What is Clover Inquiries?

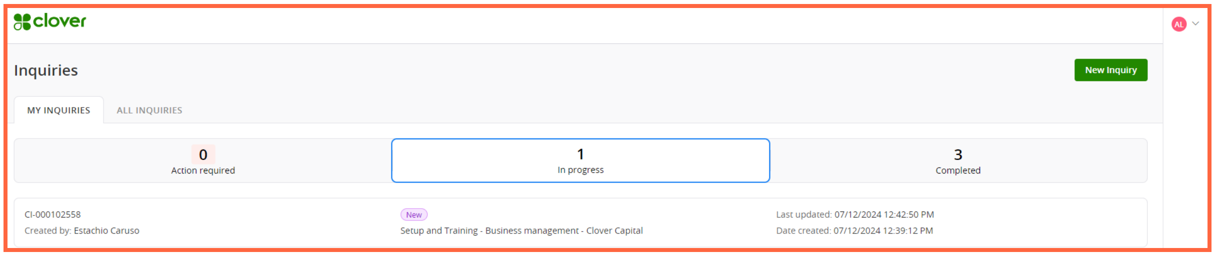
Clover Inquiries is a portal within the Clover dashboard where you can open inquiries pertaining to any issues or questions. Within the inquiry, you can interact with designated Clover support associates to help resolve your issue. In addition to opening inquiries, you can perform the following tasks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

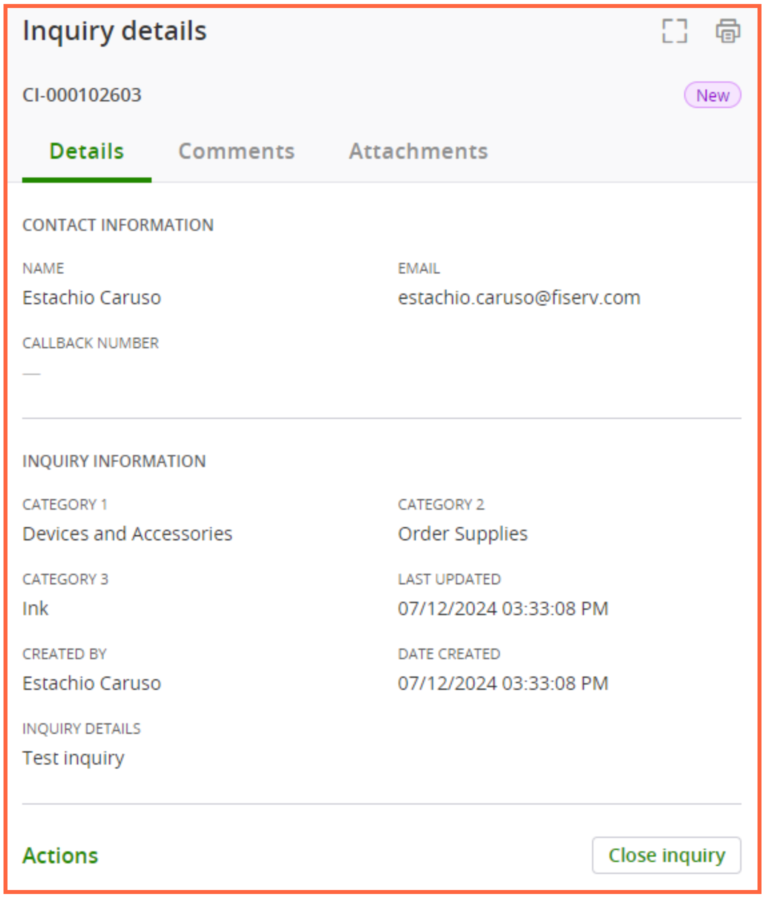
Home page



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



The **Inquiry details** window contains the following fields.

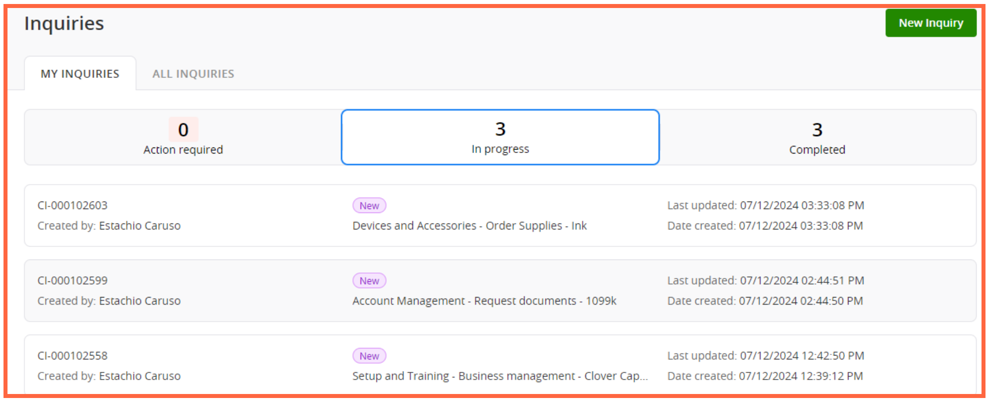
- **State** - the current status of the inquiry. This can be one of **New** (inquiry you or someone else just opened), **Pending** (awaiting action by a user at your merchant location), **In Progress** (actively being worked by a Clover support associate), or **Closed** (merchant or Fiserv has closed 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.

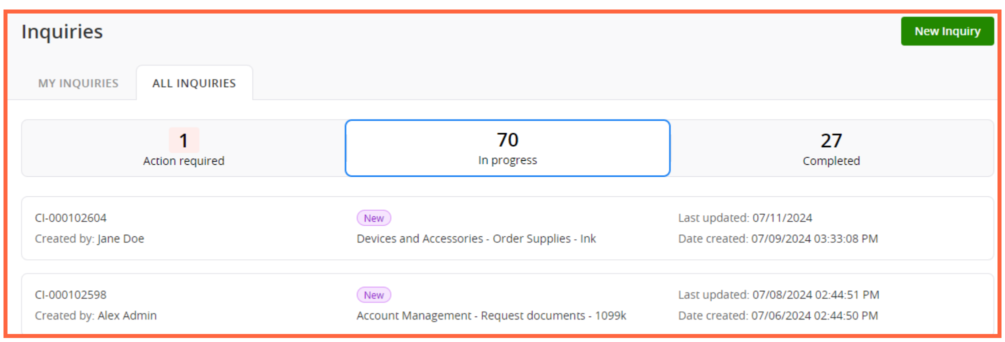
View an inquiry

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

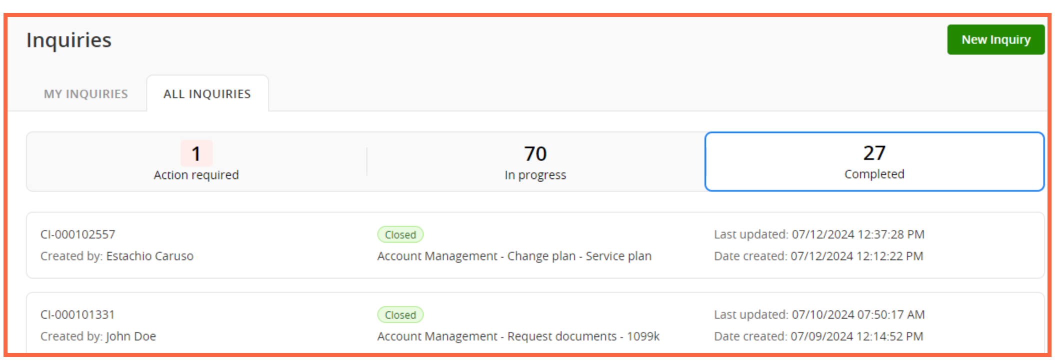
To view open inquiries that you created, select the **My Inquiries** tab. A list of inquiries you created appears. Select any of the inquiry cards to view the inquiry details.



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.



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.



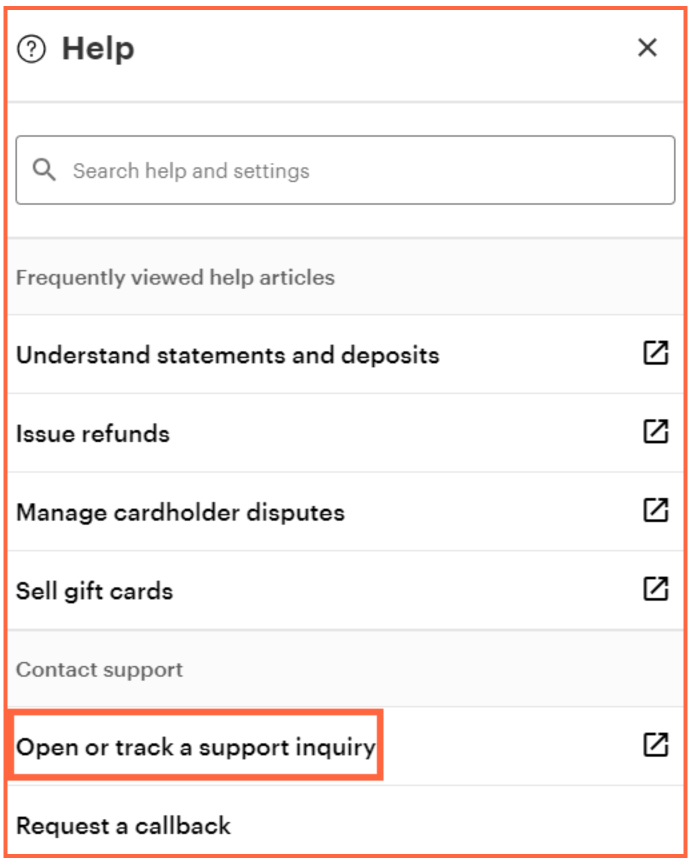
Within the **Inquiry details** window, you can select **Maximize View** () to increase the size of the window. From there, you can select **Fullscreen View** () to further increase the size or **Minimize View**() to revert to the original size.

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.



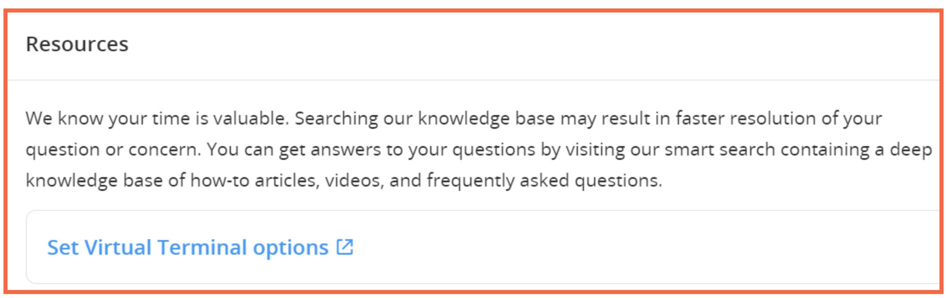
3. Select **New Inquiry**.
4. Select an inquiry reasons. Available reasons vary by merchant, but here are examples of some reasons that commonly appear.
   - **Account Management -** related to activities or issues with an end user's account.

- **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.

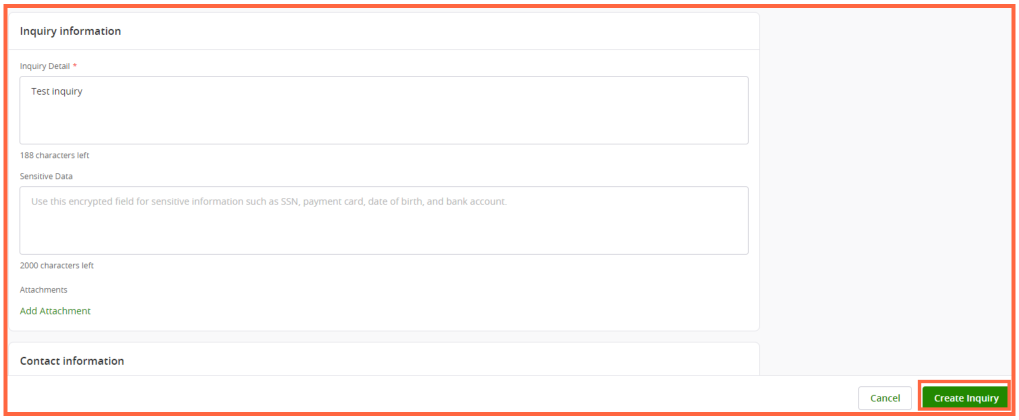
5. Describe the inquiry reason in the **Inquiry Detail** field.

   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.

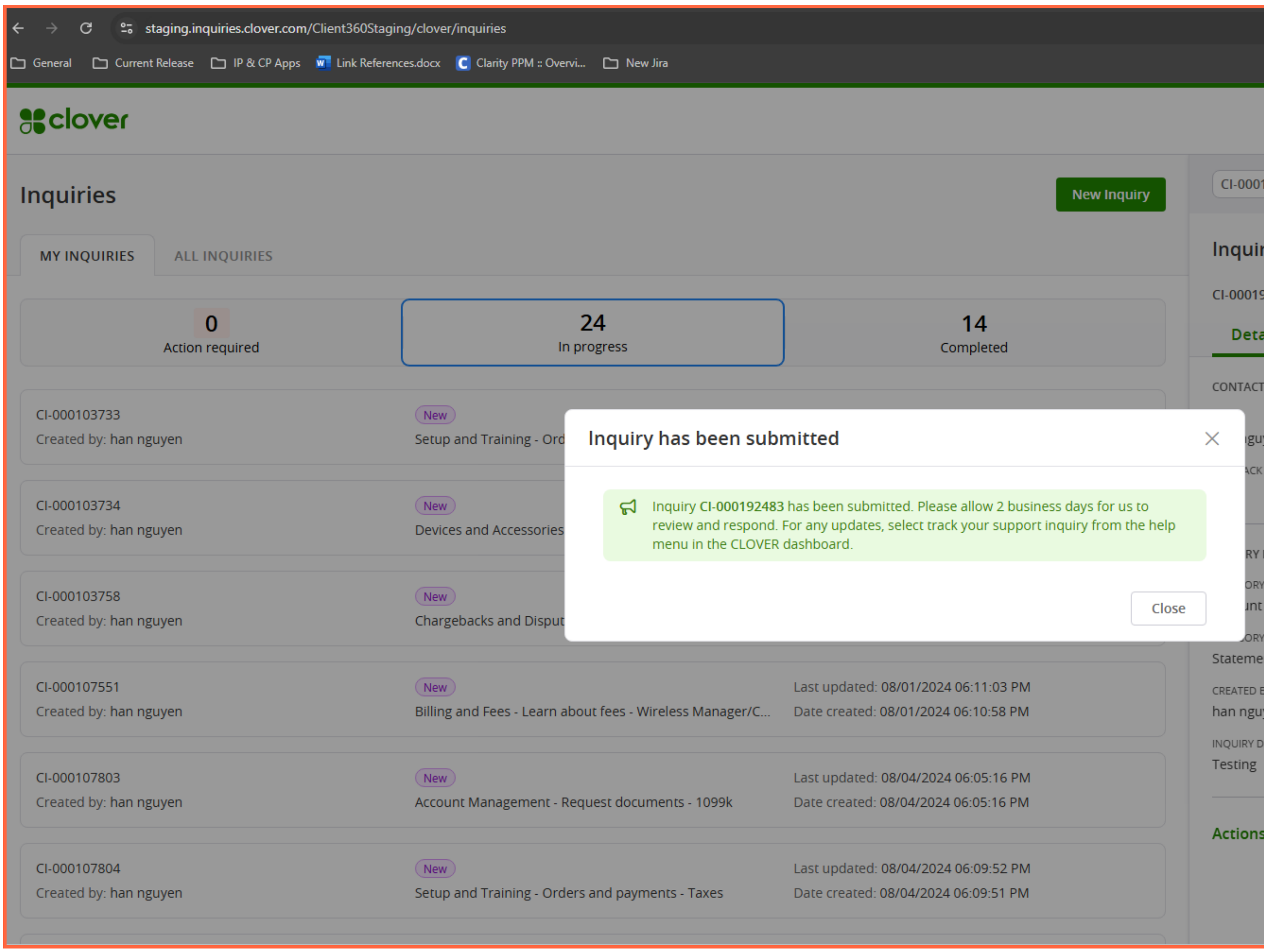
   You might also see a Resources tab, which displays a message encouraging you to search the Fiserv Knowledge Base containing how-to articles, videos, and frequently asked questions for answers to your inquiry. You can also select the link below the message to navigate to Clover Help topics containing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



6. Enter any confidential information in the **Sensitive Data** field.
7. Add any attachments relevant to the inquiry.
8. Select **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.

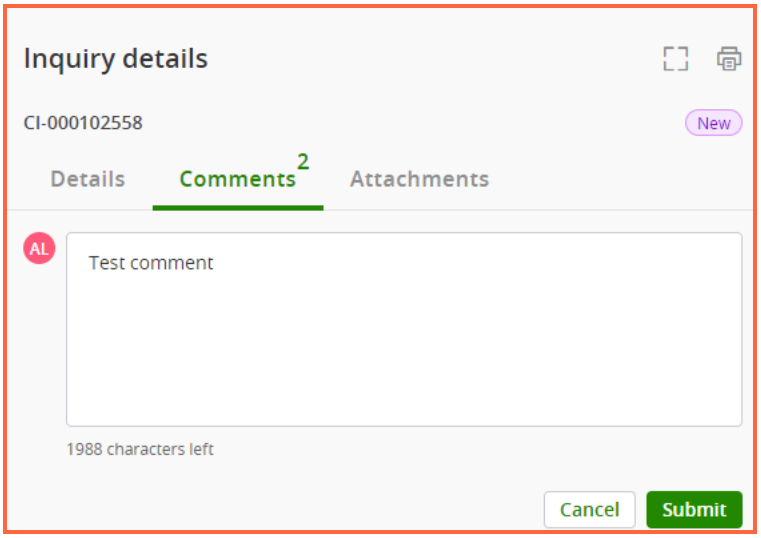


Add a comment to an inquiry

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.

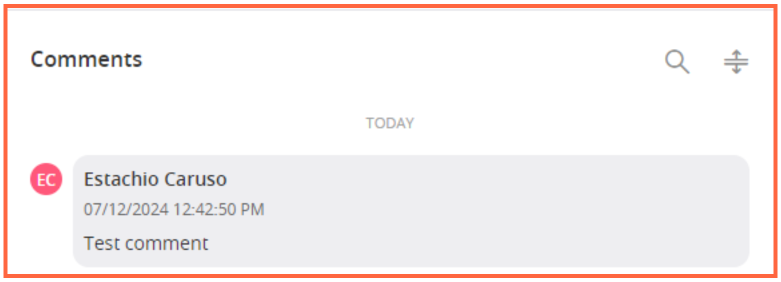
Perform the following steps to add a comment to an inquiry:

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.



4. Select **Submit**.

The new comment then appears in the **Comments** tab.

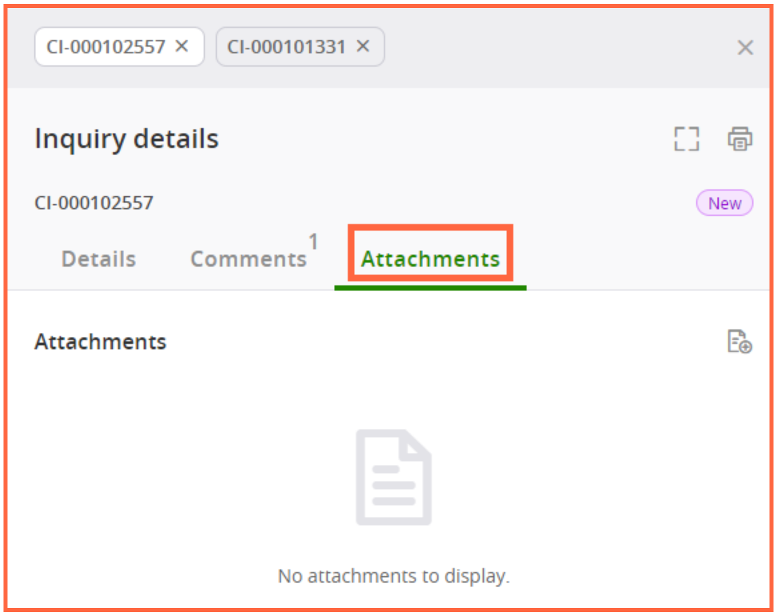


Add attachment to an inquiry

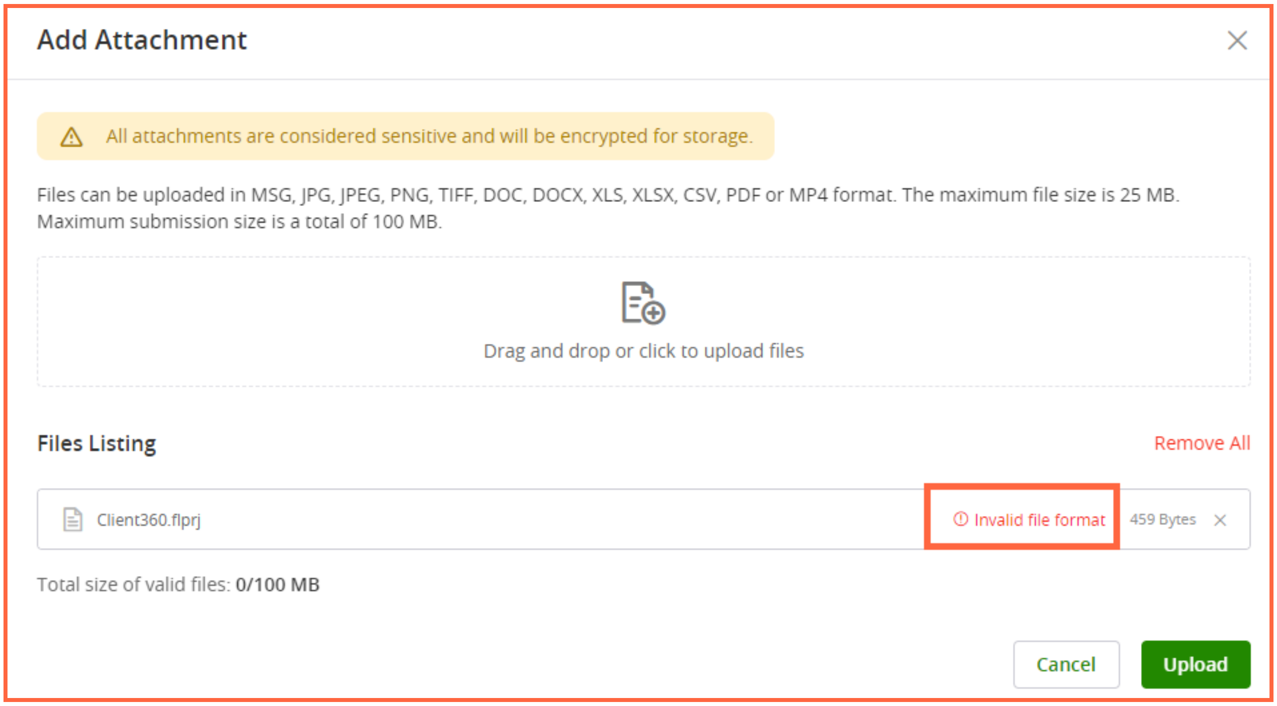
If your inquiry is about a highly specific issue, or there is more behind it than what you can explain in the inquiry details, it might be helpful to add an attachment. Examples of attachments you might include are screenshots of error messages, documentation, and more.

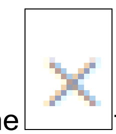
Perform the following steps to add an attachment:

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

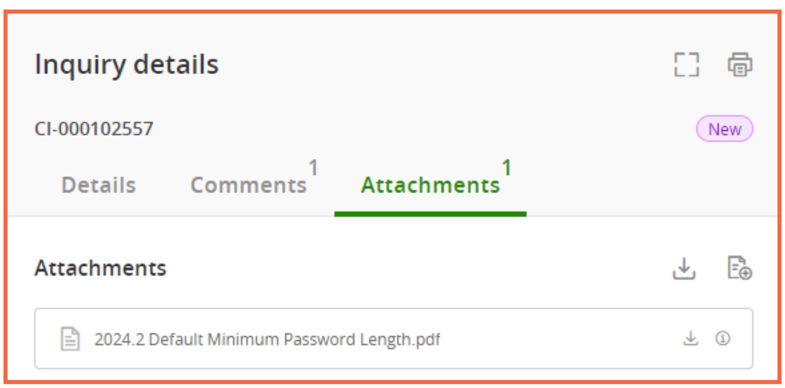


3. Select **Add Attachments**( ).
4. Drag and drop the file from your File Explorer or select the prompt to browse for the file you want to attach.
5. Check that the file is valid under **Files Listing**. If it is invalid, an error message displays, and you must remove the file before you can continue.



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.



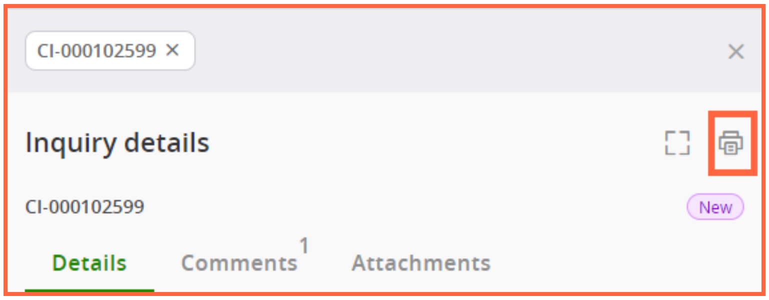
Clover Inquiries considers all attachments sensitive and encrypts them for storage.

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.



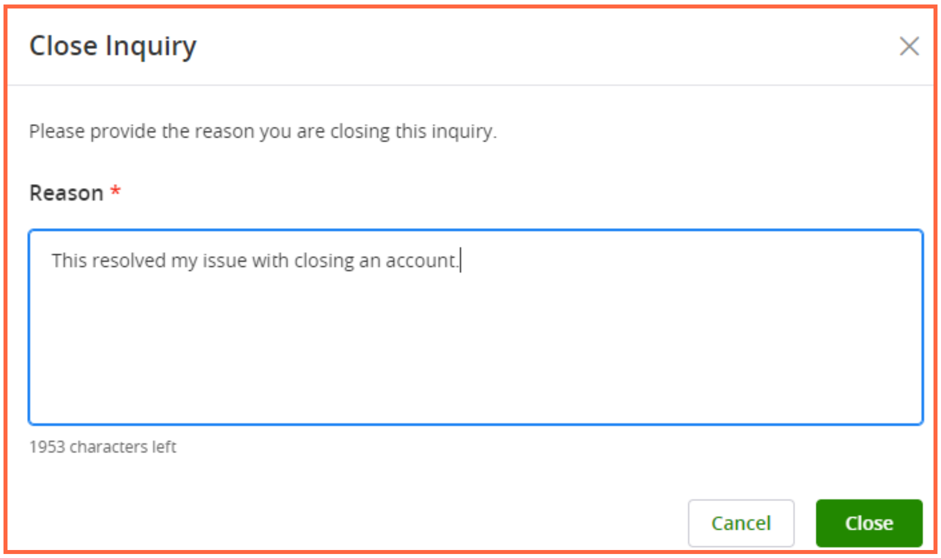
3. Select the print settings you want.
4. Select **Print** to complete the process or **Cancel** if you no longer want to print the inquiry.

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.



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