# Glossary

Set up your Station Duo

Run your business like a pro with our fastest, most secure point-of-sale system, the Station Duo. (If you're in the United Kingdom, this device is called the Station Pro.)

We're taking smart terminal to a new level, making it easy to ensure order accuracy, capture information, offer rewards, and accept just about every mobile payment type.

Fast, personal, secure. Welcome to Station Duo.

Your new Station Duo
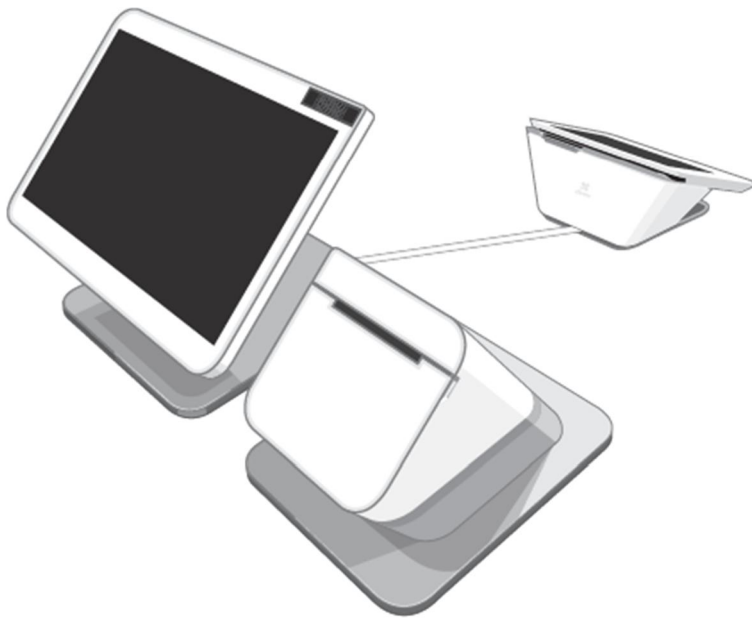
Here's what your Station Duo does:

- Takes order input on the 14-inch display. Just enter the items for purchase and tap **Pay**.

- Takes all kinds of payment cards on the 7-inch terminal. Customers can swipe, dip, and tap their cards.

- Takes digital wallet payment options where mobile customers can either tap their phones or scan a QR code.

- Takes cash and checks with the optional cash drawer.

- Promotes your loyalty programs right on the terminal where customers can see them.

Open the box

What's in the Station Duo box:

- Clover Station Duo Quick Start Guide

- 14-inch merchant-facing display

- 7-inch customer-facing terminal

- Station Duo receipt printer

- Starter kit with everything you need to set it all up

The display faces you and takes order input.

The terminal faces your customers, accepts payments and signatures, and has a headphone jack and speaker on the reverse side of the screen.

The printer prints a paper receipt on demand.

The screwdriver helps you connect all the cables for easy assembly.
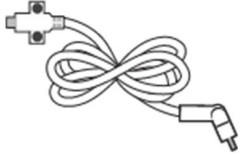
The connector cable connects the terminal to the display.
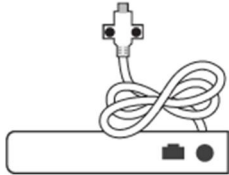
The hub connects the terminal and the display to the power adapter.
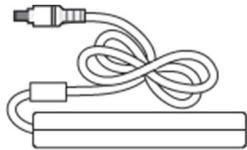
The power adapter connects the assembled system to the power cable.

The power cable connects everything to the power source.

The LAN Ethernet cable connects the completed assembly to your internet network.

The receipt paper roll goes into the printer.

The PIN Entry Aid sits on top of the terminal. This option assists customers who have difficulty using a touchscreen. (Shipped with the Station Pro in some regions, and available everywhere. Contact your merchant supplier for details.)

The optional PIN Shield sits on top of the terminal and gives customers added privacy when they enter their PINs. (Shipped with the Station Duo in some regions, and available everywhere. Contact your merchant supplier for details.)

Put together your Station Duo

Put together your Station Duo by connecting all the parts. After all the parts are connected, you can plug it in. Start by getting ready to connect the parts.

Get ready to connect the parts
1. Take everything out of the box.
2. Gently place the Station Duo Display screen side down on a clean, flat surface. Don't worry about the screen. It resists scratching.
3. Place the Station Duo Printer upside down next to the display.
4. Place the Station Duo Terminal, screen side down, next to the printer.

You'll be looking at the bases of all 3 devices and the printer will be in the middle. Now you can connect the parts.
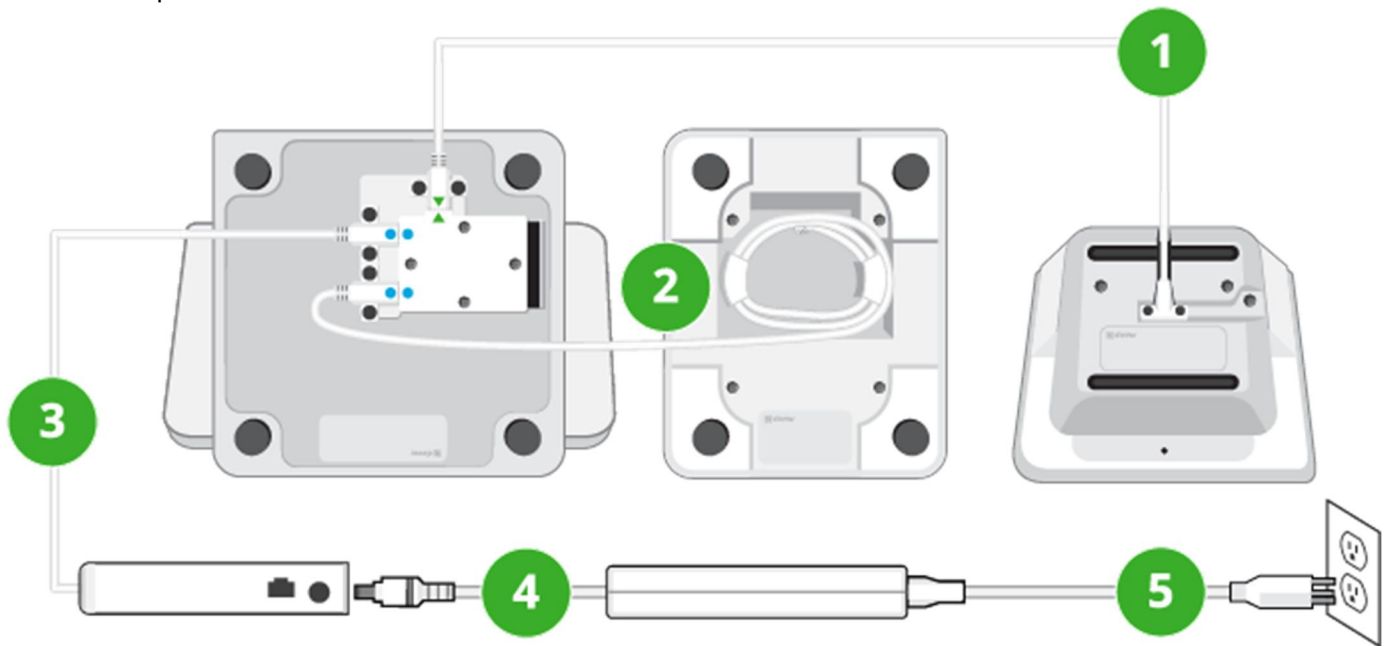
Connect the parts

Connect the parts by following the numbered steps here and above:

1. Pick up the main connector cable. This cable has two small screws in both ends and one end has a green arrow.
2. Use the supplied screwdriver to connect the end of the cable with the green arrow to the base of the display, as shown.

3. Plug in and connect the other end to the base of the terminal, as shown.
4. Screw in the screws with hand-tight pressure, in other words, just hard enough to secure each screw and also be able to unscrew it later if needed.
5. Unwind the printer cable from the printer base and use the screwdriver to connect the printer cable to the base of the display, as shown.
6. Pick up the hub and use the screwdriver to connect its cable to the base of the display, as shown.
7. Pick up the power adapter, sometimes called a power brick, and plug one end into the hub, as shown.
8. Plug the other end of the power adapter into your power source for the system.

Your system is now connected and you can place each device right side up. The (smaller) terminal automatically powers on first, and then the (larger) display. There are no power buttons, but there is a reset button on the reverse side of the customer-facing terminal screen in case you are ever instructed by Customer Support to use it.

Next, connect your Station Duo to a network.

Connect your Station Duo to a network

Connect your Station Duo to the network after you assemble it. There are three ways to connect your Station Duo to a network: Ethernet (recommended), Mobile (SIM) card, and Wi-Fi.

If you plan to connect to a network using Wi-Fi, check to make sure your router is set up, connected to the network, and has a security level of WPA or WPA2. Your network needs to be a closed, protected, secure network to process payment transactions. If you offer Wi-Fi access to your customers, follow best practices and give them a different Wi-Fi network to use.

1. On the Welcome screen, select your preferred language and then tap Next.
2. On the Network screen, choose your network type and tap Continue:
- Ethernet networks connect with the supplied Ethernet cable.
- Mobile networks use the installed SIM card and its cellular network connection.
- Wi-Fi networks connect wirelessly to a router you have previously set up.
3. Wait until you see the message that the device is successfully connected and then tap Next.

Next, activate your Station Duo.

Activate your Station Duo

Activate your Station Duo after you connect it to a network.

To activate your Station Duo, you'll need the activation code from the activation email you received from Clover.

1. On the device activation screen, enter the 8-digit code you received in your activation email from Clover Support (app@clover.com). If you've already set up your account, you can also find the code on the Web Dashboard at the top of the page after you log in.
2. On the Install apps screen, wait while Clover updates the apps that come pre-installed on your system.
3. Select the Clover Service Plan you signed up for.
4. (Optional) Check the boxes for any third party apps you want to use. (You can also do this later from the Web Dashboard by choosing **More Tools**.) You're done with activation.

Next, set up the printer.

Set up the Station Duo printer

Set up the printer after you activate your Station Duo.

1. On the Station Duo display, after you select any third party apps, select **Continue**.
2. Open the top of the printer and press the green latch to release the printer head.
3. On the display, tap **Continue**.
4. Install the thermal paper with the edge of the roll following the inside top of the compartment and out the slot.
5. Close the printer door until it clicks.
6. Tap to print a test receipt. You're done setting up the printer.

Next, customize your device.

Customize your Station Duo device

Customize your device with passcode access, fingerprint access, and signature locations.

- Passcode access requires an input code on the device screen to log in. At a minimum, you'll want to set up an account owner passcode.

- Fingerprint access sets your Station Duo to log you in by recognizing a fingerprint when tapped on the sensor at the upper edge. Fingerprint access is optional.

- Signature locations tell the system where customers will sign for their purchases, either on the device, or on paper receipts.

1. After activation, on the device, enter the four numbers you want to use to create your account owner passcode.
2. On the next screen, enter the passcode again to confirm. (To set up passcodes for employees, use the Employees app.)
3. Select **Continue**.
4. (Optional) Set up fingerprint login access:
- Gently tap your finger (or thumb) on the fingerprint sensor at the top right of the display screen.
- Keep tapping until the image on the display shows all parts of your fingerprint. The display will give you progress messages.
- When the display tells you your fingerprint has been added, tap **Continue**.
5. Decide where you want to accept customer signatures by choosing an option.
6. Tap **Continue**.

You're done customizing your device.

Next, authorize billing and get started.

Authorize Station Duo account billing

Authorize billing at the end of the setup process, after you customize your device.

1. Review the device fees and monthly totals for your account.
2. Select **Authorize**.

Now you can get started. Next, log in to your new Station Duo.

Log in to your Station Duo

After you set up a passcode or fingerprint access for your account, you can use them to log in. (To set up passcodes and fingerprint access for your employees, use the Employees app.)

- To log in with a passcode, enter the four digit code you chose for your account.

- To log in with fingerprint access, place your finger on the fingerprint sensor until the display shows your apps.

At any time, you can start adding accessories.

Set up your Mini

Your Clover Mini ships with a Quick Start Guide to help you connect your hardware components, including:

- On-screen signature capture

- Built-in printer

- Front-facing camera

- Barcode and QR code reading (using front-facing camera)

- 2 connectivity options—Ethernet and Wi-Fi; Ethernet, Wi-Fi, and 3G

- 7″ Antimicrobial Corning® Gorilla® Glass display screen (8" display screen on Mini 3)

After powering on your device, you can either follow the Setup Wizard to activate the device or use the instructions that follow.

Note: The appearance of your Mini may differ slightly depending on the model you have.

Set up your hardware

The Clover hardware package includes:

Clover Mini   Hub

OR

PIN Shield   PIN Shield + PIN Entry Aid

Power brick   Receipt paper x2   Screwdriver

Power cord (2 for Europe)   Ethernet   USB   SIM adapters (3G devices only)
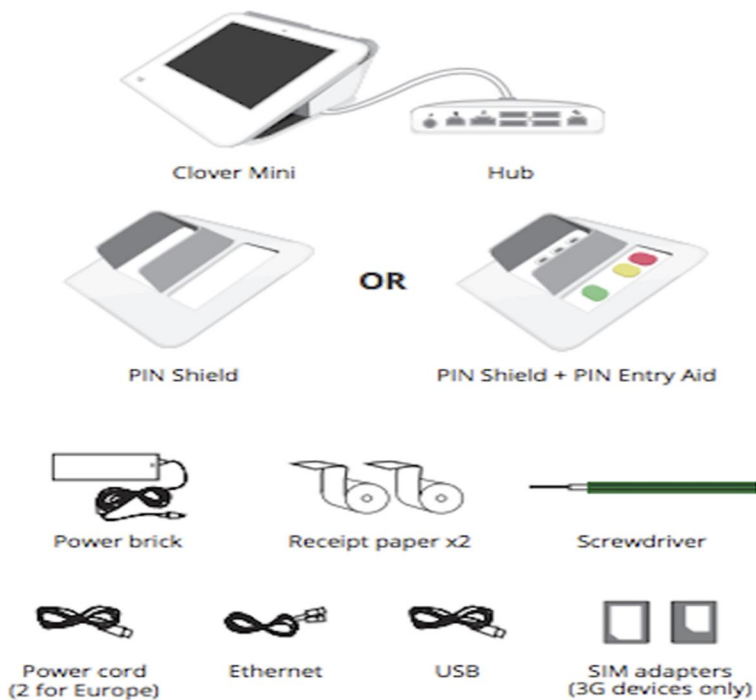
Connect your hardware
1. Plug the power brick's circular plug into the white hub.

2. Plug the power cord into the power brick and then plug the other end into a power source.
3. (Optional) Use the white USB cord to connect other accessories (such as the cash drawer, scanner, etc.) to the hub.
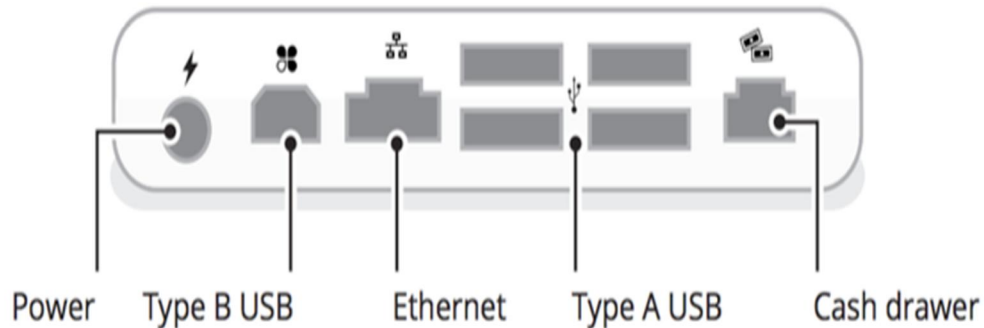
4. (Optional) To switch the direction the hub cable attached to the underside of the device, use the green screwdriver to loosen the hub connector and reverse the cable direction. Tighten the green screw until the screw's head is level with the charging cable.
5. When the Mini powers on, a Clover logo appears onscreen. Select the primary language to use for setting up your device and then follow the Setup Wizard instructions.

If the device doesn't power on when plugged in
1. Leave the Mini plugged into a power source for at least 30 minutes to allow the backup battery to charge.
2. Unplug all cables from the hub.
3. Press and hold the power button for 20 seconds, located in the receipt compartment at the back of the Mini.

4. Plug the black power cable back into the hub.
5. After you see the Clover logo display on the screen, plug in any other connecting cables and cords that were originally attached to the Mini, or that you would like to attach.

Connect your device to a network

You need an internet connection to activate your device. After your device powers on, the Connect to Network screen helps get you connected.

Connect to the network with an Ethernet cable

Because wireless connections can be unreliable or spotty (which is often out of your control), we recommend connecting your Clover devices to the internet via Ethernet. This method ensures that your Clover device is connected and online even when your wireless connection is not responding.

If your Ethernet cable is already plugged in to the hub, your device automatically tries to connect to the internet. If the cable isn't connected, follow the instructions to plug it into your device.

Note: You can always connect to the Ethernet after exiting the Setup Wizard.

1. Plug one end of your Ethernet cable into the device hub.
2. Plug the other end into your modem, router, or switch.
   Your device automatically tries to connect to the internet. When connected, you'll see **Successfully Connected to Server**.
3. If your device doesn't automatically connect, tap **Check Connection**. If this fails, wait two minutes and tap Check Connection button again.
4. If an **Error connecting to the network** message appears:
- Check that the router is connected to the internet by plugging in your laptop or mobile device.
- Check that the Ethernet cable is plugged all the way in to the Printer.
5. Tap **Check Connection**. Once connected, **Successfully Connected to Server** appears.

Connect to a Wi-Fi network
1. Tap **Configure** next to the Wi-Fi option.
2. From the list of available wireless networks, tap the name of your wireless network. (If your network doesn't appear, tap **Add a New Network** and then tap the network by name.)
3. Enter the network password and tap **Done**.
4. Tap **Check Connection**.

When the connection is successful, you'll be guided through the activation process. If not, you'll be asked to select a different network or re-enter the Wi-Fi password.

If you don't see your Wi-Fi network name, you may have a WEP, or open access, network. For successful PCI compliance, connect your Clover device to a secured WPA or WPA2 network.

Activate your device

Activation codes are unique to each device. After your device connects to the internet for the first time, Clover sends an email from Clover Support (app@clover.com) containing the activation code. Look for a subject line: *Clover Activation Code.*

Note: If you ordered multiple devices, look up the serial number to match the activation code for each device.

If you've already set up your Clover account, you can also log into the Web Dashboard and find the activation code at the top of the home screen.

The serial number of a Mini is located at the top of the activation screen or on the underside of the Mini.

1. Look for the email from Clover Support (noreply@clover.com) that contains your activation code.
2. Enter the 8-digit activation code.

After entering the activation code, your Clover device connects to the network, downloads and installs the latest version of Clover software, and then reboots. Depending on the device, you may need to install a second download. Follow the directions to continue setting up your device.

Note: Your device may reboot several times during the installation process. This is normal as Clover updates its operating system. You will be able to continue setting up your merchant account after it reboots.

Set up an Admin account

When you activate your first Clover device, you'll be asked to enter an admin passcode. This passcode lets you access all your Clover devices as the owner or admin.

Note: If you already have an admin account, the setup process skips this step and your apps start installing.

1. Enter a 4-digit passcode you want to use to access your Clover devices as the owner/admin.
2. Re-enter the passcode to confirm.

To change the passcode in the future, go to **Employees** > **Setup** on the Web Dashboard.

After entering your activation code and passcode (if required), your apps should start installing. Please wait until the install process is complete. You can customize your Clover device by installing additional apps from the More Tools > Apps by Clover menu after setup is complete.

Customize your device

After your apps install, you can set some initial custom settings. To change the passcode settings in the future, go to Employees from the Web Dashboard and select Details.

1. Do you want to require a passcode to unlock your device?
- **Yes, require a passcode**
  We recommend that every employee use a passcode to unlock your device. It provides added security and more detailed reports.
- **No, don't require a passcode**
  For terminal parity, you can select the option to unlock your device without a passcode. However, we recommend that you require employees to enter a passcode to unlock your device.
2. Where do you want to take tips and signatures?
- On tablet screen
- On printed receipt
  If you don't see an option for tips, your account isn't tip enabled yet. Contact Clover support.
3. Tap **Continue.**
  If you plan to accept tips, make sure that your closeout time is at least an hour after your business has entered tips for the day.

Set up your Flex

Your Clover Flex lets your customers use cards any way they want to. They can insert, swipe, or tap, and then sign, or enter a PIN. The Flex supports contactless payment methods like Apple Pay and Google Pay.

Set up your Flex by connecting the hardware and charging the device. Then, on the device, follow the onscreen prompts to activate it and connect it to the internet.

Your new Flex

Contactless Cards
NFC-Enabled Phones

Magnetic Stripe Cards
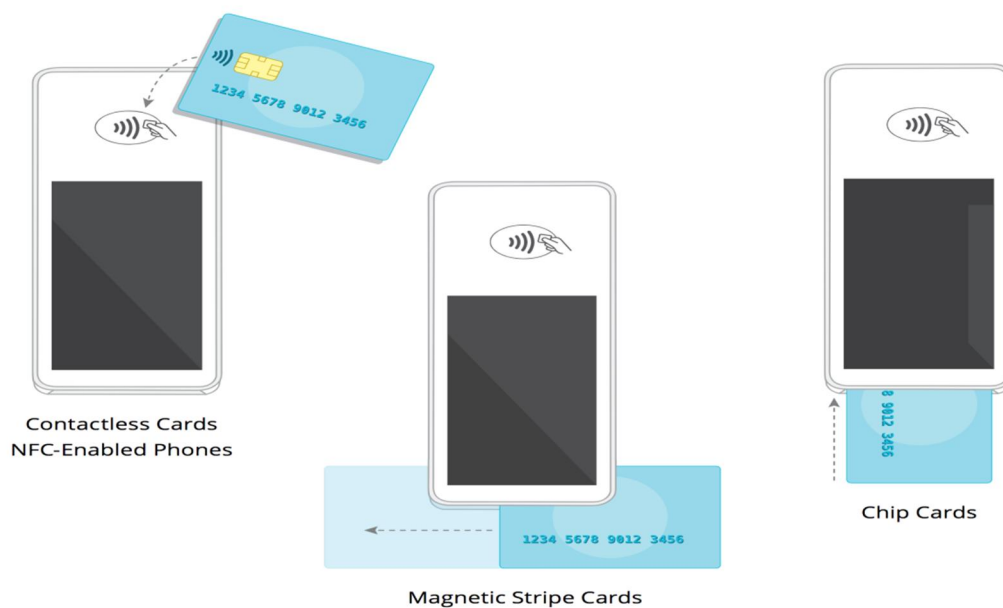
Chip Cards

Takes payments 3 ways:

1. Tap contactless cards on the NFC tag, or hold NFC-enabled phones near to the NFC tag.
2. Slide magnetic stripe cards through the reader.
3. Insert chip cards into the slot.

What's in the box

- Your new Flex device, in its protective silicone sleeve.

- Flex starter kit with:

  - Quick Start Guide

  - Charging cradle

  - Optional Pin Entry Aid

- Power brick

- Power cord

- Screwdriver

- Receipt paper roll

Flex

Silicone Sleeve

Pin Entry Aid
(Select Regions)

Power Brick

Power Cord

Screwdriver

Receipt Paper Roll

The newest Flex devices have a fingerprint sensor on the power button for instant login. (Newest devices also have black trim. Previous versions have gray trim.)

What's on the Flex

Contactless payment reader

Power button with fingerprint sensor

Display screen

Chip card reader

Microphone

Magnetic stripe card reader
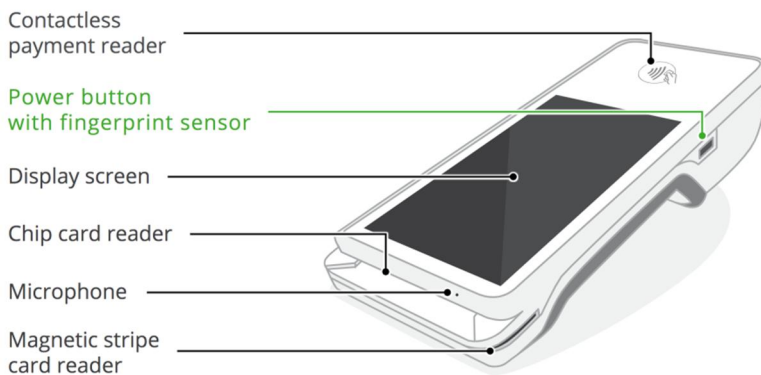
When you use your Flex:

- Switch on your Flex with the power button. Newer Flex devices have a fingerprint sensor for instant log-in right on the power button.

- Take payments and see your transactions on the display screen.

- Take payments by:

  - Inserting chip cards into the chip card slot.

  - Sliding cards without chips across the magnetic card reader groove.

  - Tapping NFC cards or NFC-enabled phones on the contactless card reader.
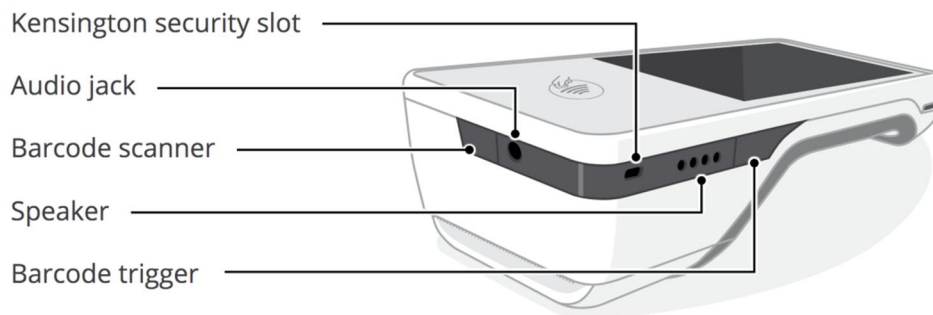
You can also:

- Plug a security cable into the Kensington Security slot to secure your Flex to a stable object.

- Find the 3.5mm audio jack here.

- Use the barcode scanner to scan merchandise that has UPC barcode images. (The barcode trigger is on the left side.)

- Hear the speaker indicate transaction processing.
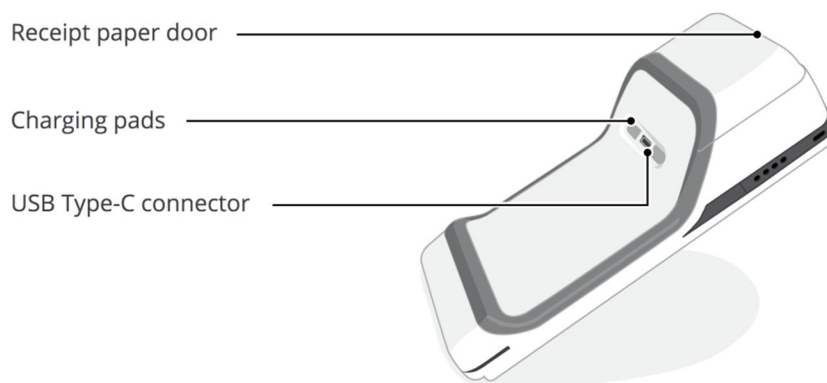
Load the thermal paper by opening the receipt paper door.

If you ever need to change the SIM card, you can find it in the paper compartment. Use the green hex screwdriver to access the SIM card. (You can also find your device serial number in the paper compartment. The serial number identifies this device version.)

You can use the USB Type-C connector port with Clover's travel kit power charger (available separately).

Charging Cradle

And finally, you'll charge your device in the charging cradle.

Connect to power and charge your Flex

Your Flex arrives with enough battery power to set it up and activate it. You can fully charge it whenever you have the time.
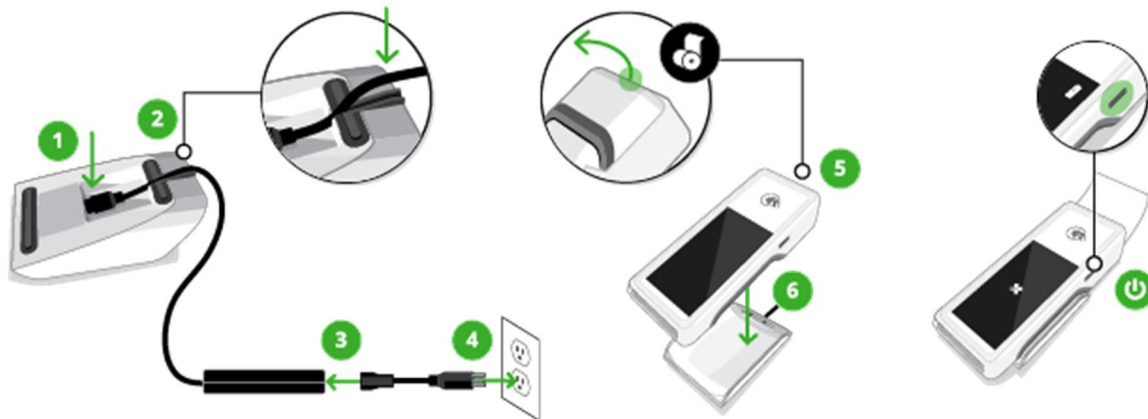
1. Holding the charging cradle upside down, firmly insert the power cord into the charging input.
2. Thread the cord across and out the back.
3. Insert the power cord into the charging brick.
4. Plug in the other end of the power cord to a power outlet.
5. Set the Flex on top of the charging cradle.
6. Allow the device to charge until the indicator shows a full battery.

After you connect to power and optionally charge your Flex, you can connect to the Internet and activate your Flex.

Connect to the internet and activate your Flex

Before you start this part of the set-up process:

- Find your activation code in the activation email you received from Clover.

- If you plan to connect to the internet using Wi-Fi, check to make sure your router is set up, connected to the internet, and has a security level of WPA or WPA2. Your network needs to be a closed, protected, secure network to process payment transactions. (If you offer Wi-Fi access to your customers, follow best practices and give them a different network to use.)

1. Remove the protective plastic film from the front display glass.
2. Switch on the device by pressing the power button on the right side until the Clover logo appears.
3. On the display, tap to choose your language and then tap **Next**.
4. On the Network screen, tell the device what kind of internet network connection you want to use:
- Mobile networks use the installed SIM card and your cellular phone connection.
- Wi-Fi networks connect wirelessly to a router you have previously set up.
5. Wait until you see the message that the device is successfully connected and then tap **Next**.
6. On the Activate screen, enter the code you received in your activation email from Clover.
7. On the Install apps screen, wait while Clover installs the latest apps for your account.

You can insert the receipt paper while the Clover apps are downloading.

Insert a receipt paper roll into your Flex

1. Hold the device so the back of it faces you.
2. Open the paper compartment by grasping the top of the compartment door and pulling it toward you.
3. Insert the roll of thermal paper so that the end extends straight out the slot in the top of the compartment door.
4. Close the compartment door until it clicks.
5. On the display screen, tap to print a test receipt.

Set up fingerprint access, passcode access, and signature locations

You can complete these tasks now during the set-up process, or later with the Employees app.

- Fingerprint access (if available on your device) sets your Flex to log you in by recognizing a fingerprint when tapped on the Power button.

- Passcode access requires an input code on the device screen to log in.

1. After Flex device activation, on the device Power button, gently tap the finger (or thumb) you want to use for login access on the fingerprint sensor.
2. Keep tapping until the image on the display shows all parts of the fingerprint. The display gives you progress messages.
3. When the display tells you your fingerprint has been added, tap **Continue**.
4. Decide whether you want to require a passcode to access the device and choose an option. (Use the Employees app to assign passcodes.)
5. Decide where you want to accept customer signatures at payment time, either on the device or on a printed receipt.
6. Tap **Continue**.

Start operating your Flex

- Turn on the device by pressing and holding the power button until you see the Clover logo.

- Turn off the device by pressing and holding the power button.

- Set the device in sleep mode or wake it up by pressing and immediately releasing the power button.

Log in to your Flex with your fingerprint

After fingerprint access is set up for you, you can use it to instantly log in.

To log in with fingerprint access, place your finger on the
fingerprint sensor until the display shows your apps.

(To set up fingerprint access, read about setting up employee device access.)

Set up payment receipt details

After you [bring your payment receipt printer online](#), you can decide what appears on receipts and whether they print automatically or on request.

1. On your Clover device, open the **Setup** app.
2. Select **Payment Receipts**. At the top, you can see whether your receipt printer has been added to the system. If you don't see it listed here, you can add it now by plugging it in, connecting it to your Clover network, opening the Printers app, tapping **Add**, and then choosing **Receipt Printer**.
3. Choose general options:
- **Automatically print customer receipt after each order**.
  Prints all receipts. If you choose this, you can also optionally choose to **Skip receipt screen & begin next transaction** because receipts print automatically.
- **Mark items as printed when printing a bill**. Lists items as printed on the screen where you are taking the payment.
- **Allow customers to opt-in to marketing on emailed prompts**. Gives customers who choose to receive the receipt by email an option to click if they want to also receive promotions you set up. If you have written the text for a marketing prompt, you'll see it here. If not, tap **Marketing prompt** and add the text for your prompt, and then save it when you are done.
4. Under Payment Receipt Appearance and Receipt Preview, choose additional options. As you choose options, check out the receipt preview image to see right now what the receipt will look like.
- **Receipt logo**. Shows your business logo on all payment receipts. This does use extra paper, so keep that in mind.
- **Custom header text**. Adds words to the top of each payment receipt. Tap here, enter the text, and save when you are done.
- **Order note**. Adds space on the receipt for the cashier to enter a note about the order.
- **Cashier name**. Adds the name of the signed-in employee who took the sale.
- **Line items**. Lists every item in the sale.
- **Modifiers**. Shows item modifiers (where available)
  on the receipt. Tap **Modifiers**, choose either not to show modifiers, or to show all modifiers, or to show only the modifiers with prices, such as add-ons and toppings. Save when you are done.
- **Modifier group names**. Adds these to the payment receipt.
- **Group items by guest**. Sorts each item by the guest who ordered it.
- **Custom footer text**. Adds words to the bottom of each payment receipt. Tap here, enter the text, and save when you are done.
- **Online receipt URL**. Shows the link to the Clover location where customers can view and print out a detailed receipt for the sale.
- **Barcode**. Shows a barcode that customers can scan to get the receipt on their phones.
- **Customer information**. Shows details your business has about this customer.
- **Add space below receipts**. Prints out a little more paper with each receipt.
5. Tap **Home**.

Set up order printing details

Set up printing details for order printers by choosing settings and options.

You can do this after you connect your order printer to the network and bring it online. Haven't done that yet? Read about [adding basic order printers](#).

Here, you can choose whether to print orders automatically or on request, what the order receipt shows, and which printer accepts orders to print.

You can also set up your system so that items go to individual order printers:

- First, complete the steps here for setting up printing details.

- After that, complete the steps that follow to [automatically send items to order printers](#).

1. On your Clover device, open the Setup app.
2. Select **Order Receipts and Sticky Labels**.
3. On the Order Receipts tab, you can see whether your order printer has been added to the system. If you don't see it listed here, you can add it now by plugging it in, connecting it to your Clover network, opening the Printers app, tapping **Add**, and then choosing **Order Printer**.
4. Tap **How will order receipts be printed in Register?**
- Manual printing:
  Tap printer icon to print manually. Waits for the cashier to tap the printer icon to print the order.
- **Auto printing**. Prints the order automatically, based on the options you choose here:
- **All items**. Sends every item to the order printer. If you have more than one order printer, the cashier taps **Pay**
   and then chooses which printer gets the order.
- **Only items with printer labels**. Sends items with a custom printer label to the order printer. This requires special setup. To use a custom printer label, choose this option here. Then read the next section on setting up items to go to individual order printers.
- **Manually print an item with no labels**. Allows the cashier to tap the printer icon to send the order to the printer, just like the manual printing option above.
5. Under Auto printing - When to Print, choose options:
- **When Pay or Save is tapped**. Sends the order when the cashier taps either of these two buttons to get the order started.
- **When Pay is tapped**. Sends the order at the start of payment.
- **When Save is tapped**. Sends the order before payment.
- **When customer receipts are printed**. Sends the order at payment completion.
6. Tap **Save**.
7. (Optional) Sometimes labels need reprinting. To prevent fraud, you can permit only your manager to reprint labels. To do this, choose **Reprinting order labels requires manager passcode**.
8. Tap **Order numbers** and choose an option:
- **None**. Leaves numbers off of orders.
- **Manual**. Allows the cashier to enter a number with each order.
- **Automatic**. Adds numbers maintain an order count. You can enter a maximum order number, for example, 99, after which order numbering resets at 1. And you can reset numbering to 1 at the time your business day starts.
9. Under **Order Receipt Appearance**, choose options. As you choose options, look at the order preview image to see right now what the receipt will look like.

- **Large Font**. Prints order receipts with the largest available letters and numbers. In the box on the right, you can see a preview showing how the label will look.
- **Blank lines in header**. Scrolls some extra paper with each order receipt. You can decide how many lines of paper to add.
- **Order note**. Allows the cashier to add a note with an order. This is useful for special preparation instructions.
- **Use alternate inventory names**. Prints the alternate name on the label. If the employees preparing the order speak another language, consider using alternate names.
- **Group line items**. Lists similar items on one line.
- **Modifier group names**. Adds the name of the associated modifier group to the order.
- **Condense modifiers**. Combines common modifiers for easier understanding.
- **Customer information**. Adds the customer's name to the label when available.

10. Return to the Home page.

For details about setting up alternate inventory names, read about defining your product items.

Next:

- If you want all your orders to go to one order printer, you're all set here. If you haven't set up a receipt printer, continue by adding a receipt printer to your Clover network.

- If you want items in some orders to go to certain order printers, follow the steps to automatically send items to order printers.

Automatically send items to order printers

Automatically send items to order printers when you have more than one order printer and you want specific types of items to go to specific printers.

Use a custom printer label

For example, if you have a restaurant and you want all the dessert orders to go to the pastry chef, you can give the chef an order printer. Then you create a custom printer label for the order printer in the chef's area and assign items to it. This sends all desserts with this custom printer label to the pastry chef.

You can set up a custom printer label by:

- Adding items to your product inventory that you want to send to a specific order printer.

- Creating a custom printer label.

- Assigning the custom printer label to the items you added.

- Assigning the custom printer label to the order printer.

Start by thinking about which items you might want to send to an order printer. Then add these items so they'll be ready for the custom printer label.

Add items for a custom printer label

1. On your Clover device, tap to open the Inventory app.
2. Select **Add New Item**.
3. Enter the item name. The name is required. That's all you need right now.
4. (Optional) Add more details to describe the item, such as price and cost.
5. When you are done adding this item, tap **Save**.

After you add items, create the custom printer label.

Create the custom printer label

1. On your Clover device, tap to open the Inventory app. If you just added items, you're already here.
2. Tap **Labels**.
3. Tap **Add**.
4. Enter a name for this label. You might want to use the printer name, such as Star Printer, or a location name, such as Kitchen, Bar, or Pastry Chef for all those dessert orders. This way you and your staff quickly understand where they're sending the order.
5. Tap **Done**.

After you create the label, assign the label to items.

Assign the custom printer label to items

1. On your Clover device, in the Inventory app, go to the page with your new label.

- If you just created the label, the page is open now. You can see the name of your new label, for example, Kitchen, at the top.
- To use an existing label instead, in the Inventory app, tap Labels and search for, select, and open the page for the label you want to use.
2. On the label page, choose **Edit** at the top right.
3. On the Edit Label page, select your items:
- To send all items to this order printer, check the box at the top of the Name column. When you add more items to your inventory, come back here to select them specifically, as described directly below.
- To send only specific items to the order printer, either scan, search, or scroll, and then select them one by one.
4. When you are done adding items, tap **Save**. (You don't need to check the box for using the label as a revenue class.)

After you assign a custom printer label to items, assign the label to the order printer.

Assign the custom printer label to an order printer

1. On your Clover device connected to the order printer, tap to open the Printers app.
2. In the Printers app, tap the order printer name. The system shows the printer and, at the bottom, your inventory item labels.
3. Find and select the custom printer label you created for sending items to this order printer. (You can optionally select any label. The system will send all items with that label to this order printer.)
4. Tap Save.

All items with the label you selected will go to this order printer.

If you want to stop automatically sending items to an order printer, you can disconnect the label.

Disconnect a custom printer label from an order printer

1. On your Clover device, tap to open the Printers app.
2. In the Printers app, tap the order printer name.
3. Find and deselect the label you created to use for sending items to this order printer.

Set up an external barcode scanner

After you [check your barcode scanner for compatibility with your Clover system](#), you can set it up.

Set it up by:

- Connecting it

- Testing it

Connect the barcode scanner

1. Plug the USB cable from the barcode scanner into the a USB port on the Hub. The barcode scanner should be immediately recognized by the Clover Stations or Mini and will be ready for use.
2. If the barcode scanner is not working as expected, you may need to scan some barcodes to factory-reset and reprogram your scanner.

Find your scanner model and follow the listed steps to reset and reprogram your scanner.

Zebra DS9308 scanner
1. Scan the first barcode to reset your scanner.
2. Scan the second barcode to reprogram your scanner.

Reset for DS9308

Add Enter Key for DS9308

Zebra DS2208 scanner
1. Scan the first barcode to reset your scanner.
2. Scan the second barcode to reprogram your scanner.

Reset for DS2208

Add Enter Key for DS2208

Zebra DS9208 scanner
1. Scan the first barcode to reset your scanner.
2. Scan the second barcode to reprogram your scanner.

Reset for DS9208

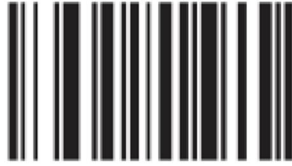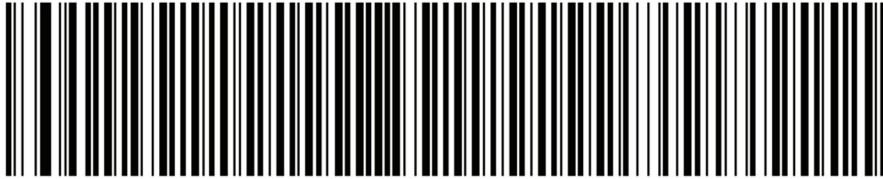**Add Enter Key for DS9208**

Test the scanner

Use the Register app to test your scanner.

1. Open the Register app.
2. Scan an item's barcode by holding down the button on the external USB barcode scanner and pointing the light to the barcode.

3. When the Clover device recognizes the item, you'll hear a beep and see the item's Product Code added.

Set up a Clover cash drawer

The Clover cash drawer includes:

- Clover Cash Drawer

- Bill tray

- Coin tray

- Two keys

- RJ-11 6P6C cable

You can connect Clover Station and Mini devices to the drawer with the RJ-11 6P6C cable.

Connect a cash drawer

To keep track of transactions, connect both your Clover device and your cash drawer to the same router.

1. Insert one end of the RJ-11 6P6C cable (with blue sticker and cash icon) into the bottom of the drawer.
2. 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

1. Insert the drawer key and turn the key all the way to the left to unlock and open the drawer.
2. Close the drawer, leaving it unlocked, with the key in the vertical position.
3. Pull the key out of the drawer.
4. Open the **Register** app.
5. 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.)
6. Tap **Other**.
7. Next to Reason for Opening, enter **Test**.
8. Tap **Continue**.

Test the connection between your Clover device and the cash drawer to make sure the Register app can successfully open the drawer.

Set a cash drawer to open automatically

You can set the cash drawer to open automatically when customers pay with specific tender types.

1. On your Clover device, open the Setup app.
2. Tap **Payments**.
3. Tap **Tenders accepted**.
4. In the list of accepted tenders, tap the first one you want to allow to use the cash drawer.
5. Check the box that **Opens cash drawer.**
6. Tap **Save**.
7. Continue adding all tender types that should open the cash drawer.

Lock a cash drawer

1. Insert the drawer key into the drawer.
2. Twist the key all the way to the right to a horizontal position.
3. Pull the key out of the drawer.

You should manually lock the cash drawer after business hours. When the cash drawer is manually locked, it cannot be accessed from the Register app.

Set up employee profiles

Set up employee profiles to allow employees to log in to Clover devices with a passcode, take payments using the various Clover features, and allow their activities to be tracked for accounting purposes.

1. From a browser, log in to your [Clover account](#).
2. Select **Employees.**
3. Select **Add New Employee**.
4. Enter the details for this profile:
- **Name**. The name this employee will use at your business.
- **Nickname (Optional)**. A name for the system to show wherever the employee is listed, for example, on receipts.
- **Email**. To give this employee access to the Clover Web Dashboard for your account, add the employee's email address. (For employees of Clover Go merchants, the email address is required.) An email message will be sent to the address with further instructions.
- **Passcode**. The 4- or 6-digit number the employee uses to unlock the Clover device. Each employee needs to have a different passcode. Leave this blank if you want the system to automatically assign a unique passcode.
- **Role**. Allow this employee to access a set of specific Clover system features. Start by assigning the role that most closely resembles the business role for this employee: An Admin is usually the business owner; a Manager has more access permissions than an Employee but fewer than an Admin. (You can give more or fewer access permissions to a role by adjusting the role definition.)
5. Select **Save**.

Once you add an employee, you can edit or delete their profile from the Web Dashboard or a device.

Manage employee roles and access permissions

You can separately manage employee roles and access permissions:

- Manage employee roles by assigning the role that gives each employee access to the features you want them to use.

- Manage access permissions by adding and removing them from a role when the assigned role doesn't give access to the right features.

- Add a new role when you want to create a special role variation with specific access permissions.

Assign employees to a role

On the Web Dashboard
1. From a browser, log in to your [Clover account](#).
2. Select **Employees.**
3. Select **Edit** next to the employee you want to edit.
4. Select the **Role** dropdown menu and select an employee role.
5. Select **Save**.

Once you assign employees to a role, you can change that role at anytime.

On a device
1. Open the **Employees** app.
2. Select the employee you want to edit.
3. Select **Edit** at the top right.
4. Select the **Role** dropdown menu and select an employee role.
5. Select **Save**.

Once you assign employees to a role, you can change that role at anytime.

Set permissions for a role

On the Web Dashboard
1. From a browser, log in to your [Clover account](#).
2. Select **Employees > Permissions**.
3. Review the list of permissions.
- The first column shows features. Select **View app permissions** to see additional access permissions you can add or remove for each feature.
- The second column shows which roles already have these access permissions.
4. Select **Edit** next to the feature you want to edit the permissions for.
5. In the **Roles** search box, search for the role you want to include this access permission.
6. When you see the role, select the box next to it.
7. (Optional) To remove a permission from a role, de-select the checkbox for that role in the search results.
8. Select **Save**.

On a device
1. Open the **Employees** app.
2. Select the **Permissions** tab.
3. Select the checkboxes to enable/disable permissions for each employee role.
4. Apps with more permissions have a dropdown menu. Select the dropdown menu to see all the permissions within that app.

Create a new role

There are three default roles: Admin, Manager, and Employee. You can create more in the Employees app.

On the Web Dashboard
1. From a browser, log in to your Clover account.
2. Select **Employees > Roles**.
3. Select **Add New Role**.
4. Enter the name of the new role.
5. Select a default role: Admin, Manager, or Employee.
6. Select **Add**.

Once you create a role, you can assign employees to it or delete it at anytime.

On a device
1. Open the Employees app.
2. Select Roles.
3. Select the add button in the bottom right.
4. Enter the name of the new role.
5. Select a default role: Admin, Manager, or Employee.
6. Select **Add Role**.

Once you create a role, you can assign employees to it or delete it at anytime.

Give access to employees

Set passcodes

Clover device passcodes can be set to 4 or 6 digits, and every employee's passcode must be the same length.

Set up passcodes for employees

On the Web Dashboard
1. From a browser, log in to your [Clover account](#).
2. Select **Employees.**
3. Select **Edit** next to the employee you want to create a passcode for.
4. Under **Passcode**, enter a new passcode.
5. Select **Save**.

On a device
1. Open the **Employees** app.
2. Select the employee you want to create a passcode for.
3. Select the edit icon in the top right.
4. Select the **Passcode** field and input a new passcode.
5. Select **Save**.

Change device passcode length

1. From a browser, log in to your [Clover account](#).
2. Select **Employees > Device Passcode.**
3. Select **Change** in the Passcode Length section.
4. Enter new passcodes for all employees or click **Autofill Passcodes**
5. Select **Save**.

To speed up updating passcodes, use **Autofill Passcodes**.

- When changing to 4-digit passcodes, selecting **Autofill Passcodes** removes the last two digits of the original 6-digit passcode.

- When changing to 6-digit passcodes, selecting **Autofill Passcodes** adds 00 to the end of the original 4-digit passcode.

Set up login methods for shift workers

Record when your employees clock in, when they clock out, and how long their shifts last based on the time set on your Clover device.

Employees can only clock in if they have an employee profile. Employee profiles can be created in the Employees app.

Clock in at the beginning of a shift
1. Open the **Shifts** app.

2. Select the green clock icon at the bottom right corner.
3. If the employee is holding cash sales, select the **I'm holding my cash sales during this shift** checkbox.
4. Select **Clock In.**

Clock out at the end of a shift

There are two ways to clock out:

- Tap the red clock icon on the Shifts app home screen.

- Tap the green **Clock Out** button when viewing shift details.

1. Open the Shifts app.
2. Select the red Clock Out button on the lower right, or select the shift and then select **Clock Out**.
3. If applicable, select the **I held my cash sales during this shift** checkbox.
4. Select **CLOCK OUT** to finish.

Set up employee device access

Unlock a Clover device with a fingerprint

Clover devices with fingerprint sensors can be set to unlock with a fingerprint instead of a passcode. You can add a fingerprint for any employee.

1. Open the **Employees** app.
2. Select the employee profile you want to add fingerprint access.
3. Select **Edit** in the upper right.
4. Select **Add a Fingerprint**.
5. Ask the employee to place their fingertip (or thumb) on the fingerprint sensor.
6. Gently press and release the fingertip. Follow the onscreen hints for assistance. When the entire print is accepted, the employee profile screen returns.
7. Save your work.

Once you've added a fingerprint for an employee, you can delete it from their profile at anytime.

Unlock a Clover device with an employee card

Employee cards provide a way for you and your employees to unlock your Clover device without a passcode. You can order employee cards by calling Clover Support. Employee cards can be assigned to any employee.

1. Open the **Employees** app.
2. Select the employee profile you want to assign an employee card to.
3. Select **Edit** in the upper right.
4. Select **Add an Employee Card**.
5. Swipe the employee card in the card reader.
6. Save your work.

Give employees permission to sell gift cards

There are three gift card permissions you can enable or disable for your employees:

- **Add money to gift card**: Lets employees activate or add money to gift cards.

- **Cash out gift card**: Lets employees convert a gift card to cash value.

- **Load gift card without a payment**: Lets employees add money to a gift card without payment from the customer.

1. Open the **Employees** app.
2. Select **Permissions**.
3. Scroll down until you see Gift Cards.
4. Select a checkbox to enable a permission for the employee role.

Add individual menu items

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Items**.
3. Select **Add Item**.
4. Enter the item name you want to see when you make a sale. Only the name is required. If you want to, you can add the additional details later.
5. For **Price**, optionally enter the price you're charging for this item. You'll see this price when you make a sale and it will also be on the customer receipt.
6. Select **Continue**.
7. Add basic information:
- If you want the item to show on a Clover device, select **Show on POS**. If you're using Virtual Terminal to make sales instead, you don't have to choose this option.
- If you want to assign a color to the item, select the dropdown labeled Item color. Choose a color or select **None** to remove the color.
- For **Pricing Type**, click and choose from the list, either a **Fixed** price (the default), a
- **Variable** price, where salespeople enter the price when they take the order, or a price **Per Unit** (typically used for items sold by weight). If you choose the price-per-unit option, additionally enter the pricing unit you want to use.
- For **Price without VAT** (where applicable): If your business is located in a region where VAT taxes automatically apply, and you want to make this item exempt from VAT taxes, enter an amount for the price without VAT. Set up VAT taxes when you set up taxes.
- For **Taxes and Fees**, click and choose from the list each tax your region requires. Need to set up taxes? Go to **Account & Setup > Taxes & Fees**.
8. If you've added everything you want to at this time, save the new item. If not, continue below.
9. Decide on online ordering options if your business sells products online:
- Online name: Accept the name you see here or edit it to show online customers a different name for this item.
- Show this item to customers ordering online by checking the **Show online** box.
- Describe the item for online order customers, up to 240 characters.
- Save additions and changes.
10. Decide on menu images if your restaurant sells food items:
- Choose an image that shows off your food and looks appetizing. Avoid images with people or multiple food items together.
- Select the image icon to upload the image. Supported file formats are .jpg, .jpeg or .png. Maximum size: 10MB, minimum dimensions: 1600 x 1200px.
- Crop the image to showcase your product. Drag the box with the dotted line to the desired location or select the corner of the box to expand or condense it.
- Save additions and changes.
11. Decide on modifier group options if your business uses them:
- Select **Modifier Groups**.
- Decide what to do:
- To add this item to an existing modifier group, select +ADD, scroll or search for the modifier group, and then check the box for the correct group. Save your changes.
- To create a new modifier group and add this item to it, select +ADD, and then CREATE MODIFIER GROUP. Enter a group name and an optional online ordering name. Save the new group.
12. Decide on category options if your business uses them:
- Select **Categories**.
- Decide what to do:
- To add this item to an existing category, select +ADD, scroll or search for the category, and then check the box for the correct category. Save your changes.
- To create a new category and add this item to it, select +ADD, and then CREATE CATEGORIES. Enter a category name and an optional online ordering name. Save the new category.

13. Decide on order printing options:
- Select **Orders & Printing**.
- Select **Printer labels** and check the box with the printer label you want to use. When your staff adds this item to an order, the order printer with this label will print the order. See below for more about setting up printer labels.
- If you want a different item name printed on the order receipt, for example, for kitchen staff who might speak a different language, enter the alternate name here. To use this feature, go to **Account & Setup**, and under Transactions, select **Order Receipts** and check the box to **Use alternate inventory names**.
- The system saves your changes.
14. Decide on item tracking options:
- Select **Item Tracking**.
- Optionally enter a universal product code (UPC) that identifies this item. On merchandise, this code is a string of numbers and letters that appears in a line of text below the barcode image, up to 12 digits. You can enter the code here now, or scan it in later.
- Optionally enter a stock keeping unit (SKU) for tracking, up to 127 characters.
- Enter the item count, the current number of this item in stock or on the menu. By default, Clover tracks stock quantities for you. (You can adjust this setting if you would like a third-party app to track your stock quantities. Read below about using inventory setup options to adjust stock tracking.)
15. Decide on item cost options:
- Select **Item Cost**.
- Enter your your wholesale cost, the price you pay for this item.
- To identify this item as one that you sell for others, check **Non-revenue item**. Examples of non-revenue items include passthrough sales on behalf of other vendors.
16. Save the new item.

After you add individual items, you can find and edit them to add anything you like. When you no longer stock an item, you can remove it.

Add general items

You can add a new item on a Clover device or on the Web Dashboard.

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Items**.
3. Select **Add Item**.
4. Enter the item name you want to see when you make a sale. Only the name is required. If you want to, you can add the additional details later.
5. For **Price**, optionally enter the price you're charging for this item. You'll see this price when you make a sale and it will also be on the customer receipt.
6. Select **Continue**.
7. Add basic information:
- If you want the item to show on a Clover device, select **Show on POS**. If you're using Virtual Terminal to make sales instead, you don't have to choose this option.
- If you want to assign a color to the item, select the dropdown labeled Item color. Choose a color or select **None** to remove the color.
- For **Pricing Type**, click and choose from the list, either a **Fixed** price (the default), a **Variable** price, where salespeople enter the price when they take the order, or a price **Per Unit** (typically used for items sold by weight). If you choose the price-per-unit option, additionally enter the pricing unit you want to use.
- For **Price without VAT** (where applicable): If your business is located in a region where VAT taxes automatically apply, and you want to make this item exempt from VAT taxes, enter an amount for the price without VAT. Set up VAT taxes when you set up taxes.
- For **Taxes and Fees**, click and choose from the list each tax your region requires. Need to set up taxes? Go to **Account & Setup > Taxes & Fees**
- If you've added all you want to add at this time, save the new item. If not, continue below.
8. Decide on category options if your business uses them:
- Select **Categories.**
- Decide what to do:
- To add this item to an existing category, select +ADD, scroll or search for the category, and then check the box for the correct category. Save your changes.
- To create a new category and add this item to it, select +ADD, and then CREATE CATEGORIES. Enter a category name and an optional online ordering name. Save the new category.
9. Decide on order printing options:
- Select **Orders & Printing**.
- Click **Printer labels** and check the box with the printer label you want to use. When your staff adds this item to an order, the order printer with this label will print the order. See below for more about setting up printer labels.
- If you want a different item name printed on the order receipt, for example, for kitchen staff who might speak a different language, enter the alternate name here. To use this feature, go to **Account & Setup**, and under Transactions, select **Order Receipts** and check the box to **Use alternate inventory names**.
- The system saves your changes.
10. Decide on item tracking options:
- Select **Item Tracking**.
- Optionally enter a universal product code (UPC) that identifies this item. On merchandise, this code is a string of numbers and letters that appears in a line of text below the barcode image, up to 12 digits. You can enter the code here now, or scan it in later.
- Optionally enter a stock keeping unit (SKU) for tracking, up to 127 characters.
- Enter the item count, the current number of this item in stock or on the menu. By default, Clover tracks stock quantities for you.
11. Decide on item cost options:

- Select **Item Cost**.
- Enter your wholesale cost, the price you pay for this item.
- To identify this item as one that you sell for others, check **Non-revenue item**. Examples of non-revenue items include pass through sales on behalf of other vendors.
12. Save the item.

After you add individual items, you can find the items and edit details to add anything you forgot. When you no longer stock an item, you can remove it.

Edit inventory items

Find an item and edit details
1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Items**.
3. Find the item:
- Scroll through the item list or enter text in the Search box and select Search.
- Optionally filter the list by choosing Filter and selecting one or more filter options. Selecting no options here shows all items in the inventory.
- **Unavailable** shows you all the items that have been marked as unavailable or that have reached 0 stock (if you are managing item availability automatically).
- **POS items** shows you all items you have marked to appear on a point-of-sale device. This is a good way to see everything you're selling using a POS device.
- **Non-POS items** shows all items you have not marked to appear on a point-of-sale device. This is a good way to see items you sell only in other ways, such as only online, and not using a POS device.
- **Online items** shows all items you have marked to appear for online ordering. This is a good way to see, for example, all your online menu items.
- **Non-online items** shows all items you have not marked to appear for online ordering. This is a good way to see items you might want to add to your online menu.
4. When you find the item, decide what to do:
- To change key details like name, price, item color and stock count, check the box next to the item name and select **Quick Edit**. Make edits and save changes.
- To change item associations like categories, modifiers, and revenue classes, click the item name to open its details page, make edits, and save changes.
- To change the menu image, select the item name to open its detail page. Under **Online Ordering**, hover over the item image. Select the edit icon to upload a new image or the delete icon to delete the image.

Find many items and edit details

You can edit details for multiple items in two ways.

- One: Find and select items and change different details for each one. This is useful, for example, when you want to change stock quantities for several items at the same time.

- Two: Find and select items and change one detail for all of them. This is useful, for example, when you want to add or remove more than one item at a time from an online menu. You can find and select all the online menu items, and then make them available by choosing the **Bulk Edit options > Availability > Show Online** option.

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory**.
3. Scroll through the item list and check the box for each item you want to change.
4. Decide what to do:
- To quickly edit different details for all selected items, select **Quick Edit** and then make changes. For example, you can change names, prices, appearance on a POS device, appearance on the online menu, stock quantity, and more. If you want to see more details you can change, select **More** and check the boxes for additional columns to show.
- To bulk-edit by making one change to all selected items, select **Bulk edit options** and then choose from the list.

- **Availability** makes the selected items available either on a POS device, or for online ordering, or both, your choice. When you set up online ordering, you can come here to make all online ordering items available at the same time.
- **Modifier Groups** adds all selected items to the groups you select.
- **Categories** adds all selected items to the categories you select.
- **Duplicate** makes a copy of all selected items and adds them to your inventory.
- **Delete** removes the selected items from your inventory.
5. Save your changes.

Delete inventory items

1. From a browser, log in to your Clover account.
2. Select **Inventory > Items**.
3. Scroll through the item list and check the box for each item you want to delete.
4. Select **Bulk edit options > Delete** and confirm your decision.

You can also delete items on a Clover device.

Use categories to organize items

Categories group similar inventory items for:

- Easier inventory management

- Faster sales order entry

- More organized reports

Add menu categories

Categories display on your POS device and your online menu(s).

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory** > **Categories**.
3. Select **Add Category**.
4. Enter a name for the category.
5. Select **Done**.

Add product categories

Categories display on your POS device.

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Categories**.
3. Select **Add Category**.
4. Enter a name for the new category.
5. Select **Done**.

Arrange categories in the order you want

After you add categories, you can arrange them in the order you want to see them on a POS device or in your online menu.

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Categories**.
3. Select **Change Layout** at the top right.
4. Use the double horizontal bars to drag and drop the categories into the order you want.
5. Use the A to Z sorting option to alphabetically sort the categories.
6. Save your changes.

Add or remove items from categories

After you create a category, you can add items to it, and remove items from it, either one at a time, or in a bulk editing action.

1. From a browser, log in to your [Clover account](#).

2. Select **Inventory > Categories**.
3. To add or remove items from one category:
- Scroll or search for the category.
- Click the category name to open it.
- Under Items, select +/-Edit.
- Scroll or search for the items you want to add or remove.
- Check the box for each item you want to add. Uncheck the box for each item you want to remove.
- Save your changes.
4. To add or remove items from more than one category:
- Scroll or search for the categories and check the box next to each of their names.
- Select **Bulk edit options > Items.**
- Scroll to find the items you want to add or remove.
- Check the box for each item you want to add. Uncheck the box for each item you want to remove.
- Save your changes.

Delete categories

Delete categories when you no longer need them. Deleting a category does not delete the items it contains.

1. From a browser, log in to your Clover account.
2. Select **Inventory > Categories**.
3. Scroll or search for the categories and check the box next to the name of each one you want to delete.
4. Select **Bulk edit options > Delete**, and then confirm the action.

Use modifier groups to define kitchen orders

For the restaurant industry, modifiers make sure the order goes to the kitchen with all the needed details. You can use modifiers two ways:

- To specify the customer order without adding cost. For example, you can create a modifier group called Cooking Temperature with a modifier for each of the five steak cooking temperatures: rare, medium rare, medium, medium well, and well. To input the order, the server chooses Steak and one of the cooking temperatures. This helps the server tell the kitchen how to cook the customer's steak.

- To add extras to the customer order along with added cost. For example, if your ice cream shop sells toppings as add-ons to an order, you can create a modifier group called Toppings. Then you can add the list of all possible toppings to the group. To input the order, the server chooses the ice cream and optionally adds any toppings the customer orders. The bill lists and charges for all the toppings.

Add a modifier group
1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Modifier Groups**.
3. Select **Add Modifier Group**.
4. Enter a modifier group name, for example, Steak Cooking Temperature or Frozen Yogurt Toppings.
5. If you're taking orders online, enter the online name you want customers to see.
6. Add another group if you want.
7. When you're finished, select **Done**.

Add modifiers to a modifier group

1. If you just created a new modifier group, scroll the list of modifier groups and open the one you just created by selecting its name.
- If you want to work with a previously created group, select **Inventory > Modifier Groups** and select the group name.
2. Add basic information. Under **Basic Info**, complete these steps:
- To list this group and its modifiers on a POS device for servers to see, check the box to **Show upon order entry on POS**.
- Under **Required**, enter the minimum required number of modifiers a server needs to enter. If modifiers are optional, there is no minimum.
3. Add online ordering details. Under **Online Ordering**, repeat the previous step with information you want to show to online order customers.
4. Add modifiers to the group:
- Scroll and select **Modifiers**.
- Select **+Add** and enter the name.
- If this modifier has a cost, enter the price. If this modifier has no cost, leave the price blank.
- Optionally select +ADD ANOTHER MODIFIER, enter a new name, and if the modifier has a cost, a price.
- Select **Done** to finish.
5. Add items to sell with these modifiers:
- Scroll and select Items.
- Optionally show more item details by choosing **More** and checking the boxes for details to show.

- Select **+Add** and search, scroll, and check the box for each item you want to add. (If this group already has items, select **+/-Edit** instead before checking the boxes for items to add.)
- Save additions.
6. Optionally set the modifier sequence for servers and online order customers to see:
- Select **Change Layout** at the top right.
- Use the double horizontal bars to drag and drop the modifiers into the order you want.
- Use the A to Z sorting option to alphabetically sort the modifiers.
- Save your changes.

Edit or delete modifier groups

Edit modifier groups to change details about them. Delete modifier groups when you no longer need them.

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Modifier Groups**.
3. Scroll to find the groups you want to work with and check the box to select each one.
4. Do one of the following:
- To edit the selected groups, select **Quick Edit**, change details, and save.
- To delete the selected groups, select **Bulk edit options > Delete**, and then confirm the decision.

Use printer labels to send items to order printers

Create a printer label on a computer, phone, or tablet
1. From a browser, log in to your [Clover account](#).
2. Select **Inventory** > **Printer Labels**.
3. Select **Add Label**.
4. Enter a name for the label. You might want to use the printer model name, such as Star Printer, or a location name, such as Kitchen, Bar, or Pastry Chef.
5. Select **Done**.

Assign a printer label to items on a computer, phone, or tablet
1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Items**.
3. Scroll, search, or use the filters to find the item name.
4. Select the item name.
5. Scroll down and select **Orders & Printing**.
6. Under **Printer Labels**, select the label to assign to this item. You can select more than one printer.
7. Save your changes.

After you assign the printer label to items, assign the same label to the order printer. This starts sending items to the order printer. You can stop sending items the same way you started.

Start or stop sending items to order printers
1. On your Clover device connected to the order printer, tap to open the **Printers** app.
2. In the Printers app, tap the order printer name. The system shows the printer and, at the bottom, your inventory item labels.
3. Decide what to do:
- To start sending items, find and select the printer label you created for this order printer. (You can optionally select any label. The system will send all items with that label to this order printer.)
- To stop sending items, find and deselect the printer label you created for this order printer.
4. Save your changes.

Use revenue classes to group item sales

Add a revenue class
1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Revenue Classes**.
3. At the top right, select **Add Revenue Class.**
4. Enter a name for this revenue class. You can add items to it now or later.
5. Save your addition.

The new revenue class appears in your Sales Overview and Item Sales reports with its own section.

Add or delete items from a revenue class
1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Revenue Classes**.
3. Scroll or search the list for the revenue class name and then select the name.
4. Add or delete items:
- Add items by clicking the items list and checking the box for each item you want to add. For proper accounting, each item can belong to only one revenue class. If you don't see an item you are looking for, it's probably already listed in a different revenue class. (Go to **Inventory > Items** and search for the item to find out.)
- Delete items by clicking the X next to items you want to remove. Each item you remove remains in your inventory. If you want to, you can add it to a different revenue class.
5. Save additions and changes.

Delete a revenue class

You can delete a revenue class when you no longer need it. If you delete a revenue class, the items with that label will remain in Inventory, but the revenue class label will be removed.

1. From a browser, log in to your [Clover account](#).
2. Select **Inventory > Revenue Classes**.
3. Scroll or search for the revenue class name.
4. When you see the revenue class name in the list, at the right, select **Delete** and confirm your decision.

Take orders

Take table orders

1. On your Clover device, open Clover Dining.
2. On your floor plan, select a table.
3. Choose an option:
- To add items for the entire table, select **Whole Table.**
- To add items for an individual guest, select a guest number.
4. Add items to the order.

Note: Clover Dining displays items that are assigned to a category. To add an item that isn't assigned to a category, enter the item name in the search bar to find it.

Take a non-table order

Take orders that aren't served at tables, for example, takeout, delivery, curbside pickup, or meals served at a bar.

1. On your device, open Clover Dining.
2. Tap **Bar & More**.
3. Tap Add on the bottom right.
4. Add items to the order.
5. Tap **Pay** to take payment for the order.

Search for a non-table order

To find any open non-table order, use the search bar in the Bar & More section. Search by:

- Customer name

- Order ID

- Order number

- Order note

- Last 4 digits of payment card

1. On your device, open Clover Dining.
2. Select **Bar & More**.
3. Select **Search** and enter a search term.
4. Select the order you want.

Move a non-table order to a table

You can convert a non-table order to a table order by moving it to a table.

1. On your device, open the Clover Dining app.

2. Tap **Bar & More**.
3. Tap the order you want to move.
4. Tap More on the bottom left.
5. Tap **Move Order**.
6. Tap the table you want to assign the floating order to.
7. Tap **Confirm**.

Work with orders

Delete a table order

You can delete a table orders using the in-order menu. An order must have at least one item in it to be deleted.

1. Open Clover Dining.
2. Select the table with the order you want to delete.
3. Select **More** at the bottom left.
4. Select **Delete**.

Delete a non-table order

You can delete a non-table order by reopening it in the in-order menu. An order must have an item in it before you can delete it. All non-table orders are located in the Bar & More section.

1. Open Clover Dining on your device.
2. Tap **Bar & More**.
3. Tap the order you want to delete.
4. Tap **More** on the lower left.
5. Tap **Delete Order**.
6. Tap **Delete**.

Move orders between tables

When a party moves from one table to another, you can move the order to the new table and continue taking orders, or move it to Bar & More to make it a non-table order.

1. Open Clover Dining.
2. Select a table, and then add items to the order.
3. Select **More** at the bottom left.
4. Select **Move Order**.
5. Select **An Available Table** to move the order to a new table, or **Bar & More** to make the order a floating (non-table) order.
6. Select the table you want to move the order to, then select **Confirm**.
7. To undo, tap **UNDO** in the message displayed at the bottom of the screen.

Combine orders

You can combine orders when one person wants to pay for multiple orders with a single card. By default, employees don't have permission to combine orders. To give employees permission to combine orders, select **Employees** > **Permissions** > **Access Register** > **Combine Orders**.

Note: Orders containing pre-auths can't be combined; be sure to void any pre-auths in the Orders app before combining orders.

1. Open Clover Dining.

2. Open the order you want to combine with an existing order.
3. Select **More** at the bottom left.
4. Select **Combine Orders**.
5. Select the table or Bar & More order you want to combine it with.
6. Select **Confirm**.
7. To see the combined order, tap **View Order** in the success message.

Transfer an order to a different server

You can transfer orders between servers without affecting the existing order. When transferred, the order is saved in its current state so the new server can continue the order from the point at which the previous server ended it.

1. Open Clover Dining.
2. Select the table with the order you want to transfer.
3. Select **More** at the bottom left.
4. Select **Transfer Server**.
5. Select the server the order is being transferred to, and then tap **Transfer**.

Work with guests

Split item cost among guests

You can split the cost of an item evenly among all the guests at a table.

1. Open Clover Dining.
2. Select the table.
3. Next to Whole Table, select **More**.
4. Select **Split Item Cost**.
5. On the left, tap the item or items you want to split.
6. Select the guests who are splitting the items.
7. Confirm your selection of items and guests.
8. Select **Confirm**.

Note: If a guest splitting the cost of an item plans to leave before other guests, be sure to split the item before printing the guest's individual bill.

Move items between guests

When you take orders for a table, you can move items from the whole table to individual guests, or from one guest to another. This can be done to correct misplaced items or help to combine checks.

1. Open Clover Dining.
2. Select the table with the items you want to move.
3. Tap **More** next to Whole Table or the guest with the items you want to move.
4. Tap **Move Items**.
5. Select the items you want to move; then select the guest to move items to.

For example, Guest 1 and Guest 2 want to combine checks, with Guest 1 paying. As the server, you can move the items Guest 2 ordered to Guest 1, then charge Guest 1 for all the items.

Move guests between tables

Sometimes guests move from one table to another, or from the bar to a table. Rather than starting a new tab, you can simply move the guest, along with their tab, to another table or area of the bar.

1. Open Clover Dining.
2. Select the table where the guest is currently seated.
3. Select **More** next to the guest you want to move.
4. Select **Move Guest**.
5. Select the option to move the guest to another table or to Bar & More.
6. Select the table or bill you want to move the guest to.
7. Select **Save**.

Your guest and their order are moved to the new location. To undo this, tap **UNDO** in the message that appears at the bottom of the screen.

Void using the Sale app

You can use the Sale app for a basic sale. Just enter the amount of the sale and run the customer's card. Accepted methods include swipe, chip, and contactless payments.

Take a swipe payment

You can take a swipe payment card in the Sale app when making a payment. However, if a customer has an EMV card (a smart card with chip), we recommend inserting the card to avoid EMV-related chargebacks that can occur when customers don't use the chip feature.

1. On your Clover device, open the Sale app.
2. Enter the sale amount, and then tap **Charge**.
3. If you've enabled prompting for invoice numbers (or your custom identifier), enter an identification number, and then tap **Continue**.
4. Swipe the payment card. (For Station Duo, have the customer swipe the card on the Mini terminal facing them.)
5. Ask the customer to enter their PIN or sign as necessary.
6. Select how customers will receive their receipt, or tap **Void Transaction** to void the payment.
7. Tap **Done**.

Take an EMV chip card payment

1. On your Clover device, open the Sale app.
2. Enter the sale amount, then tap **Charge**.
3. If you've enabled prompting for invoice numbers (or your custom identifier), enter an identification number, then tap **Continue**.
4. Insert the card.
5. Ask the customer to enter their PIN or sign as necessary. To skip entering a PIN, tap **SKIP**.
6. Select how the customer will receive their receipt, or tap **Void Transaction** or **Reject Signature** to void the payment.
7. Tap **Done**.

Take a contactless payment

1. On your Clover device, open the Sale app.
2. Enter the sale amount, then tap **Charge**.
3. If you've enabled prompting for invoice numbers (or your custom identifier), enter an identification number, then tap **Continue**.
4. Hold the card or phone over the EMV contactless logo.
5. Ask the customer to sign or enter PIN as necessary.
6. If the customer signed, tap **Verify** to accept their signature.
7. Select how customers will receive their receipt, or tap **Void Transaction** to void the payment.
8. Tap **Done**.

Issue refunds

Refund paid transactions

Your Clover device considers each payment as a transaction. When refunding a transaction, the full amount of that individual payment will be refunded.

On the Clover Web Dashboard

1. On a computer, phone, or tablet, log in to your [Clover account](#).
2. Select **Transactions**.
3. Select **Payments**.
4. Find the payment you want to refund and select **Details.**
5. Scroll down and select **Refund**.
6. Select **Yes** to confirm the refund.

On a Clover device

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

You can search for transactions in the Transactions app by transaction number or transaction ID.

Manually refund paid transactions

You can issue manual refunds for recent and past transactions using the Refund app. The system records manual refunds in the Transactions app.

If you want to refund individual items on an order, or exchange one item for another, use the Orders app instead.

Refund a recent transaction

You can manually refund part or all of the transaction amount. You'll need a payment card from the customer.

1. On your Clover device, open the Refund app.
2. Enter a refund amount.
3. Tap **Issue Refund** and confirm.
4. If you've enabled prompting for invoice numbers (or your custom identifier), enter an identification number, then tap **Continue**.
5. Swipe the customer's payment card, insert a chip card, tap for contactless payment, or manually enter the card number.

If the refunded transaction includes tips, the tips will also be refunded.

Refund a past transaction

1. On your Clover device, open the Refund app.
2. Tap **Look Up Past Payment**.
3. Tap the transaction you want to refund.
4. Tap **Refund**.
5. Tap **Refund** in the dialog box.
6. Tap where to apply the refund.

Record tips on transactions

If you want to add tips to a transaction, make sure that your merchant account has permission to adjust tips. You can't add tips to debit transactions, EMV transactions, or transactions that have been batched or closed out.

1. On your Clover device, open the Transactions app.
2. Select the transaction.
- To add a tip, tap **Add Tip.**
- To adjust a tip, tap **Edit**.
3. Enter the tip amount using the keypad.
4. Tap **Done**.
5. (Optional) If you've entered an unusually high or low tip, tap **Confirm Tip** to confirm the tip amount.

Automatically set tips to zero

If you have one or more transactions with unentered tips, you can automatically set tips to zero for these transactions.

1. On your Clover device, open the Tips app.
2. Tap **Autofill $0.00 tips**.
3. Tap **OK** in the dialog box to confirm.

If you set your Clover device to accept tips on the tablet screen, you'll see the tips in the Tips app, but you can't adjust them.

If you set your Clover device to accept tips on printed receipts, you can enter the tip amount by selecting the transaction in the Tips app.

Choose where customers enter a tip

You can choose where customers enter a tip. You can set this option on a Clover device.

- **On a printed receipt**. Customers enter the tip when they sign the printed receipt (recommended if you don't use a customers-facing device).

- **On a device screen**. Customers can enter tips on your device screen when they sign for their purchase.

If a customer pays with cash, the Clover device will not ask for a tip.

Set a tip entry location

1. Open the **Setup** app.
2. Select **Tips > Tip entry location**.
3. Select **On tablet screen** or **On printed receipt**.
4. From the dropdown menu, select which devices to apply this option to. You can choose all devices or a single device.
5. Tap **Save.**

Read a Full Sales report

View the Full Sales report to see your most important numbers during a selected reporting period. An explanation of each part of the full Sales Overview report is provided

1. From the Web Dashboard, select **Reporting** > **Sales Overview.**
2. In the report window, select **Full Report** at the right.
3. Open the report.
- If the report covers less than 3 months, the report opens automatically when you select a time frame and apply filters.
- If the report covers more than 3 months, you submitted a report request. When you receive the email that it's ready, either click the link in the confirmation email or log in to your Clover account and select **Reporting** > **Requested Reports** to see available and pending reports; then select the desired report.
4. (Optional) Click the left and right arrows above the report to view and compare previous time periods of the same duration.

View Sales

- Start with the gross sales amount.

- Subtract amounts for discounts, refunds, and exchanges to get the net sales amount.

- Add amounts for non-revenue items, gift card activations, taxes and fees, tips, service charges.

- This gives you the amount collected. If there were no partially paid orders, you're finished. If there are outstanding partially paid orders, you'll see a message and need to consider unpaid balances, which aren't included in the amount collected. Select the amount shown under **Unpaid Balance** for details about partially paid orders

- (Optional) Click **Details** at the lower right of the section to open a comprehensive

    Sales Report.

View Tender Types

Scroll to Tender types to view:

- A comparison of tender type totals to see which payment method was used most often.

- Reconciliation: The total amount collected for all tenders should match Amount Collected on the sales summary.

- (Optional) Click **Details** at the lower right of the section for a comprehensive Sales by Tender and Card Type report.

View Revenue Classes

Scroll to **Revenue Classes** to view:

- General sales numbers for each revenue class.

- The revenue class percentage of the net, available in the **% Net Sales** column.

- (Optional) Click **Details** at the lower right of the section to open a comprehensive Revenue Item Sales report.

- Want to set up a revenue class? Go to the Inventory app, create a label for the new revenue class, and then assign the label to each item in the revenue class. After you do that, this report will show you how that revenue class is performing.

View Card Types

Scroll to **Card Types** to view:

- Totals for each card type and the amount collected.

- Funds for Rapid Deposit (where this feature is available).

- (Optional) Add a column to show tips collected for each card type. At the right, check the box to **Show Tips Breakdown** to add the tips column here and to the Sales Overview report on your Clover devices.

- (Optional) Click **Details** at the lower right of the section to open a comprehensive

  Sales by Tender and Card Type report.

View Cash Deposits

Scroll to **Cash Deposit** to view:

- Total cash sales.

- (Optional) Click **Details** at the lower right of the section to open a comprehensive Cash Log report.

View Cash Adjustments

Scroll to **Cash Adjustments** to view:

- Cash adjustments made during a reporting period; typically done at the end of a shift or the end of the day.

- (Optional) Click **Details** at the lower right of the section to open a comprehensive Cash Log report.

To view a report that has the same information displayed in trends, see Read a Sales Trends report.

Understand key parts of a Sales report

Sales reports use accounting formulas to calculate the numbers you see. You can read the formulas to better understand how the reports work for your business.

Actual Taxes and Fees Collected

This number appears in your report when your reporting time period includes partially paid orders. The number shows the proportional amount of taxes and fees paid in all payments covered in the report.

The report adds a link to see partially paid order details. Order details include the order ID, the transaction date and time, and collected taxes on any payments received so far. Additional details include the unpaid balance (the portion remaining to be paid), and the employee making the sale.

Amount Collected

This number tells you the final sales amount you took in, including taxes, tips, service charges, non-revenue amounts, and gift card activations & loads.

Formula: Amount Collected = Net sales + Taxes + Tips + Service Charges + Gift Card Activations and Loads.

If your business has any orders during this reporting period that are only partially paid, the reported amount collected will be less than the reported gross sales. Why? Because the gross sales number includes the expected final totals for any partially paid orders.

The report adds a link so you can drill down to details. Order details include the order ID, the transaction date and time, and collected taxes on any payments received so far. Additional details include the unpaid balance (the portion remaining to be paid), and the employee making the sale. In the Payments report, you can find the same number in the Tender Types section under Net Total.

Discounts

This number tells you the total amount of discounts applied to orders and/or individual items. The reported amount doesn't include refunded discounts or discounts on non-revenue items. This entry is new with the Sales Report. The Payments Report doesn't list discount numbers.

Exchanges

This number tells you the total amount given out as a result of any exchanges customers made during this reporting period.

Gift Card Activations

This number tells you the total amount of gift card loads, after refunds. When a customer purchases a gift card, your staff loads it by accepting the specified amount of money from the customer. The person receiving the card redeems the amount by shopping at your business. If there are any refunds, the report shows their amounts as negative numbers. The reported total here doesn't include complimentary gift cards. The Payments report lists this number under Gift Card Activation and Load Revenue.

Gross Sales

This number tells you the total amount received for all item sales, including item modifiers for which you charge extra. For example, if you run a restaurant, you might use modifiers to help servers create orders with variations, such as extra toppings on pizzas. You'll charge for the extra toppings. That amount gets included in gross sales for this report. The gross sales number is the subtotal before subtracting discounts and refunds. It doesn't include amounts for tips, taxes, service charges, and non-revenue items. The formula is new with the Sales Report.

Net Sales

This number tells you the item sales amount that remains after you subtract discounts and refunds. The amount doesn't include amounts for tips, taxes, service charges, or non-revenue item sales.
Example: Net sales = Gross Sale - Discounts - Refunds
If there were no manual refunds during the reporting period, you can find this number in the Items Report under Item Revenue Total.

Non-revenue Items

This number tells you the total amount you received for non-revenue items sold, after discounts and refunds. The amount doesn't include amounts for gift cards, tips, taxes, and service charges. The formula is new with the new Sales Report.

Partial Orders

This number shows how many orders customers have started but have not given you full payment for. An example is a retail shop layaway order for merchandise worth $115.83 with three payments due of $38.61 each. The Sales Report lists this order as partially paid for the first and second payments of 38.61 each. It also lists the remaining unpaid balance you can expect to receive. When the customer finishes paying for the layaway order, the report stops listing it under Partial Orders and moves the information to Orders. If any of these partially paid orders were refunded (either fully or partially), those amounts are not included here. This entry is new with the new Sales Report.

Orders

This number tells you how many fully paid orders you had. (It does not include partially paid, refunded, or partially refunded orders.) This entry is new with the new Sales Report.

Refunds

This number tells you the total amount of refunds, including manual refunds, that were applied against orders and/or individual items. The amount doesn't include gift card or non-revenue item refunds, refunded tips, or voided payments. This formula is new with the new Sales Report.

Service Charges

This number tells you the total amount of service charges after refunds. The amount does not include tips. For partially paid orders, the report shows the full service charge liability for the sale. The formula is new with the new Sales Report. If you have no partially paid orders, this amount will match the Service Charge column total in the Payments report.

Taxes & Fees

This number tells you the total amount (full tax liability) of taxes and flat fees collected on all items (revenue and non-revenue), after subtracting refunds. If this reporting period has partially paid orders, you'll see an entry for Actual Taxes and Fees Collected, which covers taxes and fees proportional to the payment collected. This formula is new with the new Sales Report. If you have no partially paid orders, this amount will match the Taxes column total in the Payments report.

Tips

This number tells you the amount of tips paid, minus any tips refunded. The value is also known as Net Tips.

Formula: Net Tips = Tips Paid - Tips Refunded.

This number does not include service charges or other fees. The Payments report lists this amount in the Payments Summary section under Net Tips.

Unpaid Balance

This number lists the sum of unpaid balances for Partially Paid orders. The Taxes and Fees listing in the report covers all taxes and fees for the complete order. That amount will be your tax liability, even if the order is only partially paid so far. For partially paid orders, the Actual Taxes Collected listing tells you how much tax has been collected, including unpaid taxes (which will be proportional to the amount paid).

Formula: Unpaid balance = order total - (amount collected - tips).

From the amount collected, subtract tips, and then subtract that remainder from the order total.