## Employees

**Step 1:** Open "Employees" app
**Step 2:** To **add employee** tap on the green + (bottom right) > input employee name, set appropriate role, create a passcode (6 digits) and or set up fingerprint login authorization.
**Step 3:** Tap **"Add fingerprint"** and place index finger on the sensor (top right corner of the device) and follow clover instructions
Step 4: Tap "Save" to store employee info in device

### Employee permissions
**Step 1:** In employee app select **"Permissions"** tab

## Transactions

**Step 1:** Open "Transactions" app
**Step 2:** Displays all transactions in order showing transactions by time, transaction #, amount, payment method and employee who processed transaction.
**Step 3:** Ability to search for a transaction by device, employee, tender, and transaction type
**Step 4: Search bar in top right corner** that allows to search by "trans # / id"
**Step 5**: If conducting a refund, tap the specific transaction, there will be an option to refund the $

## Reporting

**Step 1:** Open "Reporting" app
**Step 2:** Displays income breakdown for the current date
**Step 3:** Tap the "calendar icon" on top right corner to check previous reports for previous days or a custom time period
**Step 4:** "Custom time period" – search for transactions on a specific date & time.
- o   Any transactions completed after 12 am will be included in the next day's batch.
**Step 5:** Tap "printer icon" on the top right corner to print out a copy

## Closeout

**Step 1:** Tap "Closeout" app
**Step 2:** Displays current and history of batch's – includes the batch time, status, ID, count, and total $
**Step 3:** Customizing the Closeout app: Tap the top left corner > tap settings > enable or disable the following when closing out:
1. Pending offline transactions
2. Auto-print totals report
3. Auto-email totals report

## Tips

**Step 1:** Open "Tips" app
**Step 2:** Displays time, location, transaction number, tender, transaction amount, tip amount, total amount.
**Step 3:** In order to input a new tip > tap the transaction you would like to add a tip to > enter the tip amount > tap done
**Step 3:** Automatically synchs tip $ into the "Reporting" app
**Step 4:** "Autofill" top right corner

## Setup

**Step 1:** Tap "Setup" app
**Step 2:** Payments tab –customize:
1. **Tenders accepted –** add & select accepted payment methods (i.e. gift cards)
2. **Pin entry option –** "Do not prompt for PIN" – most transactions will run as a credit or "Prompt for PIN"
3. **Signature settings –** Require signature on screen or receipt

## Setup

**Step 1:** Tap "Setup" app
**Step 2:** Ability to fully customize "Order Receipts" and "Payment Receipts"
**Step 4:** Tips tab – customize:
1. **Ask for tip –** enable or disable
2. Tip entry location – on tablet or receipt
3. **Tip suggestions –** preset tip %s with tip label
4. **Tip calculation –** include in tax calculation or no

## Help

**Step 1:** Clover is available 24/7 for customer support assistance
**Step 2:** Clover contact info appears on top right corner of the main screen of clover device > tap call me > select reason for support > tap call me and your request will be put into a queue and clover will call the number registered with the account

## Clover Dashboard

**Step 1:** Reach the clover dashboard online https://www.clover.com/home/login > put in email and password
**Step 2:** Here is where you have access to your clover online
- Same functions as the clover device however you have a greater ability to edit settings within apps available on the dashboard.
**Step 3:** Certain changes must be applied on the dashboard

## Inventory

### Add Menu Item

**Step 1:** Tap "Inventory" app
**Step 2:** Tap on "Add Item"
**Step 3:** Fully customize the item with a name, price, category, modifier, and label

### Remove or Edit item

**Step 1:** Tap "Inventory" app
**Step 2:** Select pencil icon on top right
**Step 3:** Select items
**Step 4:** Edit or delete them

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## Inventory

### Adding Modifier

**Step 1:** Open up "Inventory" app
**Step 2:** Tap "Modifiers" > Name the group > tap the blue + symbol on bottom left to add modifiers to the group
**Step 3:** Tap "Save"

### Link to a meal

**Step 2:** Tap "Categories" > select the specific item that requires a modification
**Step 3:** Tap "Modifiers" and select the appropriate modification" Tap save 2x

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## Customers

### Adding Customers

**Step 1:** Tap on "Customers" app
**Step 2:** Click on the green + symbol on the bottom right
**Step 3:** Plug in customer's name, phone, and email
**Step 4:** Track customer visits, spending, and rewards
**Step 5:** Now able to begin transactions for regulars in the customer app

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## Register - Android

### Splitting a bill

**Step 1: O**pen up the "Register" app
**Step 2:** On payment screen there are 3 options
  1. Pay full amount
  2. Split custom amount
     a. Split bill by the # of people paying the bill
  3. Split by items
     a. Select the specific items being paid for
**Step 3:** Process multiple payments to complete transaction

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## Promos

Basic – free     Plus - $99/month

### How to setup a promotion

**Step 1:** Tap "customize your offer"
**Step 2:** Customize your specific promo
**Step 3:** Tap continue and send it to customers phones (10 cents per audience member with basic), print it on receipts, post on twitter and or Facebook

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## Rewards

Basic – free          Plus - $99/month

### Set up a reward program

**Step 1:** Setup 1 rewards program on "rewards" app (app best for restaurants with repeat customers)
**Step 2:** Upon customer payment, they will inform you they are using Perka. (They earn x amount of points for spending x amount of $)
**Step 3:** Tap Perka under payment in order to track customer rewards

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## Tables - Android

### How to setup & claim a table

**Step 1:** Open "Tables" app
**Step 2:** Tap "Manage Tables"
**Step 3:** Tap "add table" & select seat capacity table number. Next tap save
**Step 4:** tap on "Your Tables"
**Step 5:** Tap "Claim/Unclaim Tables" to select tables you are claiming or unclaim them for another employee
**Step 6:** Be sure to enable "Tables" app in employee permissions

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## Printers

**Step 1:** Tap on "Printers" app
**Step 2:** To add printer tap on green + symbol on the bottom right corner > Select "Receipt" or "Order" printer > clover will automatically connect
**Step 3:** Make sure items from inventory are labeled to "Order Printer" so those items are enabled to print in the kitchen printer

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## More Tools

### Downloading Apps

**Step 1:** Tap on "More Tools"
**Step 2:** Browse apps or search for specific app on top right corner
**Step 3:** For assistance with all 3rd party apps, tap on the app, scroll down, and their contact info is provided