



Congratulations  
on the purchase  
of your new  
Clover Flex





# Set Up the Hardware

## What's included



Clover Flex



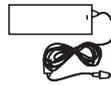
Charging cradle



Receipt paper



Power cord  
(2 for EU)

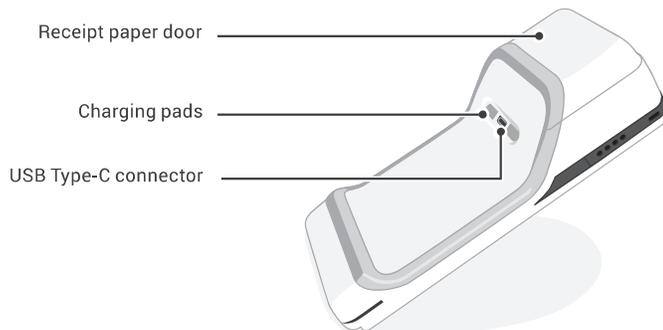
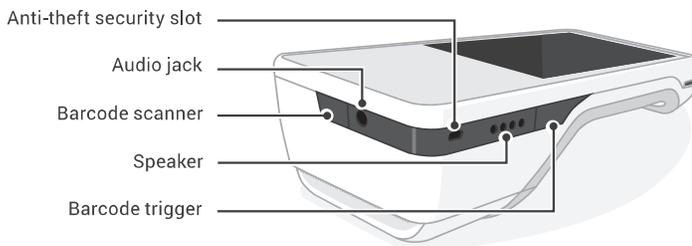
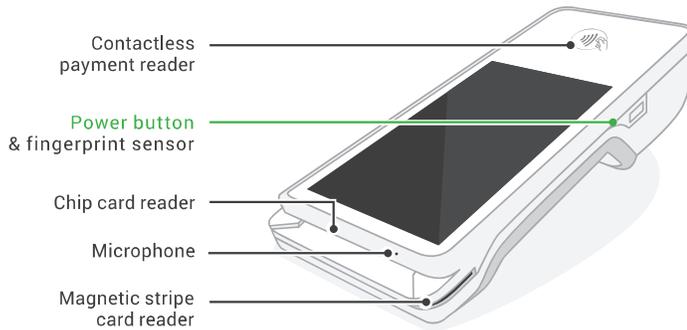


Power brick



Screwdriver

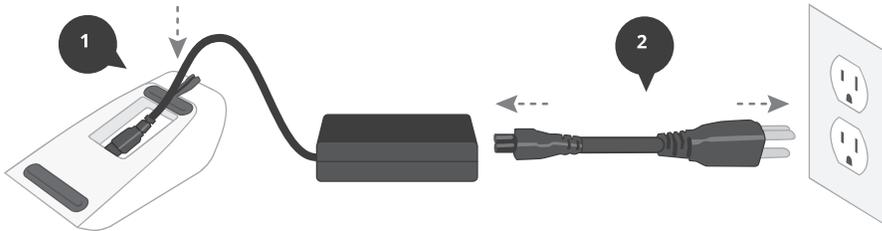
## Clover Flex Features



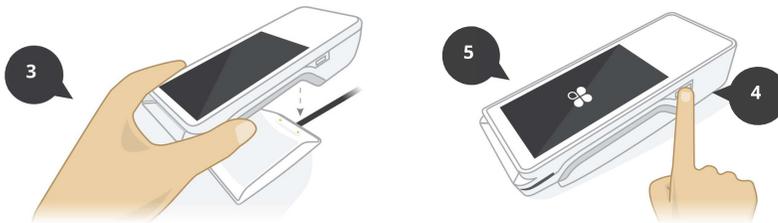
## Set Up the Hardware

### Plug in the cables for your Clover Device

1. Plug the power brick into the charging cradle.
2. Attach the power cord to the power brick and plug the power cord into a power source.



3. Place the device on the charging cradle. A battery icon will appear on the screen.
4. Press and hold the power button until the Clover logo appears on the screen.
5. Clover Flex should now be powered on.



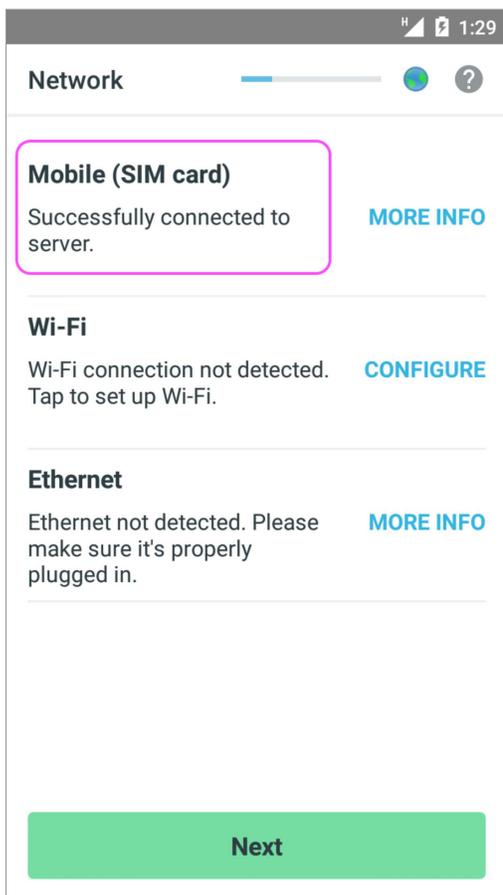
## Connect Clover Flex to a Network

Once your Clover Flex has started, select your primary language for your device.

### Connect Device via 3G

In North America, Clover offers a 3G data plan powered by AT&T. You can disable the plan in the **Wireless Manager** app, which you can access from the **App Market** app after activation.

1. Clover Flex will automatically connect via the 3G network. Please wait about a minute for the SIM card to verify that it's connected to the 3G network. Tap Next when green check mark appears.
2. Tap **Next**.



#### NOTE

If your device is out of 3G connectivity range, you can set up your 3G service after the install using the **Wireless Manager** app. For instructions, go to the section on Using Clover's 3G Data Plan in the Customize Reboot Time & 3G Data section.

#### NOTE

If red X appears when connecting to 3G, tap More Info and then Try Again.

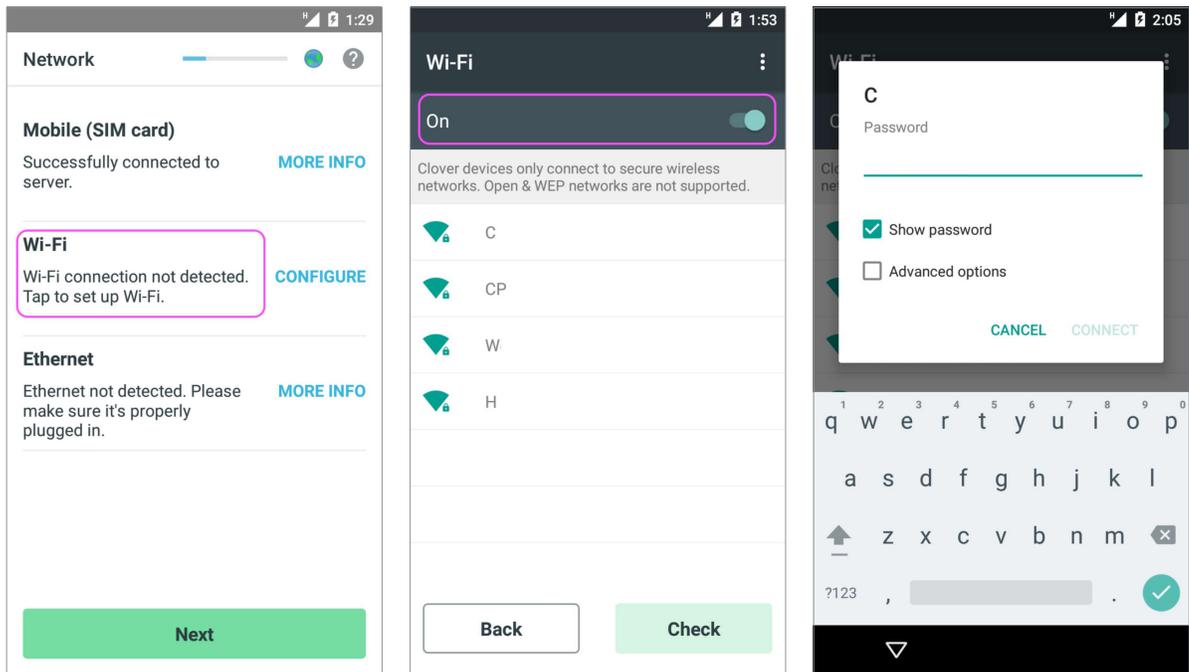
# Connect Clover Flex to a Network

## Connect Device via Wi-Fi

1. On the Network Connection Screen, tap **Wi-Fi**.
2. Tap **On** to set Wi-Fi on (green).
3. Select your wireless network from the list of available wireless networks.
4. Enter in your wireless network password.
5. Tap **Connect**.

### IMPORTANT

High-traffic activity on the same Internet Connection as your Clover Flex, such as streaming music or videos, can disrupt or delay your processing. You should either avoid this activity or ensure that you have sufficient bandwidth to support simultaneous activities.



### NOTE

If you do not see your Wi-Fi network name, you may have a WEP or open access network. Please connect your Clover Flex to a WPA or WPA2 network for PCI compliance reasons.

### NOTE

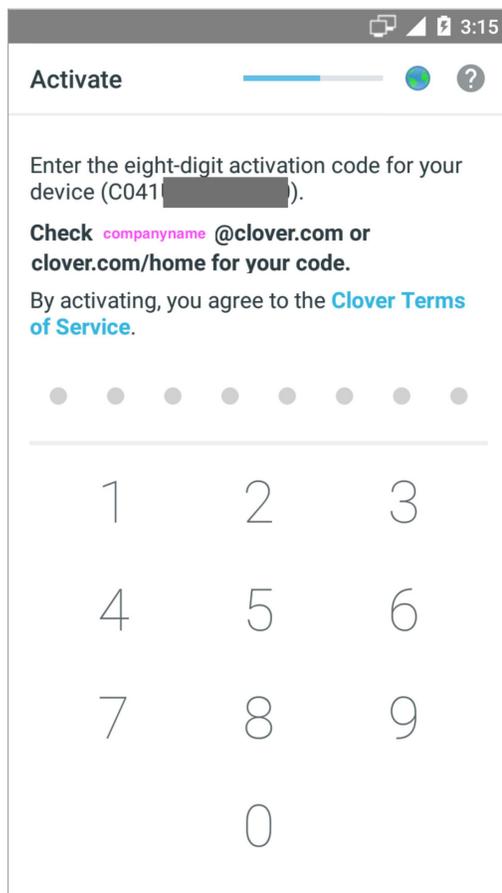
If you enter the incorrect password, you will be prompted to Try Again until you enter the correct password.



# Activate Your Clover Flex

## Locate & enter your activation code

1. Look for emails from Clover Support (app@clover.com) that contain your activation code(s).
  - For your convenience, we will resend an activation code email to you when your device first connects to the Internet. Look for the subject line "Clover Activation Code".
  - If you have already set up your Web Dashboard account on [www.clover.com/home](http://www.clover.com/home), you can log into the Web Dashboard and find the activation code listed at the top.
2. Activation codes are unique and provided for each device.
  - If you ordered multiple devices, you will need to enter the correct activation code per device, based on the device's serial number.
  - The serial number of your device can be found at the top of the activation screen.
3. Locate the activation code for the serial number of the device you wish to activate.
4. Enter the 8-digit activation code using the number pad on the touchscreen.



### NOTE

If you can't find the email, try searching in an All Mail folder or check your spam folder.

### NOTE

Your device may reboot several times during the installation process. This is normal as Clover updates its Operating System, and you will be able to continue setting up your merchant account after it reboots.

### NOTE

If you believe your code is incorrect or you receive an error, please contact Clover Support.

# Setup Admin Account & Install Apps

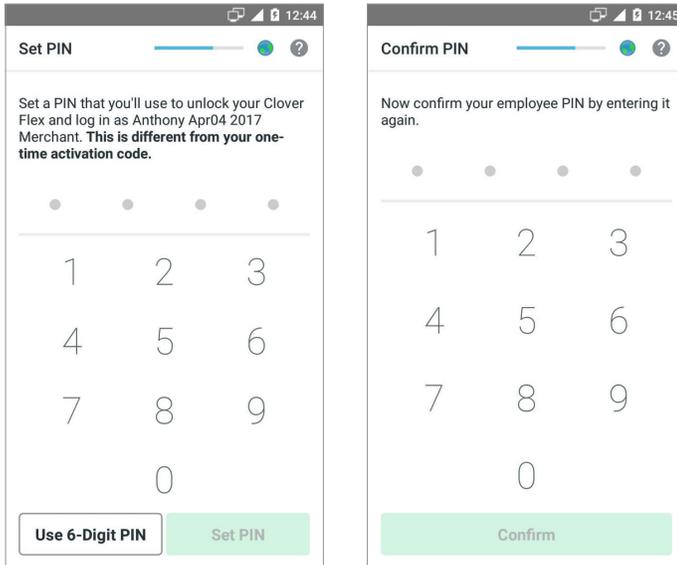
## Set up your Admin Account

If you're activating your first Clover device, you'll be prompted to create an Admin Passcode.

1. Enter a 4 or 6-digit Passcode that you would like to use to access your Clover device(s) as the owner/admin.
2. Re-enter that Passcode to confirm.

### NOTE

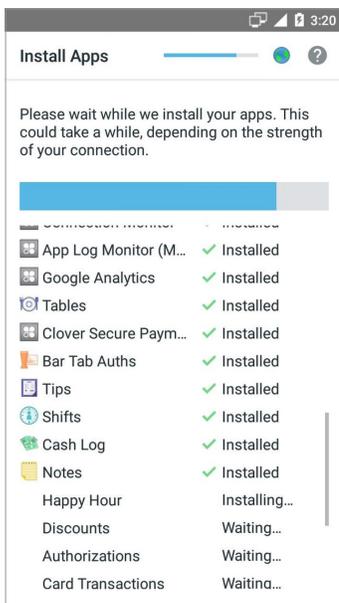
You can change this Passcode in the future in the Employees app.



## Install apps and access the App Market

After entering your activation code, your apps should begin installing. Please wait until the install process is complete.

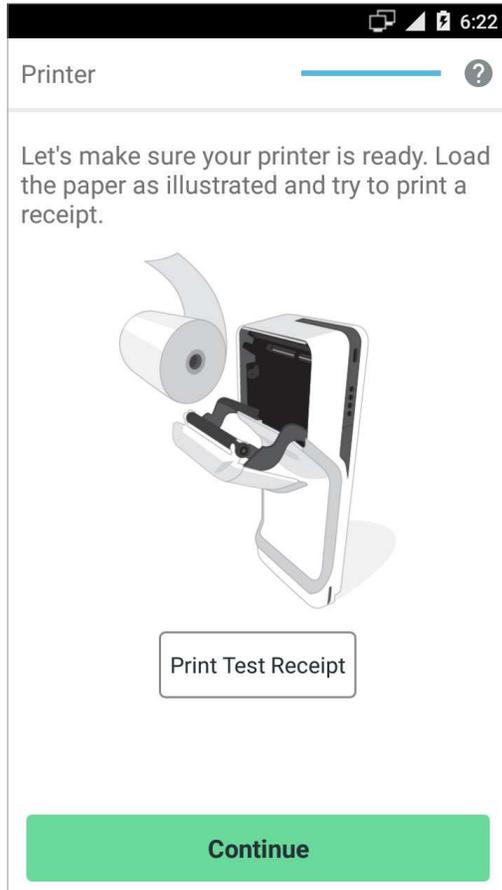
You can customize Clover by installing additional apps in Clover App Market.



## Setup Paper Roll on Flex

### Insert paper roll into printer

To make sure your printer is ready, load the paper into your device and press **Print Test Receipt**.



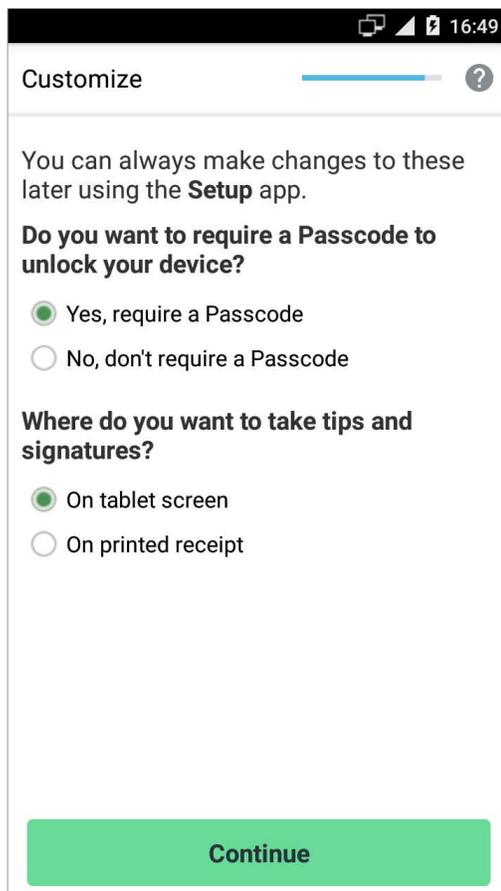
# Customize your device

## Customize your Passcode, tip, and signature settings

You will be customizing your device for the first time. Remember, you can always make changes to these settings in the Setup app.

Customize your device with the following questions:

1. Do you want to require a Passcode to unlock your device?
  - Yes, require a Passcode – We recommend that every employee have a Passcode to unlock your device. It provides added security and more detailed reports.
  - No, don't require a Passcode – We created an option for you not to require a Passcode upon entry. However, we recommend for you to require your employees to enter their Passcode into your Clover Flex.
2. Where do you want to take tips and signatures?
  - On the Clover Flex screen
  - On printed receipt
3. Tap **Continue** to complete customization.



### NOTE

You can change this Passcode in the future in the Employees app.

### NOTE

If you do not see an option for tips, your account is not yet tip enabled. Call Support and request to enable tips.

## Select a Plan

If setting up your Clover device for the first time, you will be prompted to select a plan.

The bank account associated with your merchant processing agreement will be debited monthly. The plan features are described. Select a plan you want by clicking the green **Authorize** button.

### Select Plan

**Payments Plus**

**No per device fee**

**Authorize**

**Service Features:**

- ✓ Basic Payment Acceptance

**Register Lite**

**\$9.95 per device\***

**Authorize**

**Service Features:**

- ✓ All **Payments Plus** Features, plus:
- ✓ Ring up inventory items
- ✓ Track taxes

**RECOMMENDED**

**Register**

**\$29.95 per device\***

**Authorize**

**Service Features:**

- ✓ All **Register Lite** Features, plus:
- ✓ Item modifiers & variants
- ✓ Fire orders to printers
- ✓ Cost reporting

# Change Employee Passcode and Login

## About Employee Passcodes

A Passcode allows you to provide different permission levels to different employees and also track their activities. You may choose to operate without a Passcode, however the Passcode-less login is less secure and does not allow for advanced functionality associated with an owner.

## To Set Up or Change an Employee Passcode

1. Tap **Employees** app on the home screen of your Clover Flex.
2. Tap Employee name.
3. Tap the **Pencil** icon to change Passcode.
4. Type in six-digit Passcode.
5. Tap **Save**.

### NOTE

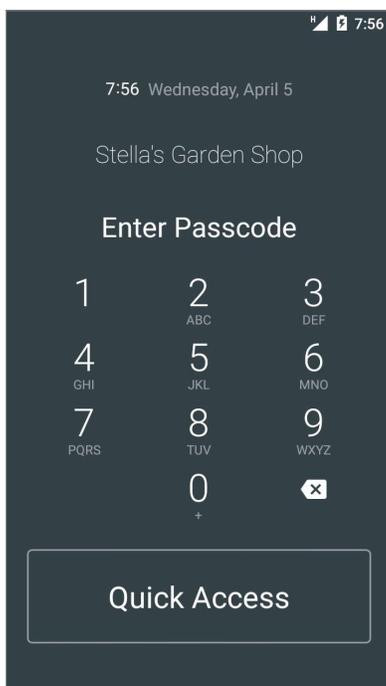
You can change employee Passcode length to either 4 or 6 digits in the Employees app Setup tab in the Web Dashboard.

## To Allow Login Without an Employee Passcode

1. Tap **Employees** app on the homescreen of your Clover Flex.
2. Tap the **Menu** icon at the top left of the screen (three horizontal bars).
3. Tap **Settings**.
4. Select the **Allow unlocking your Clover devices without a Passcode (as "Employee")**.
5. Employees can tap **Quick Access** to log in without adding a Passcode on the home screen.

### NOTE

If logged in without a Passcode, you can access the owner functionality by pressing the power button twice. Then enter your passcode.



# Customize Reboot Time & 3G Data

## Change Reboot Time on Clover Flex

Clover Flex needs to restart once every 24 hours to install any necessary updates for your Clover system. Please select a reboot time that will not be disruptive to your business.

1. Swipe down from the top of the device, twice.
2. Tap **Settings** – the Gear icon at the top right of the screen.
3. Scroll down and tap **About Clover Flex**.
4. Tap **Reboot Time**.
5. Set time by holding down and moving the green dot to set the desired time.
6. Tap **OK**.

## Using Clover's 3G Data Plan *In North America*

In North America, Clover offers a 3G data plan powered by AT&T. You can disable the plan in the Wireless Manager app.

1. Tap **Wireless Manager** app from the home screen of your Clover Flex.
2. Any Clover 3G plan SIM cards will display on the screen.
3. If a SIM is **Enabled**, tap **Disable**.

### NOTE

You may try Clover's AT&T 3G Data plan free for 30 days. After the free trial ends, you will be billed as outlined in the Wireless Manager app's description found in the App Market app.

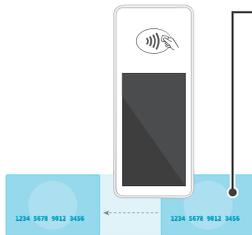
# Taking Transactions on Clover Flex

1. Open the **Sale** or **Register** app.
2. Enter the sale amount in Sale app or select items in Register app.
3. Tap **Charge** in Sale app or **Pay**, then **Charge** on card in the Register app.
4. Insert chip card, swipe magstripe card, or allow customer to “tap” with their contactless payments like Apple Pay or Android Pay.



### Chip Cards

Insert the card with the chip end first. Remove the card when prompted by the device, then follow the on-screen instructions.



### Magnetic Stripe Cards

Swipe the card with the magnetic stripe facing down. You can swipe the card from right to left or left to right.



### Contactless Payments

Tap chip cards with contactless capabilities, and phones and watches with contactless payments (including NFC, Apple Pay and Android Pay) on the contactless symbol.

5. Ask the customer to enter their PIN or sign as necessary.

### NOTE

If verifying signature, the customer will need to sign and return the device to an employee. The employee will need to verify the signature by tapping Verify.