



# **FIS Client Portal User Guide**

November 2021

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# 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>

**WELCOME TO THE CLIENT PORTAL EDUCATION CENTER**  
Find documentation and videos to help get you started, or dive into specific training materials.

- Getting started**  
Get to know the basics of the FIS Client Portal, from managing your settings to overall navigation of the client portal.  
[Learn More →](#)
- Top 5 features**  
Review our top 5 features on the Client Portal: FIS InView, My Products, Tickets, Bulletins and VMRC.  
[Learn More →](#)
- Ticketing**  
Use the Tickets feature to submit tickets to FIS and to review previously created tickets.  
[Learn More →](#)
- Other features**  
Check out these additional features available on the Client Portal.  
[Learn More →](#)
- User administration**  
Everything a Client Portal Administrator needs to know about managing their users on the Client Portal.  
[Learn More →](#)
- Authentication**  
Infinity IdP's Multi-Factor Authentication supporting a more secure way to authenticate to the FIS Client Portal.  
[Learn More →](#)

**FIS ACADEMY**

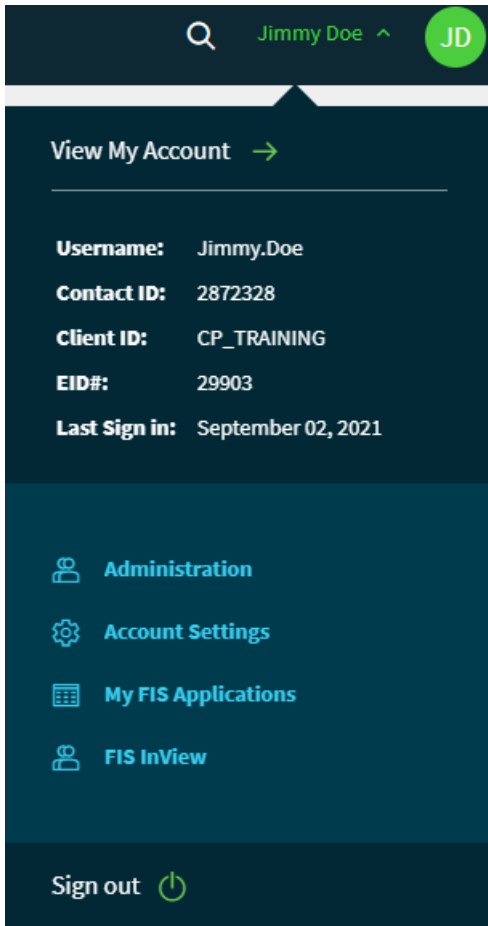
**YOUR MODERN FIS PRODUCT LEARNING EXPERIENCE**

FIS Academy's comprehensive and continuous learning solutions are built to deliver the modern self-driven development experience you want, without sacrificing the tools, insights and connectivity you need.

[Start learning](#)

## Username Dropdown

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



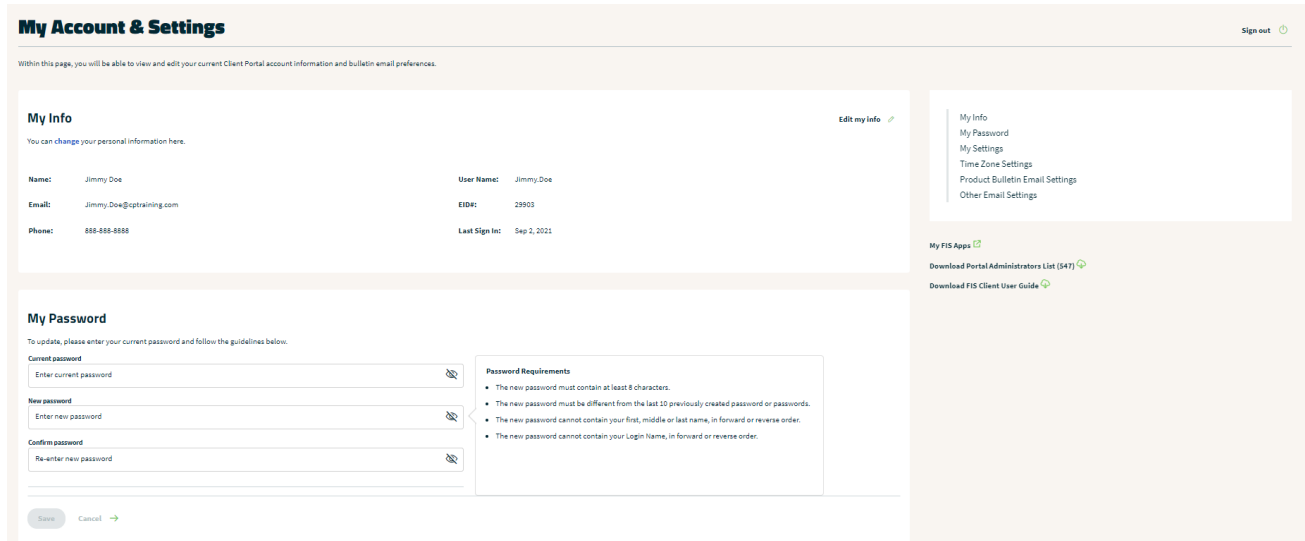
Here you will see details such as a link to “View My Account” which will take you to the “My Account & Settings” page, your Username, Contact ID, Client ID, EID# and Last Sign in information.

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 Info**
  - My Password
  - My Settings
  - Time Zone Settings
  - Product Bulletin Email Settings
  - Other Email Settings

**My FIS Apps**

**Download Portal Administrators List (547)**

**Download FIS Client 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.

#### Time Zone Setting

This setting affects the date and time fields on Tickets and Bulletins.

**Time Zone**

**Save** **Cancel**

## Product Bulletin Email Settings

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

### Product Bulletin Email Settings

Control which types of bulletin emails you want to receive for FIS Products by content level. Please allow up to 2 hours for your new selection to appear under the product selection field. Products within the dropdown selections are defined by your Client Portal Administrator. Please contact your Client Portal Admin for additional assistance on product selections.

#### Education

Get updates about relevant webinars, training, & e-Learning sessions that supports your products and services.

#### Reporting

This will include updates on all non-critical reporting items.

#### Maintenance

Scheduled maintenance events may take your products offline for a short period of time.

#### Product Notifications

Enhancements or other information related to existing products and services. Information on new products appear under the Mass Enablement Campaign notifications.

#### Regulatory And Compliance

Industry and FIS regulatory and compliance information.

#### Release

System release items.

#### Billing

Non-critical Billing items.

#### Mass Enablement Campaigns

New product launches, and 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.

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.

### Other Email Settings

Opt-in/Opt-out to notifications for Invoices, VMRC GDPR Processor updates, and Bulletin Weekly Summary emails.

**Select All**

---

**Invoices**  
Your invoice will include transaction details about your products & services, and all relevant payment terms.

---

**VMRC - FIS Subprocessor Notifications**  
Get notifications when FIS updates the GDPR Processor documentation.

---

**Weekly Summary**  
A Bulletin Weekly Summary is the summary of recent bulletins in one email that you received during the past week.

---

Save
Cancel →

## Navigation Menu

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

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

The screenshot displays the dashboard layout. At the top is the 'Urgent Bulletins' section with a 'Create a Bulletin' link and three bulletins: 'IBS BUSINESS INTELLIGENCE-FIRST COMM RESOLUTION-ONLINE ACCOUNT CREATION DATA', 'FIRST COMM RESOLUTION - ONLINE ACCOUNT CREATION ISSUE', and 'URGENT ACTION REQUIRED - CAMS SERVICE REGISTRATION FROM VISA'. Below this are 'General Bulletins' and 'Mass Enablement Bulletins', each with a 'Create a Bulletin' link and several bulletins. At the bottom are 'Opened Tickets' and 'Closed Tickets' sections, both showing 'No Open Tickets' and 'No Closed Tickets' respectively, with 'See All' links.

## 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.

The screenshot shows a form titled 'Select an entity to emulate:'. It has two input fields: 'Parent Name' with the value '(Holding Company) - Moorefield, WV' and 'Child Name' with the value '(Bank) - Moorefield, WV'. The FIS Client Portal logo is visible at the bottom.

## 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.

### Create New Ticket

---

**Choose what this ticket is for:**

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

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

I have an issue or question about my invoices

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

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

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:

The screenshot shows the 'Create a Ticket for my Product' form. At the top, a dropdown menu is set to 'I have an issue or question specific to one of my FIS products'. Below this is the 'Create a Ticket for my Product' section. It includes a 'Product' dropdown menu with 'Bankway' selected, a 'Request Reason' dropdown menu with 'Deposits - New Ticket Request' selected, and a 'Subject' text input field. A 'Description' text area is provided for a full explanation. An 'Urgency' dropdown menu is set to 'Select Urgency'. A 'Notify Additional Recipients' toggle switch is turned off. Below the form is an 'Add Attachment' section with a 'Browse files' button and a list of accepted file types: pdf, doc, docx, ppt, pptx, pps, ppsx, odt, xls,xlsx, jpg, png, txt, rtf, zip. The form ends with 'Create Ticket' and 'Cancel' buttons. Green callout boxes provide instructions: 'Select applicable Product from the dropdown menu.' points to the Product dropdown; 'Select applicable Request Reason from the dropdown menu.' points to the Request Reason dropdown; and 'Add any additional recipients that need to be notified of ticket updates here.' points to the Notify Additional Recipients toggle.

## 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:

Choose what this ticket is for:

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

---

**Create a Ticket for Client Portal**

Client Portal - These tickets are for questions or issues related to the FIS Client Portal application 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 particular FIS product, please select the **N/A** option.

**STOP!** If your ticket is product related, you must select "My Product" from the tab above. If you submit a product ticket to the Client Portal team and not the product team, it may go unanswered.

**Ticket Reason \***  
 Access - Login/OTP issues

Select applicable Ticket Reason from the dropdown menu.

**Subject \***  
 Enter a subject for your request

FIS asks that you use caution and refrain from adding sensitive data in the description field. Use the "Add Attachment" feature to securely transmit sensitive data when required.

**Description \***  
 Please provide a full explanation of your ticket reason in as much detail as possible in order to help expedite your ticket as quickly as possible.

**Urgency \***  
 Select Urgency


**Which product is this related to? \***  
 Select Product

If your client portal support ticket is not related to an FIS product, please select N/A.

**Notify Additional Recipients**

Add any additional recipients that need to be notified of ticket updates here.

**Add Attachment**



**Drag and Drop files here to upload automatically**

Or

**Browse files**

File type accepted : pdf,doc,docx,ppt,pptx,pps,ppsx,odt,xls,xlsx,jpg,png,bt,rdl,zip | Max file size: 50MB

Please be aware some email administrators block large attachments.

**Create Ticket** **Cancel** →

### 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:

**Choose what this ticket is for:**

I have an issue or question about my invoices

---

**Create a Ticket for Invoice**

Invoices - These tickets should be opened for questions around FIS billing and/or invoices.

**Invoice Reason \***

Billing Client Services Ticket (For FIS Invoice Inquiries ONLY)

Select applicable Invoice Reason from the dropdown

**Subject \***

Enter a subject for your request

**Description \***

Please provide a full explanation of your ticket reason in as much detail as possible in order to help expedite your ticket as quickly as possible.

**Urgency \***

Select Urgency

**Invoice Product(s)**

Select product(s)

**Invoice Number(s)**

Enter invoice numbers separated by commas

**Notify Additional Recipients**  Add any additional recipients that need to be notified of ticket updates here.

**Add Attachment**

**Drag and Drop files here to upload automatically**

Or

**Browse files**

File type accepted : pdf,doc,docx,ppt,pptx,pps,ppsx,odt,xls,xlsx,jpg,png,txt,rdf,zip | Max file size: 50MB

Please be aware some email administrators block large attachments.

**Create Ticket** **Cancel →**

### 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:

Choose what this ticket is for:

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

---

**Create a ticket**

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.

**Product \***  
Bankway Core Banking System

**Application / Service**  
Bankway Technology Enablement Services

**Category \***  
Bankway Windows Server Consulting Services

**Subcategory \***  
System Administration for Windows Consulting

**System Administration for Windows Consulting**  
This services system administration services for Windows Server Platform.

**Provide a short description (title) for your request \***  
Title

**Provide a detailed description for your request \***  
Description

**Purchase order (Enter PO# if applicable)**  
Purchase Order

**Who is authorized signer/approver of this request? \***  
More Information  
Select authorized signer/approver

**Will this work be performed using customer credit?**  
Select

**What is your budget (Not to exceed amount)?**  
Budget amount

**What is your desired delivery or implementation date?**  
[Calendar icon]

**What is your bill to address?**  
More Information  
[Search field]

**Add New Address**  
\* Note: Contact should be updated with in 24 Hrs. In show. New address and/or Contact information will be updated and available within 1 to 2 Business days.

**What is your ship to address?**  
More Information  
[Search field]

**Add New Address**  
\* Note: Contact should be updated with in 24 Hrs. In show. New address and/or Contact information will be updated and available within 1 to 2 Business days.

**Add Attachment**  
[Attachment icon]

*Callouts:*

- Select applicable Product from the dropdown menu.
- Select applicable Category and Subcategory from the dropdown menus.
- Select Bill to Address from the search field or create a new address.
- Select Ship to Address from the search field or create a new address.

## 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:

Choose what this ticket is for:

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

### Create a ticket

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.

**Product \***  
Product

**Application / Service**  
Select Application / Service

**Category \***  
Select Category

**Subcategory \***  
Select Subcategory

**Purchase order (Enter PO# if applicable)**  
Purchase Order

**Provide a detailed description for your request \***  
Description

**Who is authorized signer/approver of this request? \***  
More Information  
Select authorized signer/approver

**Will this work be performed using customer credit?**  
Select

**What is your desired delivery or implementation date?**

**Standard Billing Cost**  
25,000

**What is your bill to address?**  
More Information

**Add New Address**  
\* Note: New address and/or Contact information will be updated and available within 1 to 2 Business days.

**What is your ship to address?**  
More Information

**Add New Address**  
\* Note: New address and/or Contact information will be updated and available within 1 to 2 Business days.

**Add Attachment**

Drag and Drop files here to upload automatically

Select applicable Product from the dropdown menu.

Select applicable Category and Subcategory from the dropdown menus.

Select Bill to Address from the search field or create a new address.

Select Ship to Address from the search field or create a new address.

## 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.

**Comments**

Description	Created By	Date Created
-------------	------------	--------------

**Attachments**

File Name	Date Created	Remove
cgtest.txt	09.25.2020 11:43:35 AM	
Test File 5 mb version 1.pptx	09.24.2020 02:40:29 PM	
testdoc4.docx	09.24.2020 02:39:12 PM	

**ADD ATTACHMENT**

**BACK TO TICKETS**
 **PRINT**
**CANCEL TICKET**



*Pop-up 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.

**Comments**

Description	Created By	Date Created
-------------	------------	--------------

**Attachments**

File Name	Date Created	Remove
cgtest.txt	09.25.2020 11:43:35 AM	
Test File 5 mb version 1.pptx	09.24.2020 02:40:29 PM	
testdoc4.docx	09.24.2020 02:39:12 PM	

**ADD ATTACHMENT**

**BACK TO TICKETS**
 **PRINT**
**CANCEL TICKET**

Once you click on the red “” icon, you will receive a pop-up to confirm your request. Click on Ok to complete your request.

my.fisglobal.com says

Are you sure you want to delete this attachment?

OK
Cancel

## 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

**Ticket Detail**

Ticket ID	CS00129734	Owner	
Opened Date	09.25.2020 01:40:13 PM	Contact	6931, Sabine
Subject	Testing		
Description	Testing		
Status	New		
Ticket Urgency	4 - Low		
Priority	3 - Medium		
Escalation Status	Not Escalated		

ESCALATE TICKET

ACCEPT RESOLUTION

REJECT RESOLUTION

**Escalate Ticket** [X]

Select Escalation Reason.

OTHER [v]

PLEASE SELECT A REASON  
 SLO HAS BEEN MISSED  
 TICKET OWNER NON-RESPONSIVE  
 LACK OF QUALITY UPDATES  
 NEW CIRCUMSTANCES IMPACT THE SEVERITY OF THE TICKET  
 OTHER

SUBMIT CANCEL

**Success** [X]

Ticket Escalation request has been submitted successfully.

OK

**Escalation/De-Escalation Reason**

Record Id	Escalation Date	Escalation Reason	De-Escalation Date	De-Escalation Reason
ESC00001221	09.24.2020 04:57:26 PM	SLO has been missed		

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.

### Ticket Detail

Ticket ID	CS00129734	
Opened Date	09.25.2020 01:40:13 PM	Owner
Subject	Testing	Contact 6931, Sabine
Description	Testing	
Status	New	
Ticket Urgency	4 - Low	
Priority	3 - Medium	
Escalation Status	Not Escalated	

ESCALATE TICKET

ACCEPT RESOLUTION

REJECT 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.

### Ticket Detail

Ticket ID	CREQ0002453	
Opened Date	05.19.2021 04:59:33 PM	Owner
Short Description	Testing client portal ticket - Deconverison File/Extract Out	Contact
Detailed Description	Testing client portal ticket - Deconverison File/Extract Out (SM)	Created by
Status	New	Approver

APPROVE

REJECT

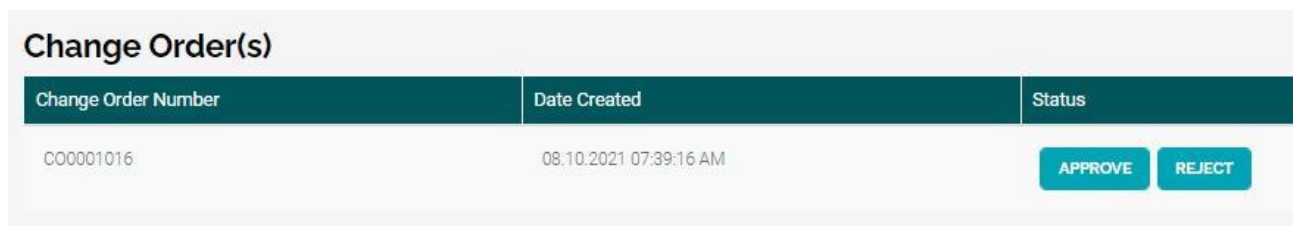
## Client Request Change Orders

*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.

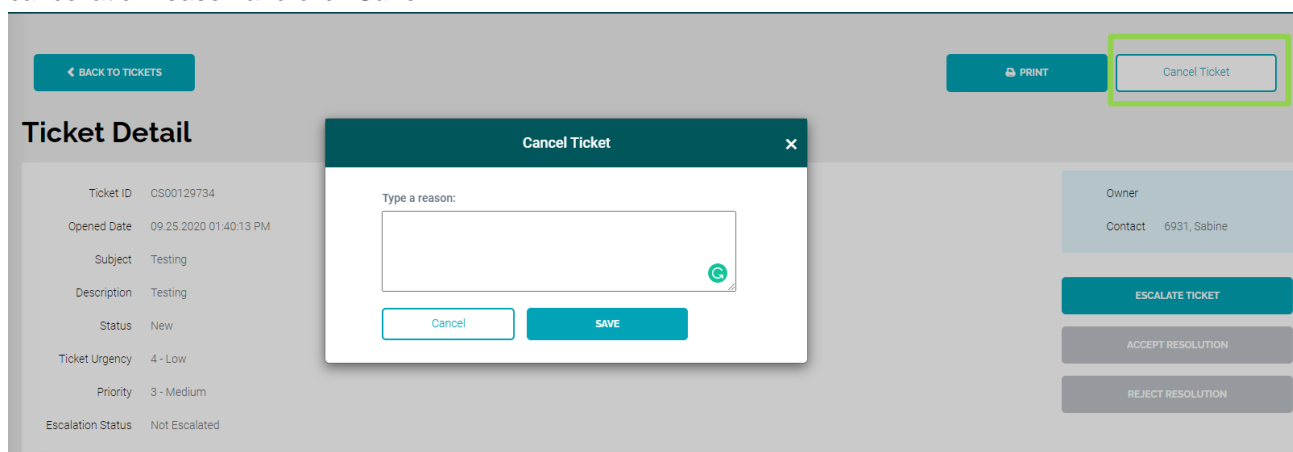


The Assignment Group will send the Change Order and any supporting documentation to the requestor via email. You can then approve or reject the Change Order using the appropriate Approve or Reject buttons found under the Change Order section within the request's Ticket Detail screen.



### 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**.

**Tickets** Create a Ticket →

You are viewing 0 of 0 Tickets Filter Tickets ⌵

Filter ticket type \*

You must choose a ticket type(s) from above

\*\*Note: At this time, You are not able to select ALL filtering options. When filtering your ticket types, You can only multi-select from My Products, Client Portal, Invoice Types OR multi-select Standard Requests, Estimate Request ticket Types.

Subject:  Ticket Age:  Ticket ID:

Product:  Tickets Opened From:  Status:

View My Own Requests

Filter Tickets Clear Filters →

Select Columns ⌵

Ticket ID ⌵ Product ⌵ Subject ⌵ Created By ⌵ Contact ⌵ Status ⌵ Opened Date ⌵ Last Updated Date ⌵

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

Ticket ID ⌵	Product ⌵	Subject ⌵	Created By ⌵	Contact ⌵	Status ⌵	Opened Date ⌵	Last Updated Date ⌵
CS01205574	Client Portal	testing internal ticket process 121720	Doe, Jane	Doe, Jane	Open	12.17.2020 10:59 AM (ET)	12.17.2020 11:23 AM (ET)

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
<b>New</b>	The default value for a newly opened ticket. Unassigned tickets originating from the FIS Client Portal will be in a New status.
<b>Open</b>	The ticket has been assigned to a Client Care representative, and the case status moves from New to Open.
<b>Awaiting Info</b>	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.
<b>Defect</b>	The ticket has been identified and approved by Client Care as a defect to be corrected in an updated software release.
<b>Resolved</b>	A resolution has been proposed to you, prompting you to accept or reject the resolution, which can be done through the FIS Client Portal.
<b>Closed</b>	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.

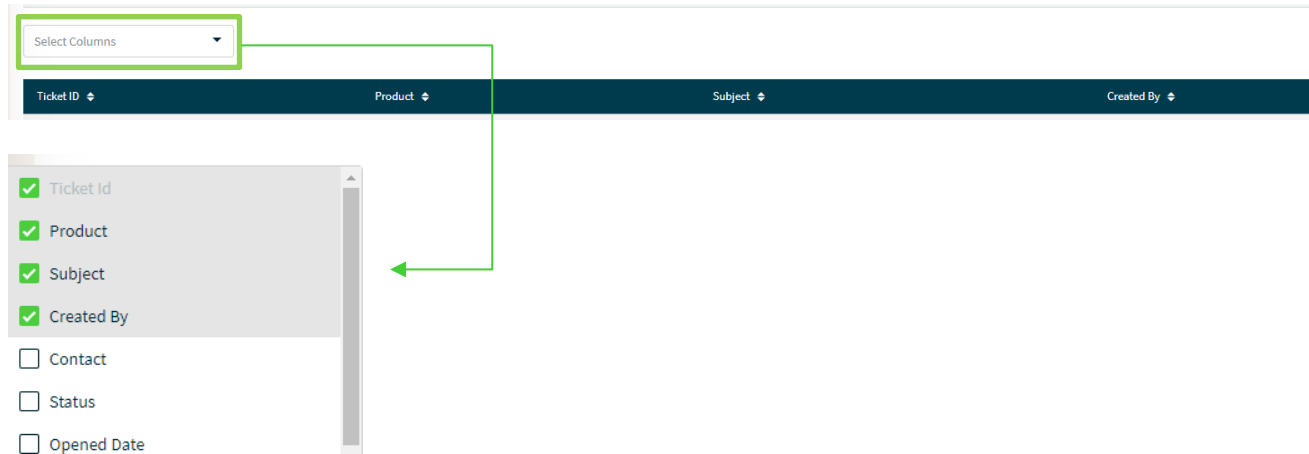
View My Own Requests

Download 1 results as a file

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.

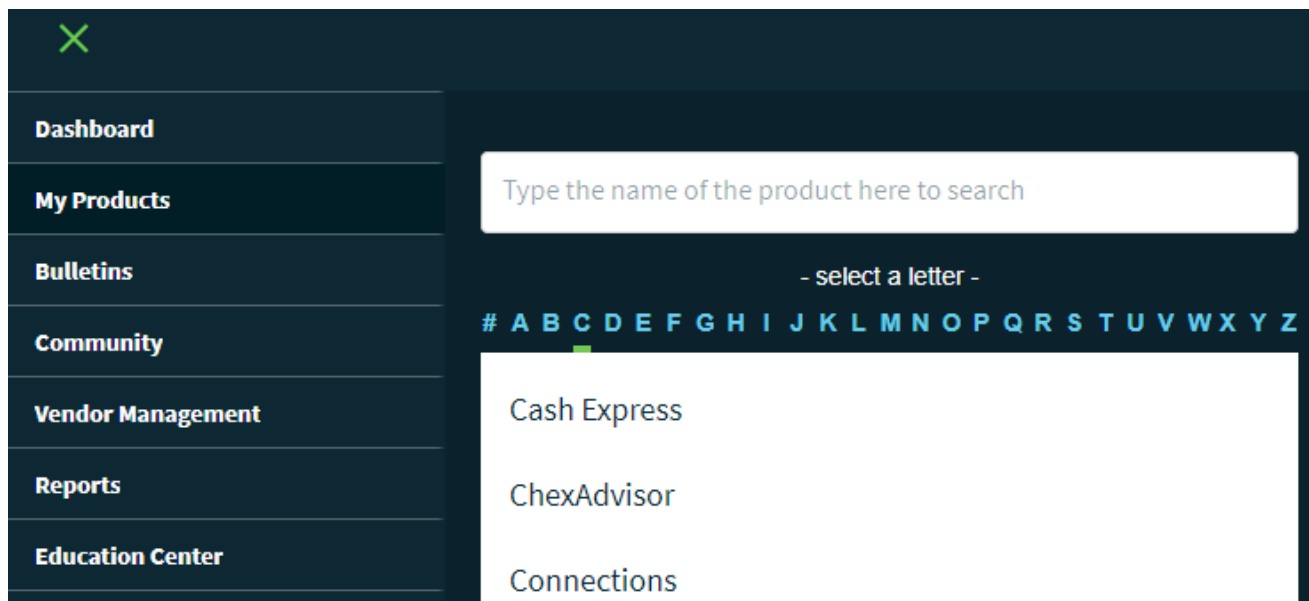


Four (4) columns are required.



## 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.

### RESOURCES AND TOOLS

Strategy

Documentation

Services

Training

## 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.

### Bulletins

You are viewing ALL Bulletins. Filter Bulletins +

Subject	<input type="text" value="Enter Subject"/>	From Date	<input type="text" value="Friday 06/05/2020"/> 31
Category	<input type="text" value="SELECT A CATEGORY"/> v	To Date	<input type="text" value="Tuesday 08/04/2020"/> 31
Topic	<input type="text" value="SELECT A TOPIC"/> v		
Solution	<input type="text" value="SELECT A SOLUTION"/> v		<input type="checkbox"/> Search Pinned Bulletins Only
Ticket Number	<input type="text" value="Ticket Number"/>		

## 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 Management 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 applicable 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**.

## Invoices

Direct Invoice Inquiries to:  
 FISBilling@fisglobal.com  
 1-866-275-6868, Option 7.2  
 FIS eAccess Invoice.Source.Documentation@fisglobal.com

Invoice Number

Account Number                      Start Date:                      End Date:  
                                           

**FIND INVOICES**                      CLEAR SEARCH FILTERS                      **ADVANCED SEARCH**

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

PREVIOUS   1   2   3   4   5   ...   53   NEXT

- [Print Selected Invoices](#)
- [Download selected invoices as single file](#)
- [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.

Direct Invoice Inquiries to:  
 FISBilling@fisglobal.com  
 1-866-275-6868, Option 7.2  
 FIS eAccess [Invoice.Source.Documentation@fisglobal.com](mailto:Invoice.Source.Documentation@fisglobal.com)

## Reports

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

### Reports

SUBJECT:                       PRODUCTS: SELECT ONE

REPORT TYPE: SELECT ONE                      FROM: 06/05/2020 **31**

REPORT SUB TYPE: SELECT ONE                      TO: 08/04/2020 **31**

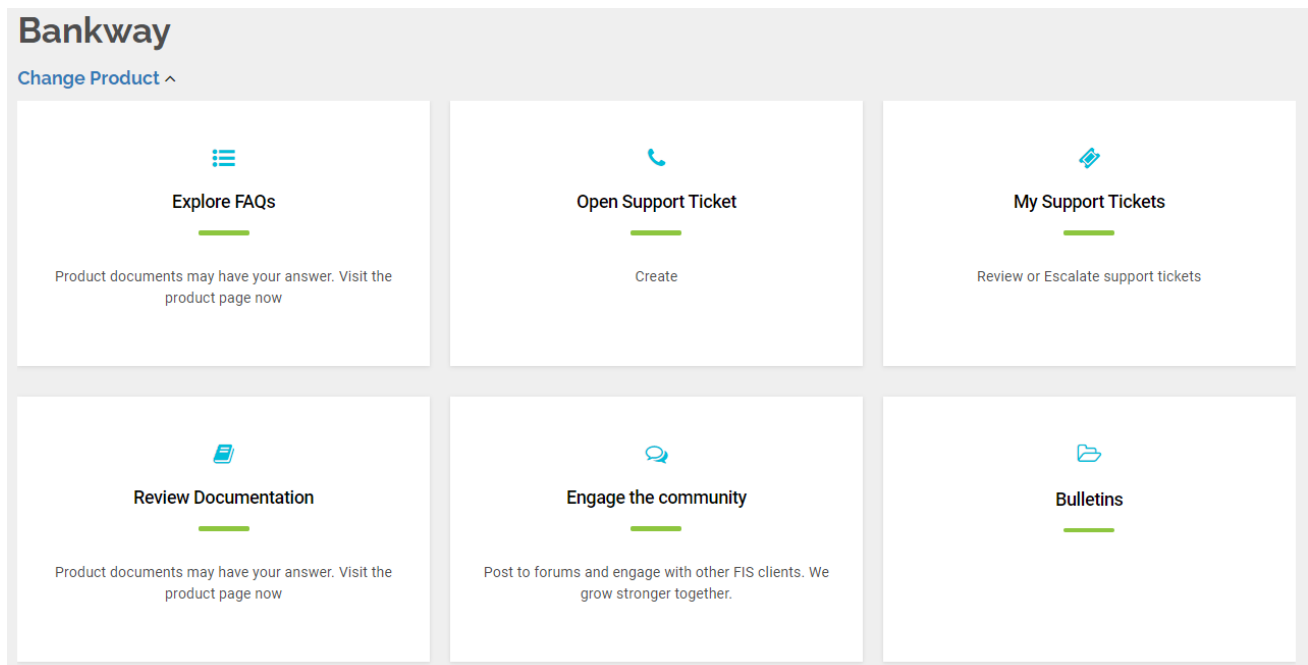
**SEARCH**                      CLEAR SEARCH FILTERS

## 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:

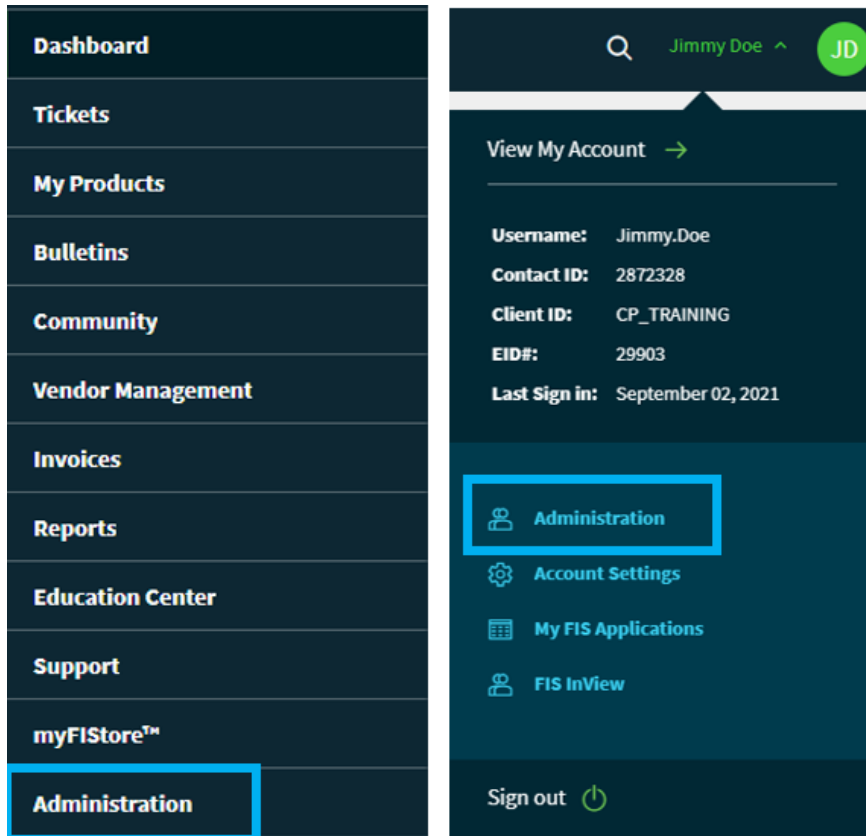


## Client Portal Administration



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.



**Entity Administration**

---

View and manage contacts, permissions, and portal access.

**Manage Entities** →

**User Onboarding**

---

Create multiple users and check status

**Manage User Onboarding** →

**Subscription Center**

---

A full comprehensive list and ability to control Bulletins sent to users per product by category.

**Manage Subscriptions** →

**Invoice Notification Subscription**

---

Subscribe and unsubscribe from invoice notifications.

**Manage Invoice Subscriptions** →

*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"

**Entity Administration**

---

View and manage contacts, permissions, and portal access.

**Manage Entities** →

CONTACTS

MANAGE CONTACT CODES

CONTACT REPORTING

MANAGE USER PROFILES

Search Contacts

---

Name/Username:

Enter name or username

## 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.

**Jane Doe**

---

Jane.Doe@FisGlobal.Com

---

LOGIN NAME:	Jane.Doe
CONTACT ID:	2833067
PHONE:	888-888-888
IS PORTAL USER:	Yes
IS PORTAL ADMIN:	Yes
LAST PORTAL LOGIN:	8/28/2020

---

- Edit Detail →
- Unlock User →
- Change Password →
- User History →
- Edit Permissions →
- Inactivate Contact →
- Remove Portal Access →
- Manage Subscriptions →

## 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.

CONTACTS | MANAGE CONTACT CODES | CONTACT REPORTING | MANAGE USER PROFILES

---

### Search Contacts

Name/Username:

Show Portal Users  
 Show Non Portal Users

Create Contact screen form below:

**CONTACTS** | MANAGE CONTACT CODES | CONTACT REPORTING | MANAGE USER PROFILES

### Edit Contact

<b>First Name: *</b> <input type="text" value="John"/>	<b>Middle Name:</b> <input type="text"/>
<b>Last Name: *</b> <input type="text" value="Doe"/>	<b>Job Title:</b> <input type="text"/>
<b>Job Department:</b> <input type="text"/>	<b>Primary Email:</b> <input type="text" value="John.Doe@fisglobal.com"/>
<b>Secondary Email:</b> <input type="text"/>	<b>Mail Location:</b> <input type="text"/>
<b>Primary Phone: *</b> <input type="text" value="888-888-8888"/>	<b>Secondary Phone:</b> <input type="text"/>
<b>Fax:</b> <input type="text"/>	<b>Mobile Phone:</b> <input type="text" value="888-888-8888"/> <small>Format: +(Country Code)(Mobile Number) e.g. +44899888888</small>

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.

**Duplicate Contacts Found** ✕

The following existing Contact(s) in this same Entity have matching or similar names:  
Doe, Jane

---

Are you sure you want to create this new Contact?

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

Save Confirmation

Your changes have been saved.

Would you like to manage your Bulletin Subscription?

YES NO

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.

**John Doe**

---

John.Doe@Fisglobal.Com

---

LOGIN NAME:	N/A
CONTACT ID:	2833091
PHONE:	888-888-8888
IS PORTAL USER:	No
IS PORTAL ADMIN:	No
LAST PORTAL LOGIN:	

---

Edit Detail →

Inactivate Contact →

Grant Portal Access →

Manage Subscriptions →

### Grant Portal Access ✕

Login Name: \*

Phone Number: \*

Format: +(Country Code)(Mobile Number) e.g.+448989888888

Email Id: \*

Confirm you want to grant portal access to this user ?

- 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'**.

### Success ✕

**John.Doe** was successfully granted portal access

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**.

**Authorized Solutions**

- BancPac
- Bankway
- Digital One

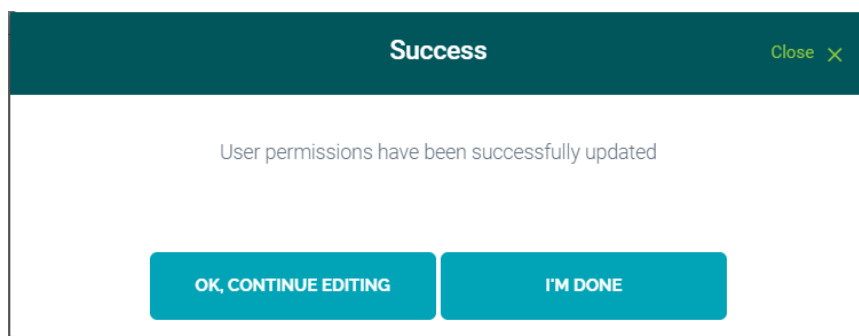
**Feature Permission By Solution**

Select All

- Bulletins
- Groups
- JointFunding
- Reports
  - General
  - Executive
- Software/Downloads
- Tickets

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.

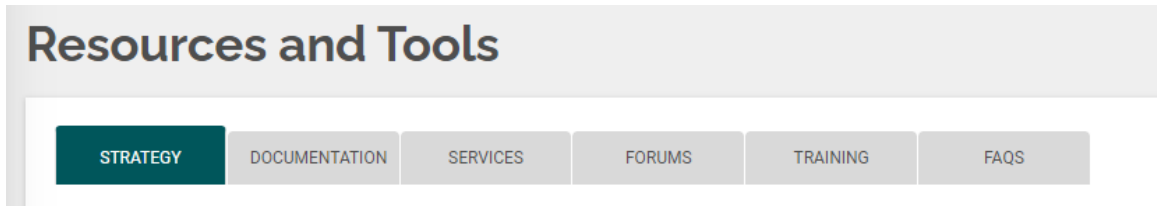


Clicking **I'm Done** will take you back to the **Search Contacts** page.

### 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.

**CONTACTS** | MANAGE CONTACT CODES | CONTACT REPORTING | MANAGE USER PROFILES

#### Edit Contact

First Name: *	Middle Name:
<input type="text" value="John"/>	<input type="text"/>
Last Name: *	Job Title:
<input type="text" value="Doe"/>	<input type="text"/>
Job Department:	Primary Email:
<input type="text"/>	<input type="text" value="John.Doe@fsglobal.com"/>
Secondary Email:	Mail Location:
<input type="text"/>	<input type="text"/>
Primary Phone: *	Secondary Phone:
<input type="text" value="888-888-8888"/>	<input type="text"/>
Fax:	Mobile Phone:
<input type="text"/>	<input type="text" value="888-888-8888"/>

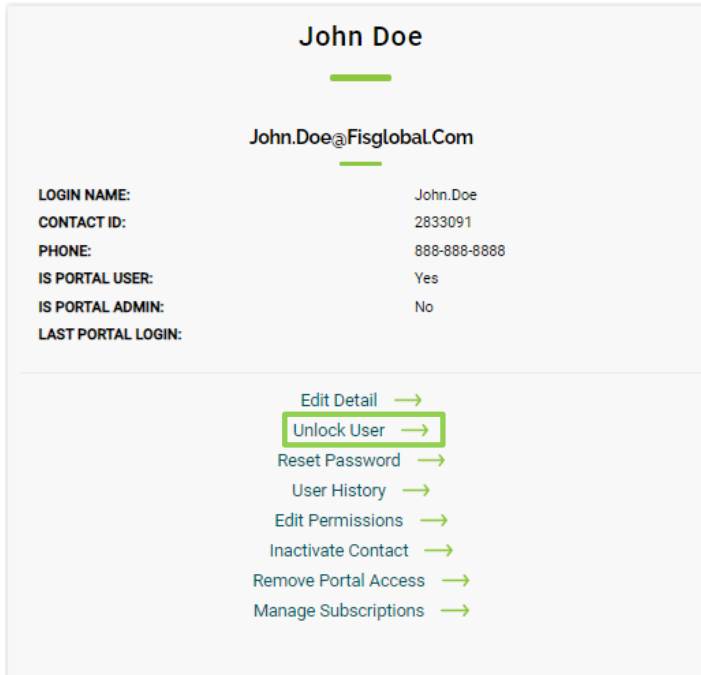
Format: +(Country Code)Mobile Number) e.g. +448989888888

**SAVE**      **CANCEL**

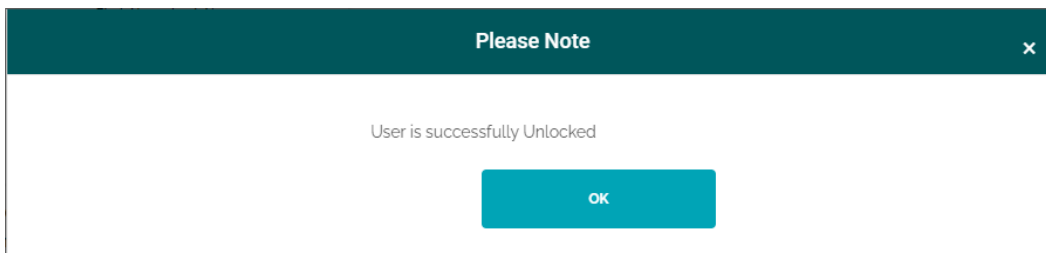


## Unlock User

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.

### John Doe

---

**John.Doe@FisGlobal.Com**

---

<b>LOGIN NAME:</b>	John.Doe
<b>CONTACT ID:</b>	2833091
<b>PHONE:</b>	888-888-8888
<b>IS PORTAL USER:</b>	Yes
<b>IS PORTAL ADMIN:</b>	No
<b>LAST PORTAL LOGIN:</b>	

[Edit Detail](#) →

[Unlock User](#) →

[Reset Password](#) →

[User History](#) →

[Edit Permissions](#) →

[Inactivate Contact](#) →

[Remove Portal Access](#) →

[Manage Subscriptions](#) →

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.

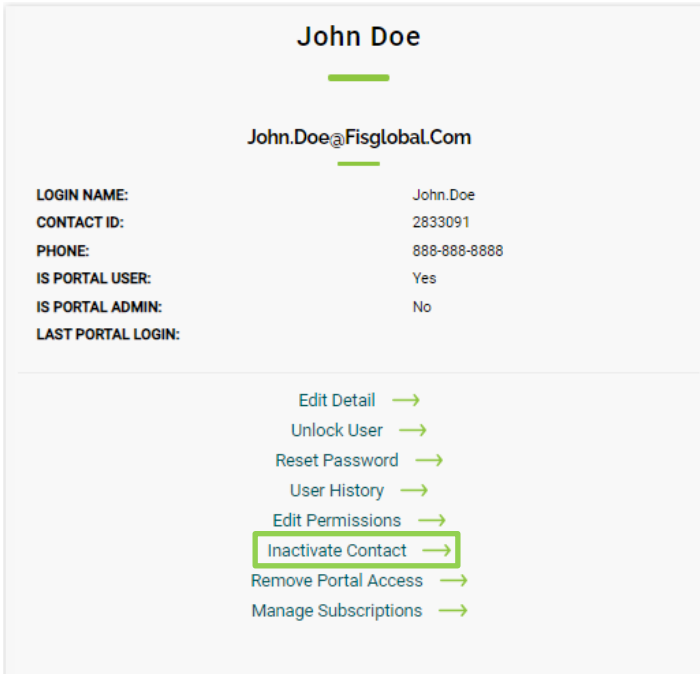
Changed By	Date Changed	Operation Type	Old Value	New Value
Jane Doe	8/28/2020 5:10:19 PM	Insert		UserID = 216086
Jane Doe	8/28/2020 5:10:19 PM	insert		UserName = zgg03John.Doe
Jane Doe	8/28/2020 5:10:19 PM	Insert		Internal = False
Jane Doe	8/28/2020 5:10:19 PM	Insert		IsBankAdministrator = False
Jane 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

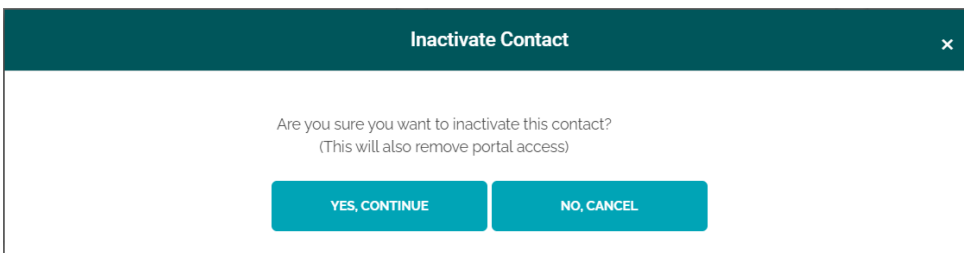
[PREVIOUS](#) 1 [NEXT](#)

## Inactivate Contact

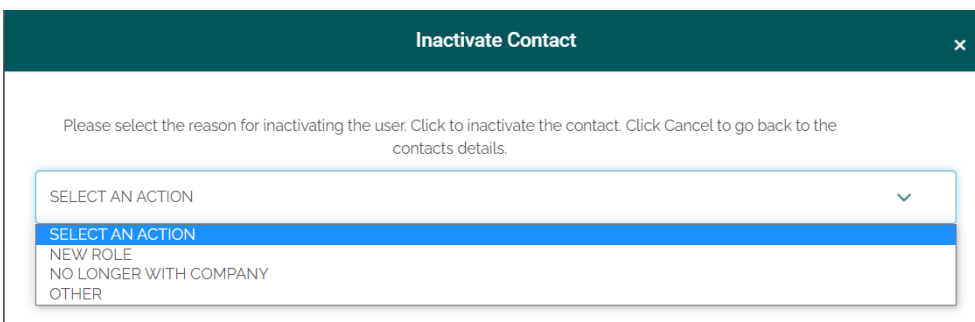
Click the [Inactivate Contact](#) link on the user's contact card to remove a User from your institution. This completely removes the user's contact card from the Client Portal. If you just want to remove portal access, but still want the user to remain in the list of authorized contacts for your institution,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



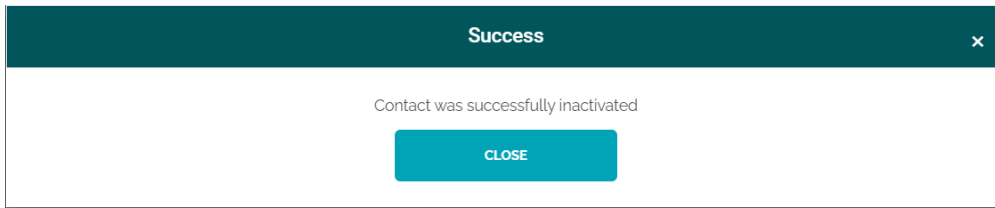
The **Inactivate Contact** popup modal window displays. Click **Yes, Continue** to proceed.



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

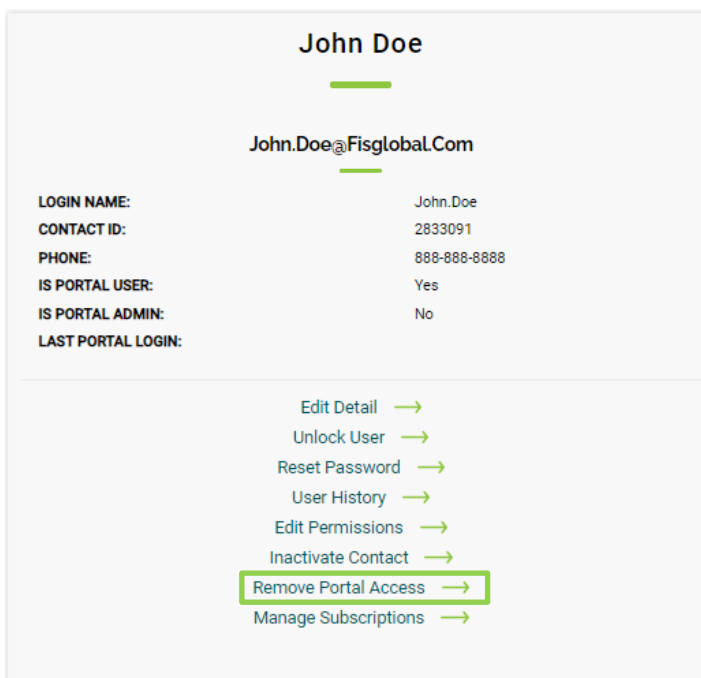


The **Success** popup modal window displays confirmation that the Contact has been inactivated.

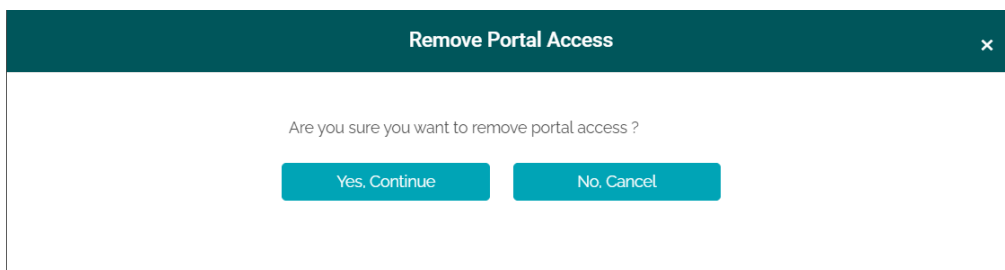


## Remove Portal Access

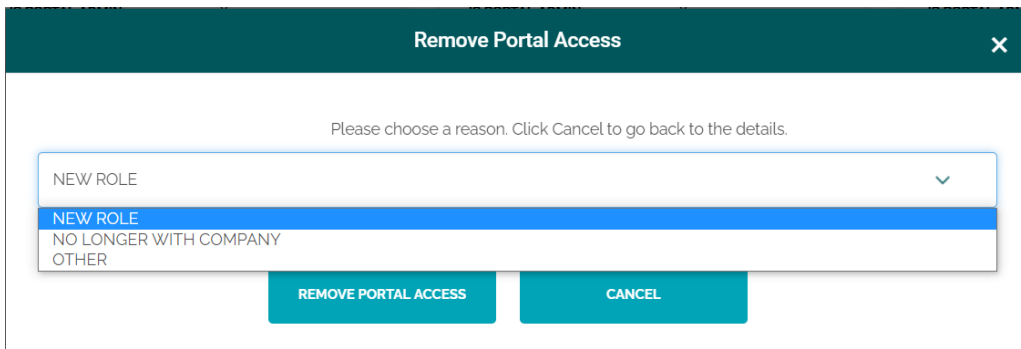
Click the **Remove Portal Access** link on the user's contact card to remove the user's ability to access the FIS Client Portal.



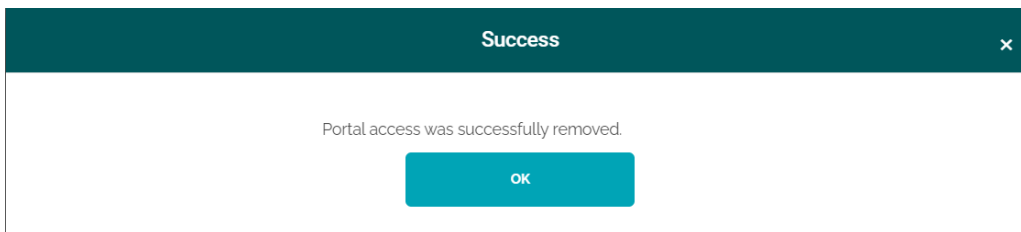
Click **Yes, Continue** on the confirmation popup modal window that displays.



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

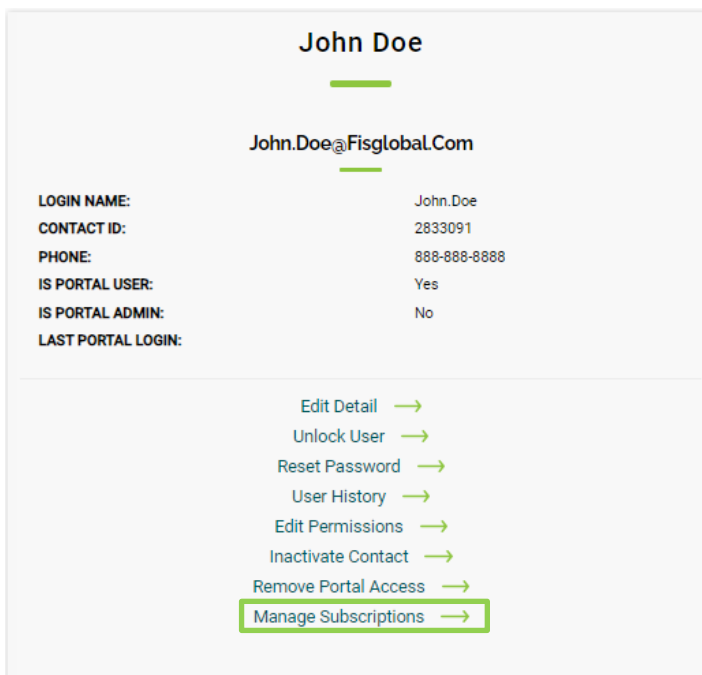


The **Success** popup modal window displays confirmation that the user's access is removed.



## 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.

The screenshot displays the 'Manage Contact Codes' interface. At the top, there is a navigation bar with four tabs: 'CONTACTS', 'MANAGE CONTACT CODES' (which is highlighted), 'CONTACT REPORTING', and 'MANAGE USER PROFILES'. Below the navigation bar, the main heading is 'Select Contact Code to Manage'. The form contains four dropdown menus: 'Category' (selected: PRODUCT LINE), 'Products' (selected: IBS BANKING SYSTEM), 'Contact Code Type' (selected: SHOW ALL CONTACTS AND ALL ASSOCIATED CONTACT CODES), and 'Codes' (selected: SELECT A CONTACT CODE). Below these is a 'Search Filter' input field with the placeholder text 'Any key Value that you would like to filter'. At the bottom of the form are two buttons: a teal 'SEARCH' button and a white 'CLEAR' button with a teal border.

## 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.

The screenshot shows the 'CONTACT REPORTING' tab selected in a navigation bar. Below the tabs, it says 'You are viewing ALL Contact Reporting' and a 'Filter Contact Reporting' button with a minus sign icon. The main area contains several filter fields: 'First Name' (text input), 'Last Name' (text input), 'Email Address' (text input), 'Portal User' (dropdown menu with 'ALL USERS' selected), 'Portal Admin' (dropdown menu with 'ALL USERS' selected), 'Authorized Solutions' (dropdown menu with 'ALL' selected), and 'Contact Codes' (dropdown menu with 'SELECT ALL OPTIONS' selected). At the bottom, there are 'SEARCH' and 'CLEAR' buttons.

## 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.

The screenshot shows the 'MANAGE USER PROFILES' tab selected in a navigation bar. Below the tabs, it says 'User Profiles'. There is a table with the following data:

Profile Name		
All Products/Features User	Edit	Delete

Below the table, there is an 'ADD USER PROFILE' button.

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.

**USER PROFILE**

### Add User Profile

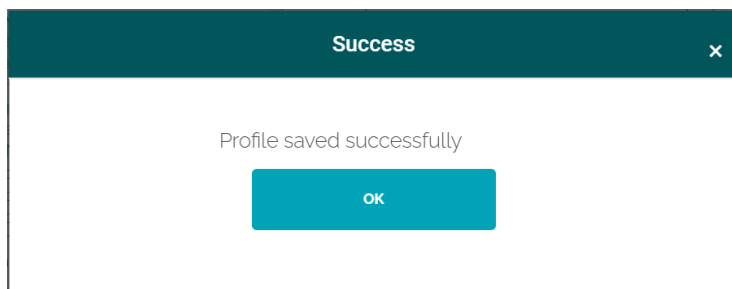
Profile Name:

Portal Administrator

#### Permissions

Unauthorized Solutions	Authorized Solutions	Feature Permission By Solution
<ul style="list-style-type: none"><li>FIS Document Management</li><li>FIS Investments</li><li>FIS Mobile Banking Services</li><li>FIS Output Solutions</li><li>FIS Report Management</li><li>FIS Xpress Deposit</li><li>FLO</li><li>Government EBT</li><li>IBS Business Intelligence</li><li>ID Authentication</li><li>ID Verification</li><li>Infinity IdP</li><li>InvestOne</li><li>Managed IT</li><li>Managed Risk Services</li><li>MarketMap Analytic Platform</li><li>MarketMap Energy</li><li>MISER</li><li>NYCE Payments Network, LLC</li><li>OFAC Watch</li><li>Open Payment Framework</li><li>Open Test Solution</li><li>OPF US Real Time Payment, Hosted</li></ul>	<ul style="list-style-type: none"><li>BancPac</li><li>Bankway</li><li>HORIZON</li><li><b>IBS</b></li></ul>	<p>Deselect All</p> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Bulletins</li><li><input type="checkbox"/> Groups</li><li><input checked="" type="checkbox"/> JointFunding</li><li><input checked="" type="checkbox"/> Reports<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> General</li><li><input checked="" type="checkbox"/> Executive</li></ul></li><li><input checked="" type="checkbox"/> Software/Downloads</li><li><input checked="" type="checkbox"/> Tickets</li></ul>

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.

### User Profiles

Profile Name		
All Products/Features User	<a href="#">Edit</a>	<a href="#">Delete</a>
Name of the Profile	<a href="#">Edit</a>	<a href="#">Delete</a>

[ADD USER PROFILE](#)

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.

The image shows four cards arranged in a 2x2 grid. The top row contains three cards: 'Entity Administration', 'User Onboarding', and 'Subscription Center'. The bottom row contains one card: 'Invoice Notification Subscription'. Each card has a title, a short description, and a link with a right-pointing arrow.

- Entity Administration**: View and manage contacts, permissions, and portal access. [Manage Entities](#) →
- User Onboarding**: Create multiple users and check status. [Manage User Onboarding](#) →
- Subscription Center**: A full comprehensive list and ability to control Bulletins sent to users per product by category. [Manage Subscriptions](#) →
- Invoice Notification Subscription**: Subscribe and unsubscribe from invoice notifications. [Manage Invoice Subscriptions](#) →

## Subscription Center

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

**Administration** Subscription Center

### Subscription Center

Subscribing and unsubscribing just got easier! You can now subscribe and unsubscribe to distribution lists associated to a particular product. It's as simple as choosing a product from the dropdown below then choose a user in the next dropdown (you can even choose yourself). Once you select a user, you can subscribe and unsubscribe distributions for that user.

You can see below that each card has the title of the distribution as well as a brief description. If you want to see all available distributions for a user, simply click on the "Download Available Subscriptions" after selecting a user.

As a Client Portal administrator you have the ability to modify all users. However, regular users do not have this ability to subscribe and unsubscribe.

**Note:**

- Subscription Center preferences do not over-ride opting out of a topic.
- Subscription Center has replaced the contact codes tab under Edit Detail.

**Product**

BANKWAY

**Select User**

Doe, Jane (2833067)

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.

Select/Deselect All **SAVE** Download Available Subscriptions →

**After Hours Contact**  
Bankway After Hours Contact - will be contacted after normal working hours if needed  
 Subscribe

**Bulletin Contact**  
Used to flag contacts to receive client portal bulletins  
 Subscribe

**Bulletin Testing Contact Code**  
Bulletin Testing Contact Code  
 Subscribe

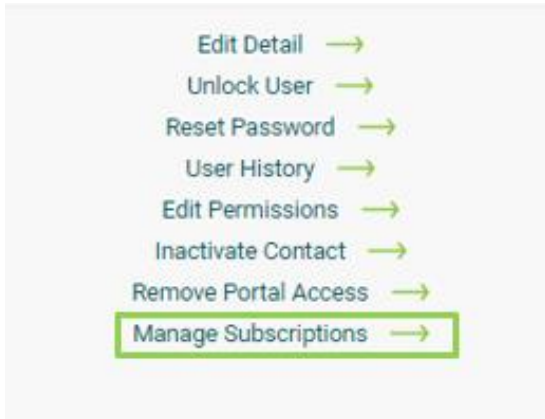
**Primary Contact**  
Primary Contact of Bankway  
 Subscribe

**CANCEL** **SAVE**

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.

**Entity Administration**

View and manage contacts, permissions, and portal access.

**Manage Entities** →

**User Onboarding**

Create multiple users and check status

**Manage User Onboarding** →

**Subscription Center**

A full comprehensive list and ability to control Bulletins sent to users per product by category.

**Manage Subscriptions** →

**Invoice Notification Subscription**

Subscribe and unsubscribe from invoice notifications.

**Manage Invoice Subscriptions** →

## 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.

**Entity Administration**

View and manage contacts, permissions, and portal access.

[Manage Entities](#) →

**User Onboarding**

Create multiple users and check status

[Manage User Onboarding](#) →

**Subscription Center**

A full comprehensive list and ability to control Bulletins sent to users per product by category.

[Manage Subscriptions](#) →

Invoice Notification Subscription

Subscribe and unsubscribe from invoice notifications.

[Manage Invoice Subscriptions](#) →

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

### Invoice Notification Subscription

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

*Note: Please allow up to 2 hours for new contacts to appear in the search results.*

User Name:

EXPORT AS FILE (LIMITED TO 10,000 RECORDS)

Show 10 entries

Search Results:

ContactID	UserName	FirstName	LastName	Email	Subscribed
328g12	testdata	Prasanna	Bujimalla	test328g12@fisglobaltest.com	<input type="checkbox"/>

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

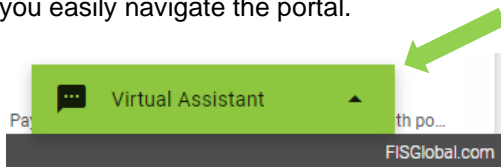
- Your institution must have the Billing feature enabled by FIS.
- Please allow up to 2 hours for new contacts to appear in the search results.
- You must assign the 'Billing Profile' to a user's account for this function to work.
- A user can override your option to subscribe them for notifications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

## FIS™ Virtual Assistant

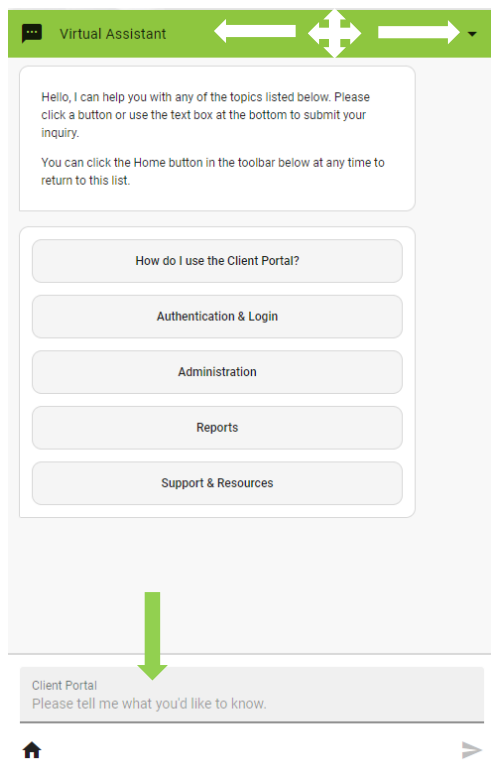
FIS™ Virtual Assistant is a simple way for you to get help navigating the FIS Client Portal. Designed with you in mind, the Virtual Assistant will:

- 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](mailto: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.