

# Deluxe Customer Care Portal

User Guide

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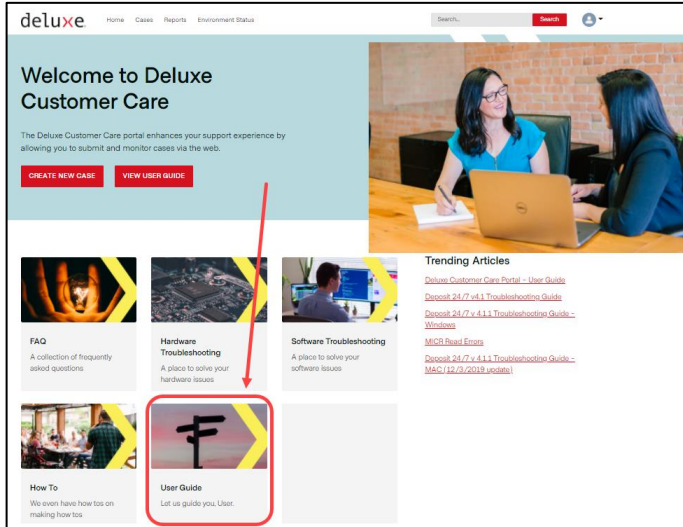
## WELCOME TO DELUXE CUSTOMER CARE PORTAL

In addition to live telephone support, Deluxe Customer Care offers a web-based support option – the Deluxe Customer Care Portal. The Portal enhances your support experience by allowing self-sufficiency in reporting and monitoring of support issues. A new support case can be opened 24/7 without ever picking up the phone.

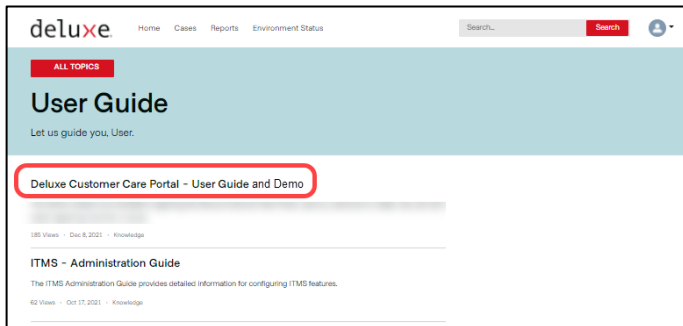
## DEMO

To view a demo of the Deluxe Customer Care Portal, log on to the portal and do the following:

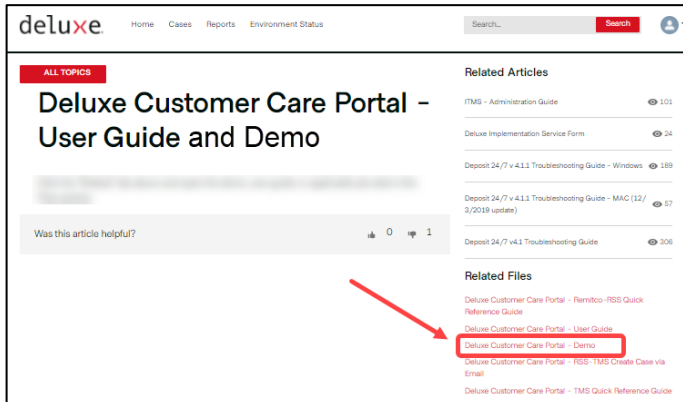
1. Scroll to the bottom of the home page and click the User Guide topic card.



2. Click 'Deluxe Customer Care Portal – User Guide' link.



3. Click the 'Deluxe Customer Care Portal – Demo' link in the Related Files section on the right.



## ACCESS

### Access Types

You will be set up the appropriate type of access for your situation. The following table provides details about the different types of access

Access Type	Details
Plus User	Can open and see cases for multiple client IDs, but still only can see the cases they open across the multiple client IDs.
Super User	Can open cases for multiple client IDs AND see all cases opened by all users allowed to open cases for their assigned client IDs.
Normal User	Can open cases for the one client id they are assigned to and only see the cases they open.

### Request a Login

Clients receive a login to the Portal when they go LIVE with their Deluxe Product Solutions.

To request a login, do the following:

1. Send email to the applicable Deluxe Customer Care Team using the email address in the following table.

Area	Email Address
Remitco	RemitcoSupportDelaware@Deluxe.com
RSS	RSS_ClientServices@Deluxe.com
Treasury Management Services	CustomerPortalTM@Deluxe.com
TRIPS	TRIPSIntegrationandQA@deluxe.onmicrosoft.com

[Result: The support team provides access, and the system sends a Welcome email.]

2. When the Welcome email is received, click link in the email and set up your password.  
NOTE: Your username will be your email address.

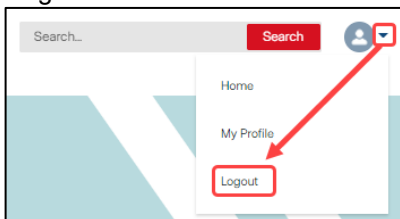
### Log On

To log on to the Customer Care Portal, do the following:

1. Access [www.CustomerPortalTM.Deluxe.com](http://www.CustomerPortalTM.Deluxe.com).  
NOTE: Google Chrome is the recommended browser.
2. Type your username (email address), type your password, and click 'Log in'.

### Log Off

To log off from the Deluxe Customer Care Portal, click arrow by your profile image in the upper right and select 'Logout'.



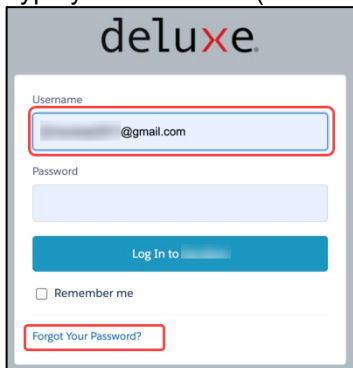
### Password Expiration

Passwords expire after every 90 days. The next time you attempt to sign on after your password expires, you will be prompted to change your password.

### Forgot Your Password

If you forget your password for the Customer Care Portal, do the following when attempting to log on:

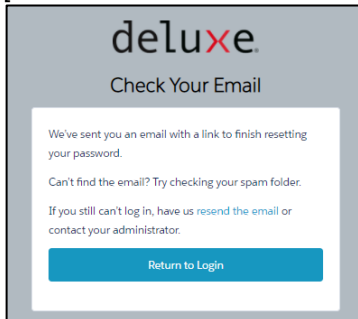
1. Type your username (email address) in the Username field and click the 'Forgot your password?' link.



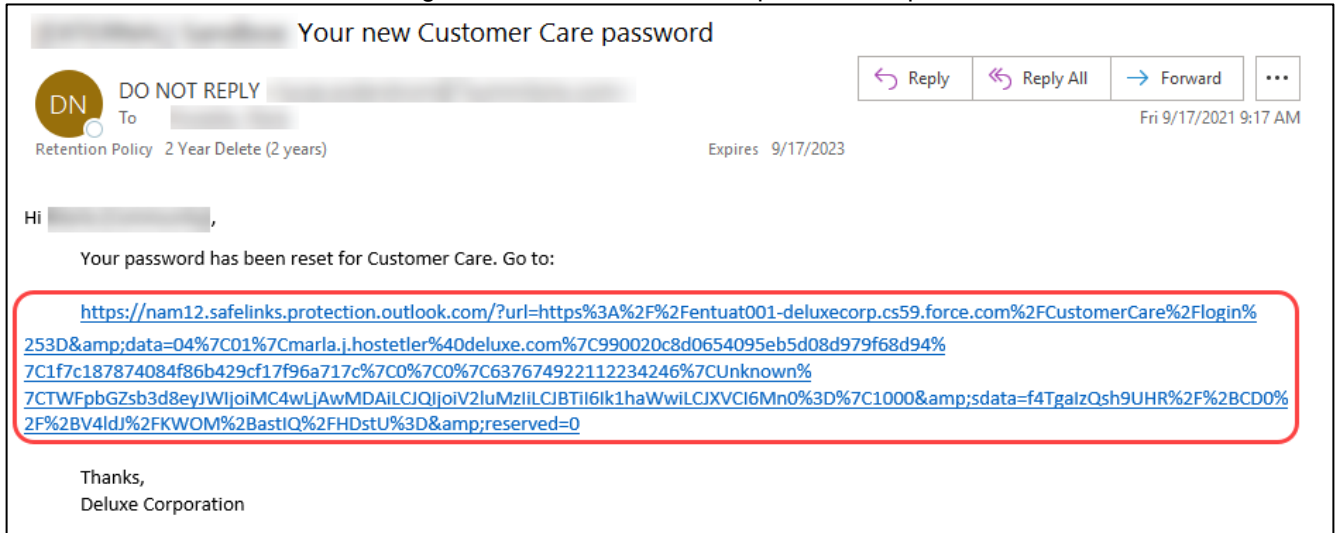
2. Type your username (email address) and click 'Continue'.



[Result: The Check Your Email message appears.]

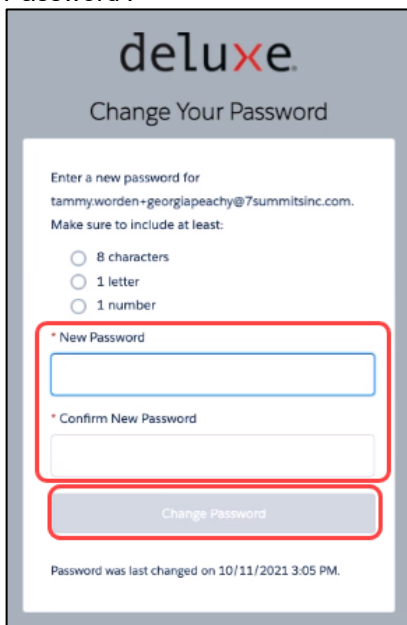


- When an email is received indicating 'Your new Customer Care password', open the email and click the link.



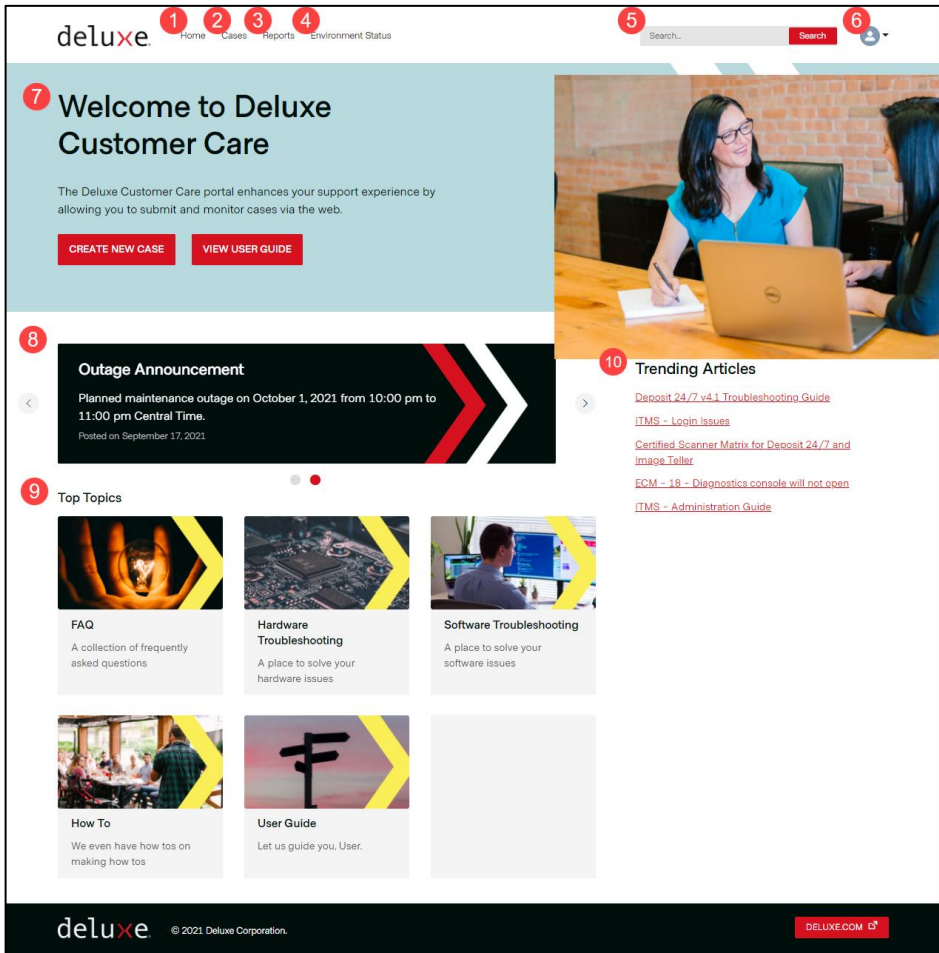
[Result: The Change Your Password screen opens.]

- Type your new password in the 'New Password' and 'Confirm New Password' fields and click 'Change Password'.



[Result: The Deluxe Customer Care Portal opens.]

HOME PAGE

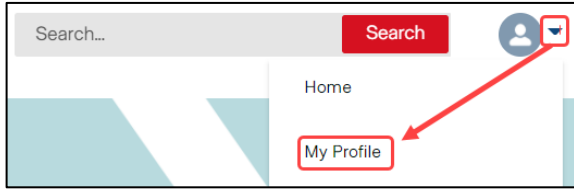


#	Field / Area	Details
1	Home	Returns you to the home page.
2	Cases	Displays list of your cases with a case number link to view more details.
3	Environment Status	Displays system availability and next scheduled maintenance timeframe base on product selected. NOTE: This tab may or may not appear depending on your access.
4	Reports	Displays report options (Open Cases, Closed Cases, etc.).
5	Search	Allows search criteria to be entered.
6	Profile Image	Opens menu with links for personal settings and to logout. <ul style="list-style-type: none"> <li>• Home: Opens the home page.</li> <li>• My Profile: Allows you to update your phone and photo.</li> <li>• Logout: Allows you to logout of the portal.</li> </ul>
7	Welcome	Contains buttons to 'Create New Case' and 'View User Guide'.
8	Announcements	Displays rotating banner of announcements, if applicable.
9	Top Topics	Displays article category topics that link to the related articles.
10	Trending Articles	Displays a list of articles users are currently accessing most frequently.

### Update Contact Information

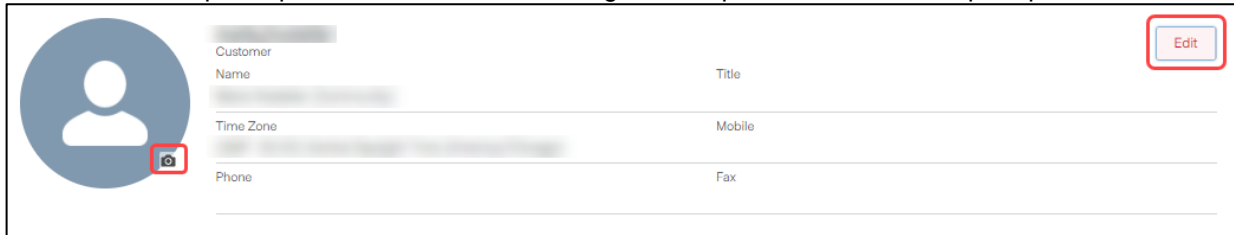
To update your contact information, do the following:

1. Click arrow by your profile image in the upper right and select 'My Profile'.



2. Click 'Edit' to edit the fields.

NOTE: To add/update photo, click the camera image on the photo and follow the prompts.



3. Complete the fields with the applicable information and click 'Save'.

NOTE: Select your time zone, as the system defaults to Central time.

#### Edit User

<p><b>*Name</b></p> <p>First Name <input style="width: 90%;" type="text"/></p> <p>Middle Name <input style="width: 90%;" type="text"/></p> <p><b>*Last Name</b> <input style="width: 90%;" type="text"/></p> <p>Suffix <input style="width: 90%;" type="text"/></p>	<p>Title <input style="width: 90%;" type="text"/></p> <p>Mobile <input style="width: 90%;" type="text"/></p> <p>Fax <input style="width: 90%;" type="text"/></p>
<p><b>*Time Zone</b></p> <p><input type="text" value="(GMT-05:00) Central Daylight Time (America/Chic..."/></p> <p>Phone <input style="width: 90%;" type="text"/></p>	

Cancel
Save



## View Articles

To view relevant articles, do the following:

1. Either click the Top Topic block (FAQ, How To, etc.) on the home page or type a word/phrase in the Search field and click 'Search'.
2. Locate and click the article title.
3. View the article and any related articles or files on the right.

### NOTES:

- The icon by the related articles shows how many times the article has been viewed.
- Once a related file is open, it can be downloaded.
- You can vote on the article's helpfulness by clicking the 'Thumbs Up' or 'Thumbs Down' icon at the bottom to help ensure the content provided is relevant and valuable.

The screenshot shows the Deluxe Customer Care Portal interface. At the top, there is a navigation bar with the 'deluxe' logo and links for 'Home', 'Cases', 'Reports', and 'Environment Status'. A search bar is located on the right with the text 'Search Cases & Knowl...' and a red 'Search' button. Below the navigation bar, there is a red button labeled 'ALL TOPICS'. The main content area features a large article title: 'Deposit 24/7 v 4.1.1 Troubleshooting Guide - MAC (12/3/2019 update)'. Below the title, there are two sections of placeholder text: 'What is Lorem Ipsum?' and 'Why do we use it?'. To the right of the main article, there is a 'Related Articles' sidebar with a list of articles and their view counts: 'CA- Recalling Employee's Direct Deposit' (31), 'Category & Category Details List' (8), 'R360 2.0 Troubleshooting Stuck batches for Data Import and CDS Imports' (7), 'Pension Plans' (20), and 'CA- Earning Codes Quick Review' (30). Below the 'Related Articles' sidebar, there is a 'Related Files' section with two items: 'testBadge' and 'how-to'. At the bottom of the article, there is a feedback section with the text 'Was this article helpful?' and two icons: a thumbs up icon with the number '1' and a thumbs down icon with the number '0'.

## Search

The search field at the top of the page allows you to search for cases or knowledge articles. Type a search term in the search field and press Enter or click 'Search'.

The screenshot shows the search results for the term 'update'. The interface includes a navigation bar with 'Home', 'Cases', 'Reports', and 'Environment Status'. A search bar at the top right contains the text 'update' and a 'Search' button. On the left, a 'Search Results' sidebar is visible with options for 'All', 'Articles', 'Cases', and a 'Collapse List' link. The main content area is divided into 'Articles' and 'Cases' sections. The 'Articles' section displays four results, each with a title, ID, validation status, and last modified date. The 'Cases' section shows one result in a table with columns for Case Number, Legacy Case Number, Priority, Date/Time Opened, Service Client ID, Subject, Account Name, Category, and Brief Description.

CASE NUMBER	LEGACY CASE NUMBER	PRIORITY	DATE/TIME OPENED	SERVICE CLIENT ID	SUBJECT	ACCOUNT NAME	CATEGORY	BRIEF C
C- [REDACTED]		Medium	8/30/2021 8:51 AM	TEST-0123-03		TMS - Treasury Test Account	Remitco	update

Search results may find different word tenses ('run' also finds 'runs'), spelling corrections, nicknames ('Michael' also finds 'Mike'), etc.

You can also use any of the following operators and tips when typing in the search field.

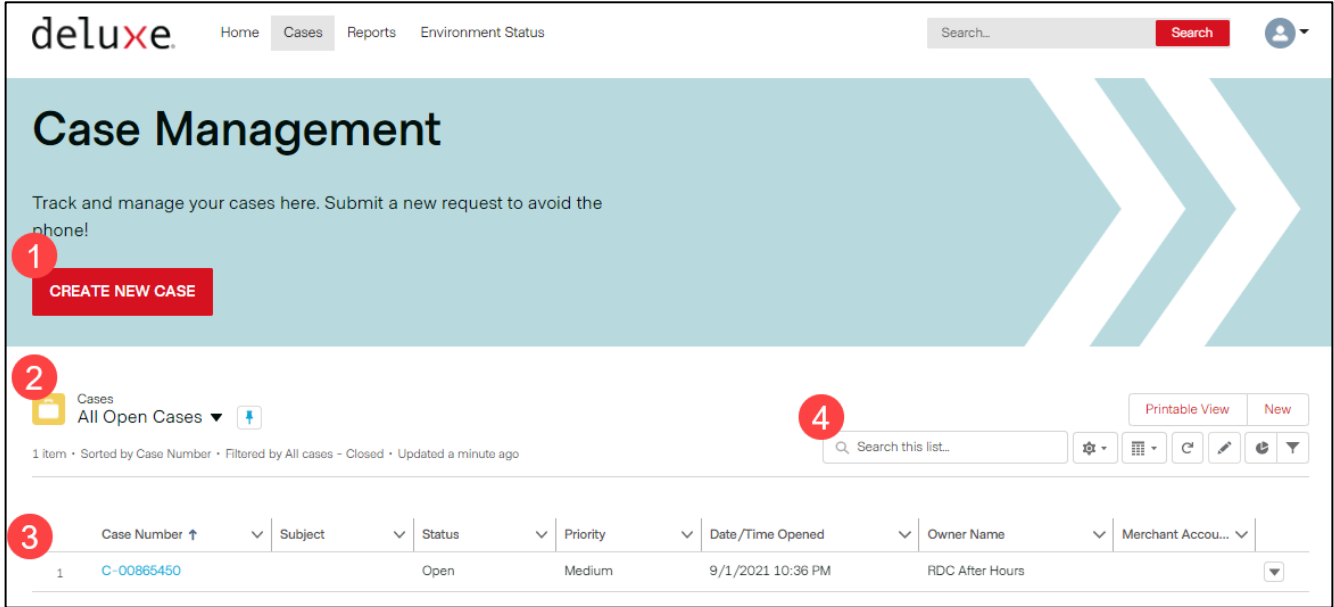
- **Phone Number** – Type part or all of a number.  
Ex: Type 415 or 999 or 3434 or to find 415-999-3434. To find last seven digits, type the dash 999-3434.
- **Asterisk (\*) Wildcard** – Type \* in the middle or end of your search word(s) to match zero or more characters.  
Ex: Type 'request\*' to find requests, requested, etc.
- **Question Mark (?) Wildcard** – Type ? in the middle or end of your search word(s) to match only one character.  
Ex. Type 'cand?' to find candy and candi.
- **AND** – Type 'and' to find all search words.  
Ex: Type 'Deluxe Bank and Shoreview' to find Deluxe Bank locations in Shoreview, MN.
- **AND NOT** – Type 'and not' then any search words to exclude.
- **OR** – Type 'or' between two search words to find at least one of the search words.
- **Parenthesis** – Type a parenthesis around terms to group them (for evaluation before other words in a string).
- **Quote Marks** – Type quote marks before and after phrase to only find all the words in the order entered.  
Ex: Typing 'spring time maintenance' will not bring back items with only the word 'spring'.

NOTE: Multiple operators are evaluated in this order: 1) parentheses 2) 'and' or 'and not', 3) 'or'.

CASES PAGE

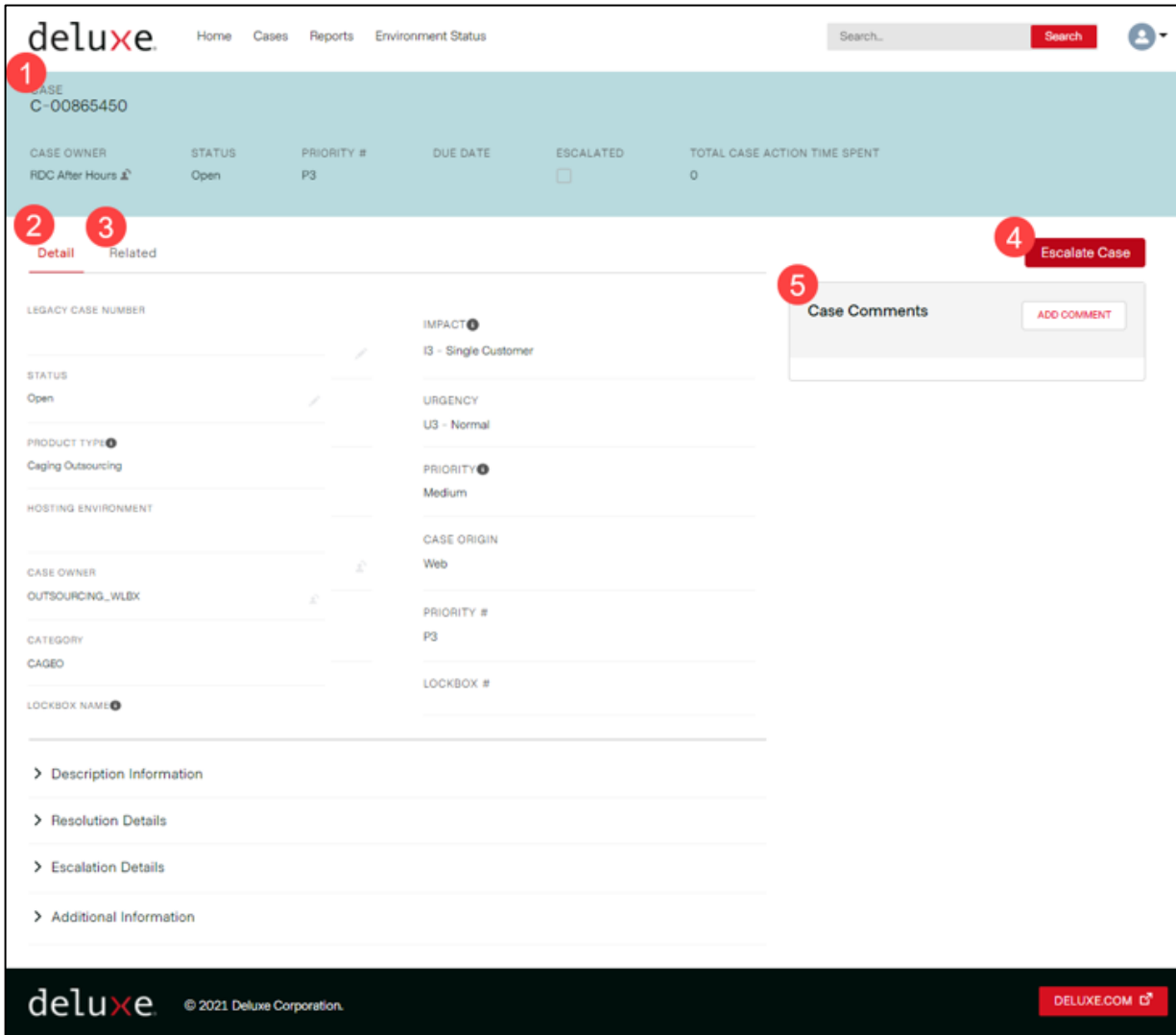
Cases Page Overview

NOTE: The column names will vary based on your Deluxe product solution.



#	Field or Area	Details																					
1	Create New Case	Used to open the form to create a new case.																					
2	Cases View	Used to select the desired view. Ex: My Closed Cases, My Open Cases, Recently Viewed, etc. NOTE: To save a view as the default, select it and click the pin icon.																					
3	Cases List	Displays a list of your cases in the selected view with Case Number links to open the case details. NOTE: The column names will vary based on your Deluxe product solution.																					
4	Case Options	Displays a list of available case options shown in the following table. <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Icon</th> <th>Name</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td></td> <td>Search this list...</td> <td>Used to search for a specific case.</td> </tr> <tr> <td></td> <td>List View Controls</td> <td>Used to select what is visible in the report. Ex: details (case lines), grand total, etc.</td> </tr> <tr> <td></td> <td>Display as Table</td> <td>Used to switch between table and Kanban display.</td> </tr> <tr> <td></td> <td>Refresh</td> <td>Used to refresh the page.</td> </tr> <tr> <td></td> <td>Toggle Chart</td> <td>Used to view/create charts. NOTE: See 'Create/Work with Case Charts' procedure, if needed.</td> </tr> <tr> <td></td> <td>Filters</td> <td>Used to view the applied filters.</td> </tr> </tbody> </table>	Icon	Name	Details		Search this list...	Used to search for a specific case.		List View Controls	Used to select what is visible in the report. Ex: details (case lines), grand total, etc.		Display as Table	Used to switch between table and Kanban display.		Refresh	Used to refresh the page.		Toggle Chart	Used to view/create charts. NOTE: See 'Create/Work with Case Charts' procedure, if needed.		Filters	Used to view the applied filters.
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Case Details Overview



#	Field or Area	Details
1	Case Information	Displays important case information, such as case number, case owner, status, priority, due date, case category, and case type.
2	Detail Tab	Displays case details and contains collapsible sections based on the customer care team (Treasury, Remitco, etc.) selected.
3	Related Tab	Displays information related to the case, such as articles. NOTE: The Deluxe Customer Care Team member resolving the case can add case-related knowledge article links in the Articles section for future reference. This allows you to increase your knowledge and assist you in helping your end users.
4	Escalate Case	Allows you to escalate the case.
5	Case Comments	Allows you to add/view comments related to the case.

## Search for Case

To search for a case, do one of the following:

- Click the 'Cases' tab, select a view filter (All Closed Cases, etc.), if needed, locate the desired case, and click the Case Number link.
- Click the 'Cases' tab, type search criteria in 'Search this list' field, press Enter, locate the desired case, and click the Case Number link.
- Type search criteria in the main Search field at the top of the screen, click 'Search', locate the desired case, and click the Case Number link.

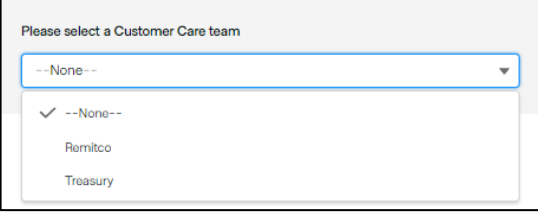
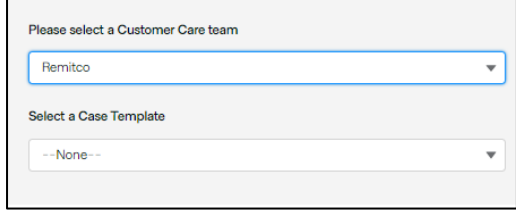
## Create Case

To create a new case, do the following:

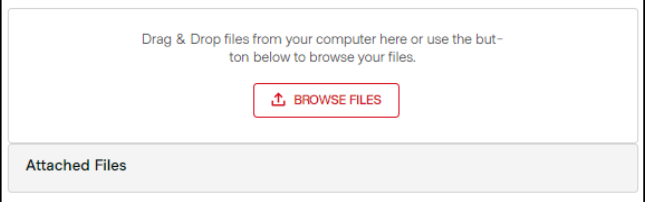
1. Click the 'Create New Case' button on the Home page or Cases page.



2. Select the appropriate Customer Care team (and case template, if applicable).

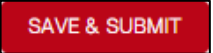



3. Complete the required \* and applicable fields.  
NOTE: Hovering over an information icon ⓘ by a field name provides more details about that field. For additional details, see your specific Quick Start Guide.
4. Attach any applicable files by clicking 'Browse Files' and following the prompts OR by dragging and dropping the file(s) from your computer.



### NOTES:

- File names cannot exceed 80 characters.
  - File size cannot exceed 2 gig.
  - To remove a file before submitting, click the 'X' by the file name.
5. Click the 'Save & Submit' button.  
NOTE: If you want to clear the form and start over before submitting, click 'Reset Form'.



[Result: The newly created case opens and is routed to the appropriate Deluxe team for resolution.]

## View/Update Case

To view or update (add comment, add attachment, or escalate) a case for which you are the contact, do the following:

1. Click the 'Cases' tab.
2. Select a different view (All Closed Cases, Recently Viewed Cases, etc.), if needed, locate the desired case, and click the Case Number link.

### NOTES:

- The column names will vary based on your Deluxe product solution.
- To save a view as the default, select it and click the pin icon.

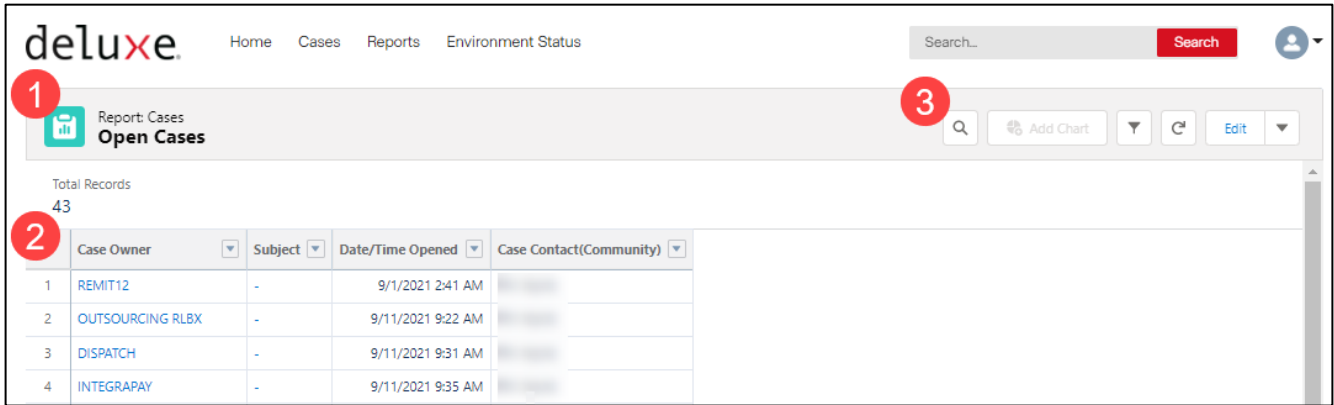
[Result: The Case record opens.]

NOTE: The Related subtab contains any attached files.

3. Do any of the following that apply:
  - To add a comment, click 'Add Comment' on the right, type the comment and click 'OK'.  
[Result: Your comment is added to the top of the 'Case Comments' string and is viewable by Deluxe.]
  - To add attachments, click the 'Related' subtab, and either click 'Upload Files' and follow the prompts OR drag and drop the file(s) from your computer.
  - To escalate the case, click the 'Escalate Case' button on the right, type the escalation reason, and click 'Save'.  
[Result: The Escalated checkbox, Escalation Notes field, and the Escalated Date/Time field are populated in the 'Escalation Details' section on the case and the case is escalated to Deluxe.]

## REPORTS PAGE

### Report Overview

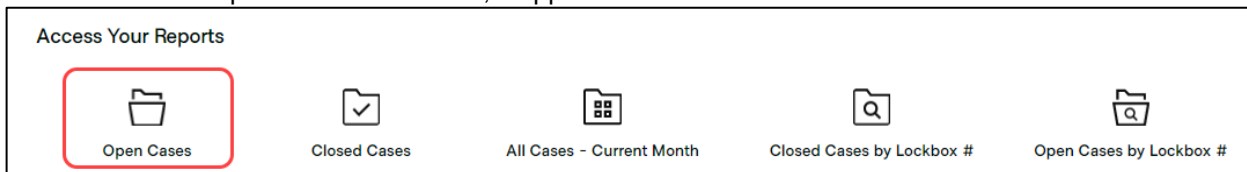


#	Field or Area	Details																		
1	Report View	Displays the selected report view.																		
2	Cases	Displays list of cases based on the view selected.																		
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	Refresh	Used to refresh the page.																		
	Edit	Used to select what is visible in the report.																		
	Export	Used to export the report to excel or as .csv file.																		

### View Report

To view a service report, do the following:

1. Click the 'Reports' tab.
2. Click the desired report view icon (Open Cases, Closed Cases, etc.).  
NOTE: Lockbox reports will be available, if applicable.

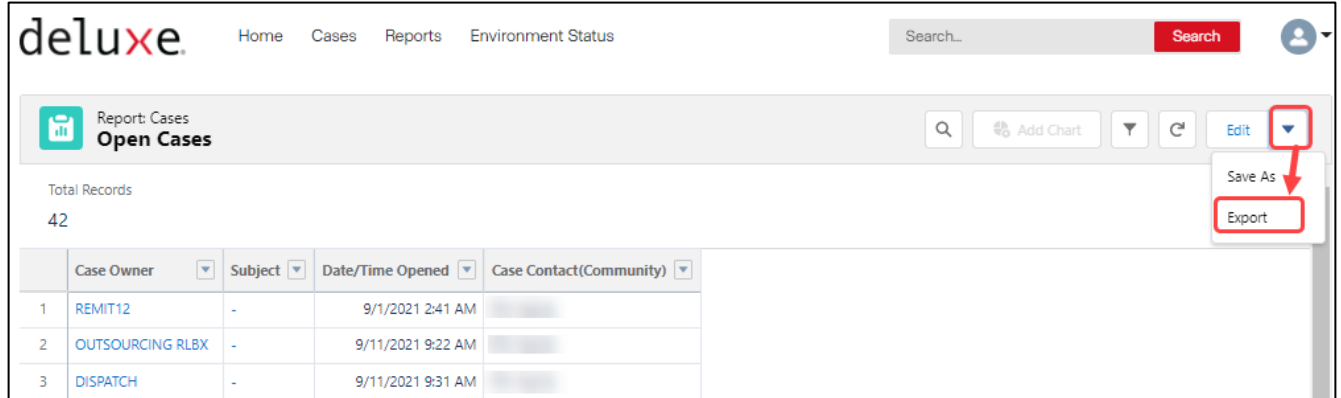


[Result: The selected report appears on the page.]

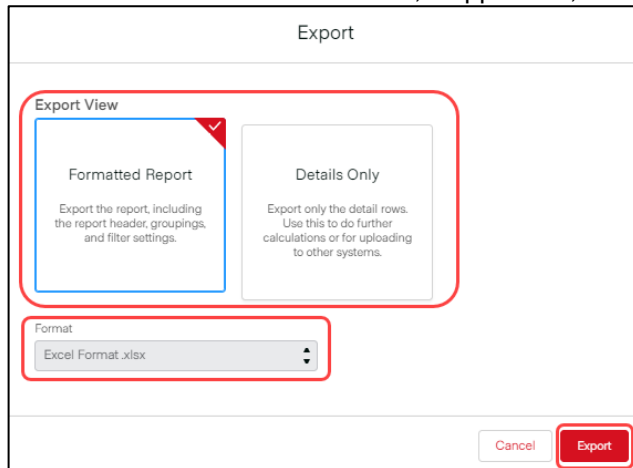
## Export Report

To export a report, do the following:

1. Open the report.
2. Click the arrow in the upper right and select 'Export'.



3. Select the desired view and format, if applicable, and click 'Export'.



4. Navigate to desired save location and click 'Save'.



## ENVIRONMENT STATUS PAGE

The Environment Status tab contains a product-specific dashboard. If the environment status is available for any of your products (ITMS, etc.), they will appear in the Product selection field.

### View System Environment Status

To view the status of a system environment, do the following:

1. Click the 'Environment Status' tab.
2. Select the product.

A screenshot of a product selection dropdown menu. The label 'Product:' is followed by a dropdown menu showing '--Select--' and a downward arrow.

3. View the system details for each environment (Production, Pre-Production, etc.), including the colored status icon, any notes, and the 'Last Updated' timestamp.

A screenshot of the Environment Status dashboard. At the top, there is a 'Product:' dropdown menu and a timestamp 'Status as of August 18, 2021, 11:27 AM'. The dashboard is divided into two main columns: 'Production' and 'Pre-Production'. Each column contains three status cards: 'Website Access', 'WebClient Access', and 'Scan & Upload'. Each card displays a status icon (green checkmark, grey X, or yellow warning triangle), a title, a subtitle, and a 'Last Updated' timestamp.

Environment	Feature	Status	Last Updated
Production	Website Access	Available ✓	7/12/2021, 09:10 PM
	WebClient Access	N/A ✗	7/12/2021, 09:09 PM
	Scan & Upload	Partially Available ⚠	7/12/2021, 09:08 PM
Pre-Production	Website Access	Available ✓	7/12/2021, 09:10 PM
	WebClient Access	Available ✓	7/12/2021, 09:09 PM
	Scan & Upload	Not Available ✗	7/12/2021, 09:08 PM