Client Engagement: Standard Request - How To Guide

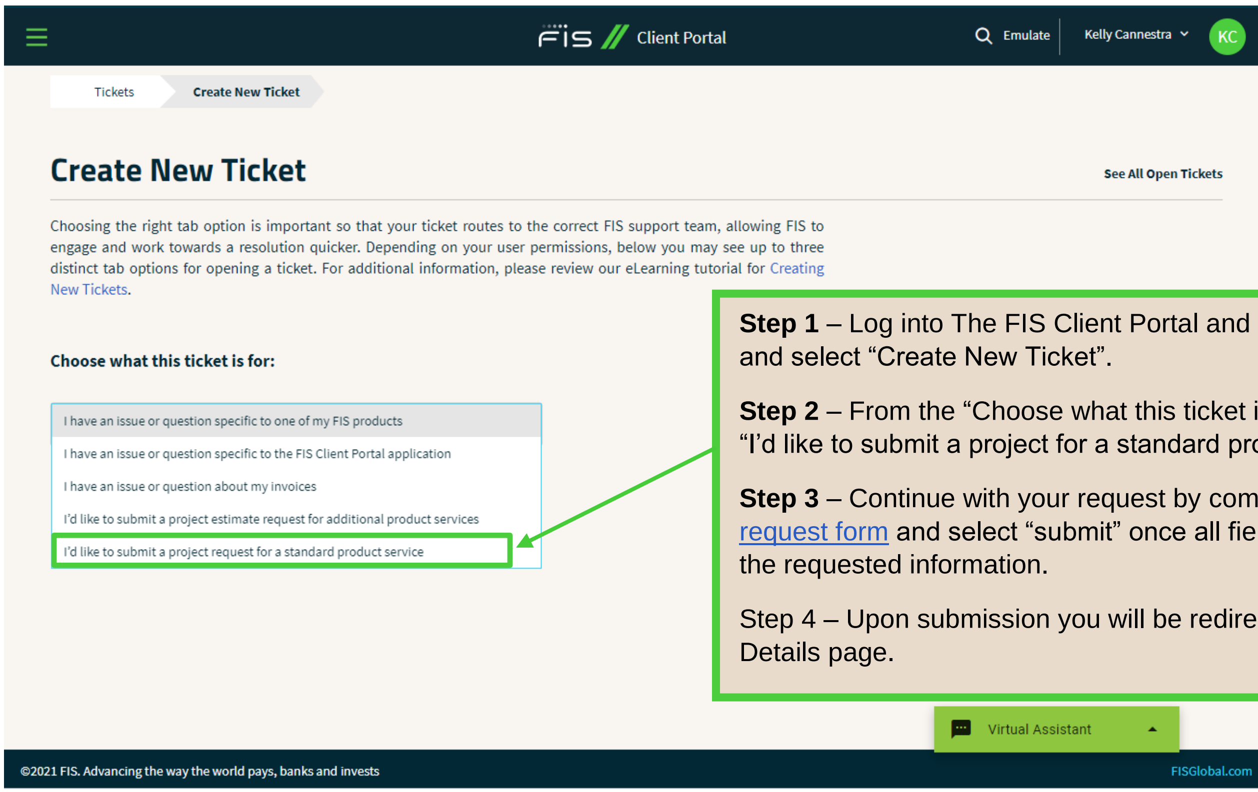
In June 2021, FIS rolled out a consolidated approach and process for clients to submit and track requests for new project work. As part of this process, you will be able to submit requests for new **standard projects** or request estimates for project work on demand via the FIS Client Portal. This guide is a quick lift from the Client Engagement Process Guidelines, on **How to Submit a Standard Project Request**.

Getting Started

A **Standard Project Request** can be submitted to request a project or services from FIS. Standard Project Requests have a fixed scope and price defined by the product owners. Please visit the Client Portal to view the Client Request Reference Guide for a list of available product and services.

Add Authorized Project Approver – An Authorized Project Approver is the client contact with the authority to approve expenditures for the project estimate request. The Authorized Project Approver permission is provisioned by your FIS Client Portal Administrator. In the event, a user requires the Authorized Project Approver permission, please contact your FIS Client Portal Admin. The admin can add the Authorized Project Approver permission to the user's profile using Edit Permissions under Entity Administration

How to Submit Your Standard Request



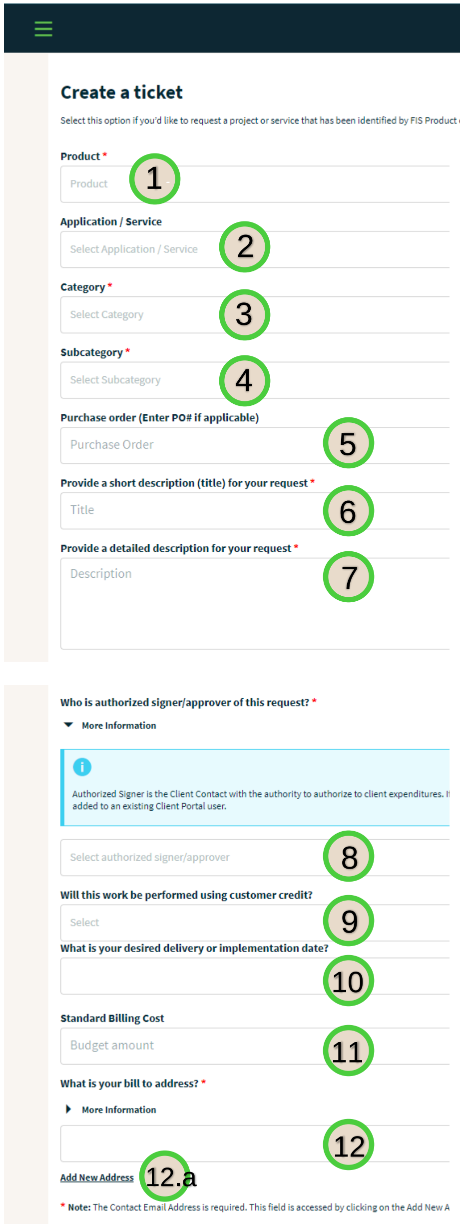
Step 1 – Log into The FIS Client Portal and navigate to Tickets, and select "Create New Ticket".

Step 2 – From the "Choose what this ticket is for" drop down, select "I'd like to submit a project for a standard product service".

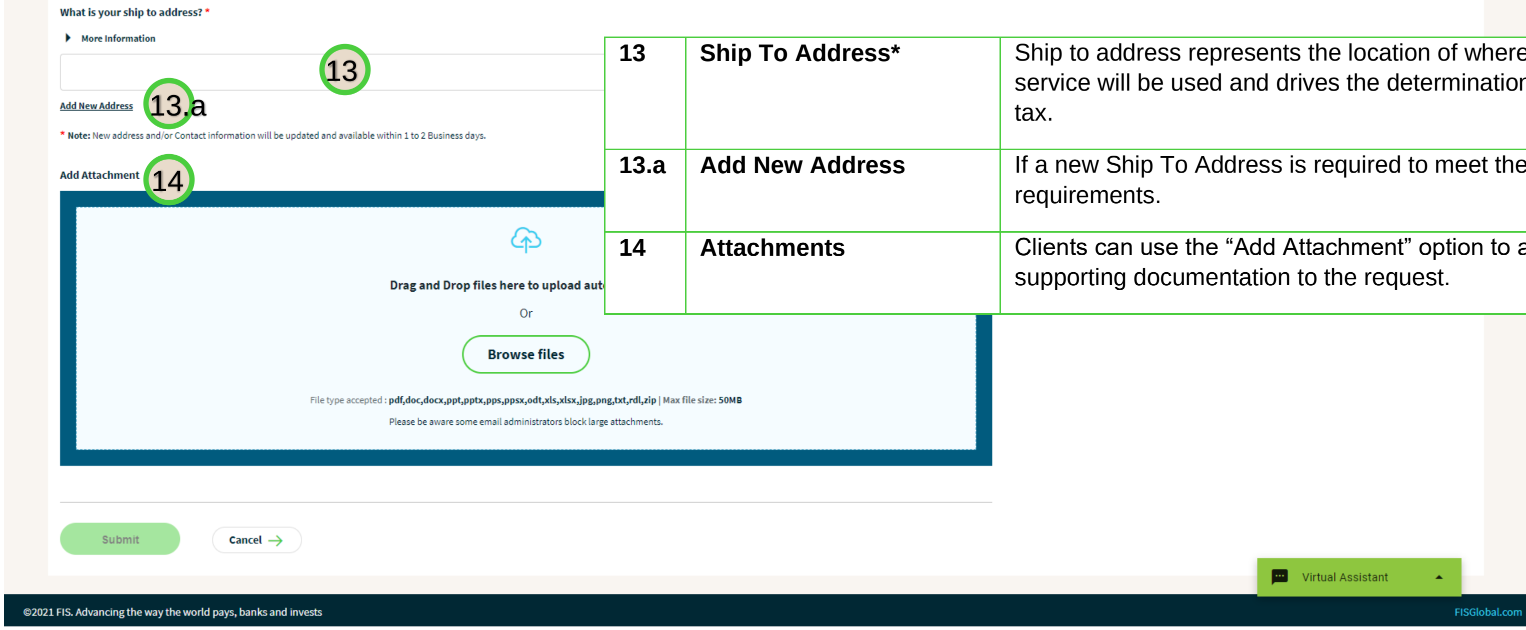
Step 3 – Continue with your request by completing the Standard request form and select "submit" once all fields have populated with the requested information.

Step 4 – Upon submission you will be redirected to the Ticket Details page.

Standard Request Form and Field Definitions

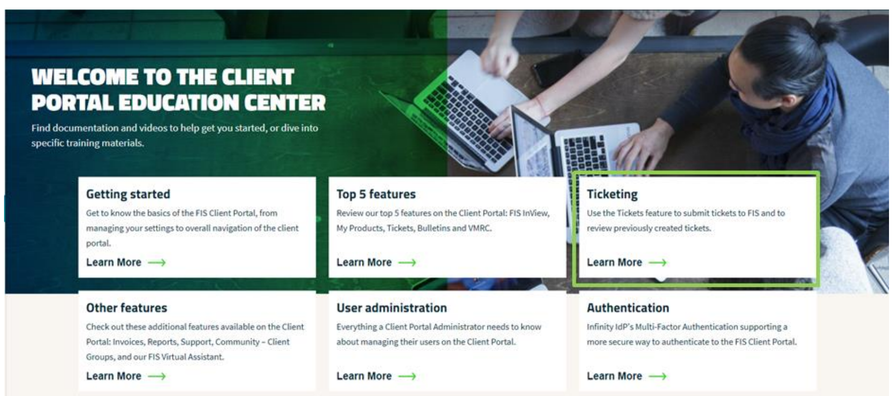


1	**Product***	The FIS product the request is for. Only available products that are contracted will populate
2	**Application/Service**	Optional to add other FIS applications/services that are impacted by the reques
3	**Category***	The second level of request categorization
4	**Subcategory***	A third level of request categorization
5	**Purchase Order**	Free-form text only required if the client requires a Purchase Order per client contract
6	**Short Description***	Free-form text field that is a summary of the request and used as the title of the request.
7	**Detailed Description***	Free-form text field that is a detailed description of the request.
8	**Authorized Project Approver***	The Client Contact with the authority to approve and authorize billing and invoices. This permission is controlled by the Client Portal Adminstrators to provision to client portal users.
9	**Customer Credit**	Yes/No drop down if the client wishes to use a contractual credit to pay for the request
10	**Desired Implementation Date**	Date the Client wishes for the project go-live. Note – implementation date will be confirmed by fulfillment team following request submission.
11	**Standard Billing Cost**	The rate defaults to the FIS standard bill rate which is pre determined.
12	**Bill To Address***	The Client address where the invoice will be delivered. A bill to address is a combination of the client's physical address and invoice recipient email address. If you do not see the correct invoice recipient email address or you see your physical address but no invoice recipient email address, a new address will be required with the correct contact information by selecting Add New Address.
12.a	**Add New Address**	If a new Bill To Address is required to meet the requirements above



13	**Ship To Address***	Ship to address represents the location of where the service will be used and drives the determination of sales tax.
13.a	**Add New Address**	If a new Ship To Address is required to meet the above requirements.
14	**Attachments**	Clients can use the “Add Attachment” option to add supporting documentation to the request.

For detailed information about the Client Portal Standard Project Request Process, the FIS Client Engagement Process Guidelines are available from the FIS Client Portal by selecting Support from the left-hand navigation bar and then selecting Client Engagement Process. From the pop up, scroll to the ”FIS Client Engagement Process Guidelines” link under Training Resources. You will find the details about this process under the section ‘Client Ticketing Contact Protocol’.



The FIS Client Portal Education Center offers additional documentation and videos specifically for Ticketing.

Please continue to visit the Client Portal Education Center and Support for continuous updates.