

What is Clover Inquiries?

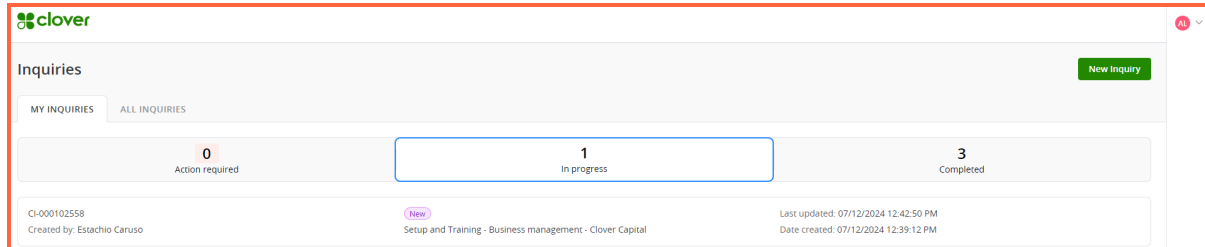
Clover Inquiries is a portal within the Clover dashboard where you can open inquiries pertaining to any issues or questions. Within the inquiry, you can interact with designated Clover support associates to help resolve your issue. In addition to opening inquiries, you can perform the following tasks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

Inquiry details

CI-000102603

New

Details

Comments

Attachments

CONTACT INFORMATION

NAME

Estachio Caruso

EMAIL

estachio.caruso@fiserv.com

CALLBACK NUMBER

—

INQUIRY INFORMATION

CATEGORY 1

Devices and Accessories

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

Close 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 Action required 3 In progress 3 Completed

CI-000102603 Created by: Estachio Caruso	New Devices and Accessories - Order Supplies - Ink	Last updated: 07/12/2024 03:33:08 PM Date created: 07/12/2024 03:33:08 PM
CI-000102599 Created by: Estachio Caruso	New Account Management - Request documents - 1099k	Last updated: 07/12/2024 02:44:51 PM Date created: 07/12/2024 02:44:50 PM
CI-000102558 Created by: Estachio Caruso	New Setup and Training - Business management - Clover Cap...	Last updated: 07/12/2024 12:42:50 PM 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 Action required 70 In progress 27 Completed

CI-000102604 Created by: Jane Doe	New Devices and Accessories - Order Supplies - Ink	Last updated: 07/11/2024 Date created: 07/09/2024 03:33:08 PM
CI-000102598 Created by: Alex Admin	New Account Management - Request documents - 1099k	Last updated: 07/08/2024 02:44:51 PM 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

CI-000102557 Created by: Estachio Caruso	Closed Account Management - Change plan - Service plan	Last updated: 07/12/2024 12:37:28 PM Date created: 07/12/2024 12:12:22 PM
CI-000101331 Created by: John Doe	Closed Account Management - Request documents - 1099k	Last updated: 07/10/2024 07:50:17 AM Date created: 07/09/2024 12:14:52 PM

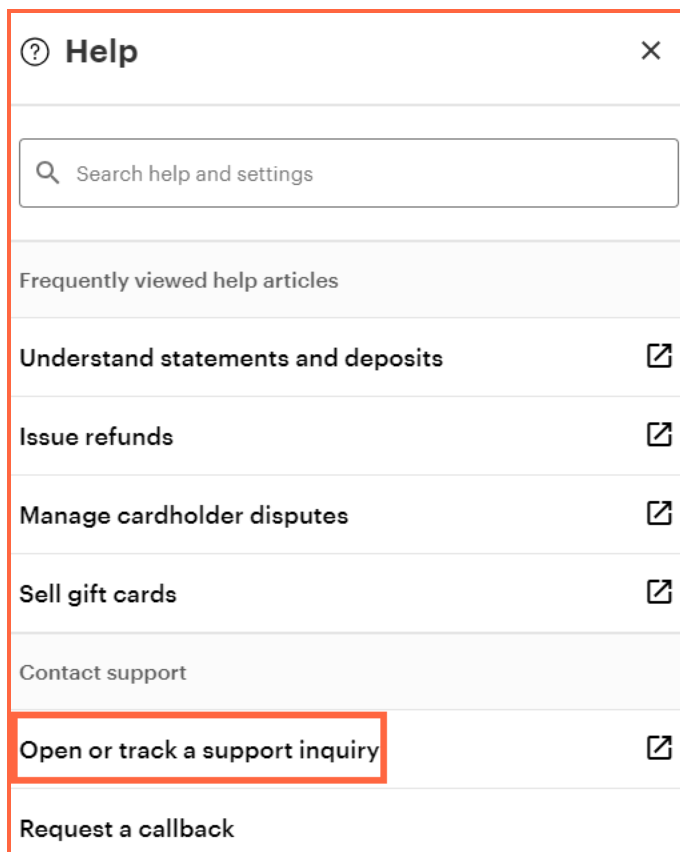
Within the **Inquiry details** window, you can select **Maximize View** () to increase the size of the window. From there, you can select **Fullscreen View** () to further increase the size or **Minimize View** () to revert to the original size.

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.



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.

Resources

We know your time is valuable. Searching our knowledge base may result in faster resolution of your question or concern. You can get answers to your questions by visiting our smart search containing a deep knowledge base of how-to articles, videos, and frequently asked questions.

[Set Virtual Terminal options](#) 

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

staging.inquiries.clover.com/Client360Staging/clover/inquiries

General Current Release IP & CP Apps Link References.docx Clarity PPM :: Overvi... New Jira

clover

Inquiries New Inquiry

MY INQUIRIES ALL INQUIRIES

0 Action required 24 In progress 14 Completed

CI-000103733	New	Setup and Training - Ord
CI-000103734	New	Devices and Accessories
CI-000103758	New	Chargebacks and Disput
CI-000107551	New	Billing and Fees - Learn about fees - Wireless Manager/C...
CI-000107803	New	Account Management - Request documents - 1099k
CI-000107804	New	Setup and Training - Orders and payments - Taxes

Inquiry has been submitted

Inquiry CI-000192483 has been submitted. Please allow 2 business days for us to review and respond. For any updates, select track your support inquiry from the help menu in the CLOVER dashboard.

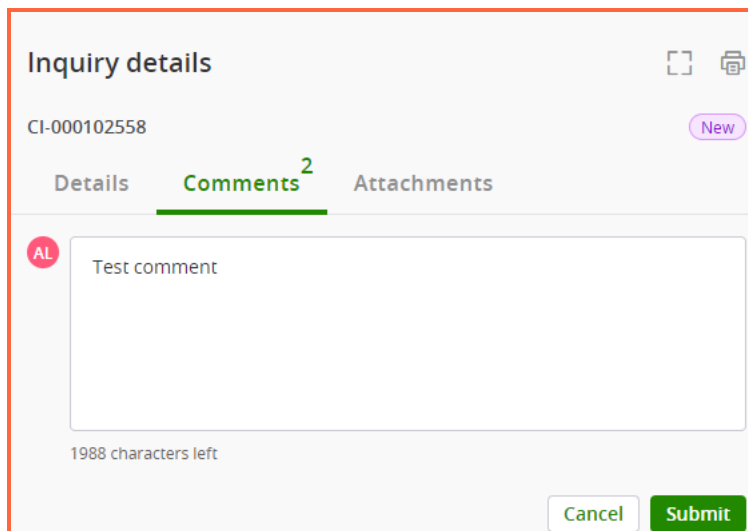
Close

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:

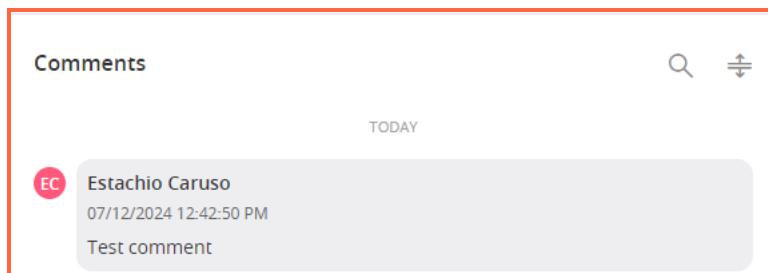
1. Select the inquiry from the **My Inquiries** or **All Inquiries** tab.
2. Select the **Comments** tab.
3. Enter your comment in the **Enter comment here** box.



The screenshot shows the 'Inquiry details' interface. At the top, the inquiry ID 'CI-000102558' is displayed next to a 'New' button. Below this are three tabs: 'Details', 'Comments' (which is selected and highlighted with a green underline and a small '2' indicating two comments), and 'Attachments'. The 'Comments' tab contains a text input field with the placeholder text 'Test comment'. Below the input field, it says '1988 characters left'. At the bottom right of the form are two buttons: 'Cancel' and 'Submit'.

4. Select **Submit**.

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



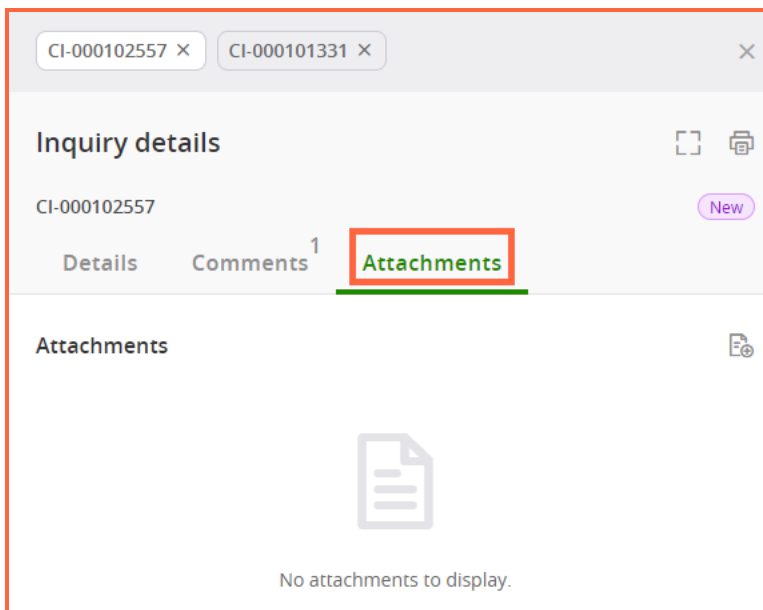
The screenshot shows the 'Comments' tab. At the top, there is a search icon and a list icon. Below this, the word 'TODAY' is centered. A comment card is displayed, featuring a profile icon with the initials 'EC' and the name 'Estachio Caruso'. The comment includes a timestamp '07/12/2024 12:42:50 PM' and the text '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.



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.

Add Attachment

All attachments are considered sensitive and will be encrypted for storage.

Files can be uploaded in MSG, JPG, JPEG, PNG, TIFF, DOC, DOCX, XLS, XLSX, CSV, PDF or MP4 format. The maximum file size is 25 MB. Maximum submission size is a total of 100 MB.

Drag and drop or click to upload files

Files Listing

Remove All

Client360.flprj


Invalid file format

459 Bytes

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

Comments¹

Attachments¹

Attachments

2024.2 Default Minimum Password Length.pdf

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

July 2024


Fiserv Confidential
Intended for Fiserv clients and associates

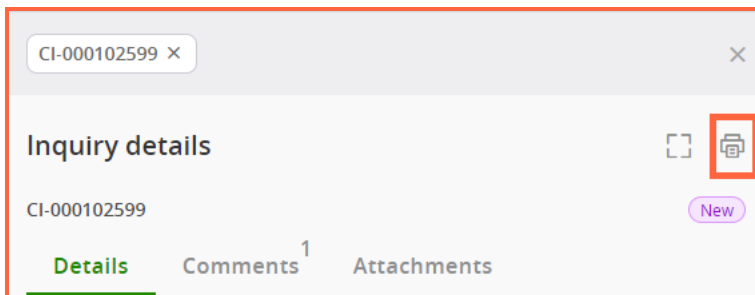
12

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.



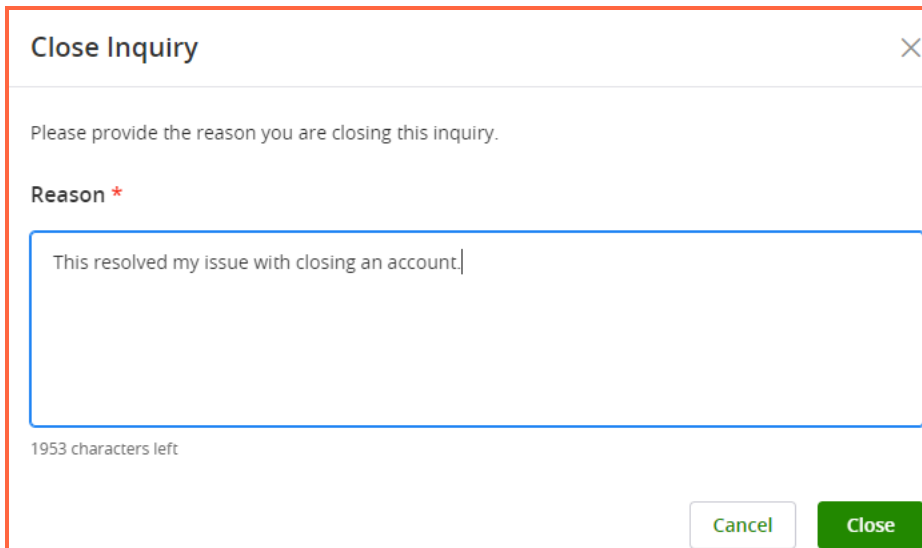
3. Select the print settings you want.
4. Select **Print** to complete the process or **Cancel** if you no longer want to print the inquiry.

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.



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.