Clover Device Guide

Clover Reminders

When using a Clover device, your transactions will **not** show up in the transactions report on the Cardpointe platform until the following afternoon. They will **not** post immediately into the report.

Every time a payment is made on the Clover device, it is imperative that it is posted into the patient record immediately. The names will not be stored on the Clover device.

Clover End of Day Process

To Print End of Day Report
- On your Clover device, go to the Reporting app
- Select the desired date
- Tap printer icon in the top right corner
- This will print out your Totals Report for all of your Clover device transactions for the selected date

To Set Up Automatic Email or Printed Reports
- On your Clover device, go to the Closeout app
- Tap the three gray lines on the top left
- Tap Settings
- Check the box to select Auto-Print and/or Auto-Email
- This will automatically email or print your Totals Report for all of your Clover device transactions each day

Cardpointe End of Day
- Go to Cardpointe platform
- Go to Reporting tab, click on transactions
- Click on Date filter, change to current day
- Look at the Total Amount (for the selected date)
- This will give you the total amount for all of your Scheduled Payments (Billing Plans), Hosted Payment Page payments (online payments), and any payments taken on the

Virtual Terminal. These are separate from your Clover payments taken in the office on your device.

Best Practices

For obtaining Total End of Day amount
- View the end of day number on the Totals Report on the Clover device (see above instructions)
- View the end of day number on the Transactions Report on the Cardpointe platform (see above instructions)
- Add these two amounts together and ensure that they match your end of day number on your ledger in your practice management software.

To reconcile your Bank Deposits (next day)
- View the end of day number on the Totals Report on the Clover device (see above instructions)
- View the end of day number on the Transactions Report on the Cardpointe platform (see above instructions)
- Add these two amounts together and ensure that they match the amount deposited into your bank account. Check the Funding Report on the Cardpointe platform by going to the Reporting tab. Then go to the Funding tab and select the correct date.

FAQ's

How do I add employees?
Go to the Employees app and tap the green plus button.

How do I change the sleep time? - My Clover screen keeps going black.
Go to the Settings app, tap Display, tap Sleep, then you can change the default time.

How do I make the font on my Clover device bigger?
Go to the Settings app, tap Display, tap Font, then you can change the font to a larger size.

How do I disable the Wireless SIM - Why am I being charged $15/month by Clover?
Go to the Wireless Manager app, tap disable. This will turn off your Wireless SIM and you will no longer be charged $15/month from Clover. If your internet goes down in the future and you need to use the Wireless SIM, you can always go back and enable it later on.

How do I add a button for when patients pay with cash?
Go to Setup app, tap Payments, tap Tenders Accepted, check the box next to Cash.

How do I turn off the passcode?
Go to Employees app, tap the three gray lines on the top left corner, tap Settings, toggle on Quick Access. As a reminder, when logged in as an employee the Refund app, Closeout app, Reporting app and Wireless Manager app will not be visible. You will need to log in as an Admin to view these apps.

How can I change employee permissions?
Go to Employees app, tap the three gray lines on the top left corner, tap Permissions, tap the pencil icon on the top right corner, change the default roles to Employee or Manager. If you want to edit additional permissions, please visit the Clover Dashboard on your computer.

How do I change the PIN debit entry if I don't want patients touching the device screen?
Go to Setup app, tap Payments, tap PIN Entry, tap "Do not prompt for PIN", then tap Save.

How do I change the signature settings if I don't want patients touching the device screen?
Go to Setup app, tap Payments, scroll down to Signature Settings, tap Signature Requirements, and then choose your preferred signature option.

How do I manually key payments when patients call in over the phone?
Go to the Phone Sale app and manually enter in the card information and the dollar amount. Also, to reduce fees, include the street address and zip code information.