

# How To

## Quick Reference Guide



### Clover Flex

#### Need Your Statement?

Log in to your merchant portal at:  
<https://www.merchantbackoffice.net>

#### Terminal Messages

**AVS (ADDRESS VERIFICATION SERVICE)** Check if the street address and ZIP code entered match the customer's billing address

**CHIP/CARD SWIPE ERROR** Chip or Magnetic stripe did not read. Insert or Swipe card again or manually key in the cardholder's account number

**COMM ERROR** A communication error has occurred. Check line connections, and call Client Services at 1.800.787.4105

**MANUAL ENTRY NOT ALLOWED** Current transaction will not allow manual entry. Debit cards may not be manually keyed in

**OD (NUMBER) OR RB (NUMBER)** Quit Duplicating or Rejected Batch. Call Client Services at 1.800.787.4105

**RECORD NOT FOUND** Invoice number is not found in terminal batch.

**BATCH CLOSE ERROR** Settlement failed. Call Client Services at 1.800.787.4105

#### How to Process a Credit/Debit Card Transaction

##### From the home screen:

- ❖ Click **Register**,
- ❖ Select items from your inventory to add to the order
- ❖ Select Review order
- ❖ Select Pay at the bottom of the screen.
- ❖ Select your method of payment
- ❖ Select "Charge (\$xx.xx) on Card" if the customer taps, swipes, or dips.

**\*Note:** If using Cash Discount, a blue window will appear before proceeding to Clover payment screen

#### Cash Sale

Same steps as above, except on the device screen, choose the cash payment type.

#### EBT Sale

Same steps as above, except on the device screen, choose the EBT payment type.

#### Void (Only Pre-Batch CREDIT Transactions Can Be Voided)

**\*Note:** You have only 25 minutes to void a transaction on Clover.

##### Option 1: Voiding current transaction

- ❖ At the receipt screen select the 3 dots then "Void Transaction"

##### Option 2: Voiding transaction before batch

- ❖ TAP on the TRANSACTION app and locate the transaction you want to void
- ❖ Tap your transaction and click the option to void

#### Refund (After Settlement/for Debit)

- ❖ TAP on the TRANSACTION app
- ❖ Locate the transaction you want to refund by searching at the top with your "Payment ID"
- ❖ Tap your transaction and click the option to refund

#### To View Batches or Authorizations

To view settled batches, select the Closeout app

You will see a list of closed batches and the current open batch at the top of the list. To view authorizations, open the transactions app to see all unsettled card transactions

## Print Receipt

On the right side of the page are the print receipts options. On the right Menu you will see the words "Done", "Print Receipt" and "More Options". Clicking on More Options provides the choice of emailing or texting the receipt to your customers.

## Connect to Wi-Fi

- ❖ Open the Settings app
- ❖ Choose Network & Internet
- ❖ Select Wi-Fi
- ❖ Choose your network and input password

## Setting Up Your Clover Device

- ❖ Plug the charging brick into the cradle.
- ❖ Connect the power cable to the charging brick and the other end to the power outlet.
- ❖ Place the device in the cradle for charging (at least 30 mins if terminal is not charged).
- ❖ Turn the terminal on by pressing the power button on the right side in the middle of the terminal.
- ❖ Set your language.
- ❖ Set the owners PIN
- ❖ Choose Service Plan

# Thank You

for being a valued  
**customer!**

