

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

Create New Ticket

Choosing the right tab option is important so that your ticket routes to the correct FIS support team, allowing FIS to engage and work towards a resolution quicker. Depending on your user permissions, below you may see up to three distinct tab options for opening a ticket. For additional information, please review our eLearning tutorial for [Creating New Tickets](#).

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**

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.

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Standard Request Form and Field Definitions

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, known as a Standard Request. Please click [here](#) to view the Client Request Reference Guide to assist in the creation of your request.

Product * 1

Application / Service 2

Category * 3

Subcategory * 4

Purchase order (Enter PO# if applicable) 5

Provide a short description (title) for your request * 6

Provide a detailed description for your request * 7

Who is authorized signer/approver of this request? *

8

Will this work be performed using customer credit? 9

What is your desired delivery or implementation date? 10

Standard Billing Cost 11

What is your bill to address? * 12

12.a

* Note: The Contact Email Address is required. This field is accessed by clicking on the Add New Address

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 request
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 Administrators 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

The screenshot shows a form titled "What is your ship to address?". It includes a "More Information" section with a text input field (callout 13), an "Add New Address" button (callout 13.a), and an "Add Attachment" section with a file upload area (callout 14). The upload area includes 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 maximum file size is 50MB. At the bottom, there are "Submit" and "Cancel" buttons, and a "Virtual Assistant" chat icon.

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 screenshot shows the "WELCOME TO THE CLIENT PORTAL EDUCATION CENTER" page. It features a grid of six cards, each with a title, a brief description, and a "Learn More" link. The "Ticketing" card is highlighted with a green border.

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: Invoices, Reports, Support, Community - Client Groups, and our FIS Virtual Assistant. 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

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.