Access® Online

Message Client Services

User guide
Version 1-0
All users

Message Client Services

Program Administrators with access can interact with Client Services at the bank using the *Message Client Services* portal.

This is available under the *Need help* menu and provides information about existing and completed cases submitted to Client Services.

The portal provides a quick method for tracking your service center cases and activities.

Benefits of using the portal

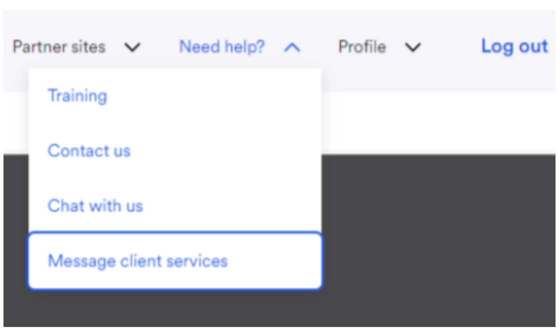
The portal provides the following benefits to you:

- **Protect account:** It helps protect your accounts against fraud.
- **Real-time updates:** You can see the status of your request in real-time.
- **Quick response:** A bank agent responds to your request within one business day.
- **No new login:** Use the portal directly from Access Online.

Access the portal

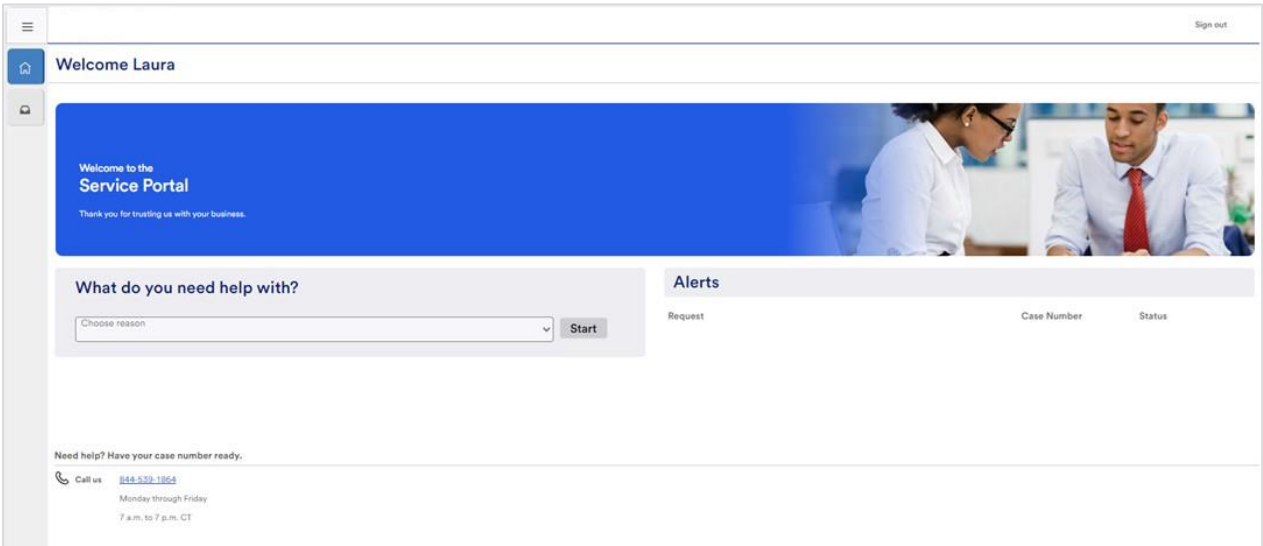
Open the **Need help** menu and select **Message client services**.

If you do not see the **Message client services** option and need access, contact your main Program Administrator at your organization.



The *Service portal* displays.

The *Alerts* area displays requests you have submitted to the bank along with the case number and status. You may or may not have active data here depending on your case status.



Create a Case

Select the down arrow in the *What do you need help with* menu. A list of Access Online help reasons appears.

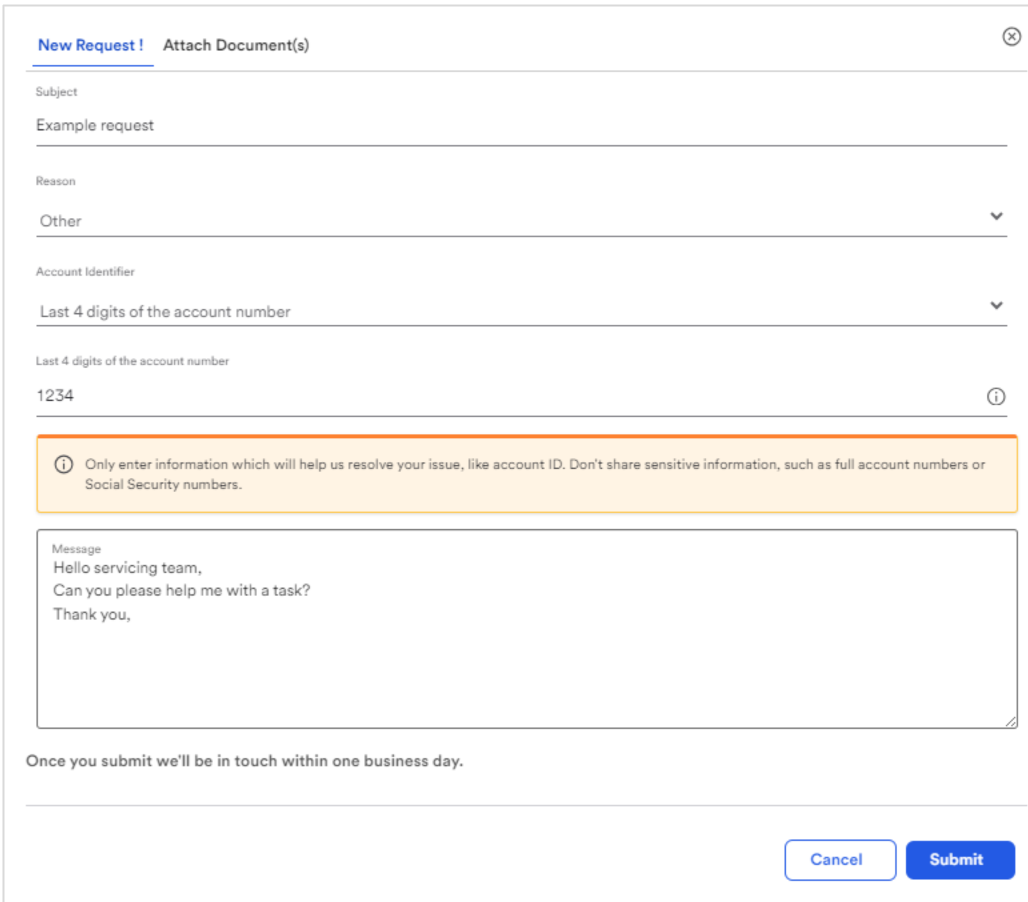
Select the item that applies to you.

Click **Start**.

The *New case form* opens.

Subject: Enter a subject line for your request.

Reason: Click the down arrow to expand the Reason menu, and select a reason for your request.



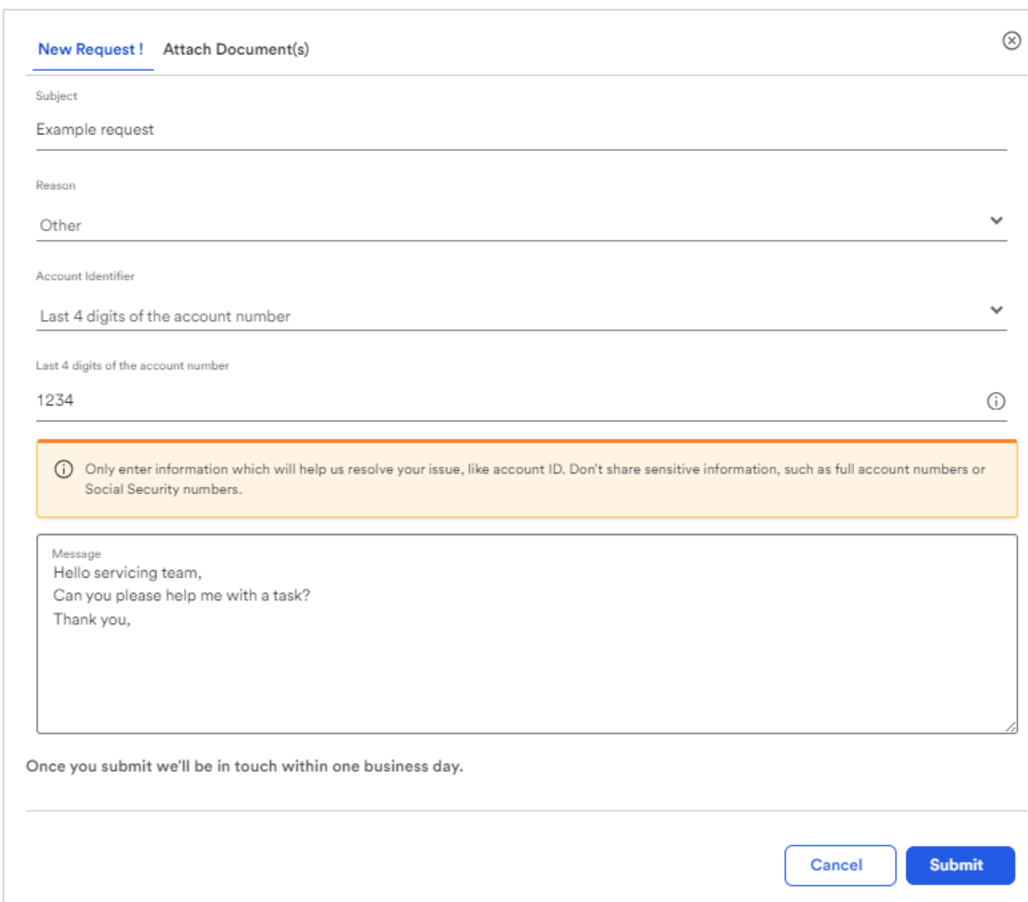
Account identifier: Click the down arrow and select an account identifier.

- **Account ID:** Your Account ID is used to protect your account number and physical card number. You can find it in Access Online under your account profile. Providing an Account ID allows us to process your request faster.
- **Last 4 digits of the account number:** You can find the values on the physical card or in Access Online under the account profile.

Type a message to the servicing team, letting them know what you need.

Attach any documents as needed. (See the next section.)

Click **Submit**.

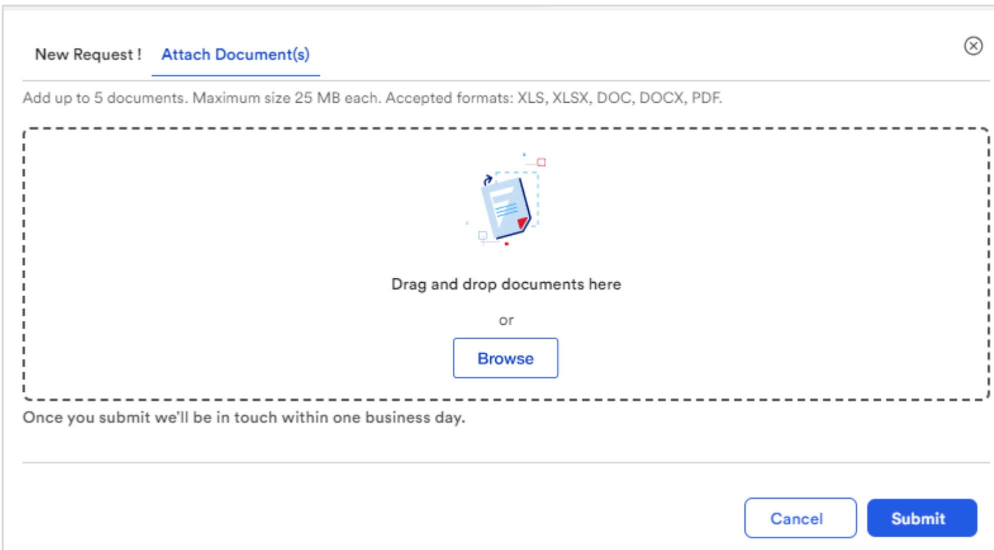


Attach a document

You can attach a document as you create a case, or, add one later after the case is submitted.

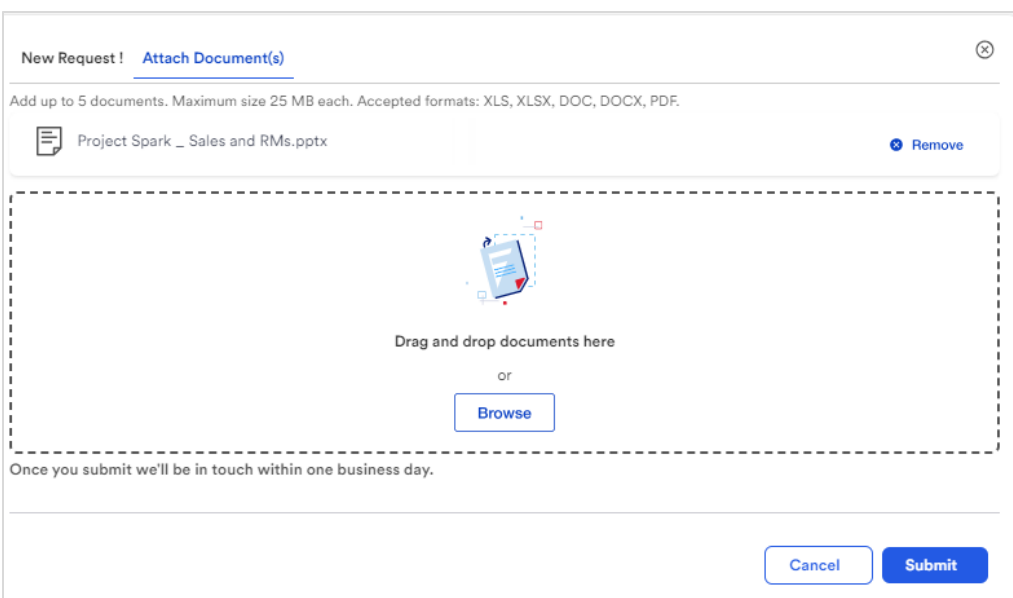
Select the **Attach Document(s)** tab.

Use the **Browse** button to find and attach your document. You may also use drag and drop as allowed by your organization. You may add documents in the formats: XLS, XLSX, DOC, DOCX and PDF.



Click the **Submit** button.

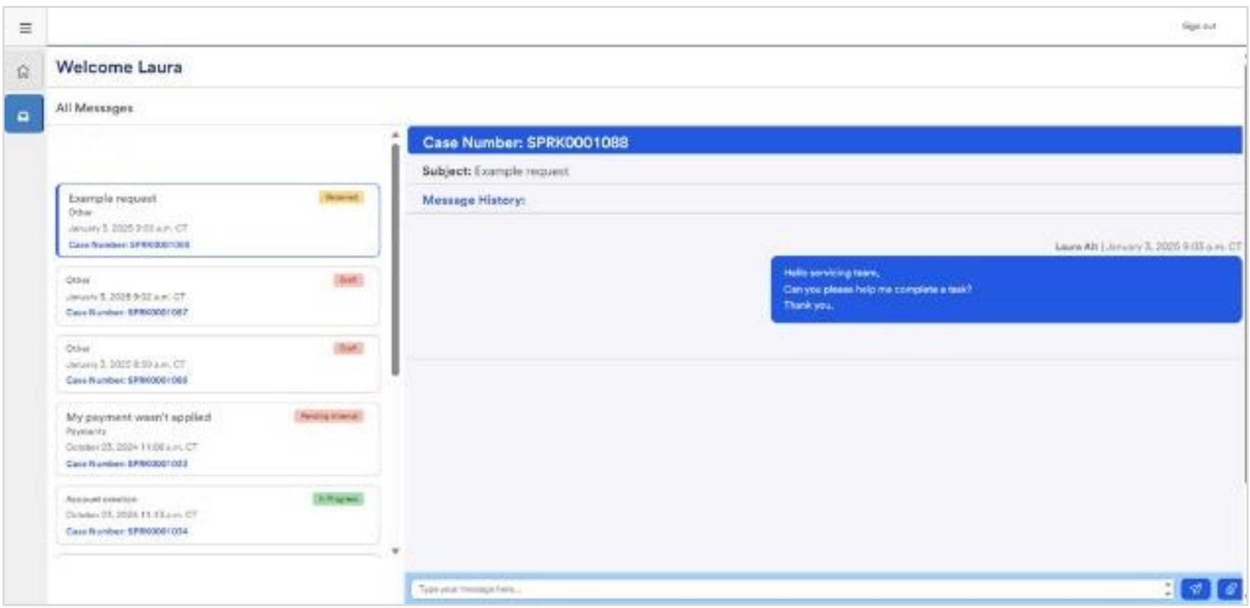
Your document title is listed above the drag and drop box. You may continue to add documents until you reach the 5 document or 25 MB limit.



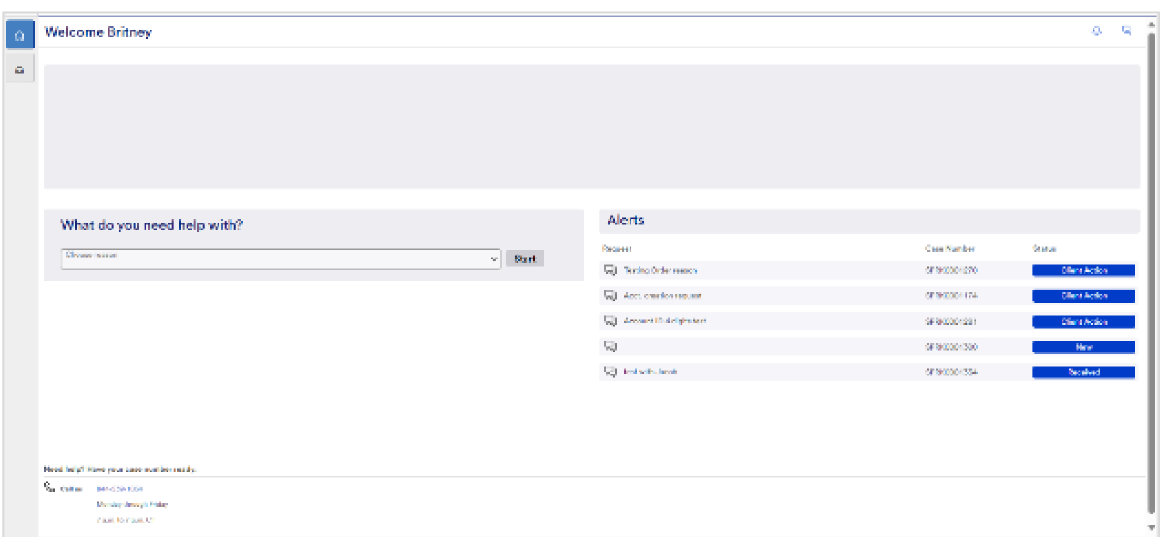
Cases in the portal

If you are returning to the portal, you'll see your active cases on the left, along with a status indicator to tell you where in the process that case is. This will show all of their cases (open and completed).

On the right, administrators with access can send additional messages and can view responses from the bank servicing team.



A list of cases with case numbers and status display.



A case status can be one of the following: *Received, in progress, client action, completed, cancelled, withdrawn* and *pending internal.*

Alerts

Request	Case Number	Status
My payment wasn't applied	SPRK0001033	Pending Internal
	SPRK0001034	In Progress
	SPRK0001041	New
The first AC manager or training person to change the status wins test	SPRK0001030	Received
Another test	SPRK0001031	Received

Notification emails are sent by the bank when the status changes to *client action*, *completed or pending internal* status.

Here is an example of a completed email notification:

We have completed your request.

Subject: Axol help case

Your request is complete and no additional action is needed from you. To view this request, choose ***Return to my request*** to log into Access® Online. Then, choose ***Need help?*** and ***Message client services*** to view your history.

Return to my request

Questions?

We're here to help. Use the 'Return to my request' button or call 844-539-1864, option 3 and have your Case Number SPRK0001158 ready.

Client Services
Client Servicing | Corporate Payment & Treasury Solutions

CAT ID: NA