

Unboxing & Setting Up a Clover Machine for a Merchant

1. Unboxing

- a. Carefully unpack the Clover machine box and remove all contents. Set aside the following items for later use: The Clover machine, the power adapter, and any accompanying accessories or documentation.

2. Preparation

- a. Find a suitable location for the Clover machine, ensuring it is close to a power source and within range of a stable internet connection. Clear the area of any obstructions or debris that may hinder the setup process. Ensure the power outlet is functioning correctly by plugging in another device or using a voltage tester if one is available.

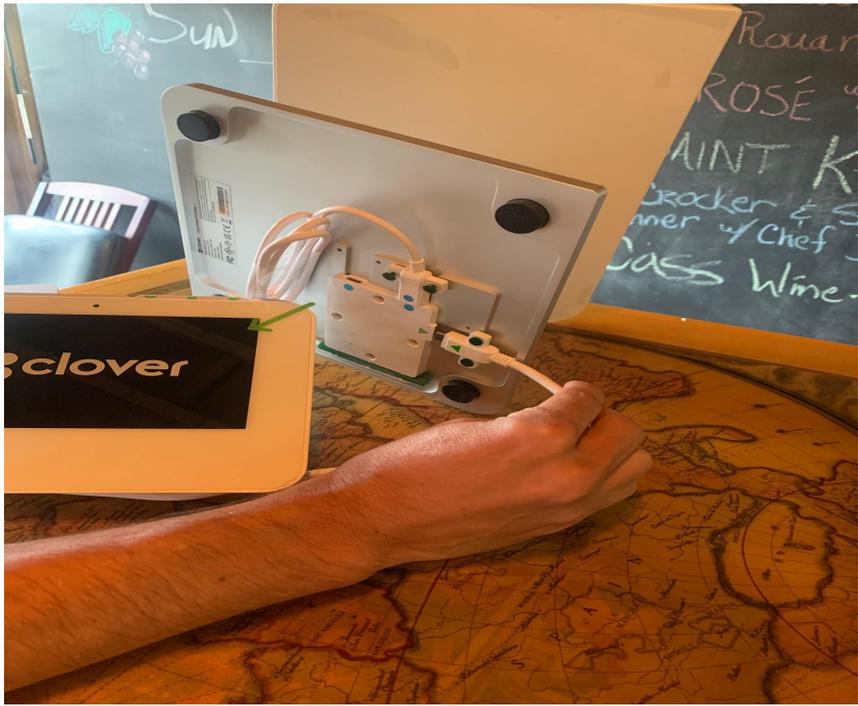
3. Connecting Hardware

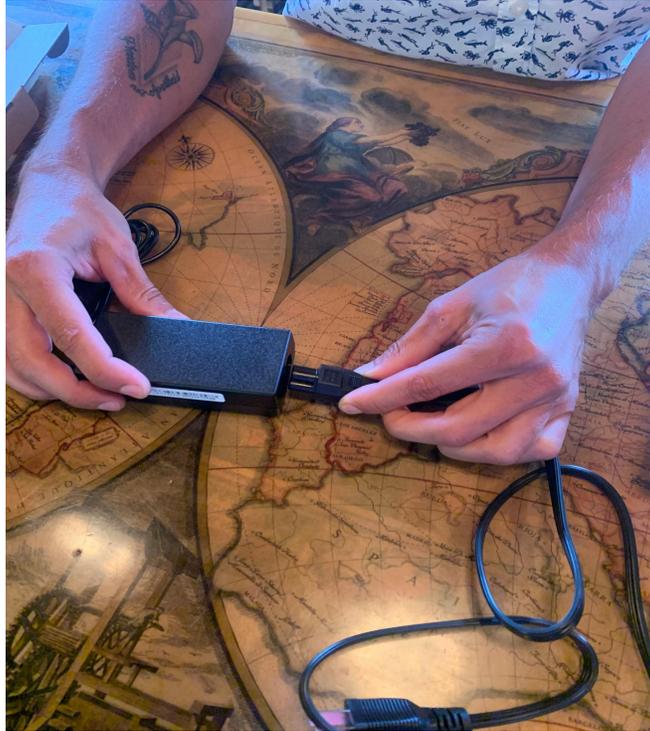
- a. Attach any cables and the power adapter to the Clover machine. The Clover Duo has shape- and color-coordinated labels to assist you in connecting everything correctly. NOTE: Plug the power adapter into a nearby outlet LAST to avoid damaging the terminal.
- b. Connect the Clover machine to the router or modem using an Ethernet cable or Wi-Fi, depending on the available options and your merchant's preference. When the terminal is initially fired up, there will be the option to connect via Ethernet or Wi-Fi. Otherwise, these options can be found in the "settings" menu, which looks like a gear.









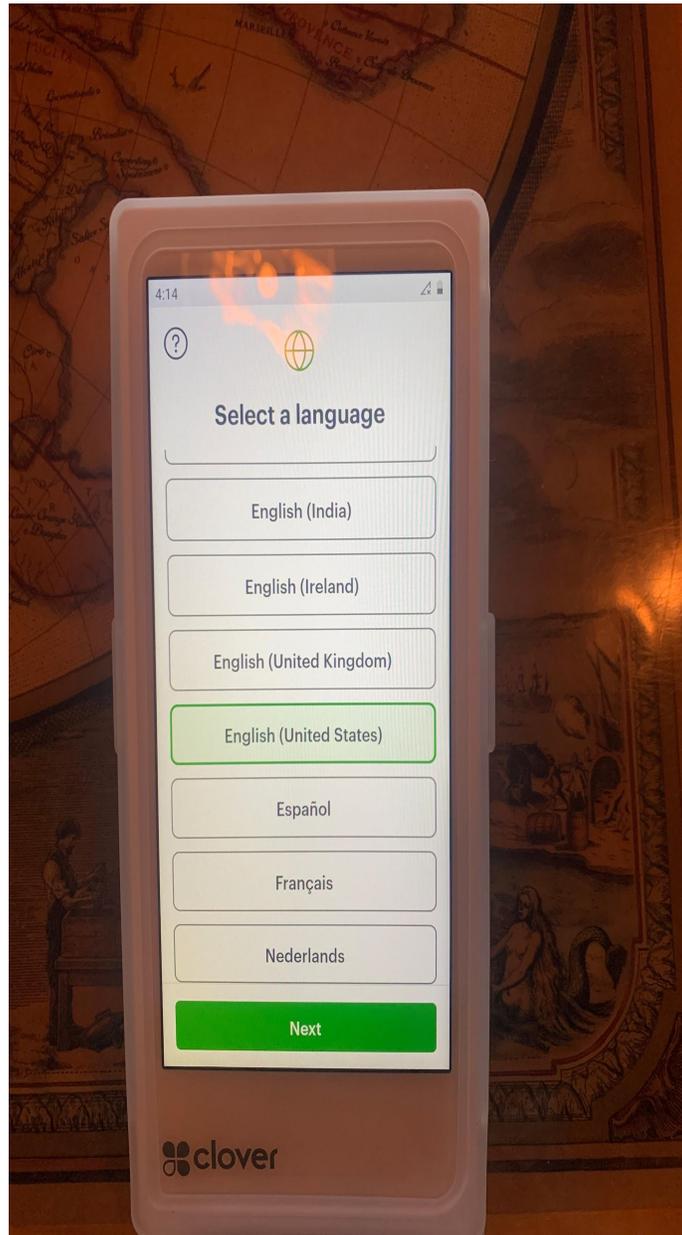


4. Initial Setup

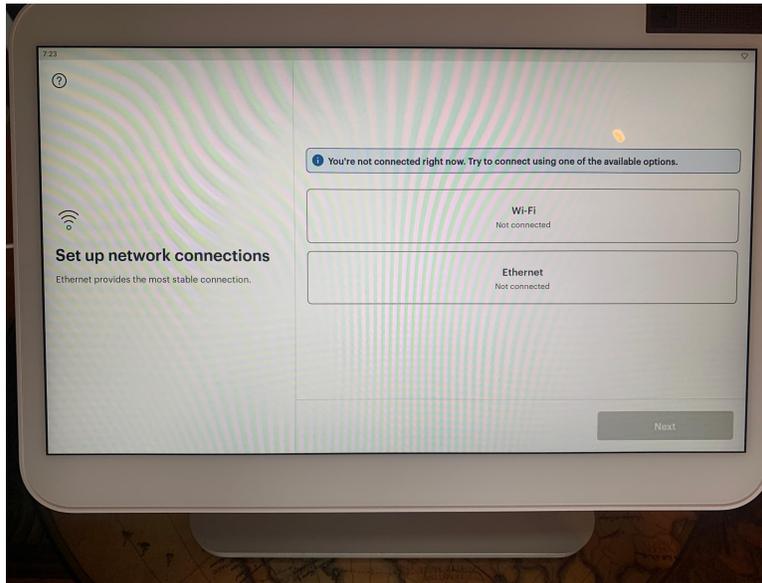
- a. Power on the Clover machine by pressing the power button (if applicable). Clovers should automatically boot up, but if not, the power button can be located for the DUO under the customer-facing screen, for the Flex on the right side, and for the Solo on the bottom right edge of the display.



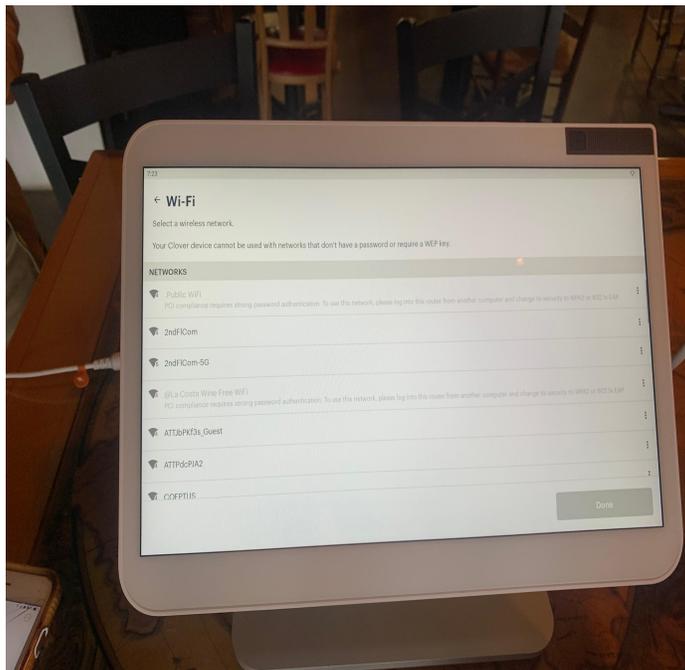
- b. Follow the on-screen instructions to select the appropriate language and region settings.



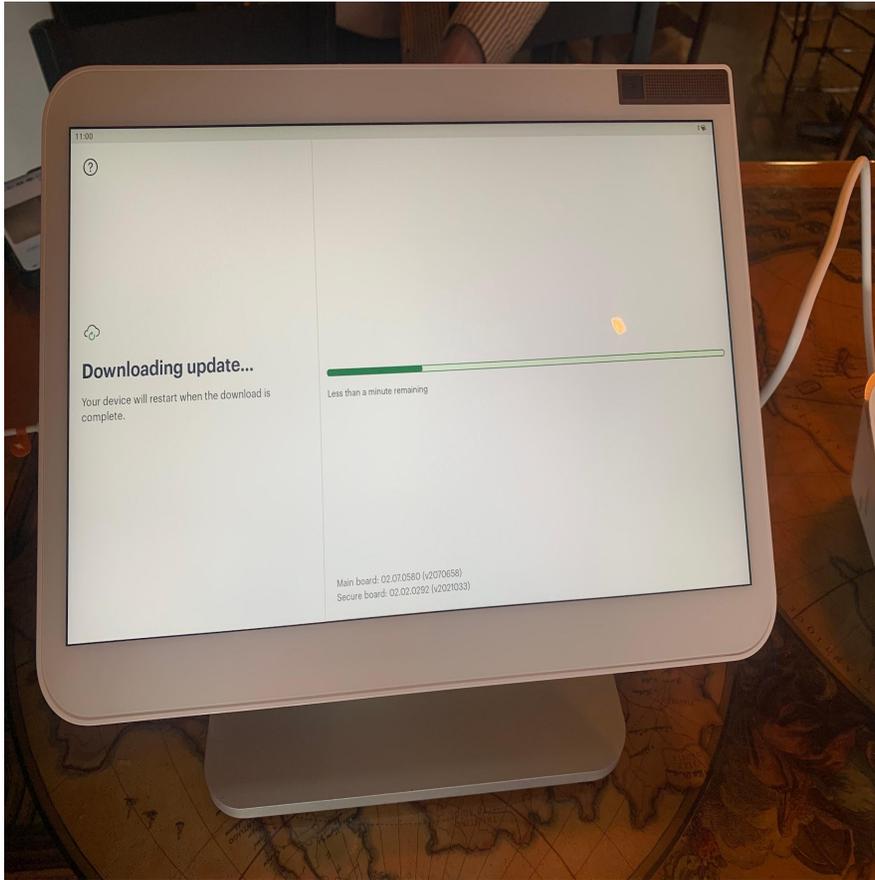
- c. Enter the necessary Wi-Fi network information or configure the Ethernet connection as prompted. Also, there may be a prompt with a checkbox to enable SIM card service with the first month of service free (typically provided by AT&T). Disable this service unless the owner has chosen to use it per your discovery and set-up agreement.



- d. Allow the Clover machine to connect to the network, which may take a few moments.

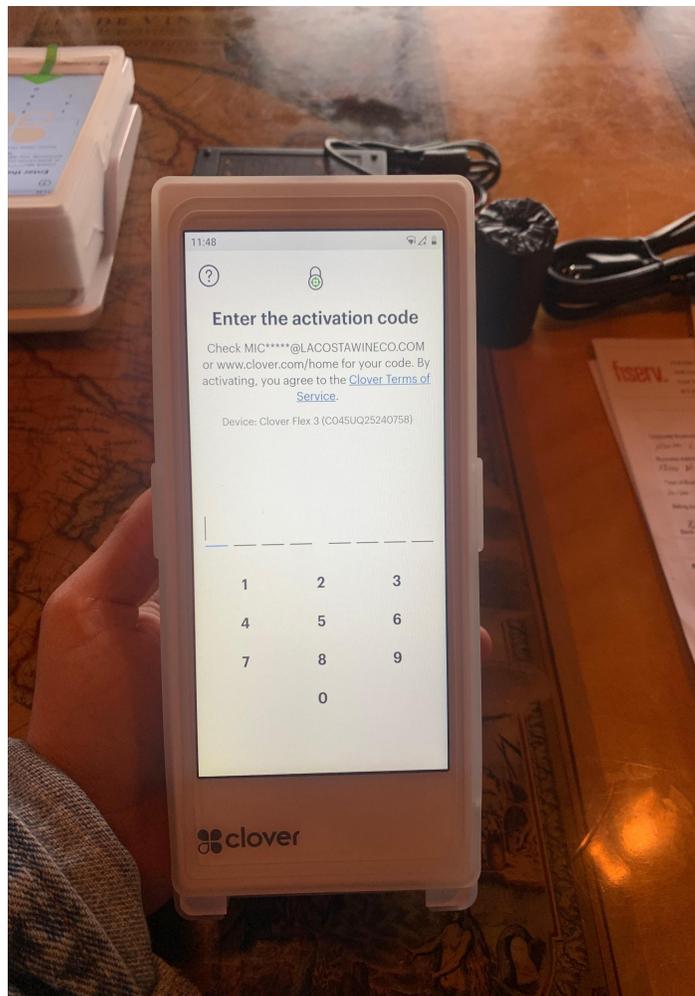


- e. Once connected, the Clover machine may prompt for a software update. Follow the instructions to update if necessary. This shouldn't take longer than 15–20 minutes, as long as you have a good signal. If your signal is bad, it could take up to a few hours.



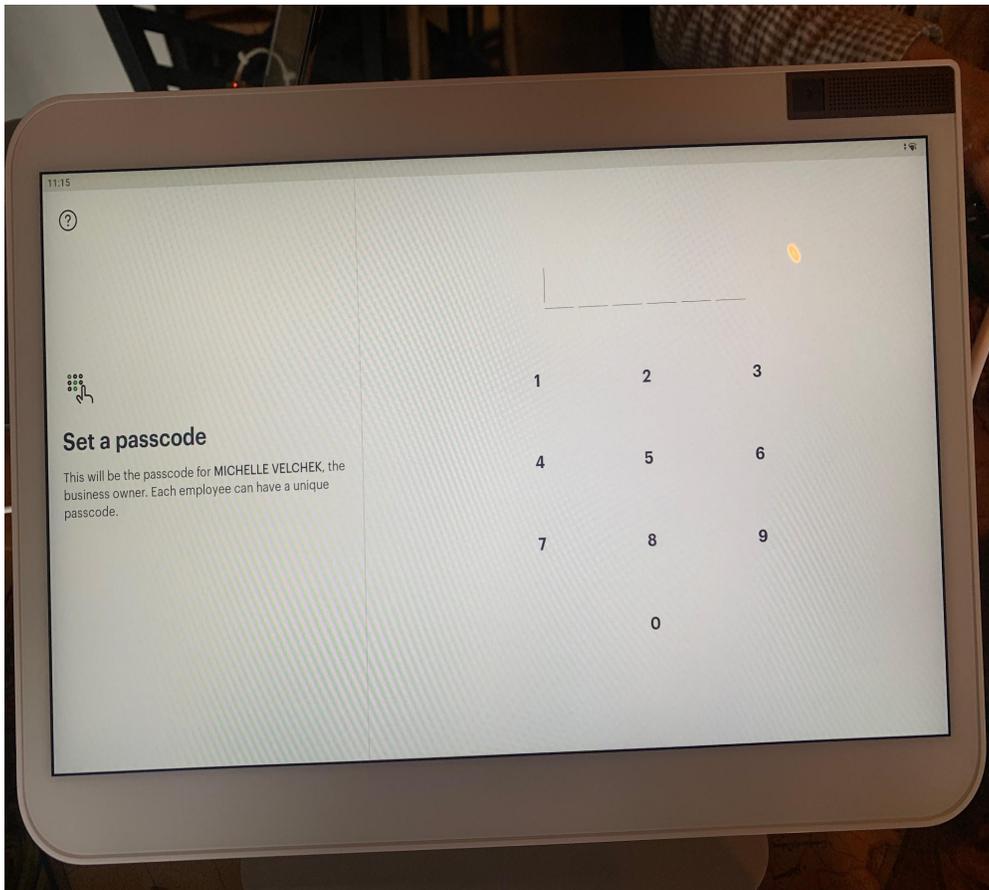
5. Account Activation

- a. If the merchant already has their Clover account set up, sign in using the provided credentials. If the merchant is new to Clover, follow the on-screen instructions to create a new account. They should have received an email from Clover with a sign-up link that was sent when their initial application was submitted.
- b. Provide any additional requested information, such as business details, bank account information, and tax settings, as required for account activation.
- c. Once the merchant's account is activated, enter the merchant activation code. The merchant should have this in their welcome email. If you aren't with the merchant, you will need to retrieve this from them via email or phone.

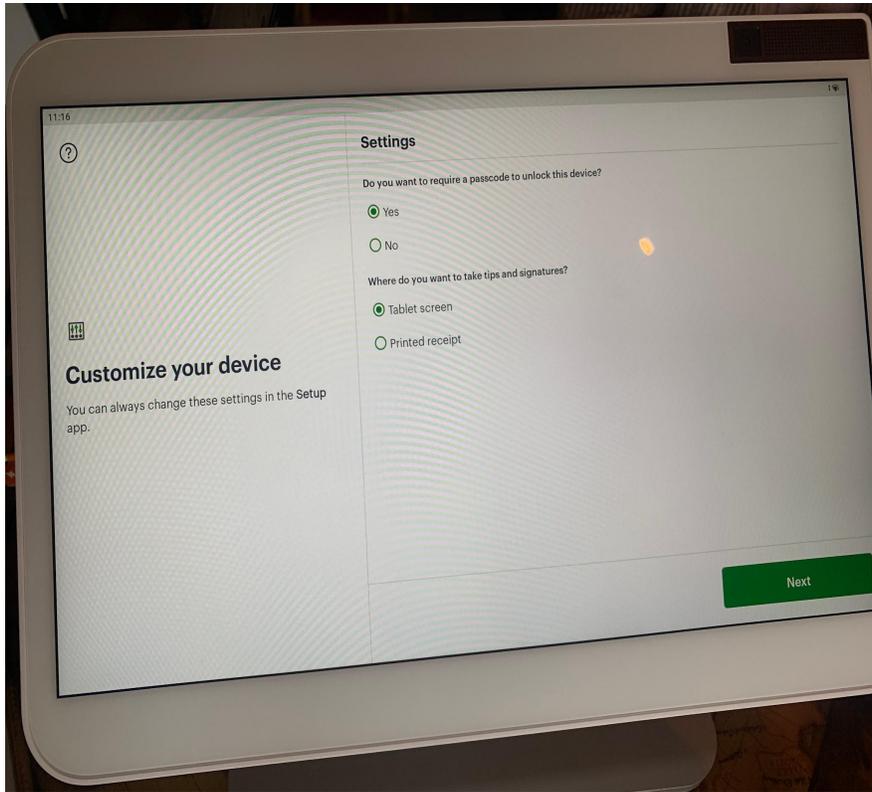


6. Configuration

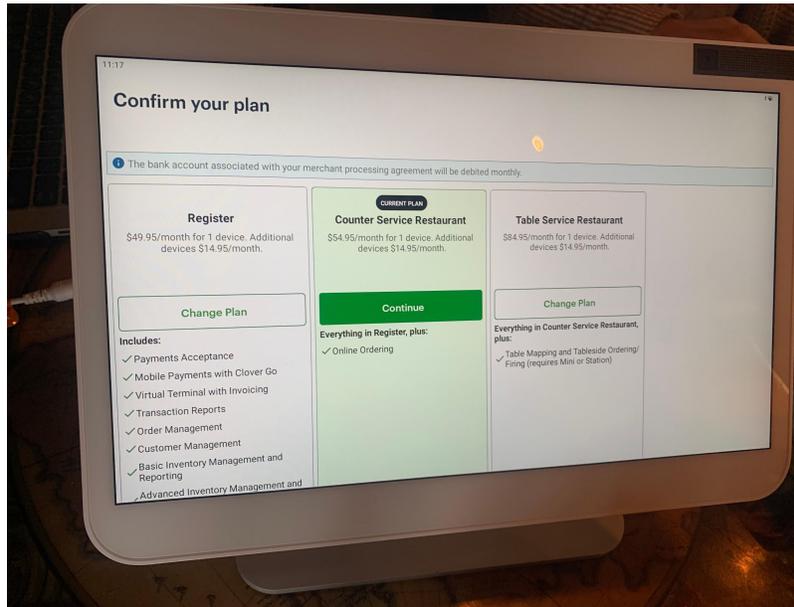
- a. If the merchant is migrating from Clover to Clover, download the existing Clover inventory in CSV format from the old MID. Once complete, upload the CSV file to the new MID.
- b. Create a unique passcode. Ask the merchant what they prefer for this passcode. *Helpful tip: Ask the merchant for permission to add you (the agent) in the employee app as an admin. This will allow you to make any necessary changes on the Clover Dashboard if the merchant calls you and needs assistance.*



- c. The next screen will ask if you want a passcode to unlock the device and where you would like to take tips (on screen or on receipt paper). Answer according to merchant preferences.

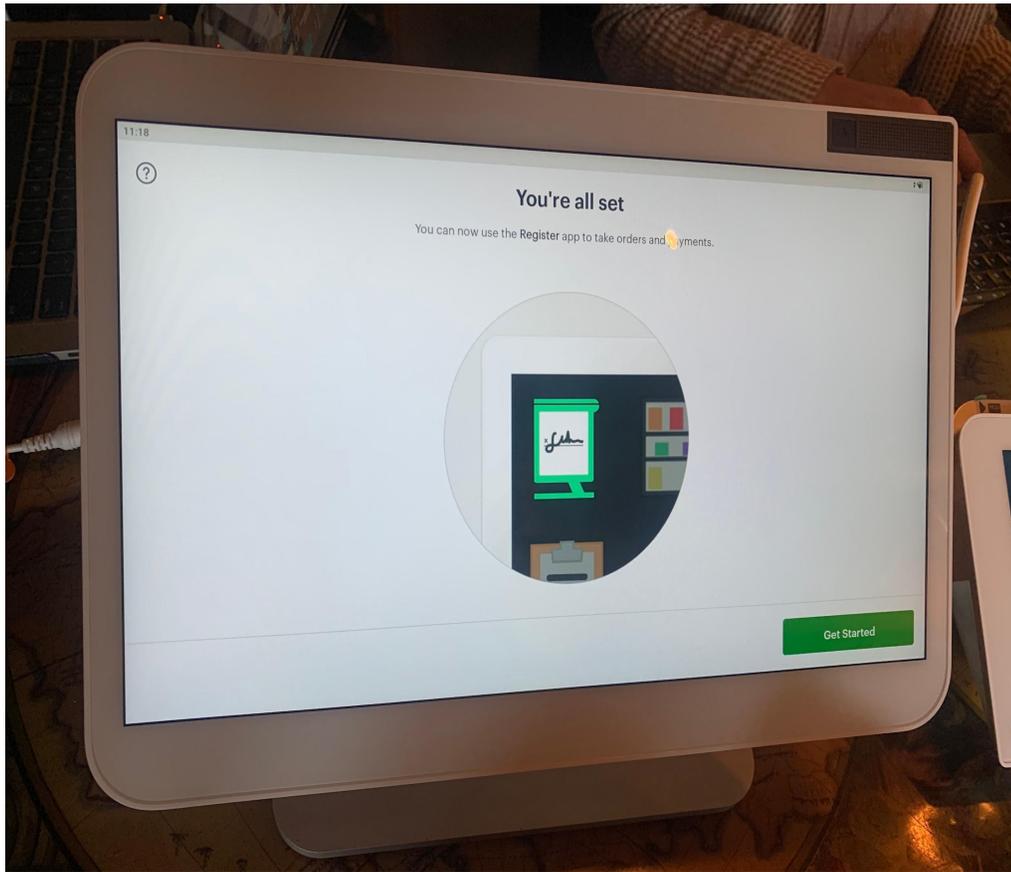


d. Confirm the merchant's plan



- e. Agree to the Clover Billing Agreement, including the Terms of Service, Privacy Policy, and App Market Terms, and click "Authorize."
- f. Check through the menu items in the "Set Up" app. This is where you can customize the settings according to the merchant's preferences, such as receipt options, tipping settings, and tax settings.
- g. Set up inventory items, if applicable, by following the instructions provided in the Clover machine's user interface or refer to the documentation.
- h. Initial adjustments to set up the app and inventory creation can also be completed on the browser or back office platform on Clover.com. You can access this with the merchant's log-in credentials or by having them add you to the employee app as an admin. Be sure they add your email address, so you can log on from a computer for this option.

7. Congrats! The initial set-up is complete!



8. Testing and Training

- a. Perform a test transaction using a test card or a low-value transaction to ensure the Clover machine is functioning properly. Be sure to process a refund or void on any test transactions to keep the reporting accurate.
- b. Be sure to familiarize the merchant with the basic operations of the Clover machine, such as accepting payments, processing refunds, and generating reports.

9. Finalize and Handover

- a. Double-check all settings and configurations to ensure they align with the merchant's requirements, and download any apps requested by the merchant located in the "More Tools" app, which is the Clover app market. —> **HELPFUL TIP:** Check the batch close time on the merchant device. This is important because it determines what time their deposits will go through to their bank on a day to day basis. If batch time needs to be changed, call the Clover support line to adjust. Note that Clover can only change the hour of the batch closing time and not the minutes. For example, 8:13 p.m. can be changed to 10:13 p.m., but not 10:45 p.m.

- b.** Answer any questions the merchant may have and address any concerns.
- c.** Provide the necessary contact information for support and troubleshooting assistance. Be sure to show the merchant the “call me” feature on their terminal that makes a direct call to Clover support from the terminal to the phone number of their choice.
- d.** Confirm that the merchant is satisfied with the setup and ready to begin using the Clover machine for their business.
- e.** If possible, help train employees and schedule enough time to be present during initial live operations to address any questions or adjustments that occur in real time as they learn to use their new POS.

Note: This SOP is a general guideline. Please refer to the specific instructions provided by Clover or consult their support resources for any device-specific details.