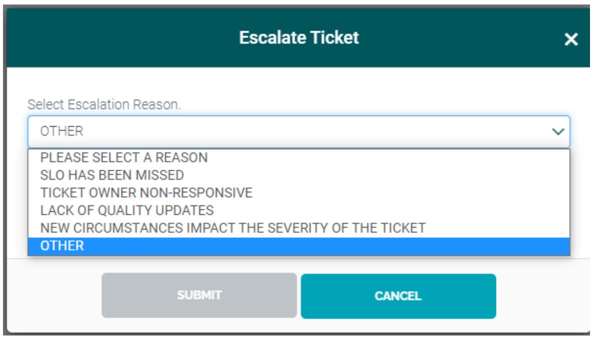
Request Ticket Escalation and Resolution

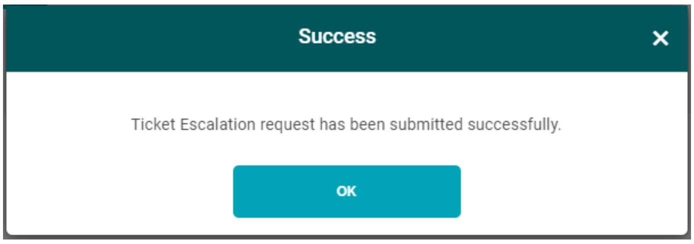
Once a new ticket is saved to the database you will be brought to the Ticket Detail screen where you still have the option to Escalate a Ticket, and now with our improved process, you will also be able to ‘Accept Resolution’ or ‘Reject Resolution’ once FIS emails you the Proposed Resolution.

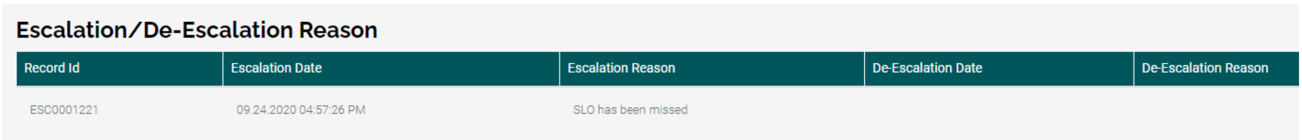
You can request to escalate a ticket by sending an escalation notification to the FIS ticket owner from the Ticket Detail screen. If the ticket does not have an owner, the escalation notification will only be posted to the ticket. It is recommended to reach out to the product’s escalation contacts for additional help with your ticket.

- Click on the **Request Ticket Escalation** button
- Enter your reason for escalation in the modal popup window
- Click on Submit







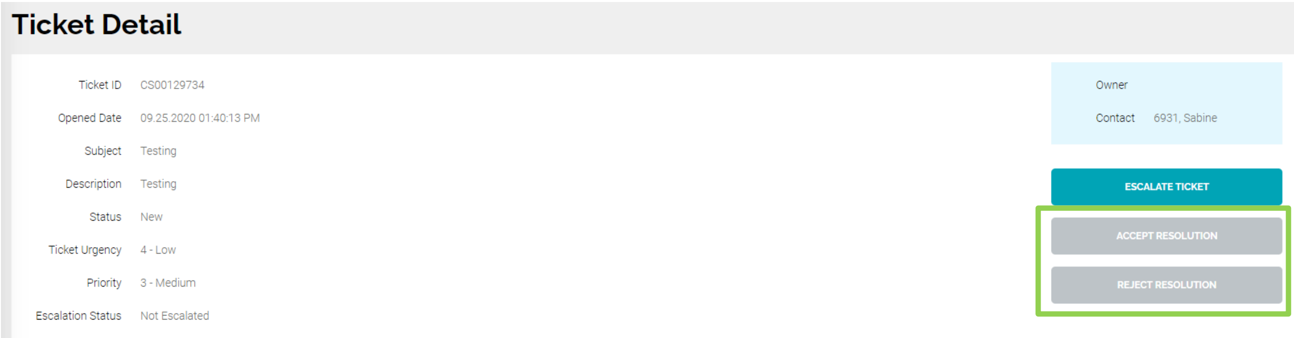


Once an escalation request is submitted via the Client Portal, the ticket details will display the Escalation Status attribute.

A ticket can only be escalated once. If you still are not receiving the support needed to resolve your issue, you can contact the Support Manager for the specific product that the ticket is related to. This information can be found on the Client Portal under: My Product -> Contact Us -> Contacts. Defect tickets cannot be escalated.

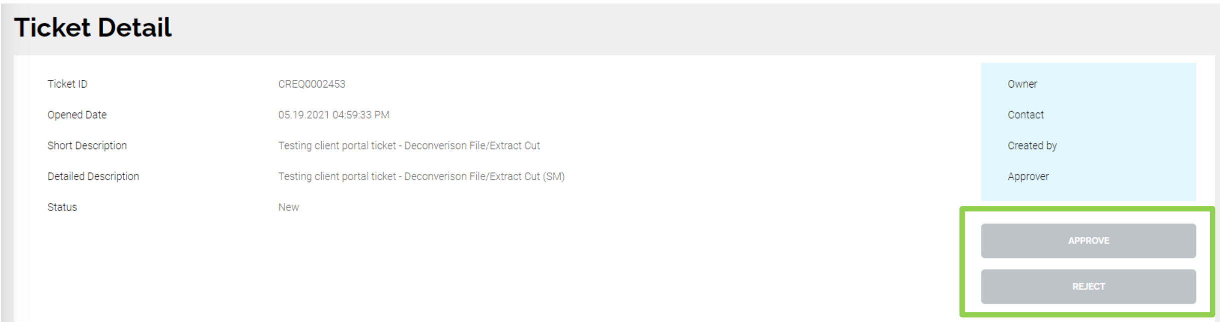
Resolutions

You will now be able to accept or reject the resolution of your ticket once FIS emails you the proposed resolution. Please note, the ticket will automatically go to a Closed State if you do not respond within 14 days of the submitted resolution.



Client Request Approvals

When a new Client Request ticket is saved to the database, you will be brought to this Ticket Detail screen where the Authorized Project Approver will have the option to Approve or Reject the client request. This is a person designated by a Client Portal Administrator at your institution via Entity Administration > Edit permissions.

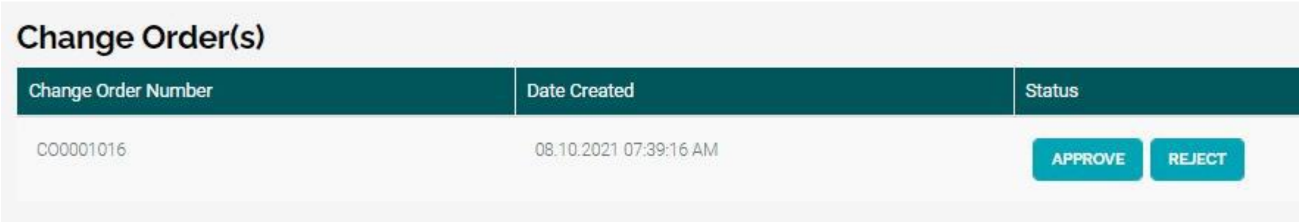


Client Request Change Orders

Request for Estimates Only.

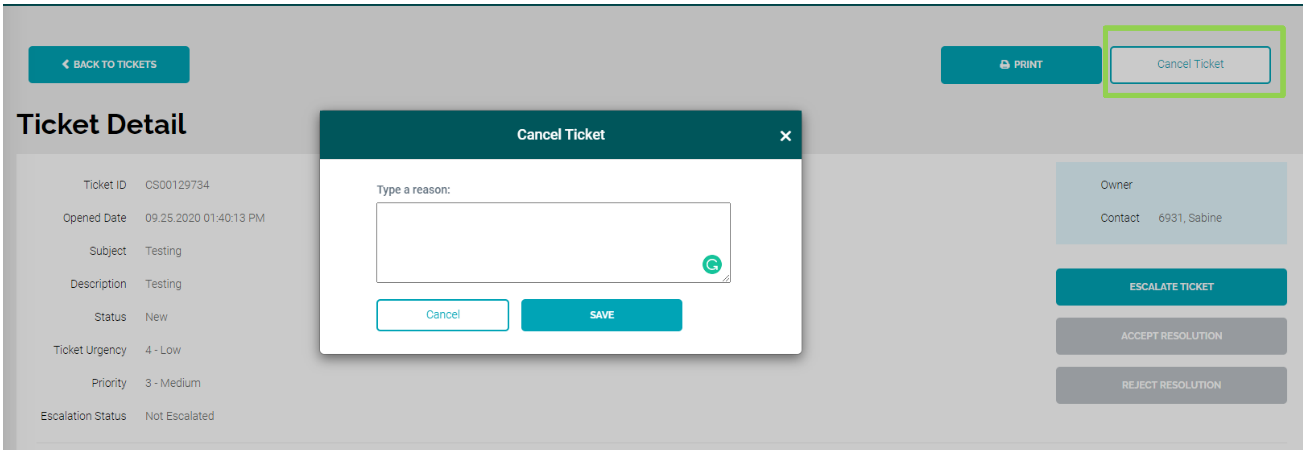
In the event a Client Request requires additional funding, a Client Request Change Order will be submitted to authorize the additional expense and document the change in scope. Client Request Change Orders can only be submitted in the time between an estimate being approved and prior to its closure. In the event the state is Work in Progress, the assignment group can move the state to On Hold to allow time for the approval of the Change Order.

The Assignment Group will send the Change Order and any supporting documentation to the requestor via email. You can then approve or reject the Change Order using the appropriate Approve or Reject buttons found under the Change Order section within the request's Ticket Detail screen.



Cancel Ticket

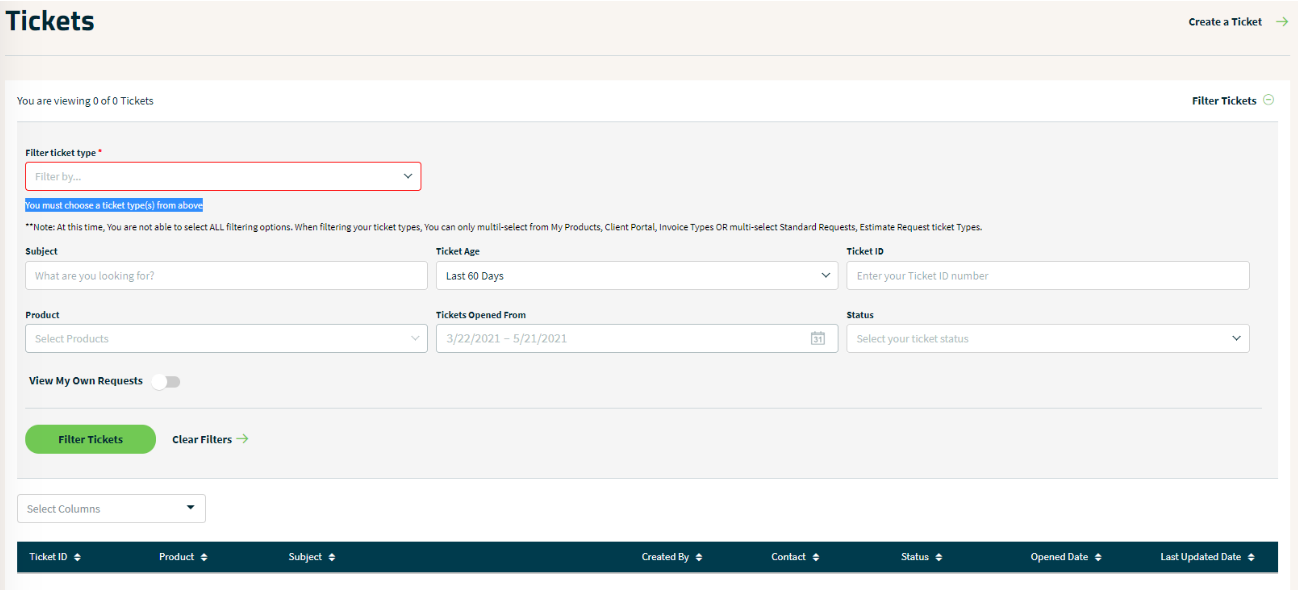
You may cancel your ticket by clicking on the **Cancel Ticket** button located on the right side. Enter your cancellation reason and click **Save**.



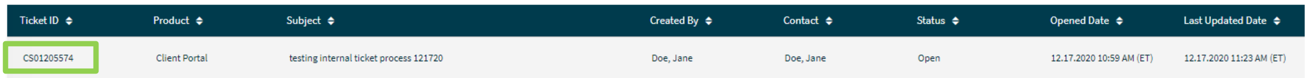
Search for Tickets

Search for tickets by their Ticket IDs. If you don't know the Ticket ID, you can filter by date, status, subject, and specific products. You will also be able to “View My Own Requests” by turning on or off the toggle button. This option gives you the ability to view open tickets that you opened if the toggle is on or opened tickets for your organization by leaving the toggle off. **Keep in mind, you must select a ticket type from the “Filter Ticket Type” dropdown feature.**

In the “Filter Ticket Type”, you can multi-select tickets for my products, client portal and invoices or you can multi-select your request tickets for reporting needs. Please note, you cannot select ALL filter options at the same time. By default, the Ticket Age is set to **Last 60 Days.**



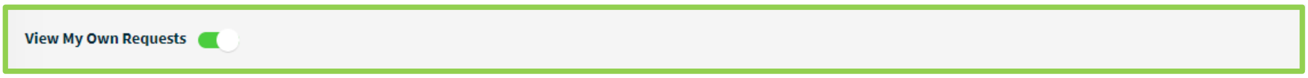
To view details of a Ticket, click on the **Ticket Number** under the **Ticket ID column**.

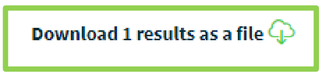


The **STATUS** field now contains six options to search for your ticket. For an explanation of each of these ticket statuses, please reference the table below:

Ticket Status	Description
New	The default value for a newly opened ticket. Unassigned tickets originating from the FIS Client Portal will be in a New status.
Open	The ticket has been assigned to a Client Care representative, and the case status moves from New to Open.
Awaiting Info	A ticket moves to the Awaiting Info status when the Client Care representative selects the Request Info option in the ticketing system. This indicates the ticket owner is awaiting additional information from you before they can proceed towards resolution.
Defect	The ticket has been identified and approved by Client Care as a defect to be corrected in an updated software release.
Resolved	A resolution has been proposed to you, prompting you to accept or reject the resolution, which can be done through the FIS Client Portal.
Closed	The ticket resolution has been accepted, moving the status from Resolved to Closed. Tickets will also automatically move to a Closed status if the proposed resolution is not accepted within 14 days.

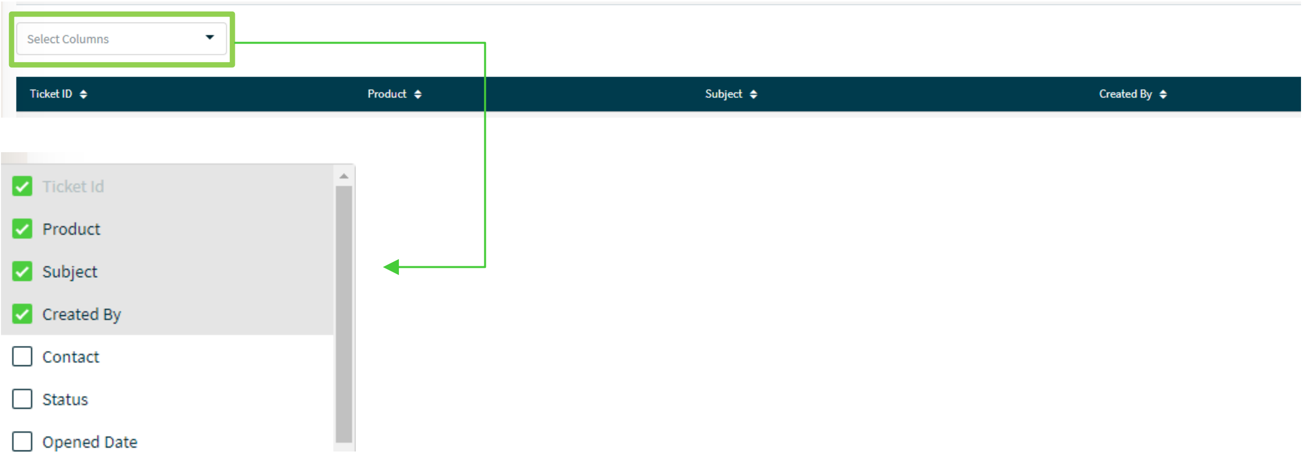
To create a report of tickets, simply search for the tickets and use the **Export** button to open in Excel. To see tickets that you have previously opened, toggle on **View My Own Requests** or review open tickets for your organization by leaving it off.





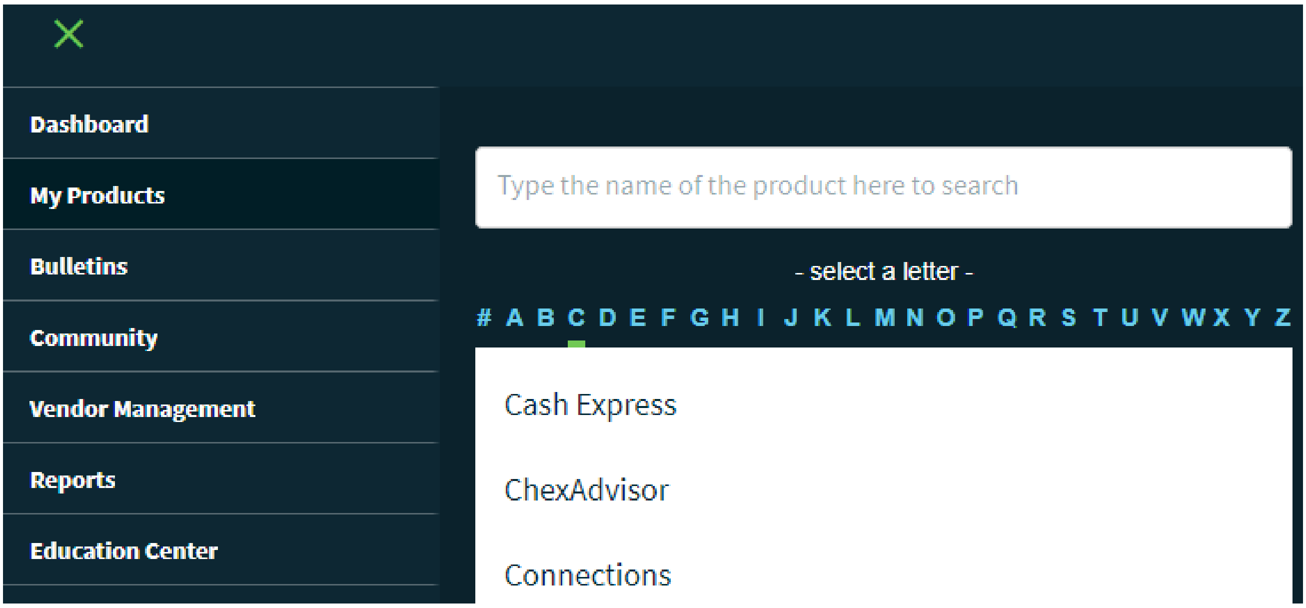
You may also customize your ticket grid layout by clicking on the 'Select Columns' dropdown. Pick which columns you would like to include in your grid layout by clicking on the checkboxes.

Four (4) columns are required.



My Products

The My Products menu allows you to access products by searching or seeing your products in alphanumerical order. To view your products, go to **My Products** on the left navigation menu, where you will find a list of your organization's products. Select the product you wish to view and access the Resources and Tools section.



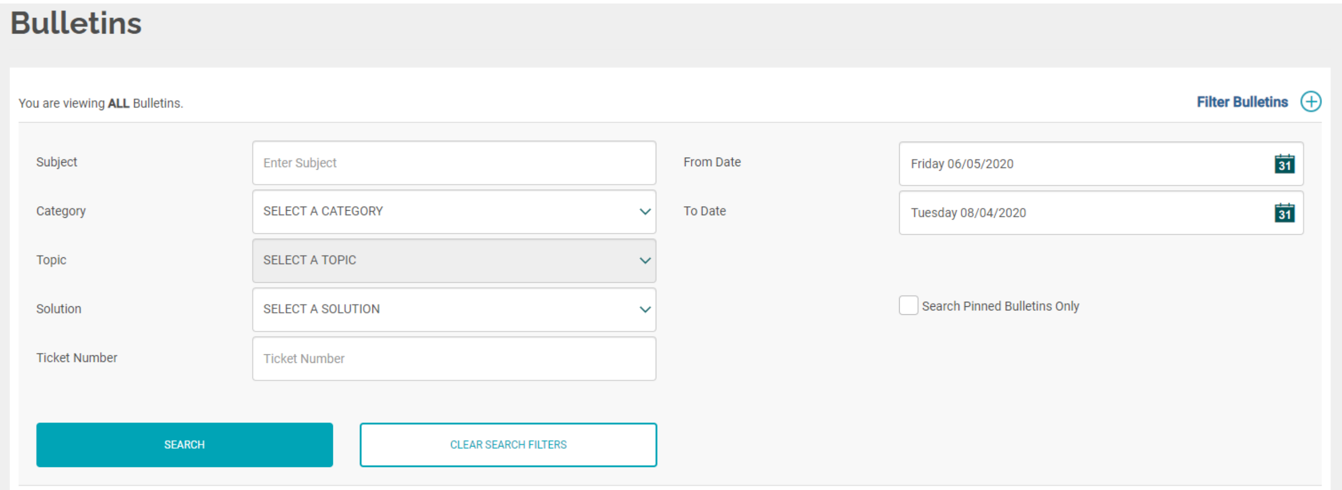
Resources and Tools

The Resources and Tools section includes Strategy and Documentation information for each product. Depending on the product, you will find different vertical tabs under each of these categories that provide more information.

Bulletins

FIS is committed to a consistent and effective approach for client communications through Bulletins driven from the Client Portal. Some bulletins are sent via email as well as posted to the Portal, and some are just posted to the Portal.

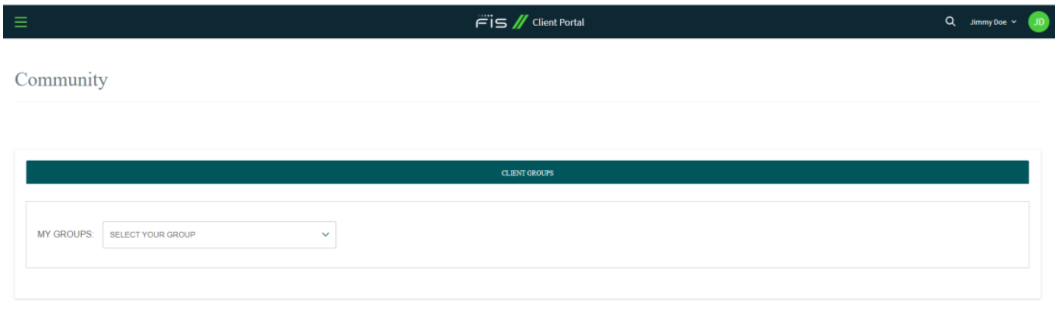
To view your Bulletins on the portal, click the **Bulletins** tab on the left navigation menu, or access them from the **Dashboard**. Bulletins can also be accessed by selecting **Support** from the left navigation menu, select a product, and then select Bulletins in the lower menu items. This will allow you to quickly filter your Bulletins for that Product.



Community

Client Groups

The *Client Groups* feature allows setup of advisory or user groups along with posting events, member lists, and sharing of user group files.



Vendor Management

The Vendor Management Resource Center (VMRC) is a centralized, self-service portal that offers our clients a comprehensive and streamlined set of resources to effectively manage third-party relationships with FIS.

The Resource Center offers detailed information and reporting in the following areas:

- Effective Vendor Management
- FIS Risk, Information Security & Compliance
- Business Overview
- Financial Condition
- Governance
- Control Functions
- External Audit & Control Validation

Reports

The VMRC also provides the robust ability to view and download individual reports, custom select, zip and download groups of reports, as well as the ability to zip and download all available reports with a single click. This functionality is available for both “Vendor Managment Documents” and “External Audit and Control Validation Documents.”

Additionally, you have the ability to see all “External Audit and Control Validation Documents,” or narrow the view down to reports appliable to your organization.

Industry Hot Topics

Keeping our clients informed of high-profile potential issues or new security and risk developments is a key tenet of our partnership with you. To help educate our clients on these high-profile industry hot topics, FIS has developed a downloadable document that provides:

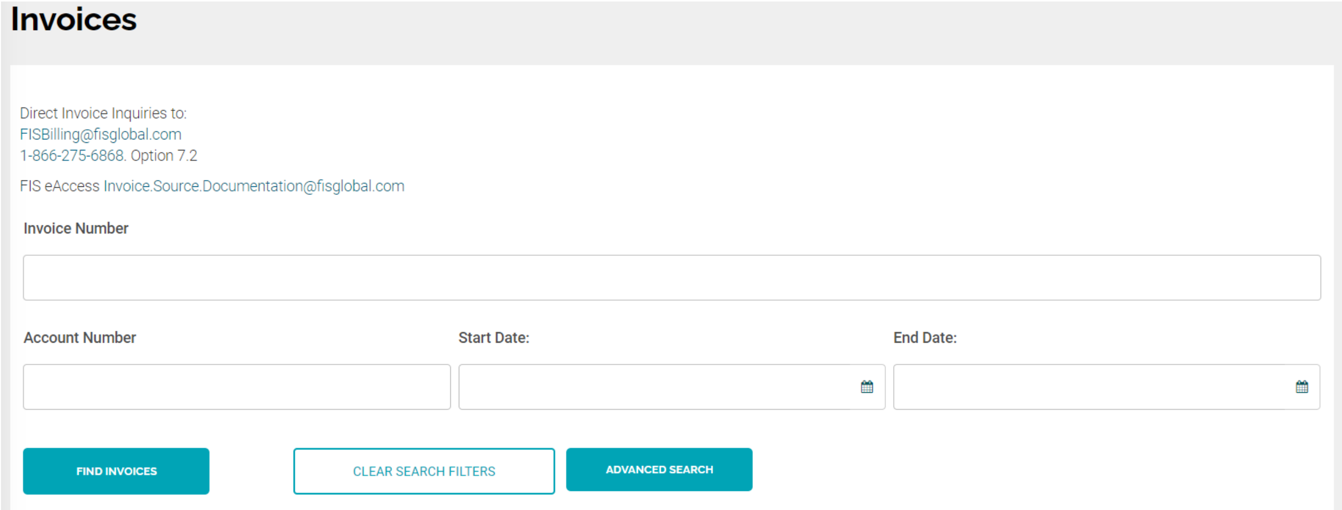
- A definition of each issue
- FIS’ response to the issue
- Our recommendations for client action

Invoices

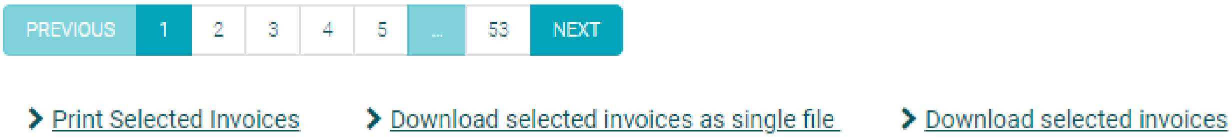
The *Invoices* feature allows users with appropriate credentials to view invoices and supporting materials. Please note that invoices are not available to all organizations.

Accessing Billing Invoices

Log in to the Client Portal and click on **Invoices** in the left navigation menu. Enter the search criteria and then click **Find Invoices**.

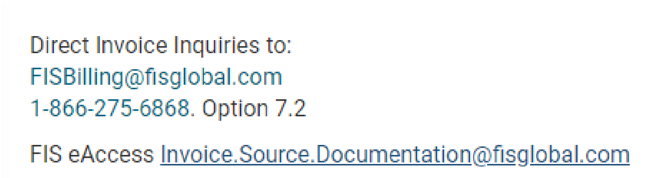


To print or download a specific invoice, click on **Print Selected Invoices, Download selected invoices as a single file or Download selected invoices.**



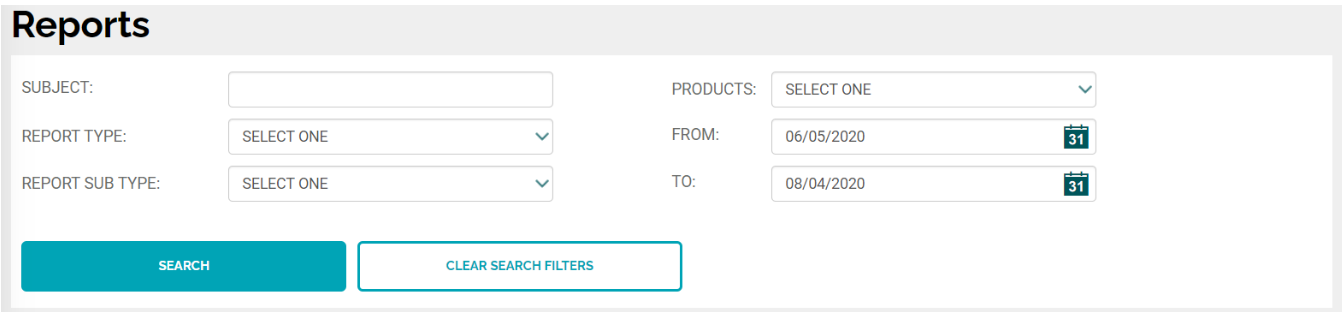
Billing Customer Service

You can find the customer service information at the top of the Billing page to assist you with any billing needs, questions, and concerns.



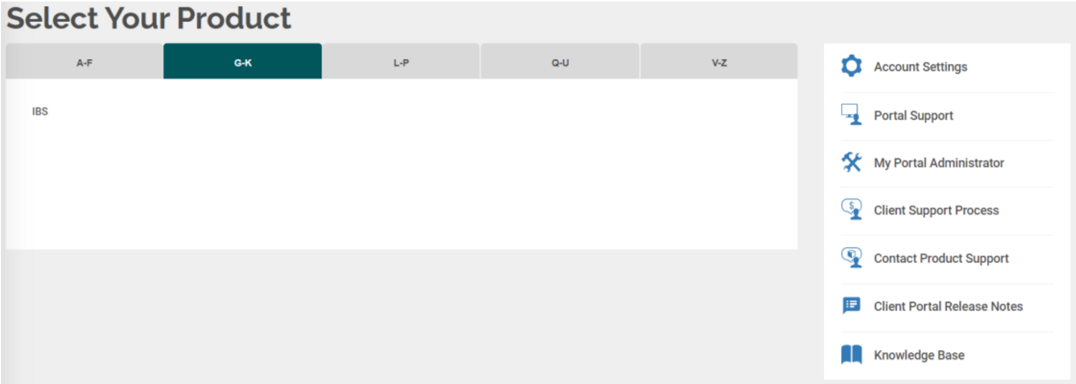
Reports

Depending on the product line, this section includes a variety of reports specific to your organization.

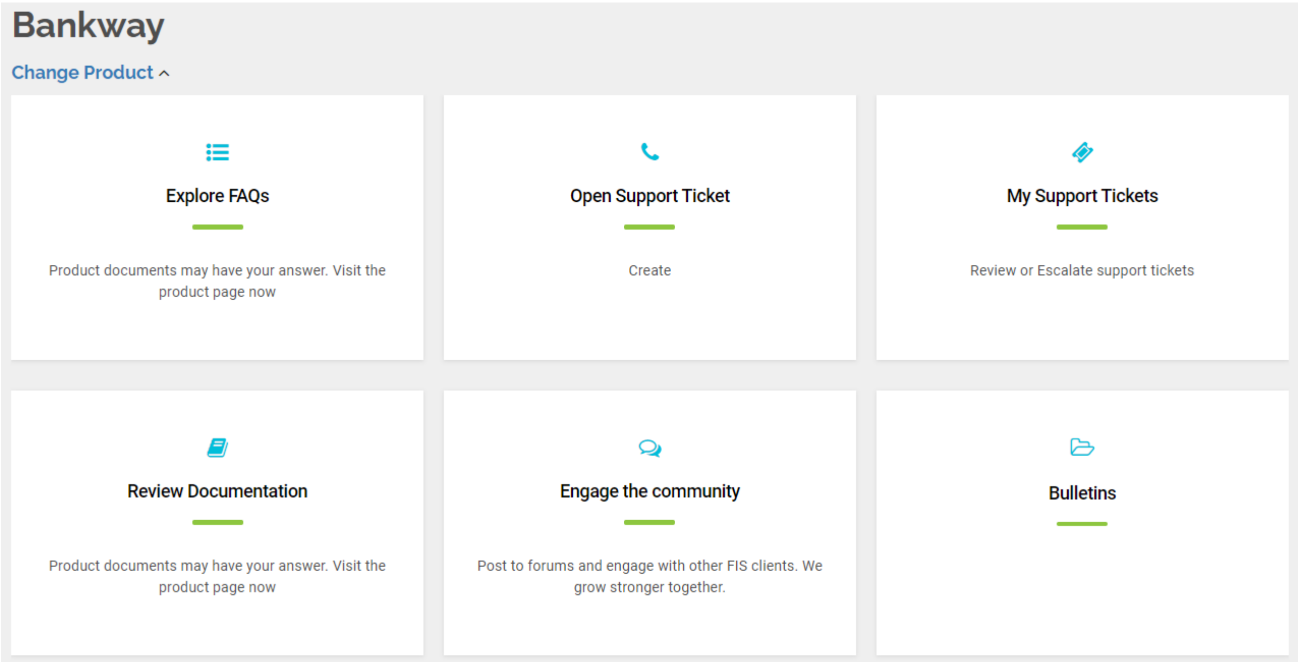


Support

The **Support** feature gives you quick access to important FIS contact information regarding each product.



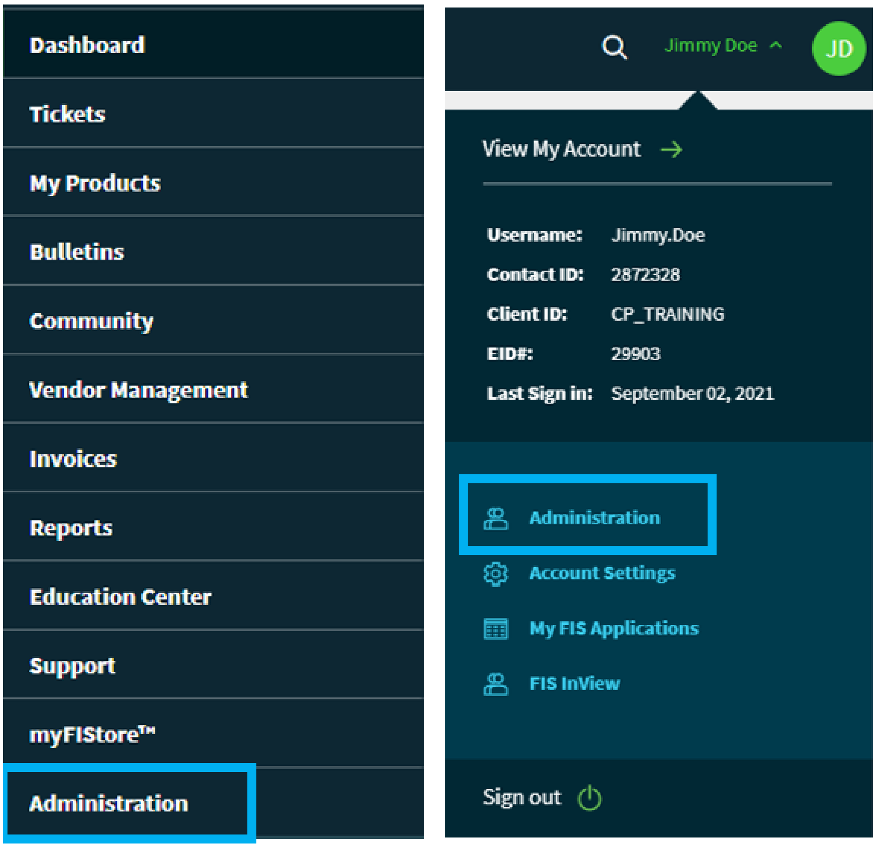
When you select the product, you will find every support option that FIS offers for that product, as seen below:



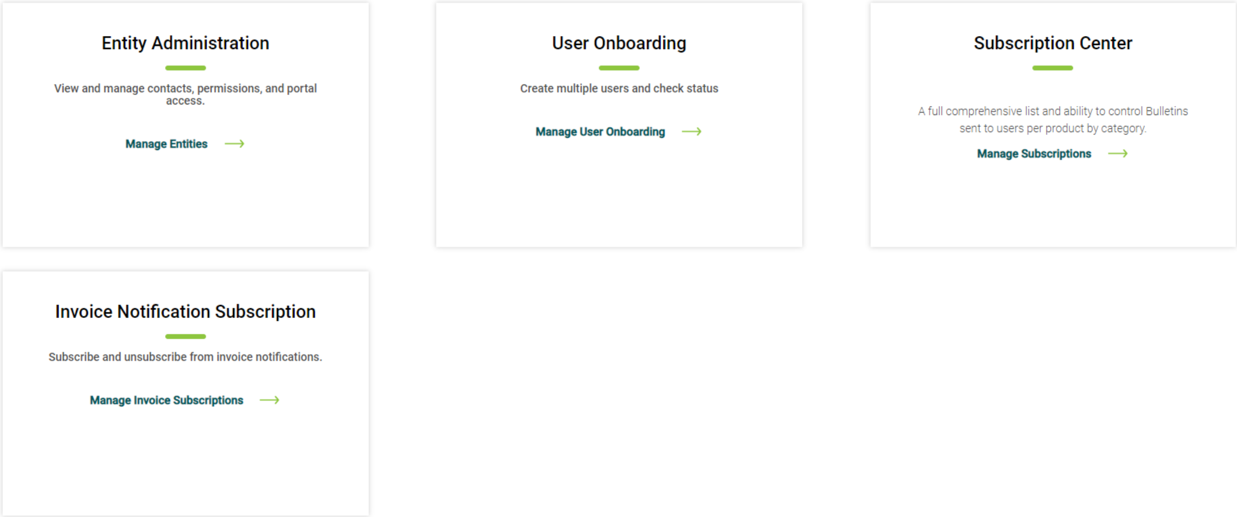
Client Portal Administration

These next few sections are ONLY applicable to Client Portal Administrators (CP Admin Role).

When you click on **Administration** from the left navigation menu or the top right dropdown panel under your name, you will reach the Administration Page from where you can manage various admin cards.



Due to FIS security measures, only a Client Portal Administrator will have access to create and manage user accounts. This will include adding and deleting users, granting others general or admin portal access, password resets, and if applicable setting up users to receive product Bulletin e-mail alerts through the Subscription Center.

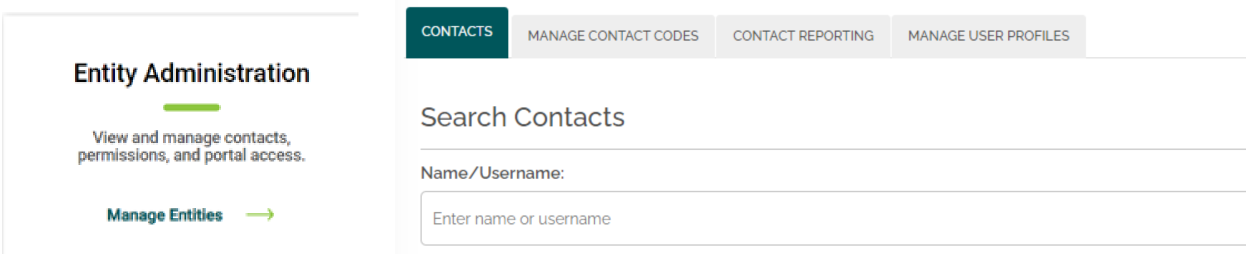


Most clients have at least one CP Admin. If you do not have a CP Admin and need assistance with your account, call the help desk at 1-844-6 FIS NOW (844-634-7669) and say "Client Portal Login Issue" at the product prompt.

Entity Administration Card

The Entity Administration card will have a 4-tabbed view after the admin clicks on the *Manage Entities* Link:

- First Tab "CONTACTS"
- Second Tab "MANAGE CONTACT CODES"
- Third Tab "CONTACT REPORTING"
- Fourth Tab "MANAGE USER PROFILES"



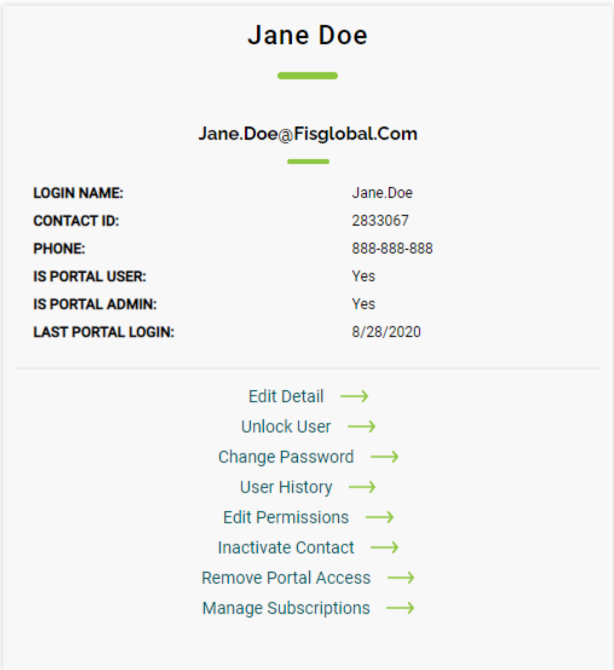
Contacts/Users

The **Contacts Tab** allows you to create new contact records, manage portal access and user permissions.

By default, you will see the list of all active portal users (i.e. contacts with portal access).

To see all authorized contacts, please check both search options for ***Show Portal Users and Show Non-Portal Users*** *in the Search Filters pane.*

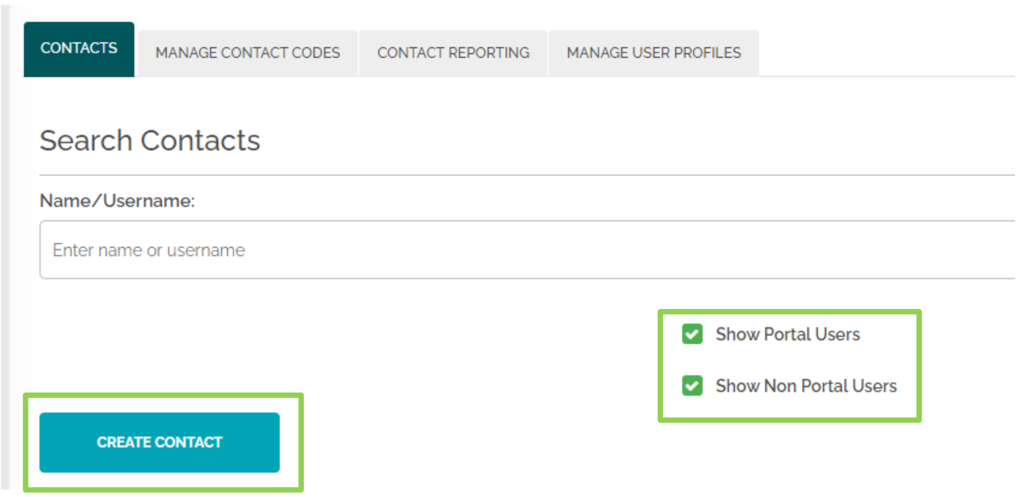
Each **User Profile** card will include First Name and Last Name, Email Address, Username, Contact ID, Phone, Is Portal User, Is Portal Admin, and Last Portal Login that counts the last successful login on the Client Portal.



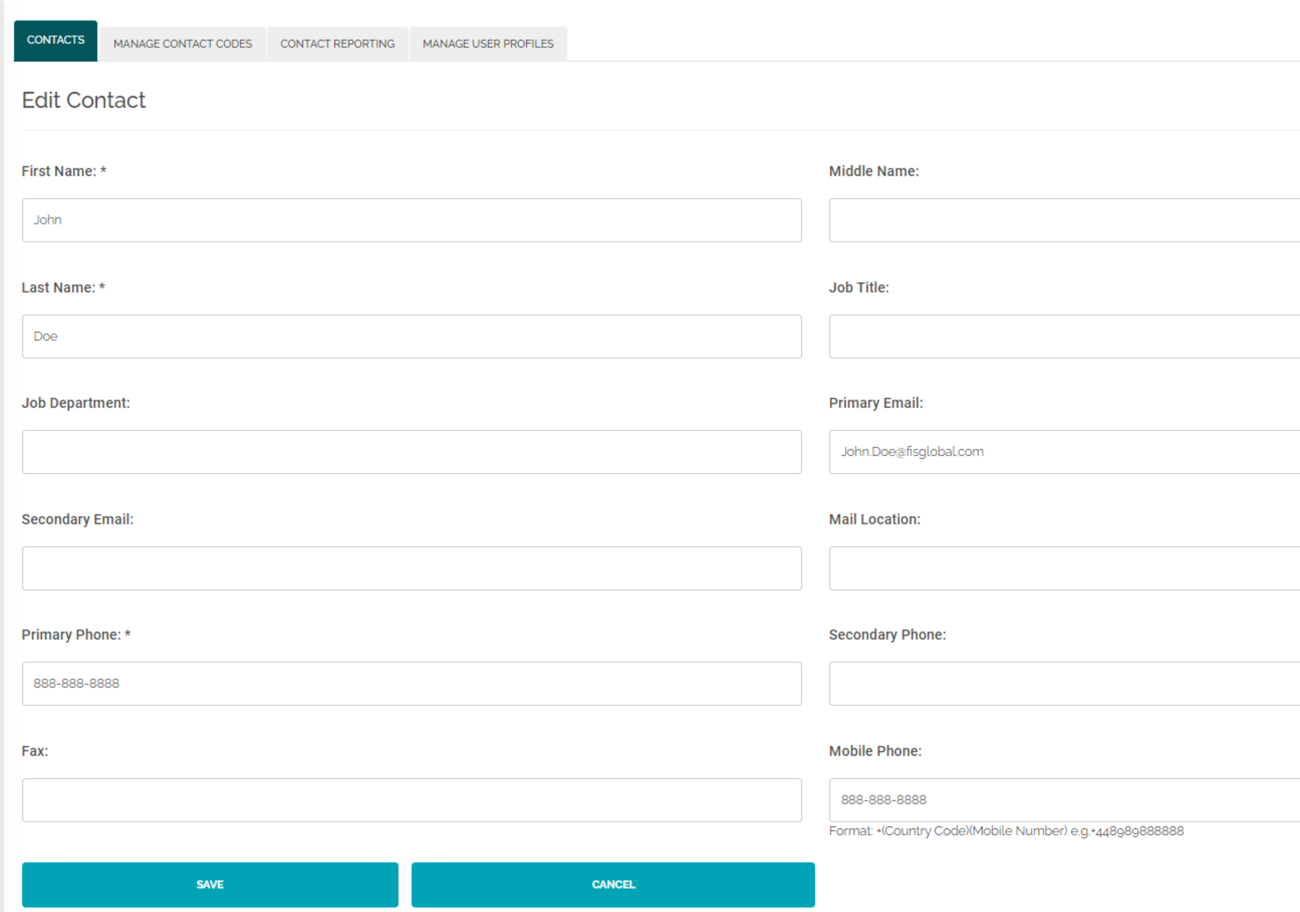
Create Contact

*Before creating a new contact record, first verify that the user is not already set up as a bank contact by clicking the **Show Portal Users and Show Non-Portal Users** checkbox in the Search Filters pane.*

If the user is not found, click the **Create Contact** button below the **Search Filters** pane.

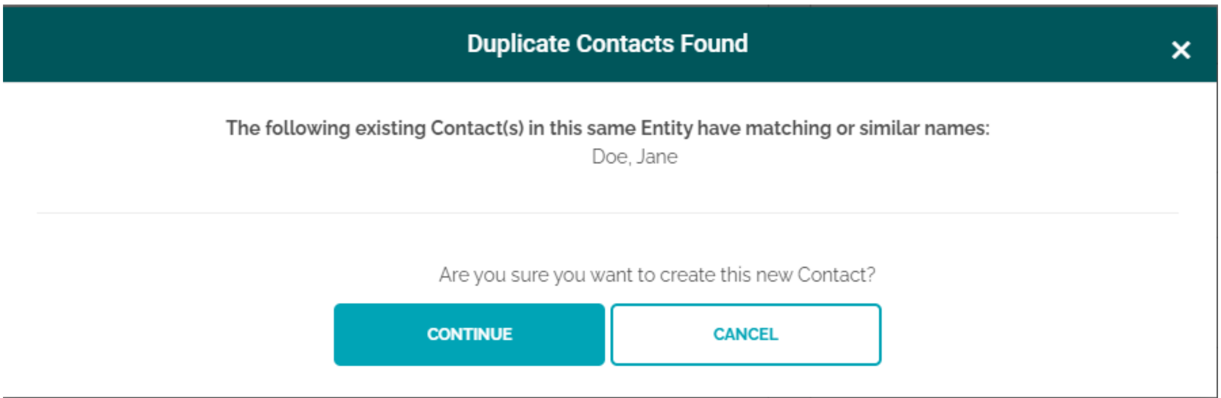


Create Contact screen form below:

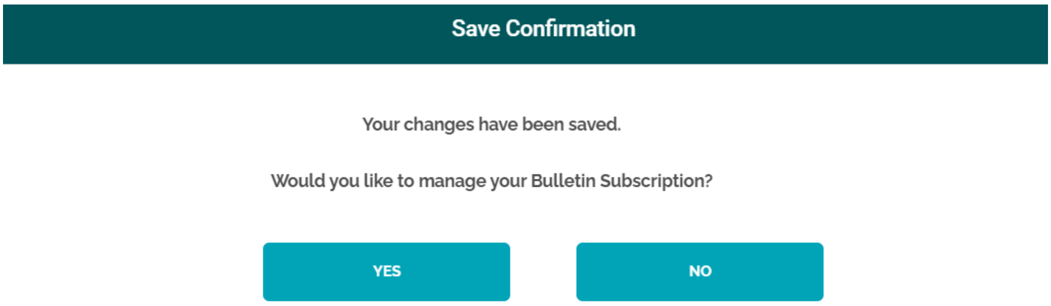


Enter the requested contact information. The **First Name**, **Last Name and Primary Phone** are required fields. **Enter a Mobile Phone if using** [MFA (Multi-Factor Authentication)](#). To set the contact up to receive email communications, the **Primary Email** field must also be completed.

After entering all the details, click the **Save** button at the bottom. It will display a popup modal window to confirm the creation of your new contact. It will also highlight if there are any matching records to avoid duplicate contacts.



Click **Continue** to proceed with creating a new Contact.



There will be a popup modal window with the Save Confirmation asking if you would like to manage the new user's **Bulletin Subscription**.

- Selecting **Yes** will take you to the **Subscription Center** where you can manage Bulletin Subscriptions as explained in the **Subscription Center** section.
- Selecting **No** will take you back to the **Contacts Tab** of the Entity Administration Screen.

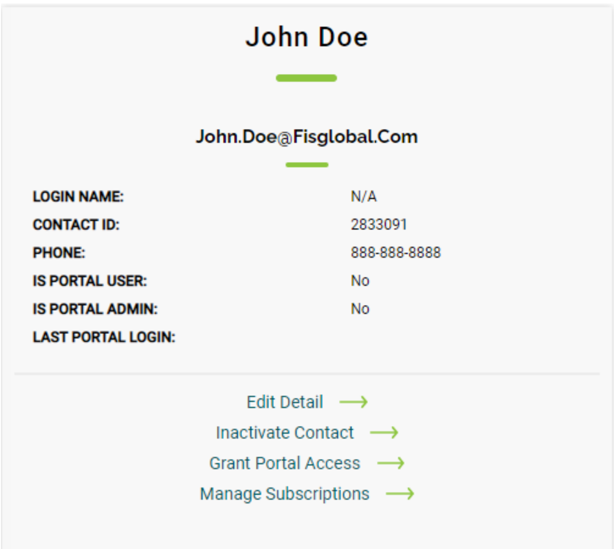
After the new Contact is created, you can proceed to the next step of granting the new user Portal Access if needed.

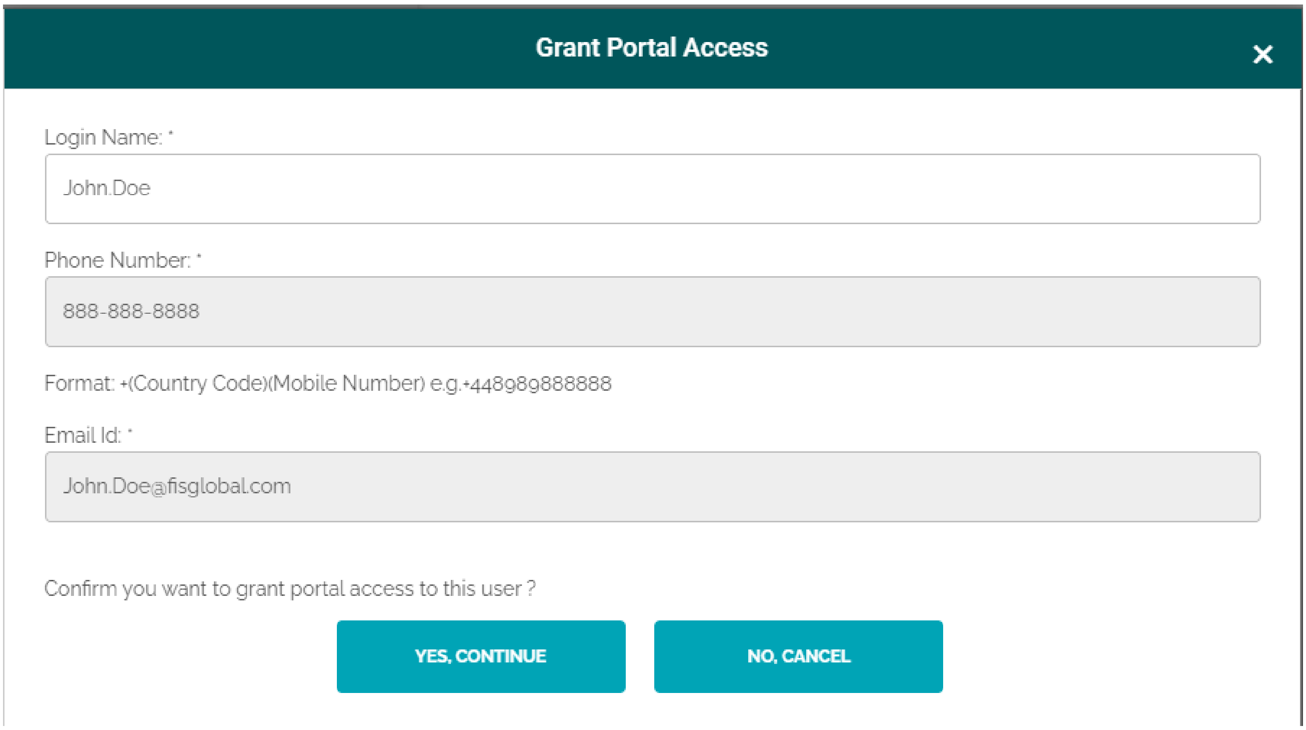
A Client Portal Contact (Non-Portal User) CAN STILL receive Bulletin emails without enabling their access to the Client Portal. See Subscription Center section.

Granting Portal Access

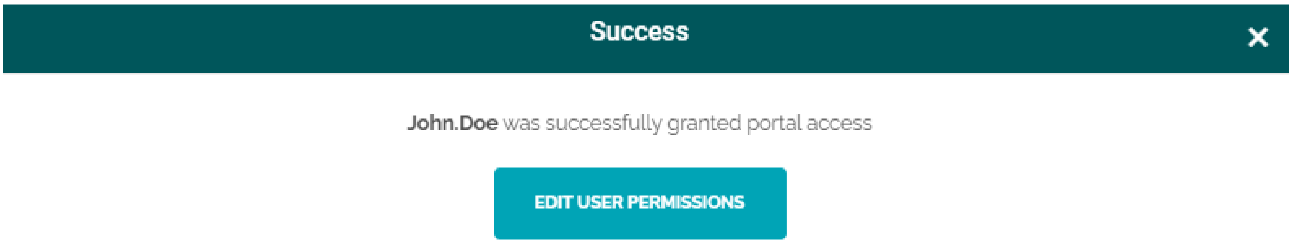
If a user needs portal access, go to **Contacts** tab under **Entity Administration** and search a contact by First Name or Last Name under the **Search Contacts** field. While doing so, make sure the **'Show Non-Portal Users'** box is also checked as this will display all your contacts including those without Portal Access:

Click on **GRANT PORTAL ACCESS** to provide access to a Contact.





- A popup modal window will display, click **Yes, Continue** to proceed.
- You will get a success message with the message – **user.name** was successfully granted access.
- Click **Edit User Permissions** to edit the user's permissions or else close the window by clicking on the '**X**'.

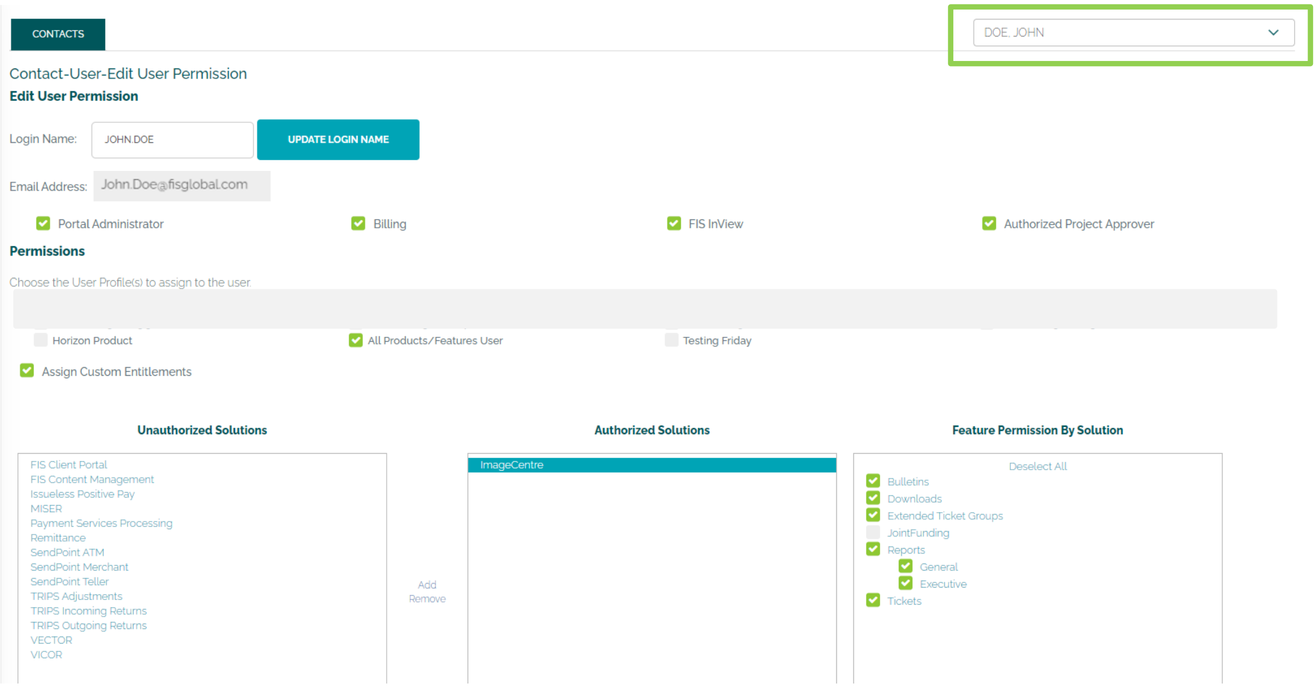


Clicking **Edit User Permissions** will take you to the Edit permissions page for the created user. You can also access this part for a user by clicking the link available on the user's Contact Card.

Edit Permissions

Click the EDIT PERMISSIONS link on the contact record to manage the user's permissions on Client Portal.

The following **Edit Permissions** screen displays. Just note on the top right corner, there is a drop down that reflects the selected user, you can select any user from your organization to edit permissions from this location.



*If you select **Assign Custom Entitlements**, make sure to **uncheck** any other '**User Profiles' under Permissions** for they will override your custom choices.*

Permissions

The process of managing a user's permissions is streamlined on this screen, allowing you to quickly assign the appropriate access to the contact by selecting pre-determined rights such as Portal Administrator, Billing and Authorized Project Approver (if applicable to your institution), FIS InView, and specific **User Profile(s)** or select **Assign Custom Entitlements** through which you can move a solution from **Unauthorized Solutions** to the **Authorized Solutions** and mark the checkboxes under **Features Permission by Solution**.

*If you select **Assign Custom Entitlements**, make sure to **uncheck** any other '**User Profiles' under Permissions** for they will override your custom choices.*

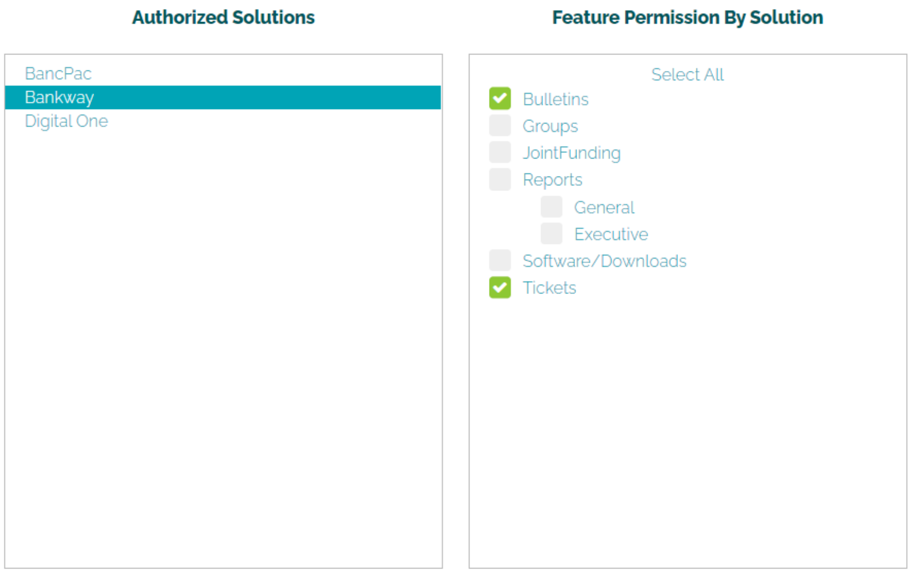
User Profiles

All Products/Features User Profile

FIS has created the default **All Products/Features User** profile, this profile allows the new user to view all products and their special features associated to your institution. If you do not wish to use this profile, you can setup a new profile under the **Manage User Profiles** tab (see **Manage User Profiles** section).

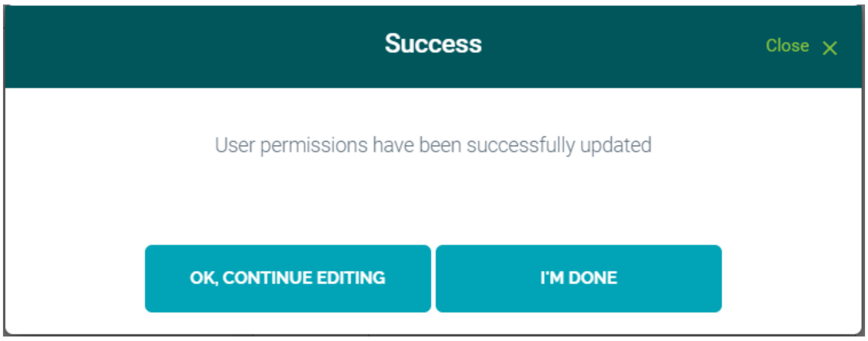
Assign Custom Entitlements

If you want to provide permissions by Product on an individual bases, select the **Assign Custom Entitlements** checkbox. Here you can move a solution from **Unauthorized Solutions** to the **Authorized Solutions** and mark the checkboxes under **Features Permission by Solution**.



If a Feature is not available for a specific solution, the checkbox will be greyed out/uncheckable within the Feature Permission section.

When finished, click on the **'Save User Permissions'** button. You will then get a **Success** message to confirm or continue editing permissions.

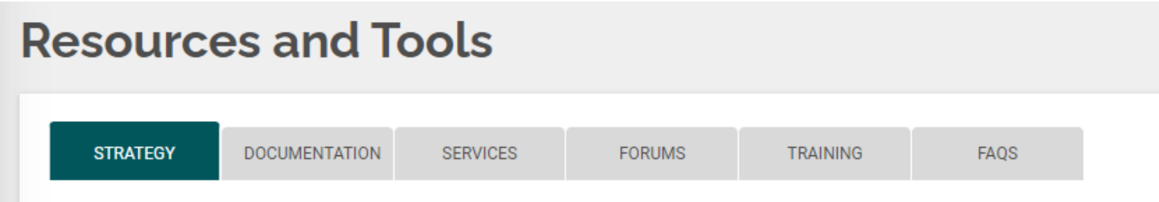


Clicking **I'm Done** will take you back to the **Search Contacts** page.

Portal Solution Availability

You can add or remove any solutions from the institution's solution list that the user is allowed or not allowed to view on the portal. If a solution is added to the **Authorized Solutions'** list, the user will have access to the product information on the Client Portal; if the solution remains under the **Unauthorized Solutions'** list, the user will not see that product's information on the Client Portal.

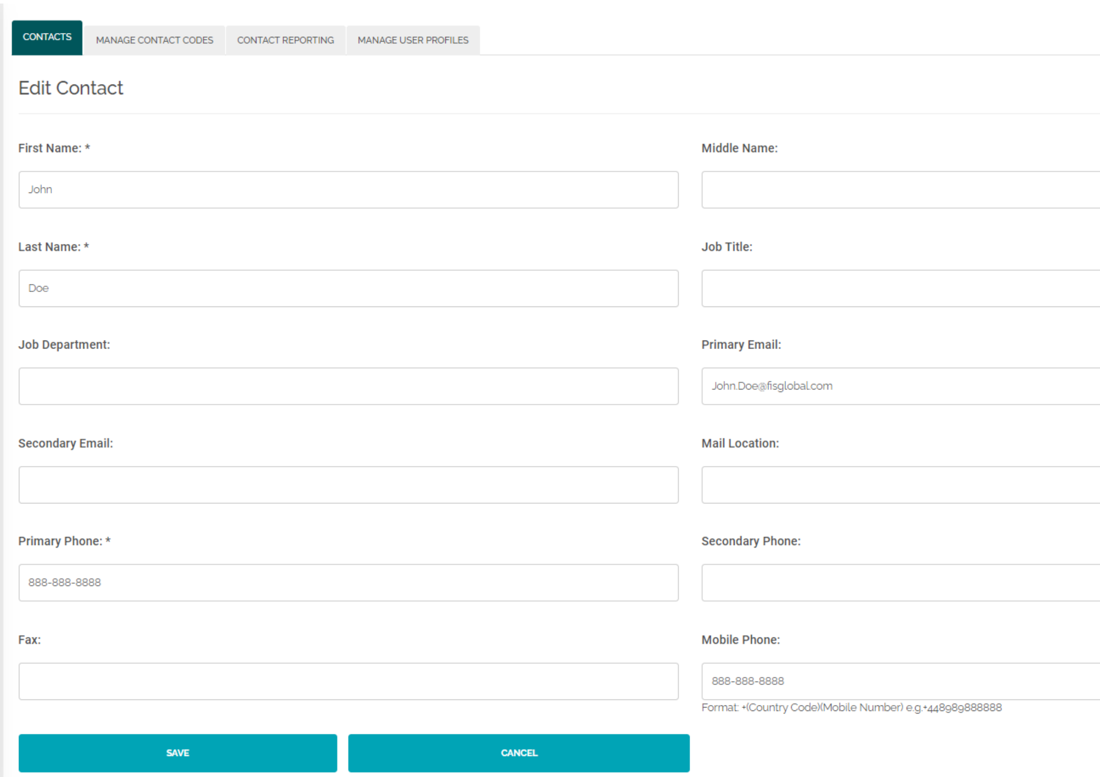
For Authorized Solutions, the following tabs below under the user's 'My Products > Resources and Tools' area are accessible unless that Solution has not enabled these sections, or the solution is moved under the "Unauthorized Solutions" field within their Permission's **User Profile** or under **Custom Entitlements**.



Please note the examples above are just placeholders and may not be applicable to all solutions public on the Client Portal.

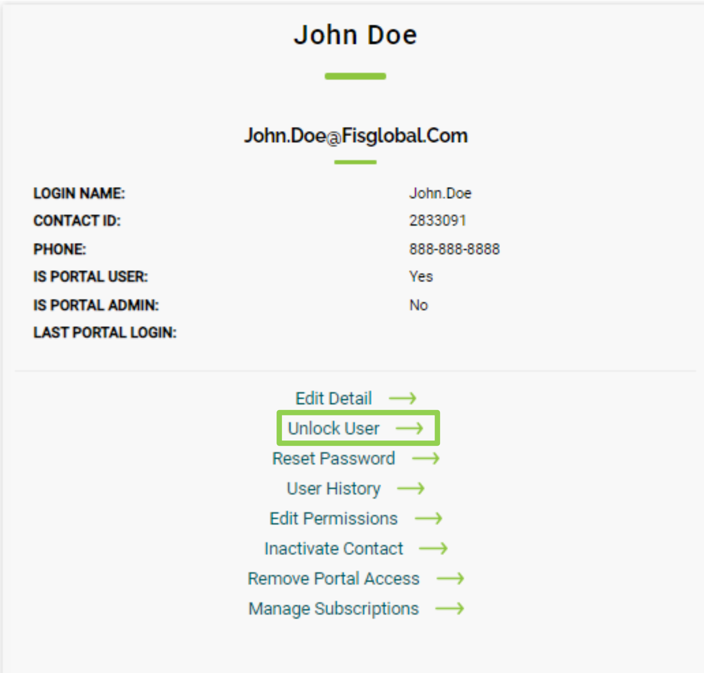
Edit Detail

Click the **Edit Detail** link on the user's contact card to edit any user's contact information.

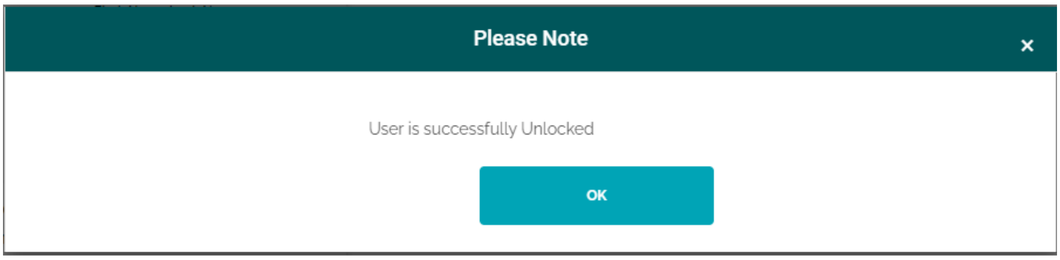


Unlock User

If a user is locked out of the Client Portal, you can unlock the user by clicking on the **Unlock User** link located on the user’s contact card.



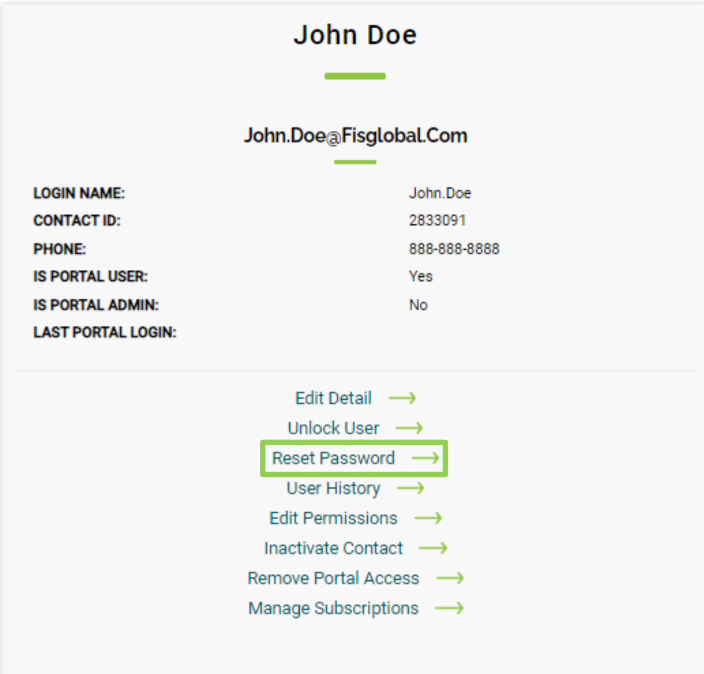
The following success confirmation displays:



Reset Password

Click the **Reset Password** link on the contact card to change (reset) a user's password. Two emails will be sent to the user with a set of instructions (if they have an email address registered with FIS). One with their new temporary password, they will be required to change it the next time they access the system, and a second email with their Username.

Users are prevented from using any of their last 10 previous passwords.



The password must contain at least 10 characters from at least three of the following four categories:

- English Uppercase (A-Z)
- English Lowercase (a-z)
- Base Digits (0-9)
- Non-Alphanumeric (e.g.: $, #, %)

User History

Click the **User History** link on the user’s contact record to view the user's permission change history.

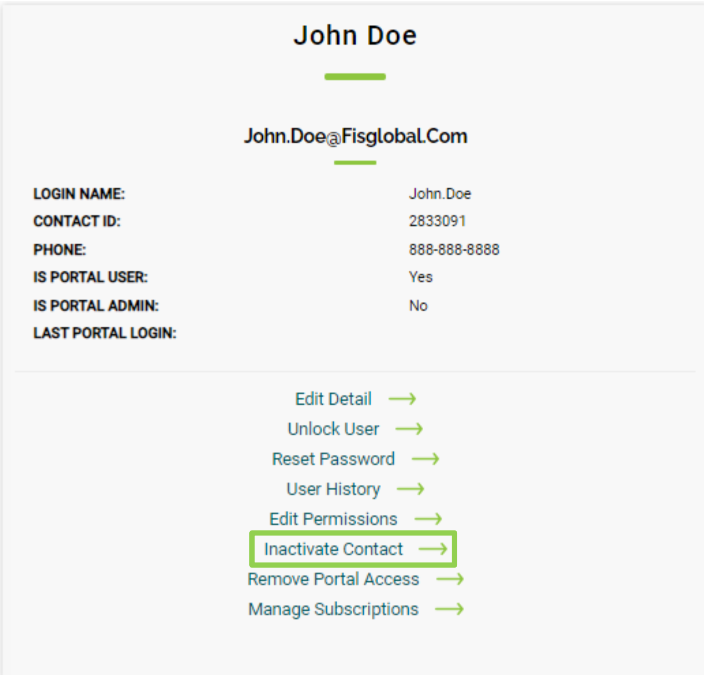
Changed By	Date Changed	Operation Type	Old Value	New Value
Jane Doe	8/28/2020 5:10:19 PM	Insert		UserID = 216086
Jane Doe	8/28/2020 5:10:19 PM	Insert		UserName = 29903|John.Doe
Jane Doe	8/28/2020 5:10:19 PM	Insert		Internal = False
Jane Doe	8/28/2020 5:10:19 PM	Insert		IsBankAdministrator = False
Jane Doe	8/28/2020 5:10:19 PM	Insert		AdministratorRoleID =
Jane Doe	8/28/2020 5:10:19 PM	Insert		IsSiteAdministrator = False
Jane Doe	8/28/2020 5:10:19 PM	Insert		IsInactive = False
Jane Doe	8/28/2020 5:10:19 PM	Insert		Contact = John Doe
Jane Doe	8/28/2020 5:10:19 PM	Insert		InternalUser =

Showing 1 to 9 of 9 entries

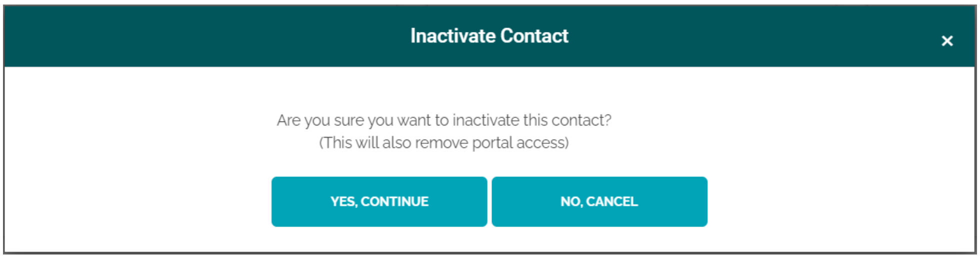
PREVIOUS 1 NEXT

Inactivate Contact

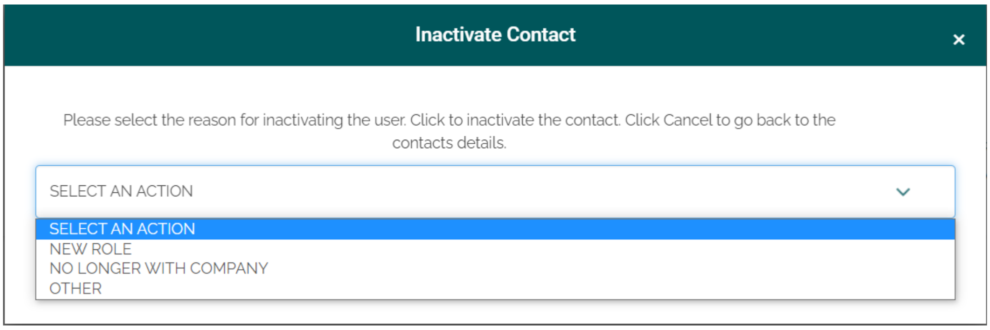
Click the Inactivate Contact link on the user's contact card to remove a User from your institution. This completely removes the user's contact card from the Client Portal. If you just want to remove portal access, but still want the user to remain in the list of authorized contacts for your institution, use the **Remove Portal Access** link instead.



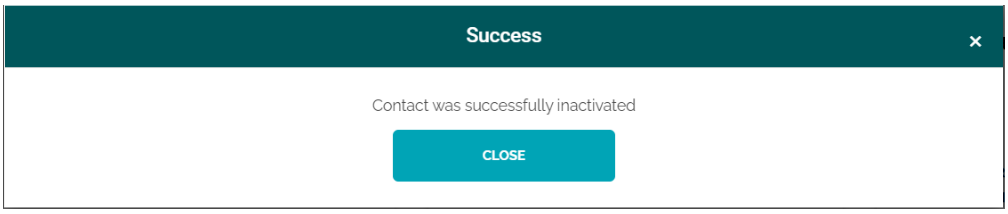
The **Inactivate Contact** popup modal window displays. Click **Yes, Continue** to proceed.



The next Inactivate Contact popup modal window displays. Select the appropriate reason and click **Inactivate.**

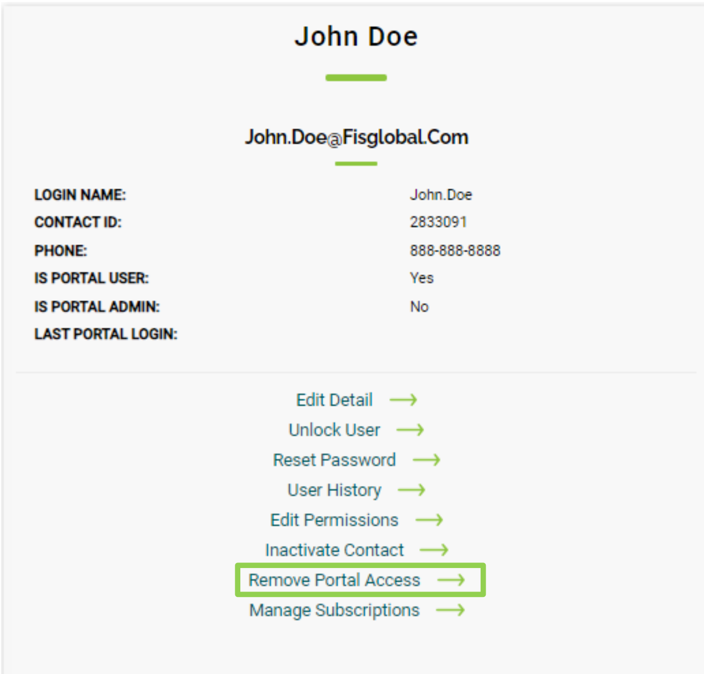


The **Success** popup modal window displays confirmation that the Contact has been inactivated.

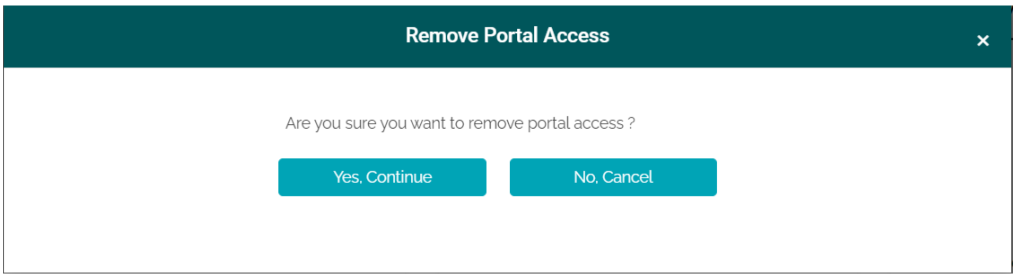


Remove Portal Access

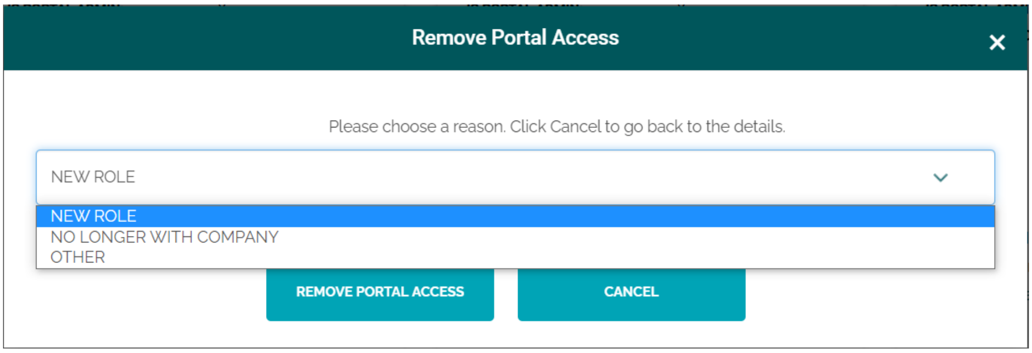
Click the **Remove Portal Access** link on the user’s contact card to remove the user's ability to access the FIS Client Portal.



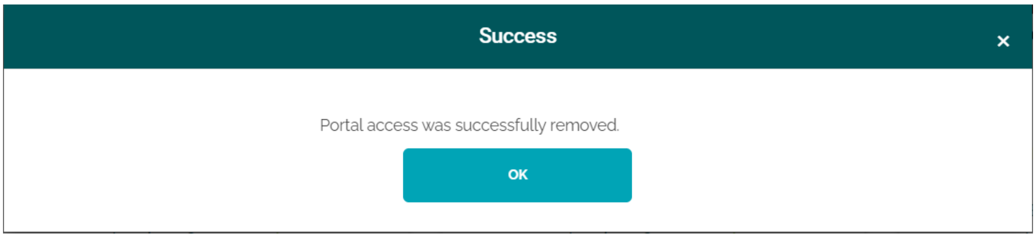
Click **Yes, Continue** on the confirmation popup modal window that displays.



The **Remove Portal Access** popup modal window displays. Select the appropriate reason and click **Remove Portal Access**.

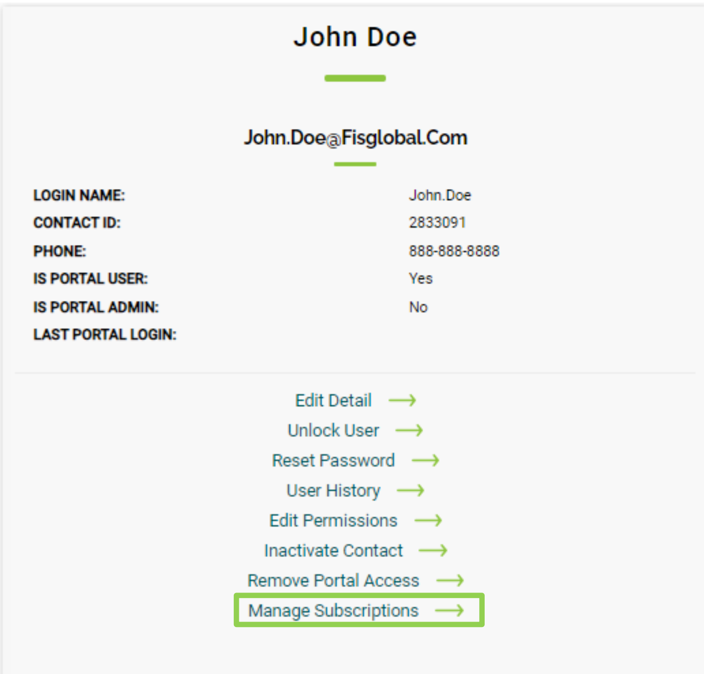


The **Success** popup modal window displays confirmation that the user's access is removed.



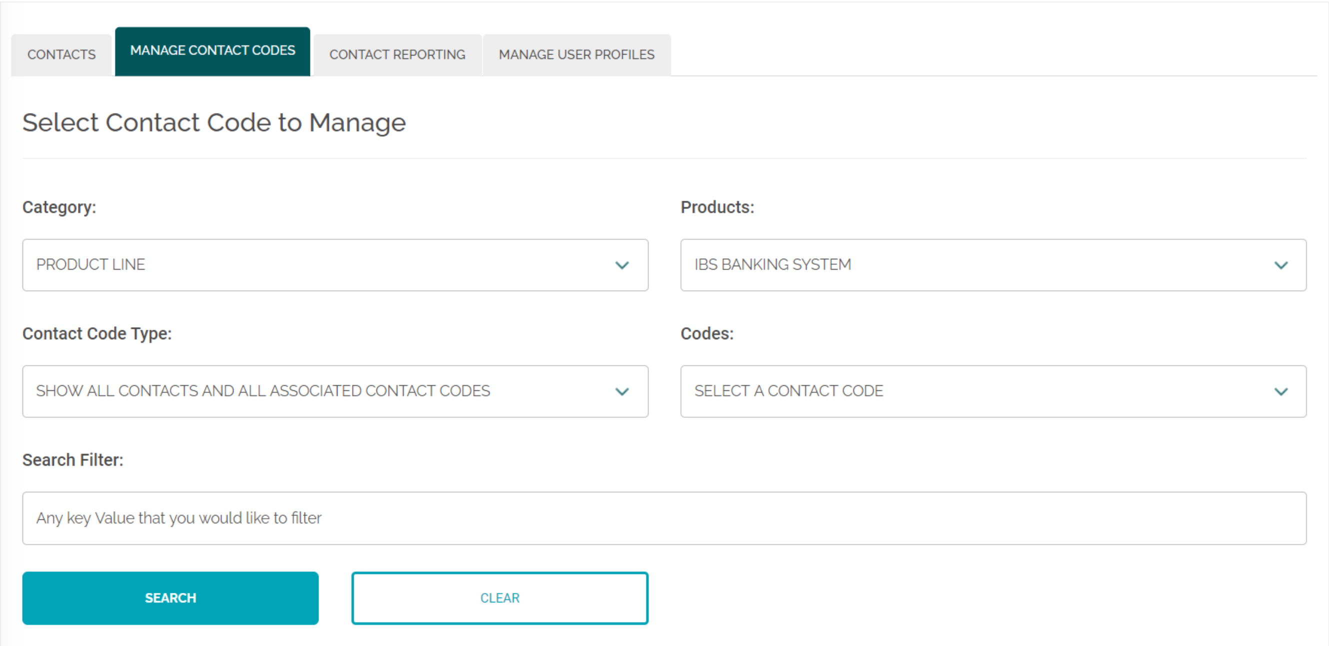
Manage Subscriptions

Clicking the **Manage Subscriptions** link on the user's contact card will take you to the Subscription Center for Bulletin communications. (See **Subscription Center** for further details).



Manage Contact Codes

The **Manage Contact Codes** feature allows you to search for contacts by Contact Code. It also allows you to view a list of all contacts in your organization.



Search for Contacts

You can search for Contacts assigned to a specific Contact Code, not assigned to a specific Contact Code, or for all contacts. Search for Contact Codes by selecting a Category, Product (if Category of *Product Line* is selected), and then the desired Contact Code.

Once a Contact Code is picked, select how you want to search. The options are:

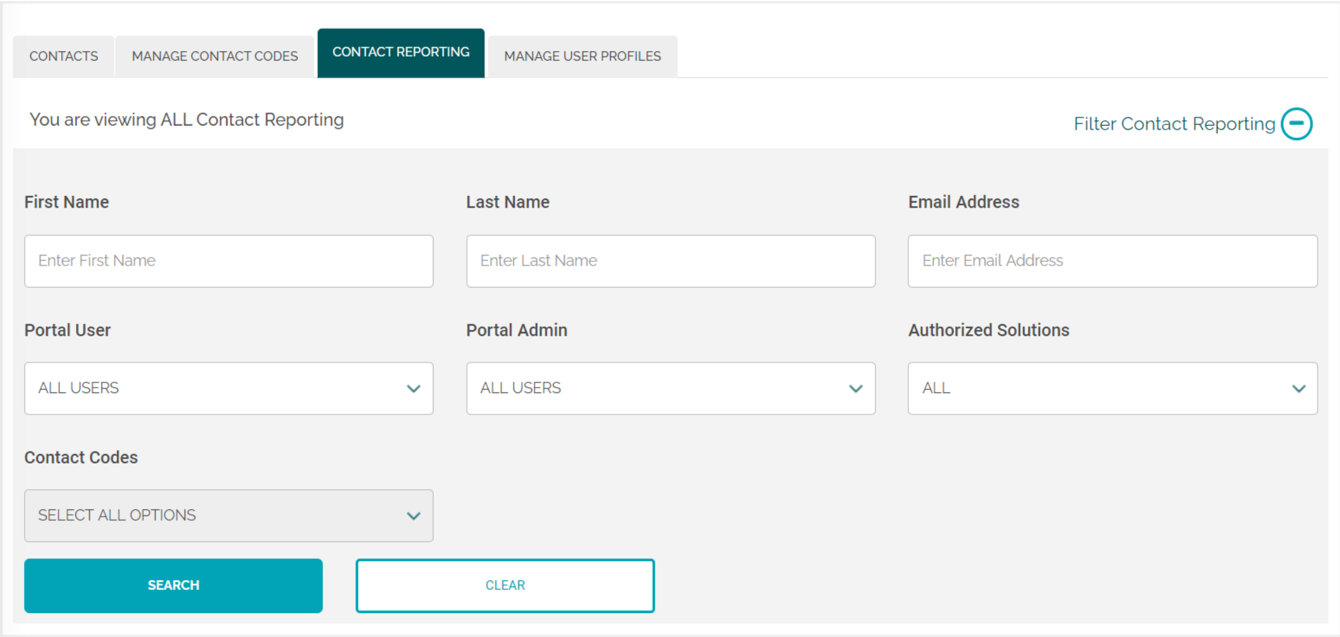
- Show contacts assigned to selected Contact Code
- Show contacts not assigned to selected Contact Code
- Show All Contacts and associated Contact Code

Click the **Search** button.

When the search is done, the list of contacts can be exported to Excel.

Contact Reporting

The **Contact Reporting** feature allows you to search for contacts of your entity by using various filters. It also allows you to view a list of all contacts in your organization. It displays key details about the user such as Portal User, Portal Admin, Last successful login date and it also displays the Authorized Solutions, Contact Codes that a user has subscribed to receive Bulletins, with an ability to Export the results in an Excel.

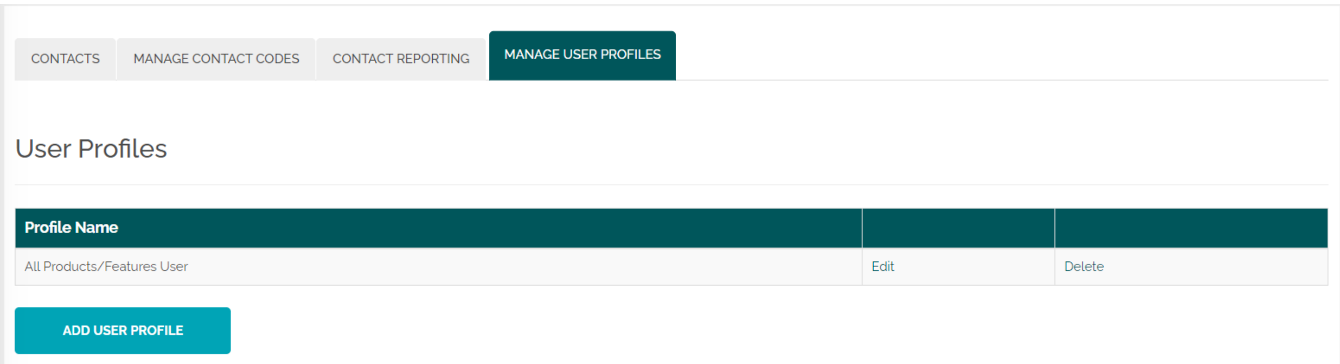


Manage User Profiles

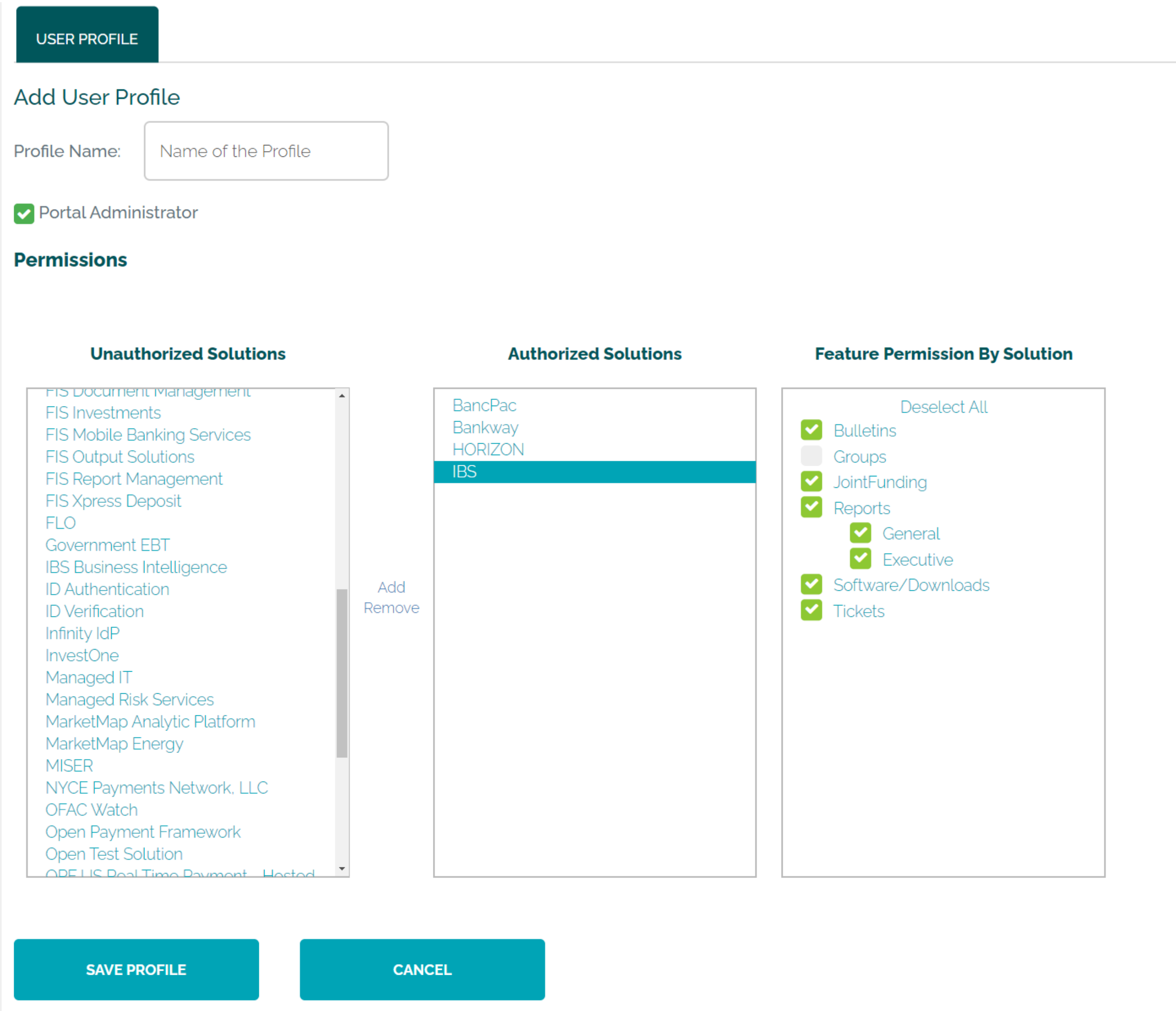
The fourth and last tab under Entity Administration is **Manage User Profiles**. The Manage User Profiles feature allows you to add or Edit existing user Profiles to manage the permissions for your institution.

User Profiles

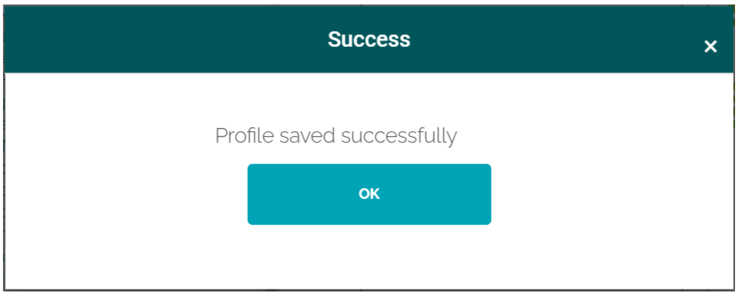
User Profiles are the permission profiles that work as a template to provide a set of permissions to a user with just one click, this feature makes it easy for you as portal administrator to keep different sets of permissions for your organization's teams or departments.



Click on the **Add User Profile** button to add a new User Profile. This will take you to a new page where you can add details and permissions to a profile. The **Add User Profile** Page mimics the **Assign Custom Entitlements** section and also includes a checkbox for Portal Administrator. You can add the products and check the permissions for each product under the feature permissions.



Click on **Save Profile** to save the changes. There will be a Success popup modal window.

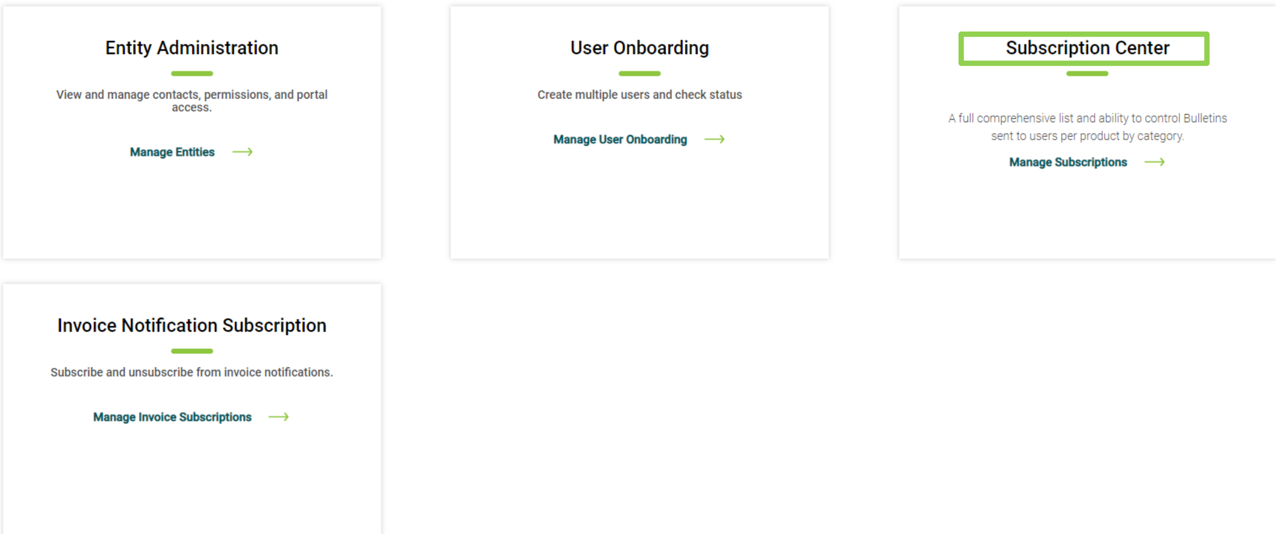


Click **OK** to take you back to the **Manage User Profiles** tab where you can see the new and old profiles listed. Here you can edit an existing User Profile and also delete a profile if no longer required by using the Edit and Delete links.

These profiles will be listed under **Edit Permissions** and will work as a bundle of permissions that can be used together when granting permissions to a user.

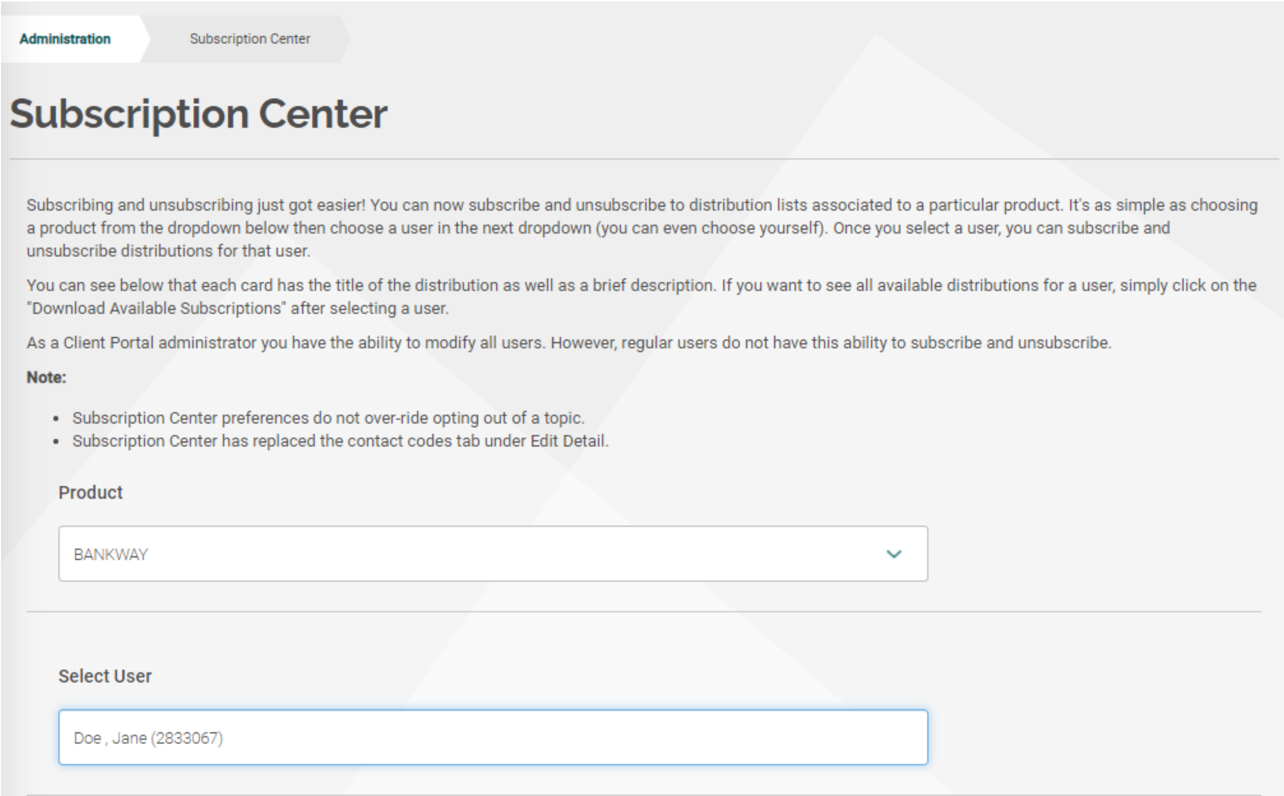
Subscription Center Card

On the Administration Screen, you will see a card labeled **Subscription Center**. It allows you to manage users' subscriptions for receiving emailed Bulletins that are sent by FIS.

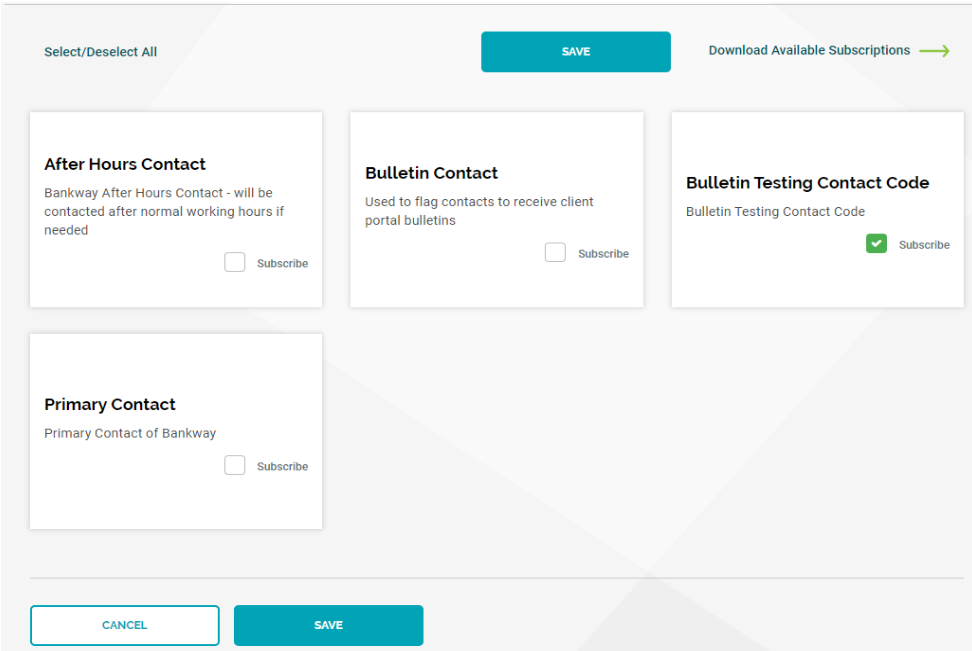


Subscription Center

Within the Subscription Center, you can manage the **Bulletin Subscriptions** for a user by selecting the product and then a user.

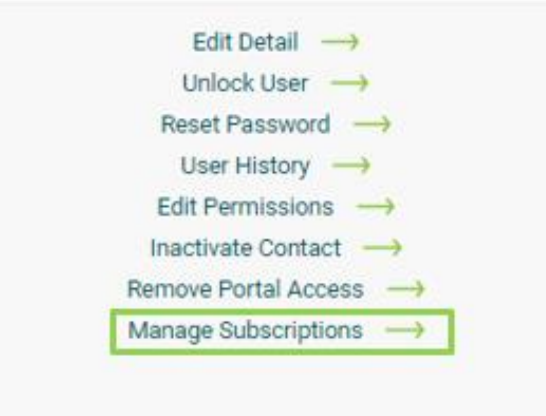


Once you select a user, you can see all the Contact Codes for that Product in the form of Cards. A Contact card includes Contact Code name, a short description and a checkbox to **Subscribe**. You can check or uncheck it for a user as needed for receiving Bulletin Emails.



After making the changes to subscriptions, click **SAVE**. You may also export the list of Subscriptions to Excel.

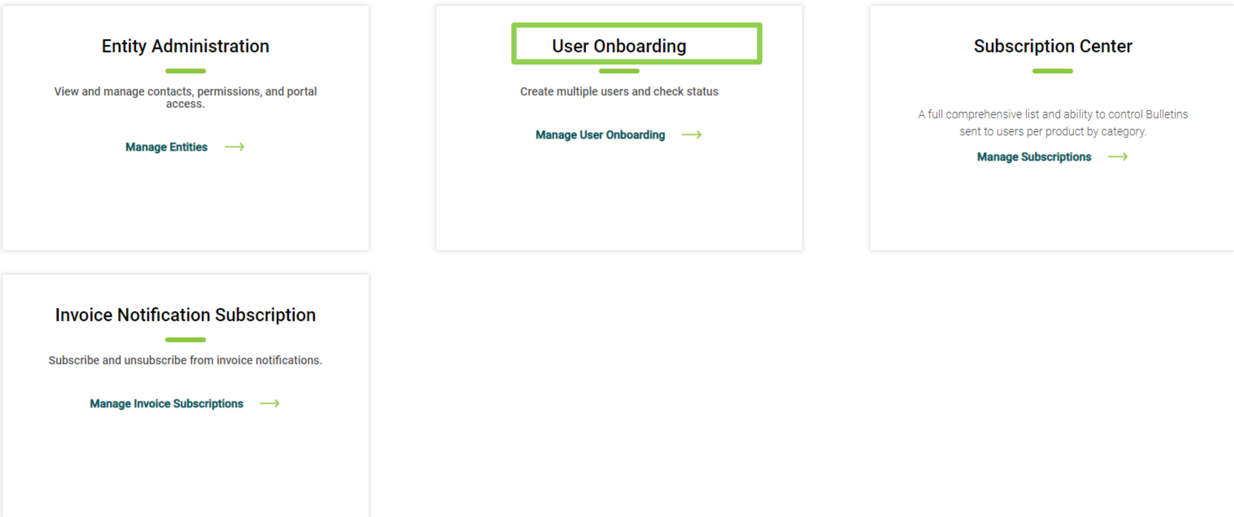
*You can also access the **Subscription Center** for a user from the user's contact card under Entity Administration by clicking the link **Manage Subscription**.*



User Onboarding Card

This is available for IDP/ Single-Sign On (SSO) Entities only.

On the Administration Screen, you will see a **User Onboarding Card** along with Entity Administration and Subscription Center.



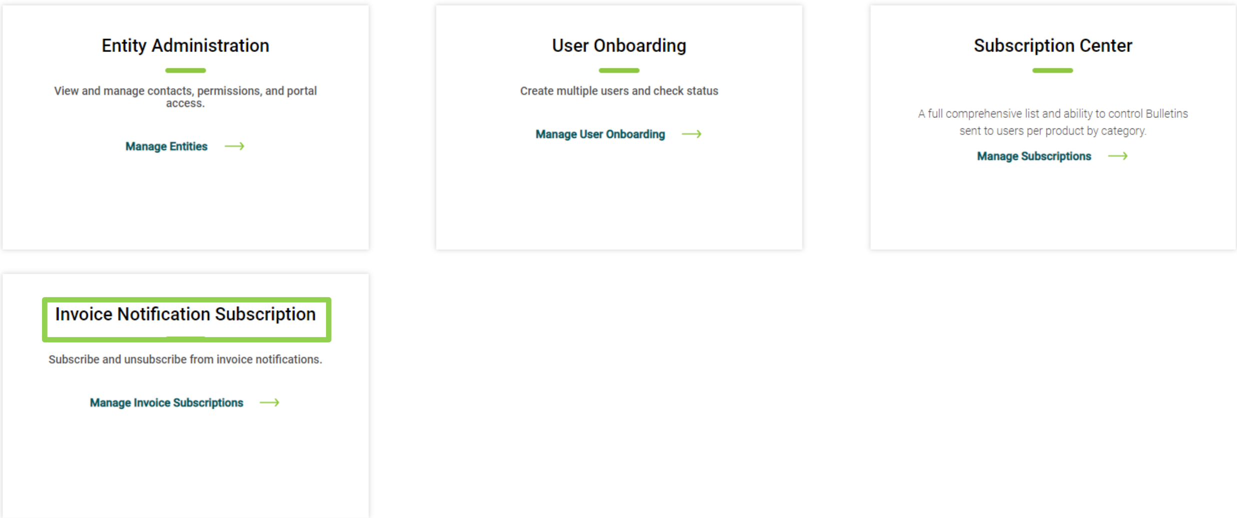
User Onboarding

With the help of the **User Onboarding** functionality, you can create multiple Client Portal Users in one go. Please review the User Onboarding Help Document for further details.

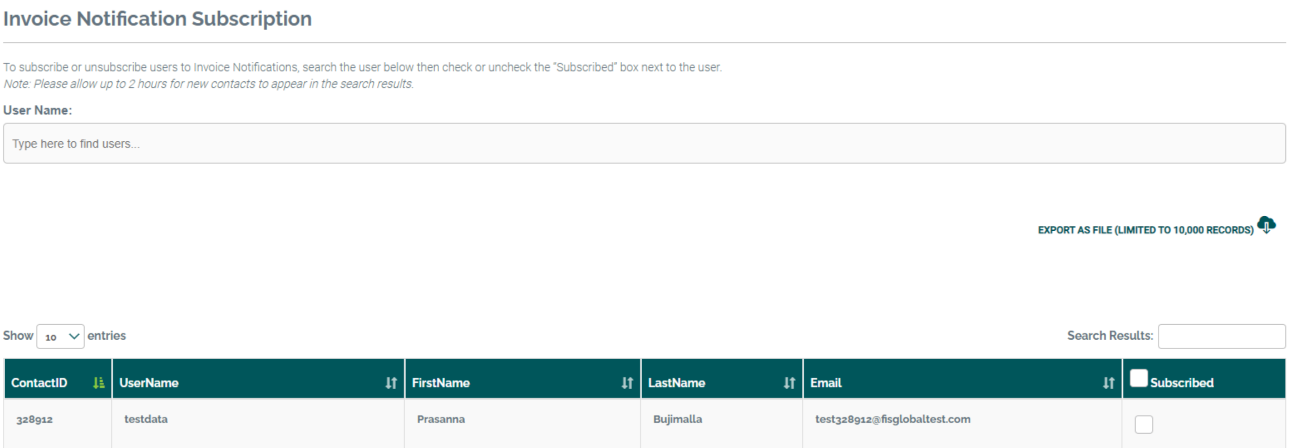
UserOnboardingHelp.pdf

Invoice Notification Subscription Card

On the Administration Screen, you will see the **Invoice Notification Subscription Card.** Here you can subscribe and unsubscribe users from receiving invoice email notifications.



To subscribe or unsubscribe users to Invoice Notifications, search for the user then check or uncheck the “Subscribed” box next to the username.



There are few things to keep in mind about invoice email notifications…

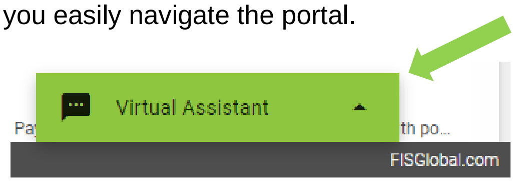
- Your institution must have the Billing feature enabled by FIS.
- Please allow up to 2 hours for new contacts to appear in the search results.
- You must assign the 'Billing Profile' to a user's account for this function to work.
- A user can override your option to subscribe them for notifications by going to their own preferences.

FIS™ Virtual Assistant

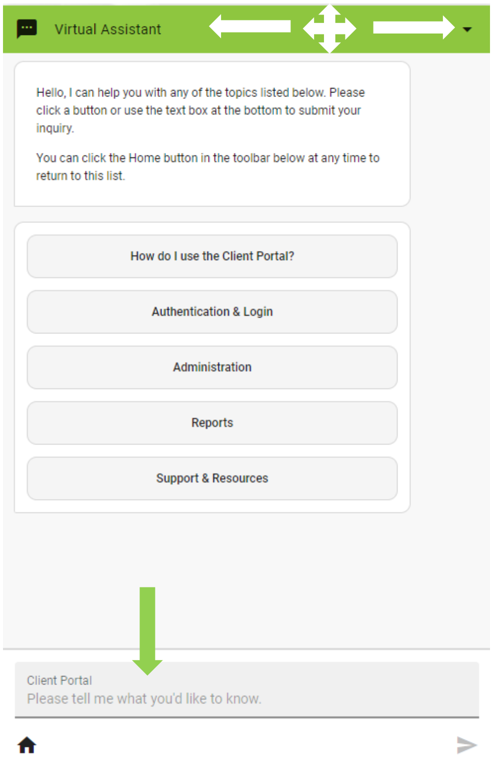
FIS™ Virtual Assistant is a simple way for you to get help navigating the FIS Client Portal. Designed with you in mind, the Virtual Assistant will:

- Answer your questions conversationally
- Navigate you directly to parts of the Portal
- Suggest resources such as knowledge-based articles

The Virtual Assistant appears in the lower-right corner of your Client Portal screen and will be available to help you easily navigate the portal.



To get started, you can navigate the pre-populated menu or ask freeform questions in the "Ask Anything" box. You can also move the window around by moving your cursor to the top toolbar.



FIS plans to continuously add information and features to the Virtual Assistant to help you quickly access the information you need in support of your business and customers.

Questions

If you have any questions or experience technical issues with the Client Portal, please contact your Portal Administrator or call the help desk at 1-844-6 FIS NOW (844-634-7669) and say "Client Portal Login Issue" at the product prompt.

If you need support related to invoices, please contact FIS Billing Support via email at FISBilling@FISglobal.com or phone at 1-866-275-6868, option 7, 2.

For specific product support, you will find support details provided directly on each product under the **Contact Us** tab.