

# User Guide for **Application Inquiry**

- ✓ Application Inquiry
- ✓ Support

The logo for clickserv, featuring the word "clickserv" in a lowercase, sans-serif font. The "i" in "click" has a dot, and the "v" in "serv" has a tail that extends to the right. A horizontal line is positioned below the "serv" portion of the text. A small "SM" trademark symbol is located to the upper right of the "v". The logo is centered within a light blue circular background.

**clickserv**<sup>SM</sup>

**Purpose:**

The purpose of this document is to...

**Content:**

- [Application Inquiry](#)

**Other Key Links:**

Insert links outside of this document here – add a table to maximize space, then remove gridlines.

- [Account Setup and Login](#)
- [Application Entry](#)

**Log In URL**    [Vendor Finance Portal \(clickservonline.com\)](http://clickservonline.com)



**Application Inquiry**

<ul style="list-style-type: none"> <li>• When you login to your ClickServ Portal, you will be on your landing page</li> <li>• Click on the App Inquiry Tab to begin your search</li> </ul>	
<ul style="list-style-type: none"> <li>• You will have a variety of ways to search for an existing application:             <ul style="list-style-type: none"> <li>○ Borrower’s Name</li> <li>○ Application #</li> <li>○ Amount Requested</li> <li>○ Submitted By</li> <li>○ Date Range</li> <li>○ Status</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>• In this first example, we have searched by app # 25354 by entering that number in the App # field</li> <li>• Below, the application has been retrieved [we have redacted the Borrower name for confidentiality purposes]</li> <li>• You can now click on the app to open it up</li> </ul>	

- In this second example, we have searched by status by entering in “Pending” in the status field
- The result of this inquiry was that multiple applications were identified with the status of “Pending”

Borrower Name	App ID	Amount	Date Submitted	Submitted By	Status
	CS-25354	--	--	--	Pending
	CS-25408	--	--	--	Pending
	CS-25409	--	--	--	Pending
	CS-25410	--	--	--	Pending
	CS-25411	--	--	--	Pending

- In this final example, we clicked on “Past Month” and can now see multiple applications entered in the past month
- Finally, between each search example, the previous search option was removed by clicking on “Clear Filters”

Borrower Name	App ID	Amount	Date Submitted	Submitted By	Status
	CS-27019	\$15,500.00	11/21/22 01:35 PM	Erik Bracamonte	Pending
	CS-27018	\$150,500.00	11/21/22 01:26 PM	Erik Bracamonte	Pending
	CS-27017	\$500,500.00	11/21/22 01:20 PM	Erik Bracamonte	Pending
	CS-27016	\$190,500.00	11/21/22 01:13 PM	Erik Bracamonte	Pending
	CS-27015	\$150,500.00	11/21/22 12:42 PM	Erik Bracamonte	Pending



**Support:**

For additional support, please contact your JCB Finance Manager, or Tom Martin @ 610-909-0146