Clover Flex – Terminal Operation Manual

Welcome to your Clover Flex device! This manual is designed to help you navigate and operate your terminal with ease. Think of it as your mobile device for business – intuitive, powerful, and easy to use.

Getting Started
- **Power On**: Press the **button on the right** side of the device to switch it on.
- **Unlock**: Enter your device password to access the system.

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1. Processing a Sale
1. Tap the **Sale** tab.
2. The keypad will pop up – **enter the amount**.
3. Choose **Charge** or **Cash**.
4. Complete the payment.

Tap the **triangle icon** to return to the home screen.

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2. Viewing Transactions
1. Tap the **Transactions** tab.
2. The **Transaction Dashboard** will open.

Dashboard Features:
- View transactions by **date, time, amount, and card details**.
- Filter transactions by:
  - **Payment Source** (e.g. device, web)
  - **Employees**
  - **Tenders** (e.g. Credit Card, Debit Card, Cash, Gift Card)
  - **Transaction Types** (Payment, Refund, Manual Refund, Void, Auth)
- **Search bar** to find specific transactions.
- **Help Centre** options:
  - Add/edit employees

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- Manage inventory
- Change employee passcodes
- Tax settings
- Run reports
- Verify a transaction

Press the **triangle icon** to return to the dashboard or main screen.

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3. Managing Customers

1. Tap the **Customers** tab.
2. View existing customer details.
3. Tap the **Add Customer** button to input:
   - Personal Info
   - Company Name
   - Phone
   - Email
   - Address (Street, City, State/Province, Post Code)

Tap the **triangle icon** to return to the home screen.

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4. Cash Log

- Tap the **Cash Log** tab to view:
  - All **cash transactions**, including payments, refunds, drawer additions/removals.

Tap the **triangle icon** to go back to home screen.

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5. Issuing a Refund

1. Tap the **Refund** tab.
2. Enter the **refund amount** via keypad.
3. Tap **Issue Refund**.
4. Choose to refund via:
   - Card (tap/swipe)
   - Manual card entry

Tap the **triangle icon** to return to the home screen.

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6. Inventory Management

1. Tap the **Inventory** tab.
2. The dashboard includes:
   - **Items**
   - **Categories** (e.g. Food, Drink)

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- o **Modifiers** (e.g. Toppings, Sides)

- o **Labels** (e.g. Hot Food, Alcohol – useful for discounts or reporting)

Tools Available:
- **Add Item** or **Add Item with Variants**

- **Search bar** (top right)

- **Bulk Edit** for quick updates

Tap the **triangle icon** to go back to the home screen.

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7. Managing Shifts
1. Tap the **Shifts** tab.

2. View the **Shift Dashboard**:

   - o Clocked-in employees

   - o Clock-out button (bottom right)

   - o Shift filters

   - o Access individual employee shifts

Note: You cannot clock out if there are pending orders on your profile.
Tap the **triangle icon** to return to the home screen.

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8. Managing Orders
1. Tap the **Orders** tab to access the **Order Dashboard**.

2. Filter orders by:

   - o **Payment status**

   - o **Order status**

   - o **Source**

   - o **Tender type**

   - o **Employee**

3. Additional features:

   - o **Sort by**: Order time / Fulfilment time

   - o **Edit**, **Delete**, or **Add payment** to orders

Tap the **triangle icon** to return to the home screen.

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9. Managing Employees
1. Tap the **Employees** tab.

2. View current employees.

3. Assign or modify:

   - o **Roles**

   - o **Permissions**

Tap the **triangle icon** to return to the home screen.

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10. Reporting

1. Tap the **Reporting** tab.

2. Choose from:

   - o **Overview**

   - o **Employee Sales**

   - o **Items**

   - o **Discounts**

   - o **Taxes**

3. Set report period:

   - o Today / Yesterday / Last 7 Days / Last 30 Days / Custom

Tap the **triangle icon** to go back to the home screen.

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11. Printer Settings

1. Tap the **Printer** tab.

2. Manage:

   - o **Printers**

   - o **Print Queue**

Tap the **triangle icon** to return to home screen.

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12. Happy Hour

1. Tap the **Happy Hour** tab.

2. Create new Happy Hours with the **+ button** (bottom right).

3. Configure:

   - o **Categories**

   - o **Days & Times**

Tap the **triangle icon** to go back to the home screen.

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13. Discounts

1. Tap the **Discount** tab.

2. View or create new discounts.

3. To create:

   - o Tap **+**

   - o Enter **Discount Name**

   - o Choose **% or £**

   - o Tap **Save** (top right)

Tap the **triangle icon** to return to the home screen.

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14. Device Settings

1. Tap the **Device Settings** tab.

2. Manage settings similar to a mobile device:

   o   Network & Internet

   o   Bluetooth

   o   Battery

   o   Display

   o   Sound

   o   Storage

   o   Security & Privacy

   o   Accessibility

Tap the **triangle icon** to return to main settings or to the home screen.

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15. Other Tools

- **Calculator**

- **Camera**

- **Clock**

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16. Managing Open Apps

- Tap the **Square button** to view open apps (like a mobile phone).

- Close individual apps or select **Clear All** to exit everything.

If you need further assistance, please reach out to our support team.