What is Clover Inquiries?

Clover Inquiries is a portal within the Clover dashboard where you can open inquiries pertaining to any issues or questions. Within the inquiry, you can interact with designated Clover support associates to help resolve your issue. In addition to opening inquiries, you can perform the following tasks within Clover Inquiries:

- View inquiries opened by you (My Inquiries) or other users at your merchant location (All Inquiries).
- Update an inquiry by adding comments or attachments.
- Close an inquiry.
- Maximize or minimize the Inquiry details window.
- Print inquiry details.

Navigate Clover Inquiries

Clover Inquiries is a user-friendly interface from which you can launch various inquiry actions. We designed this section to help you navigate the interface.

Home page

3sclover			A ~
Inquiries		New Inquiry	
MY INQUIRIES ALL INQUIRIES			
0 Action required	1 In progress	3 Completed	
CI-000102558 Created by: Estachio Caruso	(New) Setup and Training - Business management - Clover Capital	Last updated: 07/12/2024 12:42:50 PM Date created: 07/12/2024 12:39:12 PM	

The home page contains the following fields and commands.

- My Inquiries all inquiries opened by you.
- All Inquiries all inquiries opened by you or another user at your merchant location.
- New Inquiry select this button to open a new inquiry.
- Action required inquiries requiring action by a user at your merchant location.
- In progress all inquiries that Clover support is currently working.
- Completed all inquiries that Fiserv or the merchant have closed.
- **Personal Profile** your personal profile, marked by your initials in the upper-right corner, from which you can sign out of Clover Inquiries.

Inquiry details

Inquiry deta	ils		[] 🖨
CI-000102603			New
Details	Comments	Attachments	
CONTACT INFORMAT	rion	EMAIL	
Estachio Caruso CALLBACK NUMBER —		estachio.caruso@fiserv.com	
INQUIRY INFORMATI	ION		
CATEGORY 1 Devices and Acces	sories	CATEGORY 2 Order Supplies	
CATEGORY 3 Ink		LAST UPDATED 07/12/2024 03:33:08 PM	
created by Estachio Caruso		DATE CREATED 07/12/2024 03:33:08 PM	
INQUIRY DETAILS Test inquiry			
Actions		Clos	se inquiry

The Inquiry details window contains the following fields.

- State the current status of the inquiry. This can be one of New (inquiry you or someone else just opened), Pending (awaiting action by a user at your merchant location), In Progress (actively being worked by a Clover support associate), or Closed (merchant or Fiserv has closed the inquiry).
- Name the name of the person who opened the inquiry.
- Email the email address of the person who opened the inquiry.
- Callback Number the phone number at which to contact the person who opened the inquiry.
- Category 1 the broad category to which the inquiry belongs, for example, Account Management.
- Category 2 a specific aspect of Category 1 to which the inquiry belongs, for example, Request documents.

- Category 3 a specific aspect of Category 2 to which the inquiry belongs, for example, 1099k.
- Last Updated the most recent date on which Clover support or the merchant updated the inquiry.
- Created By the person who opened the inquiry.
- Date Created the date the inquiry opened.
- Inquiry Details a detailed explanation of the reason for the inquiry.
- Close Inquiry- select this button to close the inquiry.

View an inquiry

Within Client360, you can view all inquiries created by you or another user at your merchant location.

To view open inquiries that you created, select the **My Inquiries** tab. A list of inquiries you created appears. Select any of the inquiry cards to view the inquiry details.

Inquiries		New Inquiry
MY INQUIRIES ALL INQUIRIES		
0	3	3
Action required	In progress	Completed
Cl-000102603	New)	Last updated: 07/12/2024 03:33:08 PM
Created by: Estachio Caruso	Devices and Accessories - Order Supplies - Ink	Date created: 07/12/2024 03:33:08 PM
Cl-000102599	New)	Last updated: 07/12/2024 02:44:51 PM
Created by: Estachio Caruso	Account Management - Request documents - 1099k	Date created: 07/12/2024 02:44:50 PM
CI-000102558	New	Last updated: 07/12/2024 12:42:50 PM
Created by: Estachio Caruso	Setup and Training - Business management - Clover Cap	Date created: 07/12/2024 12:39:12 PM

To view open inquiries that other users created, select the **All Inquiries** tab. A list of inquiries created by other users appears. Select any of the inquiry cards to view the inquiry details.

Inquiries			New Inquiry
MY INQUIRIES	ALL INQUIRIES		
	1	70	27
	Action required	In progress	Completed
CI-000102604	De	New	Last updated: 07/11/2024
Created by: Jane Do		Devices and Accessories - Order Supplies - Ink	Date created: 07/09/2024 03:33:08 PM
CI-000102598	dmin	New	Last updated: 07/08/2024 02:44:51 PM
Created by: Alex Ac		Account Management - Request documents - 1099k	Date created: 07/06/2024 02:44:50 PM

To view all closed inquiries, select the **Completed** tab. A list of closed inquiries created by you or another user appears. Select any of the inquiry cards to view the inquiry details.

Inquiries			New Inquiry
MY INQUIRIES	ALL INQUIRIES		
	1 Action required	70 In progress	27 Completed
CL 000103557		Classed	Last updated: 07/10/2024 12:27:29 DM
Created by: Estach	io Caruso	Account Management - Change plan - Service plan	Date created: 07/12/2024 12:12:22 PM
CI-000101331 Created by: John E	ioe	Closed Account Management - Request documents - 1099k	Last updated: 07/10/2024 07:50:17 AM Date created: 07/09/2024 12:14:52 PM

Within the **Inquiry details** window, you can select **Maximize View** () to increase the size of the window. From there, you can select **Fullscreen View** () to further increase the size or **Minimize View** () to revert to the original size.

Open an inquiry

Opening an inquiry is your first step to reach a Clover support associate to resolve your issues or questions.

Perform the following steps to open an inquiry.

- 1. Select the **Help** () icon in the upper-right corner.
- 2. Select Open or track a support inquiry to open Clover Inquiries.

⑦ Help	×
Q Search help and settings	
Frequently viewed help articles	
Understand statements and deposits	Ø
Issue refunds	Ø
Manage cardholder disputes	Ø
Sell gift cards	Ø
Contact support	
Open or track a support inquiry	Ø
Request a callback	

- 3. Select New Inquiry.
- 4. Enter the reason for your inquiry in the search bar. The search bar expands as needed to allow you to enter as much information as you need. *View image*



- 5. Select Create Inquiry.
- 6. Select an inquiry reason. Available reasons vary by merchant, but here are examples of some reasons that commonly appear.
 - Account Management related to activities or issues with an end user's account.
 - Billing and Fees issues relating to fees charged to an end user.
 - Chargebacks and Disputes disputes opened by an end user and chargebacks credited to their account.
 - Devices and Accessories equipment belonging to an end user.
 - Funding and Deposits funds belonging to an end user and deposits made to their account.
 - Setup and Training the setup of an end user's Clover account and any training tasks for the new user.
 - Transactions Clover transactions that occurred on an end user's account.
- 7. Describe the inquiry reason in the **Inquiry Detail** field.

For certain inquiries, the Inquiry Detail field does not appear. Instead, a message displays encouraging you to connect with a Clover support associate either by phone or live chat.

You might also see a Resources tab, which displays a message encouraging you to search the Fiserv Knowledge Base containing how-to articles, videos, and frequently asked questions for answers to your inquiry. You can also select the link below the message to navigate to Clover Help topics containing potential answers. This link also appears as a comment in the **Comments** tab.



- 8. Enter any confidential information in the Sensitive Data field.
- 9. Add any attachments relevant to the inquiry.
- 10. Select Create Inquiry.

Inquiry information	
Inquiry Detail *	
Test inquiry	
188 characters left	
Sensitive Data	
Use this encrypted field for sensitive information such as SSN, payment card, date of birth, and bank account.	
2000 characters left	
Attachments	
Add Attachment	
Contact information	
	Cancel Create Inquiry

After you submit your inquiry, a confirmation message appears telling you that you have successfully submitted the inquiry and advising of an expected review and resolution time.

General Current Release C IP & CP Apps I L	ink References.docx 🧲 Clarity PPM :: Overvi 🕒 New Jira		
Inquiries		New Inquiry	CI-00
MY INQUIRIES ALL INQUIRIES			Inqu
0 Action required	24 In progress	14 Completed	CI-000
CI-000103733 Created by: han nguyen	New Setup and Training - Ord Inquiry has been sul	omitted	
CI-000103734 Created by: han nguyen	New Inquiry CI-00019244 Devices and Accessories menu in the CLOVE	33 has been submitted. Please allow 2 business days for us to l. For any updates, select track your support inquiry from the hel R dashboard.	lp –
CI-000103758 Created by: han nguyen	New Chargebacks and Disput	Cle	ose ii
CI-000107551 Created by: han nguyen	New Billing and Fees - Learn about fees - Wireless Manager/C	Last updated: 08/01/2024 06:11:03 PM Date created: 08/01/2024 06:10:58 PM	CREATED han ng
CI-000107803 Created by: han nguyen	New Account Management - Request documents - 1099k	Last updated: 08/04/2024 06:05:16 PM Date created: 08/04/2024 06:05:16 PM	Testing
CI-000107804 Created by: han nguyen	New Setup and Training - Orders and payments - Taxes	Last updated: 08/04/2024 06:09:52 PM Date created: 08/04/2024 06:09:51 PM	Actio

Add a comment to an inquiry

Inquiry comments are the primary way you will communicate with the Clover support associate assigned to your inquiry. Whenever you add a comment, the associate receives an email notification, and vice versa. Use the **Comments** tab to discuss any details or updates relevant to your inquiry.

Perform the following steps to add a comment to an inquiry:

- 1. Select the inquiry from the My Inquiries or All Inquiries tab.
- 2. Select the Comments tab.
- 3. Enter your comment in the Enter comment here box.

Inquiry details				[] 🖨
CI-000102558				New
Details Com	2 ments	Attachments		
AL Test comment				
1988 characters left				
			Cancel	Submit

4. Select Submit.

The new comment then appears in the Comments tab.

Con	nments	Q	*
	TODAY		
EC	Estachio Caruso 07/12/2024 12:42:50 PM Test comment		

Add attachment to an inquiry

If your inquiry is about a highly specific issue, or there is more behind it than what you can explain in the inquiry details, it might be helpful to add an attachment. Examples of attachments you might include are screenshots of error messages, documentation, and more.

Perform the following steps to add an attachment:

- 1. Select the inquiry from **My Inquiries** or **All Inquiries**.
- 2. Select the Attachments tab.

CI-000102557 × CI-000101331 ×	×
Inquiry details	0 6
CI-000102557	New
Details Comments ¹ Attachments	
Attachments	Ē
No attachments to display.	

- 3. Select Add Attachments(E).
- 4. Drag and drop the file from your File Explorer or select the prompt to browse for the file you want to attach.
- 5. Check that the file is valid under **Files Listing**. If it is invalid, an error message displays, and you must remove the file before you can continue.

Add Attachment	×
All attachments are considered sensitive and will be encrypted for storage.	e mevimum file size is 25 MD
Maximum submission size is a total of 100 MB.	ie maximum nie size is 25 MB.
Drag and drop or click to upload files	
Files Listing	Remove All
E Client360.flprj	$\textcircled{0}$ Invalid file format 459 Bytes \times
Total size of valid files: 0/100 MB	
	Cancel Upload

You can remove an attachment by selecting the to the right of the file name.

6. Select Upload. The attachment then appears in the Attachments tab.

Inquiry details	
CI-000102557	New
Details Comments ¹ Attachments ¹	
Attachments	→ 🗄
2024.2 Default Minimum Password Length.pdf	⊥ 0

Clover Inquiries considers all attachments sensitive and encrypts them for storage.

Print an inquiry

You can print an inquiry if you want a hard copy of it for your records.

Perform the following steps to print an inquiry.

- 1. Select the inquiry from My Inquiries or All Inquiries.
- 2. Select **Print** () in the upper-right corner of the **Inquiry details** window.

CI-000102599	×		×
Inquiry det	tails		0
CI-000102599			New
Details	1 Comments	Attachments	

- 3. Select the print settings you want.
- 4. Select Print to complete the process or Cancel if you no longer want to print the inquiry.

Close an inquiry

After you receive a satisfactory resolution to your inquiry, you can close it without Fiserv assistance. This moves the inquiry into the **Completed** tab, where it remains for 18 months before Clover Inquiries automatically deletes it.

Perform the following steps to close an inquiry:

- 1. Select the inquiry from My Inquiries or All Inquiries.
- 2. Select Close inquiry.
- 3. Enter a closing reason.

Close Inquiry		×
Please provide the reason you are closing this inquiry.		
Reason *		
This resolved my issue with closing an account.		
1953 characters left		
	Cancel	Close

4. Select **Close** to finish closing the inquiry or **Cancel** if you decide you no longer want to close it.

Reopen a Closed Inquiry

If you realize you are unsatisfied with an inquiry resolution, you can reopen a closed inquiry for up to 7 calendar days after closure.

Perform the following steps to reopen an inquiry.

- 1. Select the inquiry you want to reopen from the **Completed** tab.
- 2. Under Inquiry Action, select Reopen Inquiry.



- 3. Select a Reopen Reason.
- 4. Enter more details about why you are reopening the inquiry in the Reopen Notes field.

Reopen Inquiry	×
Please provide the reason you are reopening the inquiry.	
Reason	
REOPEN REASON * V Inquiry not resolved	
REOPEN NOTES * My inquiry was not resolved. I still cannot reset my password.	6
1938 characters left	
Cancel	teopen

5. Select Reopen.