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**Clover - New Software Plans Effective February 2020**

- The plans listed below apply to merchants who were boarded during/after February 2020

	Payments Focused		Business Management/Customer Engagement Focused		
	Payments Plus	Register Lite	Register	Counter Service Restaurant	Table Service Restaurant
<b>Mini Flex</b>	\$4.95/device	\$9.95/device	\$39.95 first device \$9.95 per additional device	\$39.95 first device \$9.95 per additional device	\$69.95 first device \$9.95 per additional device
<b>Station 18</b>	N/A				
<b>Station Pro</b>					

	Payments Plus	Register Lite	Register	Counter Service Restaurant	Table Service Restaurant
Accepts all credit & debit cards	x	x	x	x	x
24/7 Support	x	x	x	x	x
Employee Management	x	x	x	x	x
Includes Basic Customer Engagement	x	x	x	x	x
Access to Customer Engagement Plus	x	x	x	x	x
Robust Reporting	Basic	x	x	x	x
Access to Clover App Market apps	Basic	Basic	x	x	x
Inventory Management		x	x	x	x
Order Management		x	x	x	x
Item Level Discounts & Tax Calculations			x	x	x
Order Types			x	x	x
Item Modifiers				x	x
Weight Scale Support			x	x	x
Item Variants			x		
Kitchen Printers & Display Integrations				x	x
Menu Management				x	x
Pre-authorization A Tab				x	x
Multiple Bill Splitting Options					x
Table mapping					x
Tablesides Order/Fire/Payment					x
Scan to Pay					x

- Below is a detailed table of what is included with each software plan

	Payments Plus	Register Lite	Register	Counter Service Restaurant	Table Service Restaurant
	Smart, cloud-based payments, employee and customer management on one device	Payments Plus, plus inventory and order management on one device, cash register replacement	Payments Plus and Register Lite, plus full-featured POS with enhanced inventory and order management	Full-featured POS designed for counter service restaurants with tools to engage guests while maximizing efficiency and increasing accuracy	All in one POS specifically for table service restaurants and drive revenue by optimizing your guest's experience via ordering, firing, and pay at table
<b>Recommended devices</b>	Clover Go, Flex, Mini, Virtual Terminal	Clover Go, Flex, Mini, Virtual Terminal	Station Pro, Station 2018, Mini, Flex, Go, Virtual Terminal	Station Pro, Station 2018, Mini, Flex, Go, Virtual Terminal	Station Pro, Station 2018, Mini, Flex, Go, Virtual Terminal
<b>Payments &amp; support</b>					
Accepts all credit & debit cards	✓	✓	✓	✓	✓
24/7/365 support	✓	✓	✓	✓	✓
<b>Employee management</b>					
Shifts - Employee clock In/out	✓	✓	✓	✓	✓
Employees - Create roles, employees, and set permissions	✓	✓	✓	✓	✓
<b>Customer engagement</b>					
Promos - Engage and retain customers with promotional offers	✓	✓	✓	✓	✓
Rewards - Create a simple, customized loyalty program	✓	✓	✓	✓	✓
Feedback - Collect feedback from your customers	✓	✓	✓	✓	✓
Customers - Your customer database	✓	✓	✓	✓	✓
<b>Inventory management</b>					
Simple Items - Menu and Inventory items		✓	✓	✓	✓
Item categories - Group items into categories		✓	✓	✓	✓
Stock tracking - Track stock of items		✓	✓		
Item modifiers - Menu item modifiers to customize item preparation				✓	✓
Item variants - Define item attributes to create every possible item variant			✓		
Cost tracking - Define and track cost of menu / Inventory items			✓	✓	✓
Item exchange - Exchange sold items of the same price for a different item			✓	✓	✓
<b>Order management</b>					
Create, save, pay, refund items on orders		✓	✓	✓	✓
Item level tax calculations		✓	✓	✓	✓
Discount individual items or orders		✓	✓	✓	✓
Order numbers - Automatic order numbers for easy tracking		✓	✓	✓	✓
Notes on orders - Custom notes on orders about customers, special requests, etc.		✓	✓	✓	✓
Order types - Define order types, for example, To Go, Delivery.			✓	✓	✓
<b>Reporting</b>					
Sales / Payments reporting	✓	✓	✓	✓	✓
Product mix reporting (sales by items, categories, modifiers, etc.)		✓	✓	✓	✓
Tax reporting		✓	✓	✓	✓
Revenue class reporting, for example, sales by wine, liquor, beer		✓	✓	✓	✓
Item cost reporting			✓	✓	✓
Sales by order type reporting			✓	✓	✓
Future restaurant reporting			✓	✓	✓
<b>Counter and table restaurants</b>					
Open tabs - Open bar tabs with or without pre-authorized cards	✓	✓	✓	✓	✓
Menu management				✓	✓
Bill splitting options					✓

	Payments Plus	Register Lite	Register	Counter Service Restaurant	Table Service Restaurant
	Smart, cloud-based payments, employee and customer management on one device	Payments Plus, plus inventory and order management on one device, cash register replacement	Payments Plus and Register Lite, plus full-featured POS with enhanced inventory and order management	Full-featured POS designed for counter service restaurants with tools to engage guests while maximizing efficiency and increasing accuracy	All in one POS specifically for table service restaurants and drive revenue by optimizing your guest's experience via ordering, firing, and pay at table
Table mapping - arrange tables and floorplans					✓
Tables ordering, firing, and payment					✓
Scan to Pay (QR code on bill)					✓
<b>Additional features</b>					
Discount-based rewards	✓	✓	✓		
Customer-facing display (tethered) - Customer-facing Clover Mini	✓	✓	✓		
Item level rewards		✓	✓		
Access to Clover App Market apps		✓	✓		
Full access to Clover App Market		✓	✓		
Remote order printing - Print order receipts to kitchen or bar printers			✓	✓	✓
Support for larger 11.6" touch screen			✓		
Weight scale support/integration with orders			✓	✓	✓

- Here is a link to download the above tables as a PDF  
[https://assets.ctfassets.net/3mu3dzz76r6a/5oNLmDK2MjQQLc83QjtSae/901e4655677e\\_c420329a616e968f1b1c/Clover\\_Service\\_plans\\_2020\\_-\\_Sample\\_1\\_US\\_PPlus\\_Reg\\_Lite\\_Reg\\_1\\_.pdf](https://assets.ctfassets.net/3mu3dzz76r6a/5oNLmDK2MjQQLc83QjtSae/901e4655677e_c420329a616e968f1b1c/Clover_Service_plans_2020_-_Sample_1_US_PPlus_Reg_Lite_Reg_1_.pdf)

## Clover - Apps Included with each New Software Plan 2020

	Payments Plus	Register Lite	Register	Counter Service	Table Service
Clover Dining	⊘	⊘	⊘	⊘	✓
Happy Hour	⊘	⊘	⊘	Must be downloaded from app market	✓
Tips	⊘	⊘	✓	✓	✓
Discounts	⊘	✓	✓	✓	✓
Shifts	⊘	✓	✓	✓	✓
Clover Browser	⊘	✓	✓	✓	✓
Clover Web Browser	⊘	✓	✓	✓	✓
Register	⊘	✓	✓	✓	✓
Orders	⊘	✓	✓	✓	✓
Transactions	✓	✓	✓	✓	✓
Cash Log	⊘	✓	✓	✓	✓
Closeout	✓	✓	✓	✓	✓
Reporting	✓	✓	✓	✓	✓
Inventory	⊘	✓	✓	✓	✓
Employees	✓	✓	✓	✓	✓
Customers	✓	✓	✓	✓	✓
Help	✓	✓	✓	✓	✓
Setup	✓	✓	✓	✓	✓
App Market	✓	✓	✓	✓	✓
Printers	✓	✓	✓	✓	✓
Authorizations	✓	✓	✓	Must be downloaded from app market	Must be downloaded from app market
Manual Transactions	⊘	✓	✓	✓	✓
Rewards	✓	✓	✓	✓	✓
Feedback	✓	✓	✓	✓	✓
Promos	✓	✓	✓	✓	✓
Virtual Terminal	✓	✓	✓	✓	✓
Mobile Printer	✓	✓	✓	✓	✓
Payments	⊘	✓	✓	✓	✓
Pay Display	⊘	✓	✓	✓	✓
Refund	✓	✓	✓	✓	✓
Phone Sale	✓	Must be downloaded from app market	Must be downloaded from app market	Must be downloaded from app market	Must be downloaded from app market
Sale	✓	Must be downloaded from app market	Must be downloaded from app market	Must be downloaded from app market	Must be downloaded from app market

## Clover - Old Software Plans Prior to February 2020

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- The plans listed below apply to merchants who were boarded before February 2020

	<b>Payments Plus</b>	<b>Register Lite</b>	<b>Register</b>
<b>Description</b>	Smart, cloud-based payments, employee and customer management, on one device	All Payments Plus features, plus inventory and order management on one device, cash register replacement	All Payments Plus and Register Lite features, plus full-featured POS with enhanced inventory and order management
<b>Payments</b>			
All forms of payment	✓	✓	✓
<b>Employee management</b>			
Shifts	✓	✓	✓
Employees	✓	✓	✓
<b>Customer engagement</b>			
Promos	✓	✓	✓
Rewards	✓	✓	✓
Feedback	✓	✓	✓
Customers	✓	✓	✓
<b>Inventory Management</b>			
Simple items		✓	✓
Item categories		✓	✓
Stock tracking		✓	✓
Item modifiers and variants			✓
Cost tracking			✓
Item exchange			✓
<b>Order Management</b>			
Create, save, refund orders		✓	✓
Order numbers		✓	✓
Notes on orders		✓	✓
Order types		✓	✓
Multiple orders		✓	✓
<b>Additional Features</b>			
Open tabs	✓	✓	✓
Discount-based rewards	✓	✓	✓
Customer-facing display (tethered)	✓	✓	✓
Item level discounts		✓	✓
Item level tax calculations		✓	✓
Item level rewards		✓	✓
Access to Clover App Market apps		✓	✓
Items and orders integration		✓	✓
Remote order printing			✓
Support for larger 11.6" touch screen			✓
Weight scale support			✓
Full access to Clover App Market			✓

- Pricing for Old Software Plans:
  - Payments Plus - FREE

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- Register Lite - \$9.95
- Register - \$49.95

### How to Change Software Plans

- Login to the Dashboard
  - Click on Account & Setup
  - Select Service Plan (underneath Billing)
  - To change the software plan, click on “Change Plan” underneath the desired plan
  - Then authorize the change
  - \*This will update for all devices linked to this MID

### Clover LTE Data Plan

- To change the data plan on the Clover dashboard:
  - Login to the dashboard
  - Select Account & Setup
  - Select Wireless Manager (underneath Business Operations)
  - Then click Enable/Disable next to each SIM card that needs to be enabled/disabled
  - \*\*If Wireless Manager is not listed on the dashboard, the merchant will need to download the Wireless Manager app on the Clover device first.
    - To download Wireless Manager, login to the Clover device
    - Open the More Tools app
    - Select the search field in the right corner
    - Then search for Wireless Manager
    - Click Connect/Install
- To change the data plan on the Clover device:
  - Open the Wireless Manager app
  - Then click Enable/Disable next to each SIM card that needs to be enabled/disabled

### Device Activation

- Upon receiving a new Clover device, a Welcome Email is sent to the owner’s email address
  - Clover Station, Mini, and Flex: includes activation code for device and link to create password for the dashboard
  - Clover Go: includes link to create password for dashboard (no activation code required)
- When setting up the new Clover device, activation code is prompted. Once entered, the device will link to the merchant’s account and automatically download apps to the device
- If the merchant does not receive the activation code, you can call Clover to get the code. Confirm the email address on file and make sure it is entered in Clover’s system correctly.

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- If the device says, “Not Associated”, the device has not been associated to a merchant account in BASYS’s Clover system. Reach out to deployment or a Clover SME to associate the device

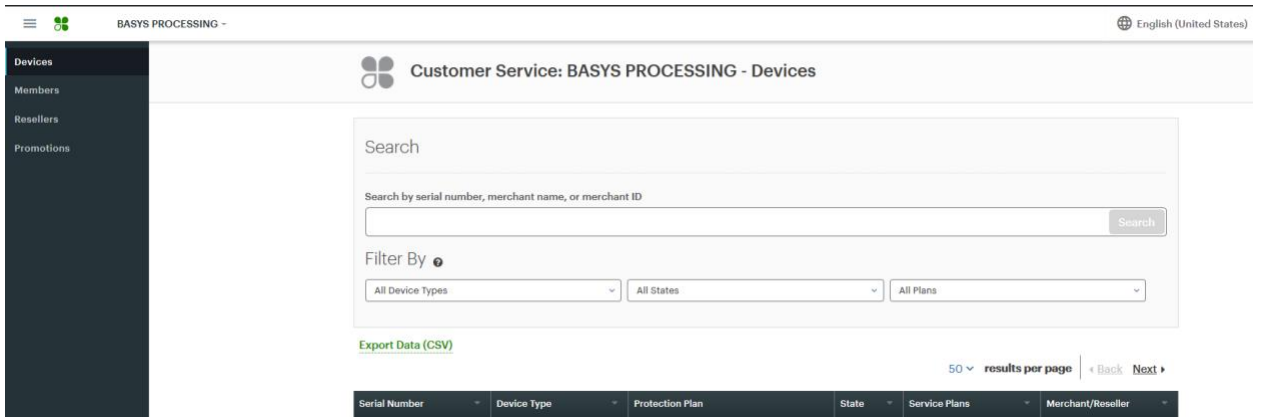
### **Seasonal Hold**

- If a merchant is on seasonal hold and does not want to be charged for the devices, the merchant has two options:
  - If the merchant was boarded prior to February 2020, the merchant can change their software plan to Payments Plus (\$0.00/month) and then change the software plan back to Register Lite or Register when their account comes off of hold
  - If the merchant was boarded after February 2020, we can disassociate the Clover device(s) from the merchant’s account and then re-associate the device(s) when they are ready to come off of seasonal hold
    - Merchants boarded prior to February 2020 have this option as well
    - To disassociate a Clover device(s) from a merchant’s account reach out to a Clover SME or deployment and they will be able to disassociate the device through the Basys Clover Provisioning Dashboard

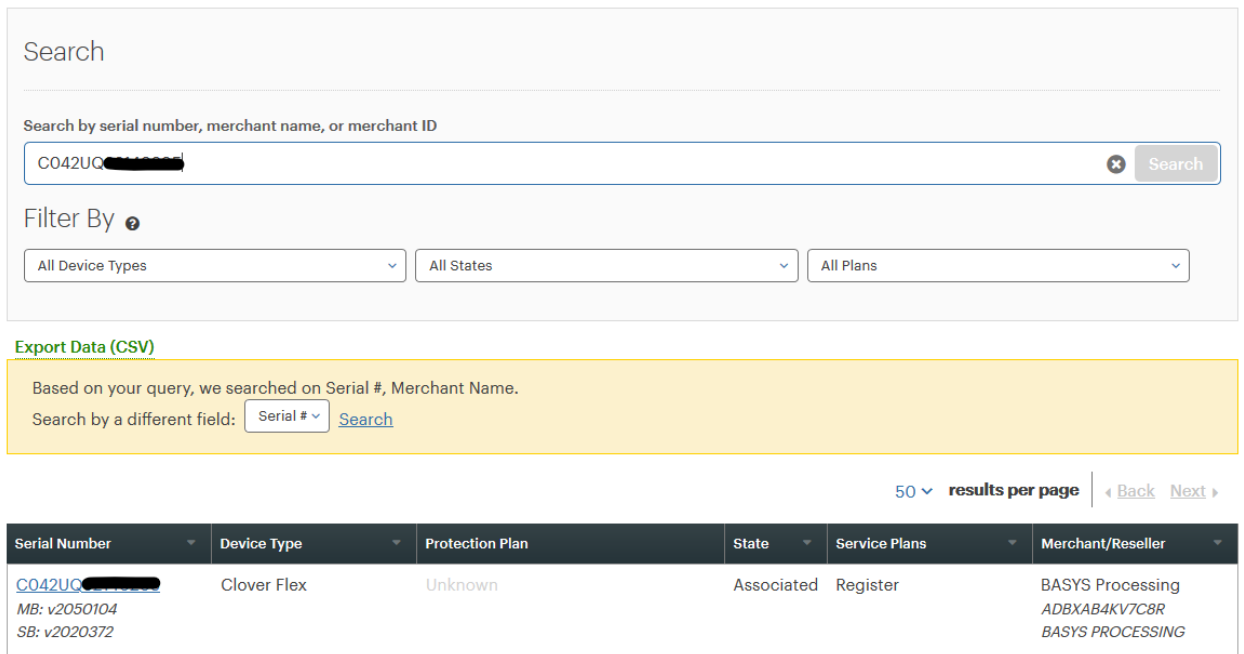
### **Provisioning (Activating/Deactivating)**

- When is provisioning a device necessary:
  - If a merchant receives a new Clover device
  - If a merchant no longer needs a Clover device linked to their account
  - If a merchant’s account is going on seasonal hold
  - If a merchant’s account is coming off of seasonal hold
  - If a merchant’s device says “not associated”
  - If a merchant’s device does not display the correct merchant name
- To provision a device, aka to activate (associate) or deactivate (disassociate) a Clover device from a merchant’s account, follow these steps:
  - If you are an RM/PM:
    - Reach out to CS
    - Please provide the serial number of the device and the name of the merchant the device should be linked to or unlinked from
    - Then, they will be able to associate/disassociate the device(s) through the Basys Clover Provisioning Dashboard
  - If you are in CS:
    - Login to your Clover Dashboard ([www.clover.com/dashboard](http://www.clover.com/dashboard))
    - The provisioning dashboard should appear (see screenshot below)





- Enter the serial number and press Search



- Then click into the serial number on the left-hand side to open the device information

## About

<b>Serial Number</b>	C042UQ [REDACTED]	<b>Device ID</b>	[REDACTED]
<b>Device Type</b>	Clover Flex	<b>Device ROM</b>	MB: [REDACTED]   SB: [REDACTED]
<b>State</b>	Associated with BASYS Processing	<b>Reseller</b>	BASYS PROCESSING
<b>Apps Installed</b>		<b>Merchant Email</b>	clover@basyspro.com
<b>Manuf. Warranty</b>	Unknown	<b>Protection Plan</b>	Unknown

## Disassociate Device

Device is currently associated with **BASYS Processing**.

**Disassociate Device**

## Device History

Action	Merchant	Date	Member
REGISTERED		05-Jun-2019 8:59 pm	
PROVISIONED	LONG'S PARK AMPH FDN	02-Aug-2019 11:54 am	Mason Juergensen
POS_MODE	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
ACTIVATED	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
DISASSOCIATED	LONG'S PARK AMPH FDN	11-Sep-2019 9:45 am	Jamaal Mondaine
REACTIVATED		11-Sep-2019 9:45 am	Jamaal Mondaine
PROVISIONED	BASYS Processing	29-Oct-2019 4:57 pm	Michael Brennan
ACTIVATED	BASYS Processing	30-Oct-2019 7:56 am	BASYS Processing

- This will show you the merchant who the device is currently associated to
- If you need to **disassociate** the device, click on “Disassociate this device”

## Disassociate Device

**Disassociate Device**

Are you sure you want to disassociate device **C042UQ [REDACTED]** (Clover Flex) from merchant **BASYS Processing (ADBXAB4KV7C8R)**?

Disassociating the device will remove all merchant data from the device and the merchant will not be able to access it. Please make sure the device is connected to the internet before disassociating.

**DISASSOCIATING WILL LOCK THE MERCHANT OUT OF THE DEVICE.**

I understand all local data and unprocessed transactions on this device will be lost.

I am aware that a payment was processed on this device 18 hour(s) ago.

**Disassociate Device** **Cancel**

- Check both boxes and then click on Disassociate Device

## Disassociate Device

**Disassociate Device**

Are you sure you want to disassociate device **C042UC** (Clover Flex) from merchant **BASYS Processing** (ADBXAB4KV7C8R)?

Disassociating the device will remove all merchant data from the device and the merchant will not be able to access it. Please make sure the device is connected to the internet before disassociating.

**DISASSOCIATING WILL LOCK THE MERCHANT OUT OF THE DEVICE.**

I understand all local data and unprocessed transactions on this device will be lost.

I am aware that a payment was processed on this device 18 hour(s) ago.

**Disassociate Device** **Cancel**

- Once you disassociate the device, the device details screen will look like this and the State will say “Not Associated”

### About

<b>Serial Number</b>	C042UC	<b>Device ID</b>	
<b>Device Type</b>	Clover Flex	<b>Device ROM</b>	MB:   SB:
<b>State</b>	Not Associated	<b>Reseller</b>	BASYS PROCESSING
<b>Manuf. Warranty</b>	24-JUL-2019 → 25-AUG-2020	<b>Protection Plan</b>	None

### Associate Device

**Associate with merchant:**

### Device History

Action	Merchant	Date	Member
REGISTERED		05-Jun-2019 8:59 pm	
PROVISIONED	LONG'S PARK AMPH FDN	02-Aug-2019 11:54 am	Mason Juergensen
POS_MODE	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
ACTIVATED	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
DISASSOCIATED	LONG'S PARK AMPH FDN	11-Sep-2019 9:45 am	Jamaal Mondaine
REACTIVATED		11-Sep-2019 9:45 am	Jamaal Mondaine
PROVISIONED	BASYS Processing	29-Oct-2019 4:57 pm	Michael Brennan
ACTIVATED	BASYS Processing	30-Oct-2019 7:56 am	BASYS Processing
DISASSOCIATED	BASYS Processing	12-Jun-2020 8:13 am	Felicia King
REACTIVATED		12-Jun-2020 8:13 am	Felicia King

- If the Clover device is connected to the internet or LTE and has a connection, the device will automatically reboot and go to the Setup screen
- If the Clover device does not have a connection, the device should automatically reboot once it has a connection. If not, have the merchant power cycle the device after obtaining a connection
- To **associate** a device:
  - Search the device by the serial number
  - Click into the serial number to open the device details
  - Type the merchant's name in the "Associate with merchant" field and the merchant's name should display as an option

#### About

<b>Serial Number</b>	C042UQ [REDACTED]	<b>Device ID</b>	[REDACTED]
<b>Device Type</b>	Clover Flex	<b>Device ROM</b>	MB [REDACTED]   SB: [REDACTED]
<b>State</b>	Not Associated	<b>Reseller</b>	BASYS PROCESSING
<b>Manuf. Warranty</b>	24-JUL-2019 → 25-AUG-2020	<b>Protection Plan</b>	None

#### Associate Device

**Associate with merchant:**

BASYS Processing (ADBxAB4KV7C8R)

#### Device History

Action	Merchant	Date	Member
REGISTERED		05-Jun-2019 8:59 pm	
PROVISIONED	LONG'S PARK AMPH FDN	02-Aug-2019 11:54 am	Mason Juergensen
POS_MODE	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
ACTIVATED	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
DISASSOCIATED	LONG'S PARK AMPH FDN	11-Sep-2019 9:45 am	Jamaal Mondaine
REACTIVATED		11-Sep-2019 9:45 am	Jamaal Mondaine
PROVISIONED	BASYS Processing	29-Oct-2019 4:57 pm	Michael Brennan
ACTIVATED	BASYS Processing	30-Oct-2019 7:56 am	BASYS Processing
DISASSOCIATED	BASYS Processing	12-Jun-2020 8:13 am	Felicia King
REACTIVATED		12-Jun-2020 8:13 am	Felicia King

- Click on the merchant's name

## Associate Device

**Associate with merchant:**

[Clear Merchant](#)

**BASYS Processing**  
Clover ID: ADBXAB4KV7C8R  
MID: 434213988885  
Owner Email: clover@basyspro.com  
Service Plan: Register

**Service Plan:** Register

Device is being hand delivered  
 Device is being shipped

[Associate Device](#)

- Then confirm that the MID is correct and make sure “Device is being hand delivered” is selected
- If all is correct, click “Associate Device”

## Associate Device

**Associate Device**

Are you sure you want to associate device **C042UQ92140205** (Clover Flex) with merchant **BASYS Processing** (ADBXAB4KV7C8R)?

The merchant will be assigned the **Register** Service Plan.

Please verify that the device has been factory reset and displays the Welcome splash screen when powered on.

Associating the device will send an email to clover@basyspro.com with an activation code.

[Cancel](#) [Associate Device](#)

- If all is correct, then select “Associate Device” again
- After associating the device, you’ll see that it shows “Provisioned” and includes the merchant’s name as well as the date and time and who provisioned the device

## Disassociate Device

Device is currently associated with **BASYS Processing**.

**Disassociate Device**

## Device History

Action	Merchant	Date	Member
REGISTERED		05-Jun-2019 8:59 pm	
PROVISIONED	LONG'S PARK AMPH FDN	02-Aug-2019 11:54 am	Mason Juergensen
POS_MODE	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
ACTIVATED	LONG'S PARK AMPH FDN	09-Aug-2019 6:45 am	RACHEL BITNER
DISASSOCIATED	LONG'S PARK AMPH FDN	11-Sep-2019 9:45 am	Jamaal Mondaine
REACTIVATED		11-Sep-2019 9:45 am	Jamaal Mondaine
PROVISIONED	BASYS Processing	29-Oct-2019 4:57 pm	Michael Brennan
ACTIVATED	BASYS Processing	30-Oct-2019 7:56 am	BASYS Processing
DISASSOCIATED	BASYS Processing	12-Jun-2020 8:13 am	Felicia King
REACTIVATED		12-Jun-2020 8:13 am	Felicia King
<b>PROVISIONED</b>	<b>BASYS Processing</b>	<b>12-Jun-2020 8:22 am</b>	<b>Felicia King</b>

- The merchant will receive an email with the activation code
  - Also, the activation code can be viewed by having the merchant login to their dashboard and the activation code will be listed in a blue box at the top of the main dashboard screen
- To walk a merchant through setting up their device, follow the Clover Device Setup instructions

## Disabling Offline Sales

- Login to the Clover Dashboard
- Select Account & Setup
- Click on Payments
- Scroll down to Offline Payments
- Then select Edit
  - This will allow you to edit the offline payment settings for each device

## Invoice Prompt

- Login to the Clover Dashboard
- Select Account & Setup
- Click on Payments
- Invoice Number

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## Invoice Number

An invoice number lets you enter an identifier with a payment or order.

- Enable Invoice Number
  - Prompt for Invoice Number
    - Make Invoice Number mandatory on all transactions
  - Use Clover Order Number as Invoice Number

Set a custom label

This name will apply to all your devices

- Select the desired options and then click save to save the changes

## Third Party App Billing

- To stop charges for third party apps, uninstall the app from the device and the charges will stop incurring
- **How to uninstall an app:**
  - Login to the Clover device
  - Open the More Tools app
  - Click into the search field and search for the app
  - Then click on the app icon
  - Lastly, select Uninstall

## Submitting Clover Menu to Boarding

- Boarding submits the Clover menu when they submit the MSC request so it takes about 2-3 days to get it uploaded
  - If MSC rejects the request for some reason, this could take 4-5 if they have to resubmit it
- Boarding needs the Clover menu prior to the coding step and it's always better if they have it when the application is originally sent in so it doesn't get held up at coding
  - They do have some that submit the application with a note saying to wait for the menu before they complete the coding step.
    - If they don't submit it with the application, it's highly suggested to submit a note. Otherwise there's a chance that they'll assume the merchant didn't want to submit a Clover menu and they'll complete the MSC request without the menu

## Clover Demo Videos

- Hair Salon: <https://www.youtube.com/watch?v=9biFRdzy9EU&feature=youtu.be>

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- Restaurant: <https://www.youtube.com/watch?v=75O7D5MSnrU&feature=youtu.be>
- Bakery: <https://www.youtube.com/watch?v=CDdrhNVhOnQ&feature=youtu.be>
- Retail: <https://www.youtube.com/watch?v=skvHZkKfgGc&feature=youtu.be>

### When to Call Clover

- If the owner's email address needs to be edited/changed
- If the merchant wants to change the settlement type (auto/manual) or time
  - If settlement is set to auto, merchant can manually settle the batch
  - Time can be changed to whichever time the merchant would like
- If the device is not functioning properly or troubleshooting steps listed on Clover's website are not working
- If the merchant did not receive activation code via email for a new device, call Clover for the code

### Helpful Clover Links

- Clover Help <https://www.clover.com/us/en/help/>
- Accessing the Clover Dashboard - <https://www.clover.com/dashboard/login>
- Troubleshooting <https://www.clover.com/us/en/help/troubleshooting/>
- Clover App Market - <https://www.clover.com/appmarket/>

### Gift Cards

- Clover Gift Cards
  - Download the Gift Cards app
    - Login to the Clover device
    - Open the More Tools app
    - Click the search field in the upper right hand corner
    - Search for "Gift Cards"
    - Click on the Gift Card app icon
    - Then select Connect/Install
  - Once the app is downloaded, Clover will automatically add the gift card entitlement within 24 hours. Once the entitlement is added, the merchant will be able to use the app.
    - If the merchant tries to use the app immediately after downloading it, they may receive an error message since Clover hasn't added the entitlement yet.
    - Clover will automatically add the entitlement and you should see it in MSA within 24-48 hours
  - Once the Gift Card app is installed and the entitlement is added by Clover, the merchant can use the app

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- Here is a helpful link regarding ordering Clover gift cards as well as using and troubleshooting the Clover Gift Card app  
<https://merchantsupport.gyft.com/hc/en-us>
- FD Gift Cards
  - If a merchant was previously using FD gift cards through Clover prior to becoming a Basys merchant, the merchant will need to continue using FD gift cards
  - FD gift cards will need to be ordered through FD
  - In addition, the gift card entitlement will need to be added to the account by FD

## Check Acceptance

- The Clover Check Acceptance is used to accept checks through Clover.
  - \*Note: The merchant must have the telecheck entitlement in order to use this app
- Here is a QRG for using the Check Acceptance App:



### Installation

- 1.) Merchant opens Clover App Market
- 2.) Click on the Clover Check Acceptance App
  - Click on the "Install" button
  - Click on the "Open" button
  - Enter your Owner password
- 3.) Review the EULA (Terms and Conditions)
  - Click on the acceptance box
  - Enter First and Last Name
  - Click "Accept"
- 4.) A Welcome email will be sent

### Response Types and Actions

- 1.) **Approved** - transaction is approved, write VOID on the check and return the check to the customer
- 2.) **Not Approved** - the transaction is declined, return the check to the customer and request another form of payment
- 3.) **Error** - Retry the transaction
- 4.) **Approved-1234** - the transaction is approved, write approval code on the check, keep the check for bank deposit.

### Using the Check Acceptance payment function in Clover

- 1.) Customer presents check as a form of payment
  - Confirm amount on check
- 2.) Press the "TeleCheck Check" tender button
  - The Return Check Fee notification appears
  - Customer must sign and press "AGREE"
- 3.) Check Image Capture Screen appears
  - Hold check in front of camera
  - Align with image guide marks
  - Tap the button to take the picture
- 4.) Accept the image or retake the image
  - Retake the image if it is blurry, in poor lighting, or if any information is obstructed. You can see all four corners of the check in a good image.
- 5.) The response message is displayed

### Driver's License Validation

- 1.) Enter the state of issuance
- 2.) Enter the driver's license number (include letters as necessary)
- 3.) Press "Valid" button to complete the entry

[Quick Reference Guide](#)

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## Online Ordering

- [Set up online ordering](#)

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- Clover's online ordering is fully integrated with your POS device and is free of charge.
- Customers find your restaurant on the ordering website we create for you for free. They'll place orders online and pay when placing an order (card not present rate applies, the fee is paid to the company through which you purchased your Clover device), it'll show up on your Clover device as paid, and will print automatically to the printer of your choice. Customers can only place online orders during your service hours.
- **To sign up for online ordering:**
  - Log in to the [Web Dashboard](#).
  - Select **Setup > Online Ordering**.
  - You can find information specific to each online ordering service in the help articles or select **More Options** after getting started.
  - Here, you can find how to pause online orders, the order types supported by this service, the URL to your website, a QR code that links to your website, ways to spread the word via social media and email, and ways to start promotions.
  - Set up your business information
  - Your ordering site displays the business information you provide. Basic information is pre-filled with what you've already given Clover. You can edit this and provide a business name and phone number to be used specifically for online orders, which can be different from your regular information. Keep in mind that your restaurant's logo won't be shown on your website.
- **To set up your business information:**
  - Log in to the [Web Dashboard](#).
  - Select **Setup**.
  - Under Business Operations, select **Online Ordering**.
  - Select business information.
  - Select the pencil to edit your business information. Fields with an asterisk are required.
  - Select **Done**.
  - Set up your operational information
  - Service hours determine when a customer can place on your ordering website. Your service hours will be pre-filled with your business hours or 11am to 8pm, if no business hours are available. Make sure to update your service hours and check that your timezone is accurate before you start taking online orders.
  - Food preparation time tells your customers when they can expect their food to be ready. Select the average amount of time it takes to cook an order at your restaurant.
  - The remote firing device for printing is used to print your online orders with Clover, but not with The Ordering.app. Clover chooses a default device and uses the printer connected to that device, but you can change it at any time. Choose the most reliable device at your restaurant.
- **To set up service hours:**
  - Log in to the [Web Dashboard](#).

- Select **Account & Setup**.
  - Under Business Operations, click **Online Ordering**.
  - Select service hours; then edit the hours when you want your customers to place online orders.
  - Click **Done**.
- **To check or change your timezone:**
    - Log in to the [Web Dashboard](#).
    - Select **Setup**.
    - Select **Business Information**.
    - Locate the timezone, and either verify that it's correct or select a new timezone from the menu.
    - Select **Save**.
- **To edit food preparation time (if applicable):**
    - Log in to the [Web Dashboard](#).
    - Select **Setup**.
    - Under Business Operations, select **Online Ordering**.
    - Select **Operational information**.
    - Next to Food Preparation Time, click the pencil to edit it, and then select the average amount of time it takes to make orders.
    - Select **Done**.
    - Set up your online menu
    - You can edit your online ordering menu at any time from your [Clover Web Dashboard > Setup > Online Ordering > Online Menu](#). These changes won't be reflected in your inventory to provide the best online ordering experience for your customers and the best in-store experience for your servers and cashiers. Changes will reflect on our online menu immediately for all online ordering services. Make sure to remove alcohol and items with a variable price or those that are sold by the unit.
    - If you want information about how to add, edit, delete items from your Clover inventory and learn more about modifiers, labels, categories, and more, read the Inventory guide. Read best practices for your online menu with [Clover](#), and online menu with [The Ordering.app](#).
- **To edit your online menu/store:**
    - Log in to the [Web Dashboard](#).
    - Click **Account & Setup**.
    - Under Business Operations, click **Online Ordering**.
    - Click the online menu box.
    - Click the blue pencil. You can edit the online name or description of items or modifiers.
    - Click **Done**.
- **To remove items or modifiers from your online menu/store:**
    - Log in to the [Web Dashboard](#).
    - Click **Setup**.
    - Under Business Operations, click **Online Ordering**.
    - Click the online menu box.

- Find the item you want to remove.
  - Click the checkbox to remove the checkmark.
  - Click **Done**.
- **To edit the name of a category in your online menu:**
    - Log in to the [Web Dashboard](#).
    - Click **Account & Setup**.
    - Under Business Operations, click **Online Ordering**.
    - Click the online menu box.
    - Click the pencil icon on the top right corner, and then rename the category.
    - Click **Done**.
- **To remove a category from your online menu:**
    - Log in to the [Web Dashboard](#).
    - Click **Account & Setup**.
    - Under Business Operations, click **Online Ordering**.
    - Click the online menu box.
    - Uncheck the boxes next to all the items in the category.
    - Click **Done**.
- **To edit prices for your online menu:**
    - Log in to the [Web Dashboard](#).
    - Select **Inventory**.
    - Find the item you want to edit.
    - Click the pencil icon on the right, and then edit the price.
    - Select **Save**.
- **Marketing your online ordering websites**
    - When you finish setting up online ordering, you should make sure your customers know that you're taking online orders. To do this, here are some ways that you can market your new online order websites to new and existing customers.
    - For simple and effective ways to promote your online ordering menu, download our ebook [here](#).
    - **To make sure customers know you accept online orders:**
      - Spread the word on social media like Facebook, Twitter, and Instagram. If you're taking online orders with Clover, you can easily share to Facebook and Twitter from the More Options menu.
      - If you have an existing website for your restaurant, add links to your new online ordering websites on your existing site.
      - Email your customers with links to your online ordering websites. When you get started with Clover's web and app ordering experience, we'll automatically email the customers who have agreed to be contacted by you with instructions for placing online pickup orders within 24 hours.
      - Add links to your Yelp page.
      - Use Google adwords to drive traffic to your site.
      - In More Options for Clover, you'll find a QR code that links to your online ordering website. You can print the QR code and create in-restaurant cards and/or include them with your other online orders.

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- If you want to customize your website's URL you can purchase a custom domain link and link it to your online ordering websites. Reach out to your domain registrar for more information on how to do this.

### **Adding Employees to the Dashboard**

- If additional users need access to the Clover Dashboard, the owner will need to login to the dashboard and then follow these steps:
  - Select Employees
  - Add New Employee
  - Include the Employee's email address
  - Once the employee is added, he/she will receive an email to create a password for the Clover Dashboard
- \*\*If there are multiple locations, each employee's email address will need to be added to each location in order for them to access that location on their dashboard

### **Updating Business Information/Receipts**

- Login to the dashboard
- Select Account & Setup
- Then select Business Information (underneath About Your Business)
- This is where you can update the business information that populates on the customer receipts

### **Exporting Inventory**

- Login to the Dashboard
- Click on Inventory
- Click on EXPORT INVENTORY at the top of the screen
- The inventory template will download as an excel file
- This file can be edited if needed and then imported to the Clover Dashboard

### **Importing Inventory**

- Login to the Dashboard
- Click on Inventory
- Click on IMPORT INVENTORY at the top of the screen
- Select the inventory file from the computer
- Then click Import from Excel
- \*\*NOTE: The inventory spreadsheet must be in the correct format
- To view the correct format, click on DOWNLOAD TEMPLATE at the top of the screen

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- Copy and paste inventory data to the template for best results
  - **\*\*Do not change the column header names or the inventory template will not upload**
  - **\*\*Do not rearrange the columns or spreadsheet tabs or the inventory template will not upload**
  - **\*\*It is recommended to delete the “Instructions” tab before uploading**
- **\*\*TAX RATES:** If uploading inventory for multiple locations and the inventory list is the same for each location, but the tax rate varies... you can change the tax rate on the inventory spreadsheet. Save the updated spreadsheet. Then import the inventory list to the next location.

### Downloading the Inventory Template

- Login to the Dashboard
- Click on Inventory
- Click on DOWNLOAD TEMPLATE at the top of the screen
- Copy and paste inventory data to the template for best results
- **\*\*Do not change the column header names or the inventory template will not upload**
- **\*\*Do not rearrange the columns or spreadsheet tabs or the inventory template will not upload**
- **\*\*It is recommended to delete the “Instructions” tab before uploading**

### Adjusting Tax Rates

- Login to the Dashboard
- Select Account & Setup
- Then select Taxes & Fees
- All tax rates will be listed on this screen
- You can add a new tax rate, delete an existing tax rate, or edit an existing tax rate
- If changes are made to the tax rates, you will need to update the tax rate associated with inventory items accordingly
  - Select Inventory from the dashboard menu bar
  - Then select items
  - The column titled Tax will show the name of the tax assigned to each item
  - To adjust the tax for an item, select the pencil icon on the right-hand side of the item
  - Then add/remove the tax rate under the “Taxes & Flat Fees section”
  - Click save to save changes

### Adjusting Signature Prompt

- Login to the Dashboard
- Select Account & Setup
- Then select Payments
- Scroll down to “Signature Settings”

## Signature Settings

For faster transactions, you can allow customers to pay without a signature.

- Don't require signature if transaction is under
- Always require signature

Ask for signature and tip

- On printed receipt
- On tablet screen

- Adjust the settings as desired
- Then click Save

## Changing Owner's Name

- If a merchant wants to change their name that displays when they login to Clover, they can follow these steps:
  - Login to the dashboard
  - Click on their name in the top right corner
  - Select "User Settings"
  - They can change their name under "Owner Name" and select save

## Adding a Tip Line

- On the Clover Dashboard:
  - Login to the Clover Dashboard
  - Make sure tips are turned on
    - Select Account & Setup > Tips > check the box for "Ask for tip (always requires signature)"
  - Then, go to Account & Setup > Payments
    - Select the option for "Always require signature"
    - Select the option for ask for signature and tip "on printed receipt"
  - Then click "Save" to save changes

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- On the Clover Device:
  - Make sure tips are turned on
    - Open the Setup app > Tips > check the box for "Ask for tip (always requires signature)"
  - Then, go to Payments (in the Setup app)
    - Select the option for "Always require signature"
    - Select the option for ask for signature and tip "on printed receipt"
  - Then click "Save" to save changes

**Automatically Print Batch Report on Closeout**

- On the Clover Device:
  - Open the Closeout app
  - Click the three lines in the top left corner
  - Then click on Settings
  - Check the box for "auto-print Totals Report on closeout"
  - Then click "Save"
  - The batch report will automatically print when the batch is closed out

**Clover Station Pro v 2018**

**Clover Station Pro**

Includes:

Clover Station Pro  
 Basic Printer  
 Customer-Facing Display (**NOT** a Clover Mini and **cannot** be used separately)

Features:

High-definition 14" merchant-facing touch screen  
  
 Customer-facing 7" touch screen display that lets your guests see their transaction details, pay, sign, and redeem rewards  
 Accepts all types of payments including contactless; integrated into customer touch screen display

Key Differences:

Customer-facing display allows for NFC (contactless) payments  
 Connects via Wi-Fi, 4G/LTE, and ethernet



**Clover Station 2018**

Includes:

Clover Station 2018  
 Basic Printer

Features:

High-definition 14" merchant touchscreen with swivel neck that rotates to accept signatures and customer engagement  
  
 Stand-alone customer receipt printer  
 Accepts all types of payments including contactless; integrated into printer

Key Differences:

Does not allow for NFC payments unless merchant buys the NFC printer or a customer-facing Clover Mini  
 Connects via Wi-Fi and ethernet only (No LTE option)



\*\*The Clover Station Pro and the Clover Station 2018 **DO NOT** include the cash drawer. The cash drawer is sold separately.

**Clover Flex 2 v Clover Flex**

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## Clover Flex 2

### Includes:

Clover Flex 2

### Key Differences:

**Faster Processor** - Qualcomm Snapdragon 660 octa-core processor  
**Increased Memory** - 2 GB RAM  
**Increased Storage** - 16 GB  
**Updated Operating system** - Android 8.1, multi-language support (API Level 27, Oreo)  
**Wi-Fi and 4G LTE**  
Comes with a **built-in Fingerprint reader**

### Features That Remained The Same:

5", 720x1280 XHDPI display (320ppi)  
Merchant-facing and customer-facing modes (both in portrait layout)  
EMV chip card reader, NFC reader, and MSR reader  
Built-in SMP camera for 1D and 2D trigger-activated barcode scanner with a dedicated external button for barcode. The camera is forward looking and landscape orientation.  
Internal thermal receipt printer  
3.5mm audio jack (with L/R output and mic input), speaker and microphone  
On-screen PIN entry (with a solution for the visually impaired)



## Clover Flex

### Includes:

Clover Flex

### Key Differences:

**Processor:** Qualcomm Snapdragon 400 quad-core CPU  
**Memory:** 1GB RAM  
**Storage:** 8GB  
Clover's hardened version of Android (AOSP) 5.1.1 (API Level 22, Lollipop)  
Wi-Fi and 3G LTE  
Does not have a fingerprint reader

### Features That Remained The Same:

5", 720x1280 XHDPI display (320ppi)  
Merchant-facing and customer-facing modes (both in portrait layout)  
EMV chip card reader, NFC reader, and MSR reader  
Built-in camera for 1D and 2D trigger-activated barcode scanner. The camera is forward looking and landscape orientation  
Internal thermal receipt printer  
3.5mm audio jack (with L/R output and mic input), speaker and microphone  
On-screen PIN entry (with a solution for the visually impaired)



## Common Third Party Apps

- QuickBooks by Commerce Sync
  - In order to use QuickBooks by Commerce Sync, the merchant will have to have a compatible version of QuickBooks. The QuickBooks by Commerce Sync app has a monthly service fee depending on which version of QuickBooks they are using
  - Here is a link to the QuickBooks by Commerce Sync app for more details:
    - <https://www.clover.com/appmarket/apps/EYKBJ4X083XYG>
    - **\*Note:** The monthly fee can be viewed under "Pricing & Subscription Information".
- Repeat Customer Order
  - The **Repeat Customer Order** tracks what the customer had previously purchased using the Customers app. Then, when a repeat customer places an order, a popup window appears and displays what the customer had previously purchased. This app integrates with the Customer app and is available on both the Clover Mini and the Clover Station. I have provided a link below with more information:
    - <https://www.clover.com/appmarket/apps/R1BTQNYFZEXQY>
    - **\*Note:** This app does have a monthly fee which can be viewed under "Pricing & Subscription Information".
- Time Clock by Homebase
  - This is a great app for time clocking, scheduling, timesheets, payroll, and employee reporting
    - <https://www.clover.com/appmarket/apps/79E83NSKV7TMC>

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- \*Currently, this app is free
- Rental apps:
  - Rent Item – <https://www.clover.com/appmarket/apps/AQD6D752WXFWA>
  - Rental Timer - <https://www.clover.com/appmarket/apps/HHH31XZRBTAKW>
- Age Verification
  - This app is used for merchants who sell alcohol or tobacco and need to scan IDs to verify the customer is of legal age to purchase the product
    - <https://www.clover.com/appmarket/apps/M6PND5CREJQ5T>
    - <https://agev.helpsite.com/>
- Shopify Integration and Alternative apps:
  - If they keep Shopify:
    - They can continue to use the website that is already created through Shopify and use the **Shopventory** app which will integrate Shopify (including their website) with Clover. There is a monthly fee for the Shopventory app depending on which subscription they choose. The subscription prices are listed on the link below under Pricing & Subscription Information:
      - <https://www.clover.com/appmarket/apps/N2G91QZ007GTP>
    - **skulQ** -
      - <https://www.clover.com/appmarket/apps/46MV959XVDGSC>
  - If they do not keep Shopify, they have a few options:
    - They can download the **Sell Online by Ecwid** app which will allow them to create an online store that integrates with their Clover inventory. I provided a link below to the Sell Online app. There is a monthly fee for this app, but the fee is lower than that of Shopventory.
      - <https://www.clover.com/appmarket/apps/7Z3PJ28D6XAEF>
        - I also provided a couple links to Ecwid's website that has more details on using the app and creating the online store:
          - <https://support.ecwid.com/hc/en-us/articles/207102159-Ecwid-for-Clover-POS>
          - <https://support.ecwid.com/hc/en-us/categories/115000865389#Product%20catalog>
      - **Pointy** automatically creates a website for the merchant that displays the merchant's products from Clover inventory on their website. However, it doesn't look like this app allows customers to purchase products online.
        - <https://www.clover.com/appmarket/apps/8DF14T9WGQM96>
        - <https://www.pointy.com/us/clover>
      - There is also the app **Online Order** where the merchant can create an online store that connects to their Clover device and Clover Inventory using the Online Order app:
        - <https://www.clover.com/appmarket/apps/1MZH0GXTGK2K2>
          - Here is a link for setting up the website:
            - <https://4leaflabs.freshdesk.com/support/solutions/articles/12000031714-install-and-setup-guide>
          - \*It looks like this app is more geared towards restaurants

- Consignment
  - Here is a link to the Consignment app:  
<https://www.clover.com/appmarket/apps/5CMJECAN5DCTE>
  - Here is a link below to the Consignment website for more information:  
<https://zoomifi.com/help/consignable/>
- Salon Scheduler
  - <https://www.clover.com/appmarket/apps/90JDEGEXPXN9Y>
- 








## Setting Up a Clover Device

- To setup a Clover Device, click on this link <https://www.clover.com/help/>
- Then on the left-hand side, select the type of device under “Set Up Your System”



# Set Up Your System

New to Clover? Set up your Clover system to get started.

- >  Clover Station Pro
- >  Clover Station 2018
- >  Clover Station
- >  Clover Mini
- >  Clover Flex
- >  Clover Go
- >  Clover Mobile
- > Add accessories

- Follow the step-by-step instructions to setup the device

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## Clover Go Implementation

- The merchant needs to create a password for the Clover Dashboard
  - Ask them if they received an email from Clover to create their password
    - If they have not received the email, go to [www.clover.com/dashboard](http://www.clover.com/dashboard) and click forgot password. Then type in their email address.
    - If they still don't receive the email, call Clover and "update the owner email address on the dashboard". Then call the merchant back and they should receive the welcome email from clover.
    - Have them click on the link in the email to create their password
- Download and Login to the Clover Go app
  - The steps below are also available here: <https://www.clover.com/help/set-up-my-clover-go/>
  - After the password is created, have them open the Clover Go app and login with their email and password
  - **Downloading the Clover Go App:**
    - Choose a store:
      - For an iOS device, go to the Apple Store.
      - For an Android device, go to the Google Play Store.
    - At the store, search for the Clover Go app.
    - Download the app and install it on your device.
  - **Logging into the Clover Go app:**
    - Open the Clover Go app on your phone or tablet.
    - Tap **New User** at the bottom of the screen. (Regular users tap **Log In**.)
    - Enter your email and password using your Clover Web Dashboard login credentials.
    - (Optional) Tap **Allow** if you want to let Clover send you messages. Messages keep you informed about the system.
    - Tap **Proceed** to help identify where transactions take place.
    - Tap **Allow** to allow location access for fraud protection.
    - Enter the user **passcode** you use for Clover devices. If you don't have a passcode, you can set one now.
    - (Optional) Select **Enable Touch ID** or **Enable Face ID** if you have these features on your phone or tablet and you want to use them.
    - Complete this step for your Clover Go device:
      - **Contactless + Chip** (Bluetooth-enabled Clover Go reader): You'll be asked if you want to pair your device using Bluetooth.  
**Important:** Do not wear headphones or ear buds while when your reader connects. A high pitched connection sound blasts from the phone or tablet.
      - **Chip Card reader** (Clover Go reader): Insert the card reader into the audio jack on your phone or tablet.

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- Follow the prompts to complete the setup sequence.
- Pair Clover Go with Phone/Tablet:
  - To pair your Clover Go device with your phone or tablet:
  - On your phone or tablet, open the Clover Go app.
  - Enter your passcode.
  - Tap Menu .
  - Select **Card Reader**.
  - If your Clover Go doesn't pair immediately, press and hold the power button for 5 seconds or until the blue light blinks.
  - On your phone or tablet, select your device from the list of readers.
- Charge the Clover Go reader (if it's not already charged)
  - Insert the USB charging cable into a laptop USB port, a portable charger, or a wall charger (not included). If you purchased the optional stand, you can charge the reader in the stand.
  - Allow the reader to charge for 1 to 2 hours, until both lights continuously glow.
- Walk them through using the Clover Go app
  - If you have the Clover Go app downloaded on your phone, you can walk them through exactly what you see on the screen of your phone
  - If not, you can follow these steps for using the app and processing a sale:
    - <https://www.clover.com/help/use-the-clover-go-app/>

### Clover Troubleshooting

- Select the link below to Clover's Troubleshooting website:  
<https://www.clover.com/us/en/help/troubleshooting/>
- Then select which device needs troubleshooting
- Follow the troubleshooting steps
- If the steps do not work, call Clover for further assistance

### Connecting a Kitchen/Order Printer

- <https://www.clover.com/help/set-up-a-kitchen-printer/?device=6bPljSaxAQUg2eYAm6Kuiw>

### Transaction Functions

Processing a Sale:

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1. Open the Sale app.
2. Enter the sale amount, then tap **Charge**.
3. Insert/Swipe/Tap the payment card.
4. Select **Credit** or **Debit**.
5. Ask the customer to enter their PIN or sign as necessary.
6. Select how customers receive receipt, or tap **Void Transaction** or **Reject Signature** to void payment.
7. Tap **Done** to finish the transaction.

#### Refund an Order:

1. Open the Orders app.
2. Find and tap the order you want to refund.
3. Tap **Exchange/Refund**.
4. Tap **Refund Payment** on the popup window.
5. Tap the payment you want to refund.
6. Tap **Refund**.
7. Tap **Refund** on the dialog box.

#### Refund a Transaction:

1. Open the Transactions app.
2. Tap the transaction you want to refund.
3. Tap **Refund** and then confirm.
4. Select where to apply the refund.

Issue a Manual Refund: (*refund on a card not previously processed or a transaction processed on a device that is not a Clover device ex: FD130. Manual refunds are rarely used*)

1. Open the Refund app.
2. Enter a refund amount.
3. Tap **Issue Refund** and confirm.
4. Swipe payment card, insert chip card, tap contactless payment, or manually enter card number.

#### Void a Transaction:

Tap the **Void Transaction** button on the payment screen once payment has been completed.

- You cannot void transactions paid for in cash. You can only refund those transactions.
- You can only void a transaction immediately after processing the payment.

### **Clover Go Device Requirements (as of 5/19/2020)**

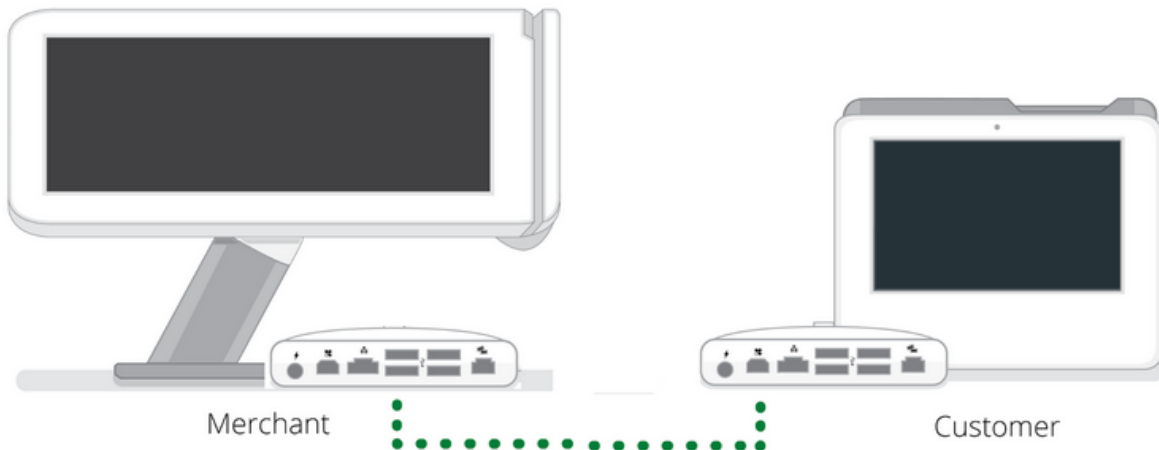
- iOS version is 10.0 or higher (Model 5s or later)
- Device is Bluetooth 4.0 (BTLE) enabled (iPad and iPad2 not supported)
- Android version 5.0 or higher
- Windows Phone® (deprecated) or Amazon devices are NOT compatible
- Device cannot be a jailbroken or rooted device

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- Here is the link for Clover Go device requirements and troubleshooting:  
<https://www.clover.com/help/fix-clover-go-setup-problems/>

### Connecting a Customer-Facing Mini

- In order to connect the Clover Mini as a customer-facing device, the following will need to be completed:
  1. Setup and activate both devices (if this has not already been completed)
  2. Login to both devices using a manager/admin passcode
  3. Download the USB Pay Display app on both devices
    1. Open the More Tools app
    2. Search for USB Pay Display
    3. Then click Connect or Install
  4. Once the app is downloaded on both devices, open the USB Pay Display app on both devices
  5. Then, connect the USB cable to the Clover Mini and the Clover Station (I provided a screenshot below of which end of the cable should be plugged into which port on each device)



6. Then, the Clover Mini will be connected to the Clover Station as a customer-facing device
7. Lastly, complete a test transaction to confirm

### Device Not Turning On

- If the device is not turning on, double check the power cord is plugged in all the way and the outlet that the power cord is connected to is working
- The Clover Station and Mini should automatically turn on while connected to power
- If the device is a Clover Flex - Press and hold the power button (white button on the right side of the terminal) for a few seconds until the Clover Logo appears
  - If the Clover logo does not appear, perform a hard reboot:

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- Disconnect your power by removing the device from its charging cradle or unplugging the power cord.
  - Hold the power button for 40 seconds before releasing it.
  - Press the power button again until you see the Clover logo on the screen.
  - Place the Flex on its charging cradle or connect the power cord back to the device.
  - When ready, the device prompts you to log in.
- If the device still will not turn on, contact the Clover Help Desk for further assistance

## Troubleshooting an FD40 PinPad

- **Set up the FD40 PinPad**
  - Unpack the FD40 Pin Pad device.
  - Plug it into one of the USB Ports into the Hub. The FD40 PIN Pad will turn on.
  - Allow the device time to boot up. Once the FD40 device shows the First Data logo, check to see that a red and green circle are both displaying at the top of the screen to the left of the time display.
- **Install the Pin Pad app**
  - Open the App Market.
  - Search to find the PIN Pad app.
  - Tap **Install**.
  - Tap **Accept & Install**.
  - After you app install, open the app.
    - If the screen displays **PIN Pad Terminal OK** in a green confirmation box, your FD-40 PIN Debit device is ready to use.
    - If you see **Please Connect the PIN Pad to your Station Printer** in a red warning box, confirm that the USB cable is firmly connected. If it is, tap **It's Connected**.
- **Run a transaction using the FD40**
  - Initiate a PIN debit, EMV, or contactless transaction (including Apple Pay, Google Wallet, Visa PayWave, and MasterCard PayPass) from the Register, Order, or Manual Transaction app.
  - If this is your first transaction, your device may display a message saying "PIN Pad needs to be updated. This may take up to 2 minutes", Clover Station automatically installs a firmware upgrade for your FD40 device. Please wait until the FD40 has rebooted and finished installing the firmware upgrade.
  - **To process a PIN Debit:**
    - Open the Register or Tables app.
    - Enter an order.
    - Tap ++Pay\*\* in the Register app, or **Charge** in the Manual Transaction App.
    - Tap **Charge \$xx.xx on the Pin Pad**.
    - This will send the requested amount to the FD40 for processing.
    - After confirming the total, the customer can swipe, tap, dip or pay by contactless phone. If using a debit card, they will be asked to enter a PIN.

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- After the customer has entered their PIN and pressed confirm, select receipt mode (print, text, or email a customer receipt.)

### Enabling Manual Transactions

- On the device, open the Setup app
- Select Payment
- Check the box for Enable Manual Card Entry
- When paying for a transaction, manual card entry will now be an option

### Cash Drawer - Open Automatically

- Follow these steps on the Clover Device:
  - Open the Setup app
  - Tap Payments
  - Tap Tenders accepted
  - Select a tender type (for example: Cash)
  - Select Accept tender check box to select payment type
  - Select Opens cash drawer
  - Then tap Save

### Cash Drawer - Add/Remove Cash

- On the Clover Device:
  - Open the Register app.
  - Tap More on the upper right.
  - Tap **Open Cash Drawer**.
  - Select the action you want to perform, then enter the amount you're removing or adding.
  - Enter a reason in the **Reason for...** field. This reason will appear in the Cash Log.
    - For Example:
      - Starting Cash: \$300
      - Or Removing \$20 for cash tip (etc.)
  - Tap **Continue**.
  - The cash drawer will open and then you can add/remove cash accordingly

### Cash Drawer - Cash Log Report

- The Cash report in the Cash Log app contains the following details:
  - **Date:** Date and time of the cash event.
  - **Event:** Type of cash event that occurred (Adjustment, Open, or Transaction).
  - **Amount:** Total cash amount.
  - **Reason:** Order ID, Payment ID, or reason for opening the cash drawer or adjusting cash amount.
  - **Employee:** Employee who handled the cash event.
- The Cash Log app only records cash transactions that occur *after* the app is installed.
- To view the Cash report:
  1. Open the Cash Log app.
  2. View the cash report.

## Cash Drawer - Troubleshooting

- **Connect a cash drawer**
  - To keep track of transactions, connect both your Clover device and your cash drawer to the same router.
  - To connect your cash drawer:
    - Insert one end of the RJ-11 6P6C cable (with blue sticker and cash icon) into the bottom of the drawer.
    - Insert the other end of the cable (with blue sticker and printer icon) to the Clover Station Printer's port (with blue cable image).
- **Test a cash drawer connection**
  - Test the connection between your Clover device and the cash drawer to make sure the Register app can successfully open the drawer.
  - Make sure the drawer key is in the vertical, unlocked position.
  - To test the connection between your Clover device and a cash drawer:
    - Insert the drawer key and turn the key all the way to the left to unlock and open the drawer.
    - Close the drawer, leaving it unlocked.
    - With the key in an upright, vertical position, pull the key out of the drawer.
    - Open the **Register** app.
    - Tap **Open Cash Drawer**. Not seeing the **Open Cash Drawer** button? Your employee profile might not give you permission to open the drawer. (Use the Employees app to set up permissions.)
    - Tap **Other**.
    - Enter **Test** next to Reason for Opening.
    - Tap **Continue**.
- **Does your employee have the correct permissions to open the cash drawer or access the Cash Log app?**
  - If your employees do not have permission to open the cash drawer:

- They will not be able to see the **Open cash drawer** option in the Register app.
  - They will see **You do not have permission to use this app** when accessing the Cash Log app.
- To give your employees permission:
  - Open the Employees app.
  - Tap **PERMISSIONS**.
  - Tap **Register**.
  - Tap **Open cash drawer manually** to set Employee permissions.

### Error Messages: PIN XLATE ER-181

- Clover Device shows the following error message “Transaction rejected: charge declined. PIN XLATE ER-181.”
  - This occurs as the account does not have the pin-debit entitlement and is not setup to accept pin-debit transactions
- To resolve the issue:
  - Open the Setup app on the device
  - Select Payments
  - Select Pin entry
  - Change the pin entry to: Do not prompt for pin
  - Click Save
  - Complete a test transaction

### Clover Go - Carbon Copy Receipt

- You can setup automated emails/text messages to be emailed/texted to you each time a transaction is processed. This email will show you a receipt of the transaction that includes the invoice number (if entered during the payment process)
- To setup automated emails/texts (Carbon Copy Receipt):
  - Login to the Clover Go app on a phone or tablet
  - Click on the three lines in the top left corner
  - Select Setup
  - Select Carbon Copy Receipt
  - Enter your email address/phone number and press save
  - Each time a transaction is processed, you will receive an email/text with the receipt and details for that transaction
- This only needs to be done on one user account and it will update for all other users

### Clover Go - Transaction Report to View Invoice Numbers

- Login to the Clover Dashboard to view the invoice numbers/receipts for each transaction

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- Login to [www.clover.com/dashboard](http://www.clover.com/dashboard)
- Select Transactions
- Then select Payments
- Choose a Date Range and press Search
- From here, you can view each transaction individually:
  - Click on Details on the right-hand side of each transaction to view the transaction details
  - The customer number is located in the left-hand side of the page under Payment Details
- OR, you can select “Export Payments from this page” at the top of the page
  - This will export all payments on the screen into an excel spreadsheet