

# Deluxe Customer Care Portal

**User Guide** 

### **DELUXE CUSTOMER CARE PORTAL**

USER GUIDE

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### DELUXE CUSTOMER CARE PORTAL

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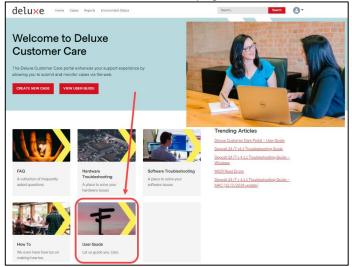
### WELCOME TO DELUXE CUSTOMER CARE PORTAL

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.

### **D**ЕМО

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

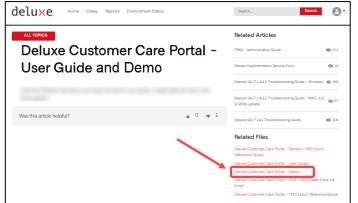
1. Scroll to the bottom of the home page and click the User Guide topic card.



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 <u>www.CustomerPortalTM.Deluxe.com</u>. NOTE: Google Chrome is the recommended browser.
- 2. Type your username (email address), type your password, and click 'Log in'.

deluxe
Customer Care
Lusername
Password
Log in
Ecrypt your bassword?

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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.

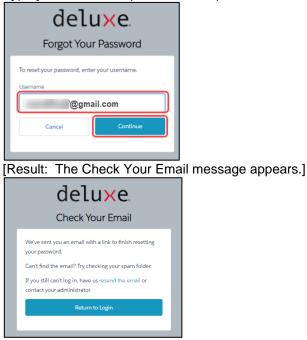
### Forgot Your Password

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.

delu <mark>x</mark> e
Username
@gmail.com
Password
Log In to
Remember me
Forgot Your Password?

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



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

Your new Customer Care pass	sword				
DO NOT REPLY		S Reply	🤲 Reply All	$\rightarrow$ Forward	•••
DN To				Fri 9/17/2021 9	9:17 AM
Retention Policy 2 Year Delete (2 years)	Expires 9/17/2023				
Hi ,					
Your password has been reset for Customer Care. Go to:					
https://nam12.safelinks.protection.outlook.com/?url=https%3A%2	E%2Eentust001_deluxee	orn cc59 force	com%2ECustor	orCaro%2Elogin	%
253D&data=04%7C01%7Cmarla,j.hostetler%40deluxe.com%7C99002			.com/ozr custon	iercare/02riogin	/0
7C1f7c187874084f86b429cf17f96a717c%7C0%7C0%7C637674922112234		5100005 110			
7CTWFpbGZsb3d8eyJWljoiMC4wLjAwMDAiLCJQljoiV2luMzliLCJBTil6lk1ha	WwiLCJXVCI6Mn0%3D%	7C1000&	;sdata=f4TgalzQ	sh9UHR%2F%2B	CD0%
2F%2BV4ldJ%2FKWOM%2BastIQ%2FHDstU%3D&reserved=0					
Thanks,					
Deluxe Corporation					

[Result: The Change Your Password screen opens.]

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

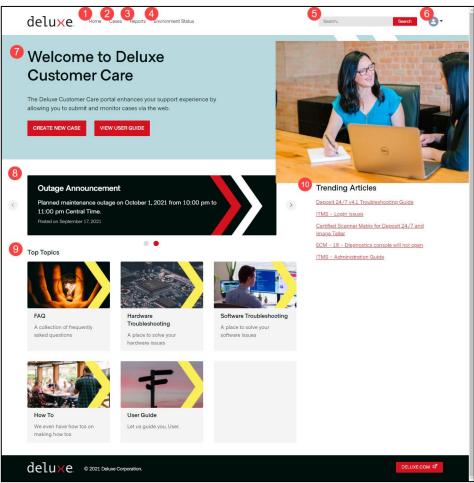
delu <mark>x</mark> e
Change Your Password
Enter a new password for tammy.worden+georgiapeachy@7summitsinc.com. Make sure to include at least: 8 characters 1 letter 1 number
* New Password
* Confirm New Password
Change Password
Password was last changed on 10/11/2021 3:05 PM.

[Result: The Deluxe Customer Care Portal opens.]

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### 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.		
4	Departa	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.		Opens menu with links for personal settings and to logout.		
		Home: Opens the home page.		
		My Profile: Allows you to update your phone and photo.		
		Logout: Allows you to logout of the portal.		
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.		

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### **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'.



Click 'Edit' to edit the fields.
 NOTE: To add/update photo, click the camera image on the photo and follow the prompts.

	Customer Name	Title	Edit
	Time Zone	Mobile	
Ø	Phone	Fax	

3. Complete the fields with the applicable information and click 'Save'. NOTE: Select your time zone, as the system defaults to Central time.

Ed	lit User
*Name	Title
First Name	
Middle Name	
*Last Name	
Suffix	
*Time Zone	Mobile
(GMT-05:00) Central Daylight Time (America/Chic▼	
Phone	Fax
	· · · · · · · · · · · · · · · · · · ·
	Cancel Save

### **DELUXE CUSTOMER CARE PORTAL**

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#### **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.

	Related Articles
Deposit 24/7 v 4.1.1 Troubleshooting	CA- Recalling Employee's Direct Deposit
Guide - MÁC (12/3/2019 update)	Category & Category Details List
What is Lorem Ipsum?	R360 2.0 Troubleshooting Stuck batches for Data import and CDS I mports
Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting,	CA-Earning Codes Quick Review
remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.	Related Files
Why do we use it?	testBadge
It is a long established fact that a reader will be distracted by the readable content of a page when looking at its layout. The point of using Lorem Ipsum is that it has a more-or-less normal distribution of letters, as opposed to using 'Content here, content here', making it look like readable English. Many desktop publishing packages and web page editors now use Lorem Ipsum as their default model text, and a search for 'lorem ipsum' will uncover many web sites still in their infancy. Various versions have evolved over the years, sometimes by accident, sometimes on purpose (injected humour and the like).	

### DELUXE CUSTOMER CARE PORTAL

#### 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'.

delu×e. Hor	me Cases Reports Environment Status
Search Results	Articles
All	4 Results - Sorted by Relevance
Articles Cases	Deposit 24/7 v 4.1.1 Troubleshooting Guide - MAC (12/3/2019 update) 000001024 · Not Validated • Last Modified Aug 18, 2021, 5:31 PM Deposit 24/7 v 4.1.1 Troubleshooting Guide - MAC
Collapse List	ITMS - Administration Guide         000001034 · Not Validated · Last Modified Aug 18, 2021, 5:57 PM         This guide includes: How to update password Administering users Setting up reports Other         R360 Shared Documentation Links         000001041 · Not Validated · Last Modified Oct 18, 2021, 1:53 AM         Features Updates doc         ECM - 18 - Diagnostics console will not open         000001023 · Not Validated - Last Modified Aug 18, 2021, 5:31 PM
	Files (x86)\Hyland\Services\Diagnostics\" and once found bet the following to a value of "true Cases 1 Result
	CASE NUMBER LEGACY CASE NUMBER PRIORITY DATE/TIME OPENED SERVICE CLIENT ID SUBJECT ACCOUNT NAME CATEGORY BRIEF D C- Medium 8/30/2021 8:51 AM TEST-0123-03 TMS - Tressury 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.

delu <mark>×</mark> e	Home Cases Re	eports Environment	Status		Search_	Search
Case Ma	anagem	nent				
Track and manage yo phone! CREATE NEW CASE	our cases here. Sub	mit a new request	to avoid the			
Cases All Open Cases 1 Item • Sorted by Case Numb		osed • Updated a minute a	go	4 Q Sear	ch this list	Printable View         New           \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$\$ • ] \$\$ • ]
3 Case Number ↑ 1 C-00865450	✓ Subject	V Status Open	V Priority Medium	<ul> <li>✓ Date/Time Opened</li> <li>9/1/2021 10:36 PM</li> </ul>	Owner Name     RDC After Hours	✓ Merchant Accou ✓

#	Field or Area	Details		
1	Create New Case	Used to	open the form	to create a new case.
2	Cases View	Ex: My		red view. My Open Cases, Recently Viewed, etc. v as the default, select it and click the pin icon.
3	Cases List	case de	ails.	cases in the selected view with Case Number links to open the ames will vary based on your Deluxe product solution.
4	Case Options	Displays	ble case options shown in the following table.	
		Icon	Name	Details
		Q Sea	rch 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.
		$\blacksquare$	Display as Table	Used to switch between table and Kanban display.
		C	Refresh	Used to refresh the page.
		Ľ	Toggle Chart	Used to view/create charts. NOTE: See 'Create/Work with Case Charts' procedure, if needed.
		T	Filters	Used to view the applied filters.

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### **Case Details Overview**

deluxe.	Home Cases	Reports En	wironment Status			Search	Search	0-
ASE C-00865450 CASE OWNER RDC After Hours x	STATUS Open	PRIORITY # P3	DUE DATE	ESCALATED	TOTAL CASE	ACTION TIME SPENT		
2 Detail Related						5	4 Escalate Ca	ise
LEGACY CASE NUMBER			IMPACT	ĸ		Case Comments	ADD COMMENT	
STATUS Open			URGENCY U3 - Normal					
PRODUCT TYPE Caging Outsourcing			PRIORITY					
HOSTING ENVIRONMENT			CASE ORIGIN Web					
CASE OWNER OUTSOURCING_WLBX			PRIORITY #					
			LOCKBOX #					
> Description Informa	tion							
> Resolution Details								
Escalation Details     Additional Informat	on							
deluxe	© 2021 Deluxe Co	prporation.					DELUXE.C	OM B

#	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.

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#### Search for Case

To search for a case, do <u>one</u> 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.

CREATE NEW CASE

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

ease select a Customer Care team	
None	•
✓None	
Remitco	
Treasury	

Remitco		
elect a Cas	e Template	

- 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.

	Drag & Drop files from your computer here or use the but- ton below to browse your files.
	▲ BROWSE FILES
Attached File	s

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'.

### SAVE & SUBMIT

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

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#### 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.
- 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.

deluxe. Home Cases	Reports Environme	nt Status			Se	earch		Search	0-
Case Manage	ment								
Track and manage your cases here. S phone!	Submit a new request	to avoid the							
CREATE NEW CASE									
Cases All Open Cases 🔻 🖡								Printable View	New
1 item • Sorted by Case Number • Filtered by All cases	- Closed • Updated a few seco	nds ago			Q Search this list		\$ <b>*</b>		¢ T
Case Number 🕇 🗸 Contact Nar	ne 🗸	Status 🗸	Priority 🗸	Date/Time	Opened V	Owner Name	~	Merchant Ac	~
1 C-00865450		Open	Medium	9/1/2021	10:36 PM	RDC.			

[Result: The Case record opens.]

NOTE: The Related subtab contains any attached files.

- 3. Do any of the following that apply:
  - To <u>add a comment</u>, 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 <u>add attachments</u>, 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

[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.]

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### **REPORTS PAGE**

#### **Report Overview**

de	elu <mark>x</mark> e	Home Ca	Search	Search	8-				
Ľ	Report: Cases Open Cases					3 Q 🖏 Add Chart	C <sup>I</sup> Edit	•	
	Total Records 43								
2	Case Owner	Subject	Date/Time Opened 💌	Case Contact(Community)					
1	REMIT12	-	9/1/2021 2:41 AM						
2	OUTSOURCING RLBX	-	9/11/2021 9:22 AM						
З	DISPATCH	-	9/11/2021 9:31 AM						
4	INTEGRAPAY	-	9/11/2021 9:35 AM	the second s					

#	Field or Area	Details		
1	Report View	Display	rs the seled	cted report view.
2	Cases	Display	s list of ca	ses based on the view selected.
3	Report Options	Display	rs a list of a	available report options shown in the following table.
	Icon Name		Name	Details
		Q	Search	Used to search in the report table.
		<b>T</b>	Filters	Used to filter which cases appear. NOTE: Select Date/Time filters for a range. All your cases appear regardless of the 'Show Me' selection.
		C	Refresh	Used to refresh the page.
		Edit	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.

Access Your Reports				
Open Cases	Closed Cases	All Cases - Current Month	Q Closed Cases by Lockbox #	Q Open Cases by Lockbox #

[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'.

de	eluxe	Home	Cases Reports	Environment Status	Search	Search
	Report: Cases Open Cases				Q 🚯 Add Chart 🔻	C' Edit
Tot	tal Records					Save As
42	2					Export
	Case Owner 💌	Subject 💌	Date/Time Opened	Case Contact(Community)		
1	REMIT12	-	9/1/2021 2:41 AN	1		
2	OUTSOURCING RLBX	-	9/11/2021 9:22 AN	1		
3	DISPATCH	-	9/11/2021 9:31 AN	1		

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

	Export	
Formatted Report Export the report, including the report header, groupings, and filter settings.	Details Only Export only the detail rows. Use this to do further calculations of for uploading to other systems.	
ormat Excel Format xlsx	:	
		Cancel

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

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### **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.



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

roduction		Pre-Production	
Website Access	Available 🔽	Website Access	Available
website access prod notes		website access preprod notes	
Last Updated 7/12/2021, 09:10 PM		Last Updated 7/12/2021, 09:10 PM	
WebClient Access	N/A Ø	WebClient Access	Available
webclient prod notes		webclient preprod notes	
Last Updated 7/12/2021, 09:09 PM		Last Updated 7/12/2021, 09:09 PM	
Scan & Upload	Partially Available	Scan & Upload	Not Available