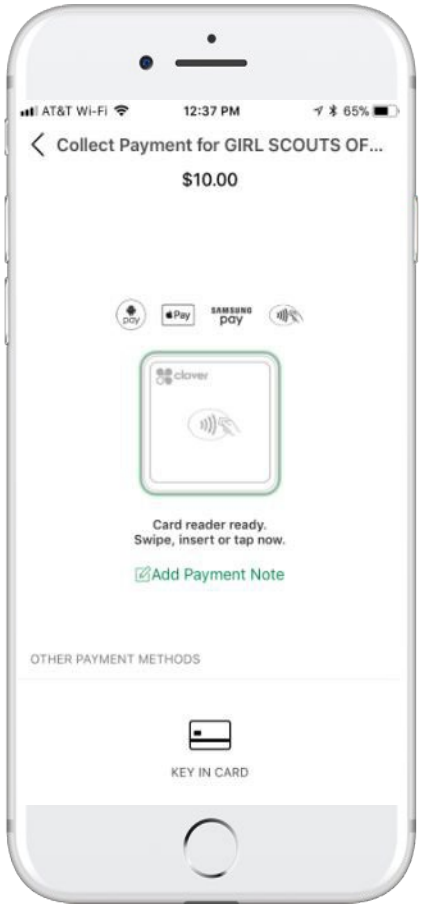


girl scouts of southern alabama

Clover Go Training Deck

For Troop and Cookie Coordinators

2022-2023

FORTUNE Magazine **World's Most Admired Companies®**
2014 | 2015 | 2016 | 2017 | 2018 | 2019

First Data is now fiserv.

Welcome to the Clover Girl Scout Program

We're excited to have your troop participate in a special technology pilot during this year's cookie sale!

What is Clover Go?

Clover Go Card Reader for cookie booths

Let your cookie buyers simply swipe, dip, or tap to pay using this portable device. Clover Go wirelessly pairs with your iOS or Android device via Bluetooth. It can accept credit or signature debit cards and mobile payments like Apple Pay or Android Pay or Samsung Pay. Perfect for your troop to use at a booth sale! Special price for our council is $39.95 plus $10 shipping, purchased through fiserv.

Clover Go app for payments on the go

You will also be able to securely take payments on the Clover app by keying in the card information or using your phone's camera, without the need for any extra card reader. Perfect for individual girls making sales to friends and family!

Best of all, processing rates are a flat 2.00% + .08 cents.

Why participate?

Learn more skills

Cookie Entrepreneurs can take their business financial skills to the next level by seeing live reports on how their sale is going and more in the Clover Go app

Reduce burden on parents

Digital payments mean fewer trips to the bank – money goes safely and directly to the troop bank account

Sell more cookies!

Potential customers are more likely to buy when they can use a card – and often end up buying more boxes

Quick Reference Guide

- **Troop Boarding**
  - At least 2 weeks before cookie sales begin, complete training on Council website to retrieve the link to boarding your Troop account.
  - Be prepared with your checking account information and an understanding of how many Clover Go readersyou need to purchase for your Troop.

- **Clover**
  - In 48 hours when you receive your Welcometo Clover email verify your email address by following the instructions in the email.

Clover Go Training for Troop Leaders: Table of Contents

1. Troop Boarding
2. How troop coordinators / cookie coordinators can set up their troops and add Council Admin users in Clover
3. How girls / parents can make a Clover Go transaction
4. How to handle account issues or problems making a transaction and other FAQs
5. How administrators can track the sale using Clover Dashboard reporting
6. Additional Information

1 How to apply for a Merchant Account for your Troop

- Troops will login to Council website and complete CloverGo training.
- When training is completed Troop will be provided a link to the First Data Clover boarding website.

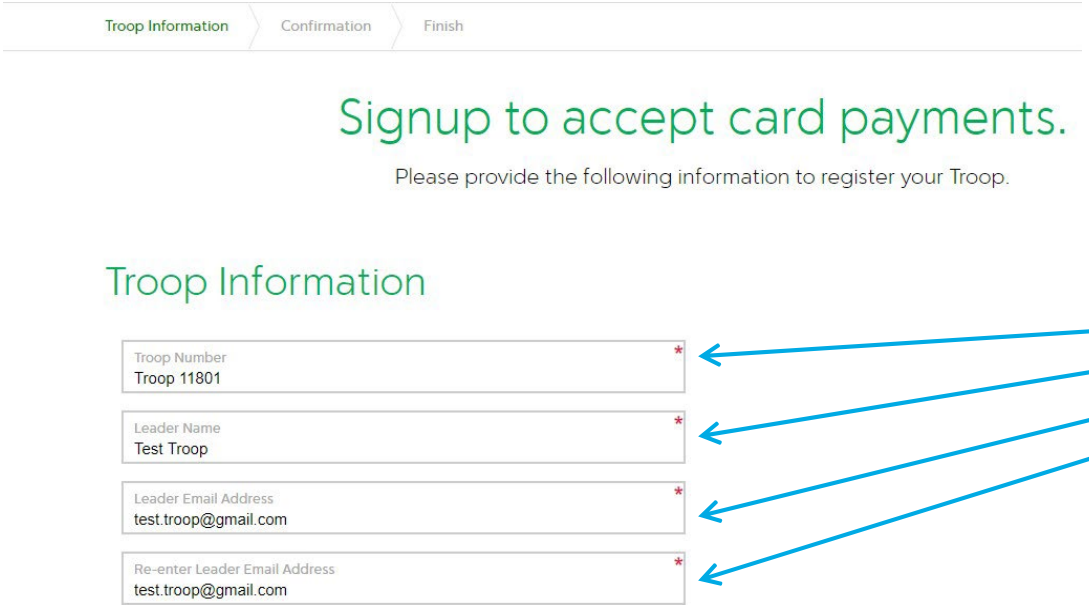
- Troop Leader will select Clover Go Software Only

- If Troop chooses to use any other devices besides the app they will be responsible for purchasing those items. Fees for these will NOT be reimbursed.

- Troop leader will enter checking account information.
  - If you do not have a check or bank statement that includes your routing number contact the bank or you can google the routing number as well.
  - Do not enter your personal checking account information.

**NOTE – Clover Go readers are available at the Apple Store and on various websites but the price may not be the same.

1 Troop Information



Please enter:

- Troop number
- Your name
- Your email address
- Re-enter your email address

Information may auto populate. If not auto populated or if incorrect, enter your info or correct your info.

1 Troop Boarding – Banking Information

Banking Information

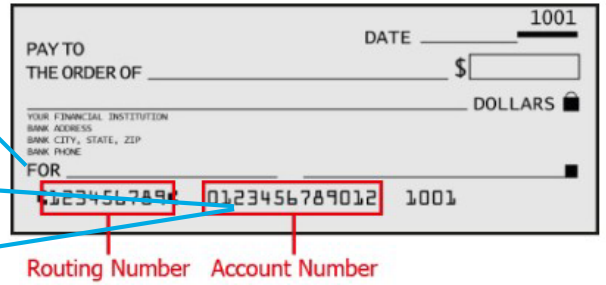
All items purchased will be credited to this account unless other arrangements have been agreed to by your Council. Purchase of a Clover Go reader fees may be debited from this account depending on the arrangements agreed to by your Council. Transaction fees and chargebacks may be debited depending on the arrangements agreed to by your Council. Contact your Council lead if you have any questions.

ABA routing number
052204359

CNB BANK, INC.

Checking account number
000123456789

Re-enter checking account number
000123456789



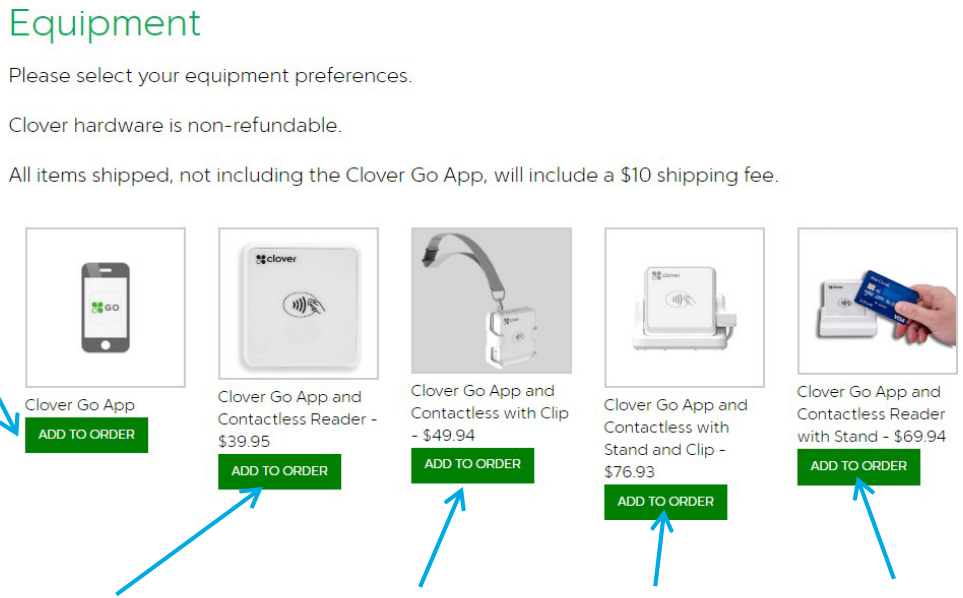
Council will NOT be providing card readers for free. If the troop chooses to purchase the reader(s), the troop will incur the cost.

Note: Do not attempt to copy and paste your checking account number you must key the account number twice to ensure accuracy.

1 Troop Boarding – Equipment

Select the Clover Go App *if you are not purchasing a Clover Go Reader. There is no charge for downloading or using the app.*

Keep in mind without the reader all transactions will need to be entered manually by using the OCR reader or manually keying the card number.



The fee for the reader will be deducted from your Troop account so please ensure funds are available so the account is not overdrawn. You will be charged a $20 fee per day from fiserv if the funds are not available each time there is an attempt to charge the fee.

Council will NOT be providing card readers for free. If the troop chooses to purchase the reader(s), the troop will incur the cost.

Select the Clover Go App and reader for $39.95 plus $10 shipping if you would like to purchase the App and Reader Bundle

Select the Clover Go App, Reader and Clip for $49.94 plus $10 shipping if you would like to purchase the App, Reader and Clip Bundle

Select the Clover Go App, Reader, Stand and Clip for $76.93 plus $10 shipping if you would like to purchase the App, Reader and Clip Bundle

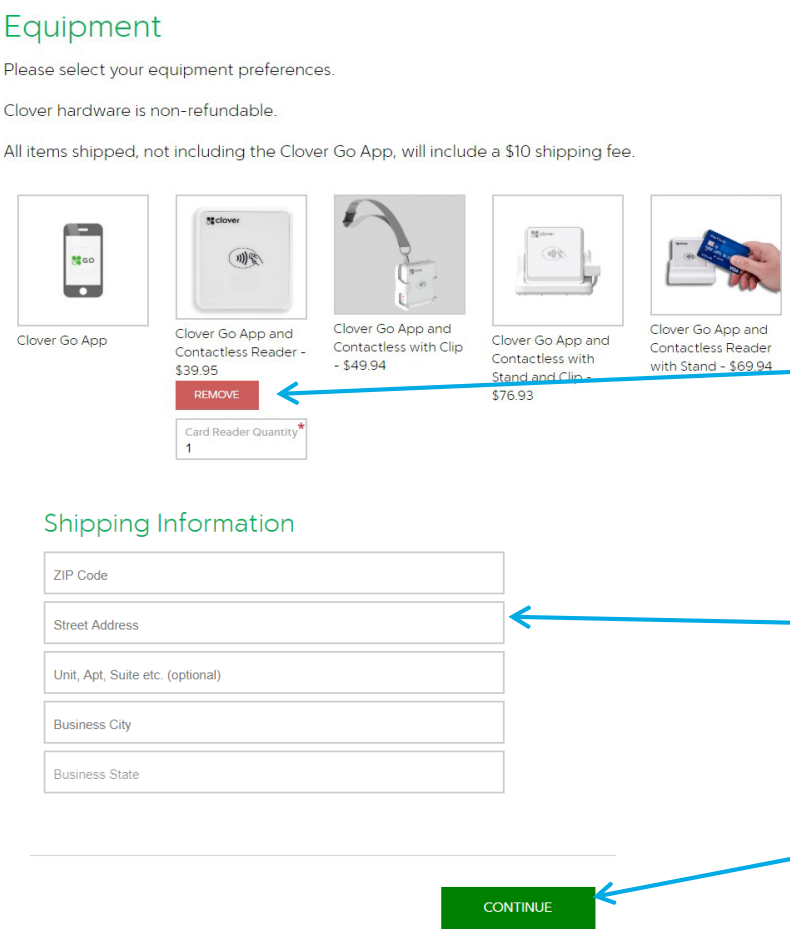
Select the Clover Go App, Reader, Stand and Clip for $69.94 plus $10 shipping if you would like to purchase the App, Reader and Clip Bundle

returnable or refundable be mindful of this when placing your order.

1 Troop Boarding – Equipment

IMPORTANT: Clover Go Readers, Stands and Clips are not returnable or refundable be mindful of this when placing your order.

1 Troop Boarding – Clover Go Reader Purchase **TROOP PAYS THIS FEE**

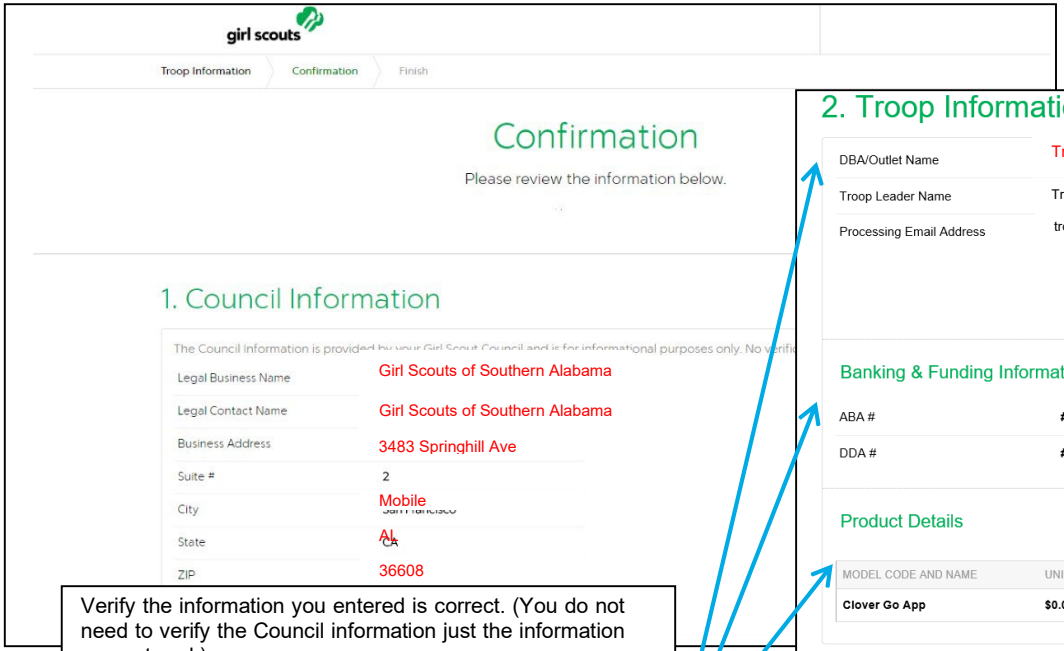


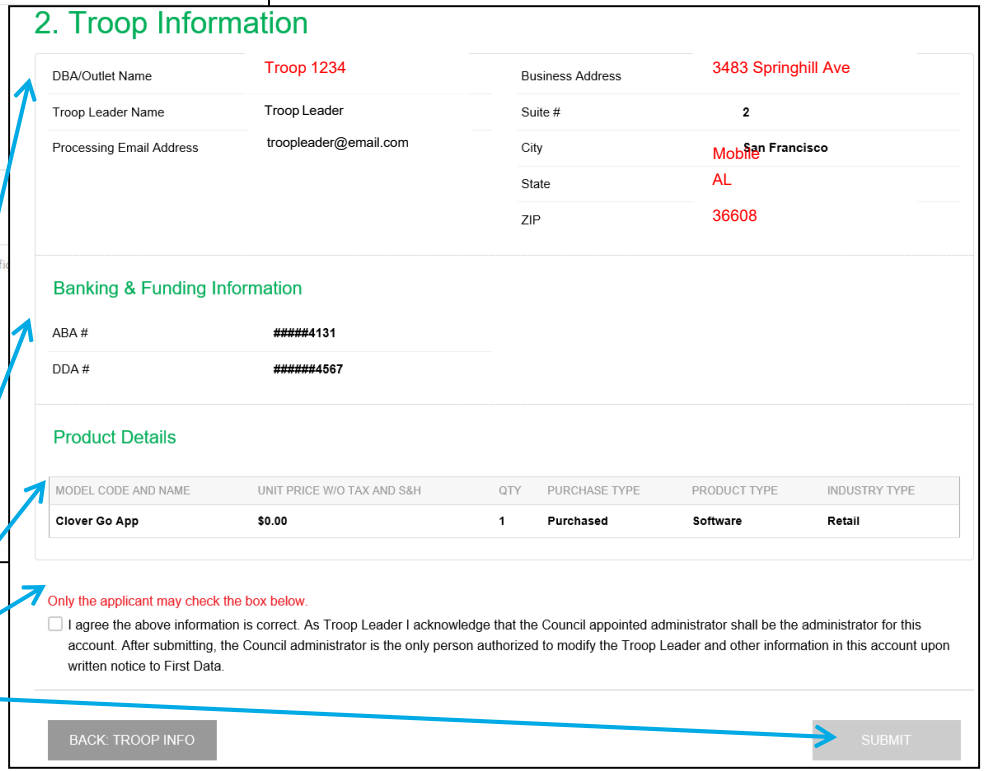
If purchasing more than 1 reader enter quantity required – If you no longer wish to purchase the reader click on remove. Readers may not be returned, and no refunds will be applied.

Enter your mailing address or the address the reader will be shipped to; do not enter a PO Box, it must be a physical address.

Hit continue

1 Troop Boarding – Confirmation Page





Verify the information you entered is correct. (You do not need to verify the Council information just the information you entered.)

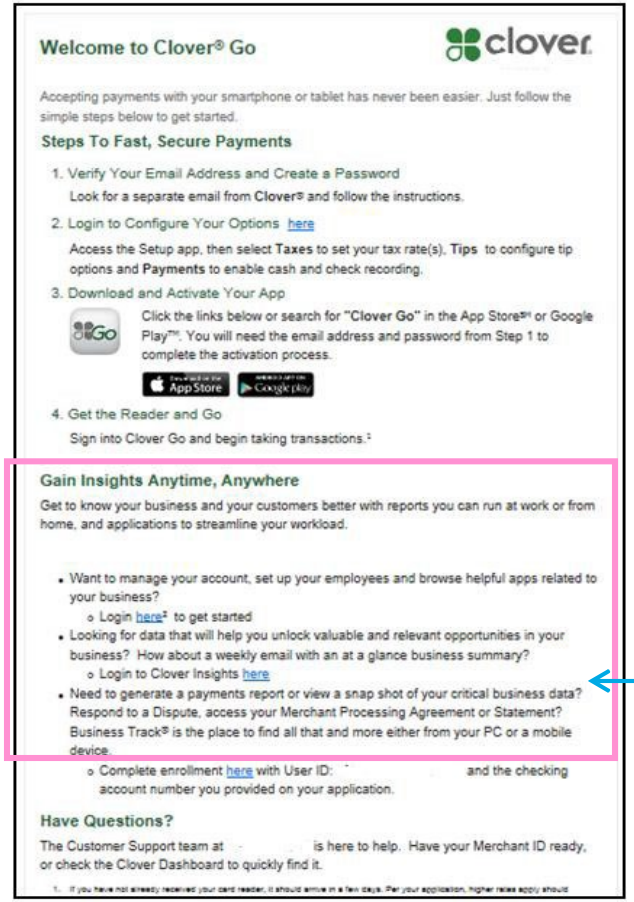
This is your last chance to change any incorrect information if changes are needed click on “BACK TROOP INFO” to go back an d make changes.

Check the “I confirm that the information above is correct”.

Click **Submit**

You’re Done!

1 Troop owner will receive two welcome emails



Welcome to Clover® Go

clover

Accepting payments with your smartphone or tablet has never been easier. Just follow the simple steps below to get started.

Steps To Fast, Secure Payments

1. Verify Your Email Address and Create a Password
   Look for a separate email from **Clover®** and follow the instructions.
2. Login to Configure Your Options here
   Access the Setup app, then select **Taxes** to set your tax rate(s), **Tips** to configure tip options and **Payments** to enable cash and check recording.
3. Download and Activate Your App
   Click the links below or search for **"Clover Go"** in the App Store℠ or Google Play™. You will need the email address and password from Step 1 to complete the activation process.
   App Store Google play
4. Get the Reader and Go
   Sign into Clover Go and begin taking transactions.[1]

Gain Insights Anytime, Anywhere

Get to know your business and your customers better with reports you can run at work or from home, and applications to streamline your workload.

- Want to manage your account, set up your employees and browse helpful apps related to your business?
  - Login here[2] to get started
- Looking for data that will help you unlock valuable and relevant opportunities in your business? How about a weekly email with an at a glance business summary?
  - Login to Clover Insights here
- Need to generate a payments report or view a snap shot of your critical business data? Respond to a Dispute, access your Merchant Processing Agreement or Statement? Business Track® is the place to find all that and more either from your PC or a mobile device.
  - Complete enrollment here with User ID: and the checking account number you provided on your application.

Have Questions?

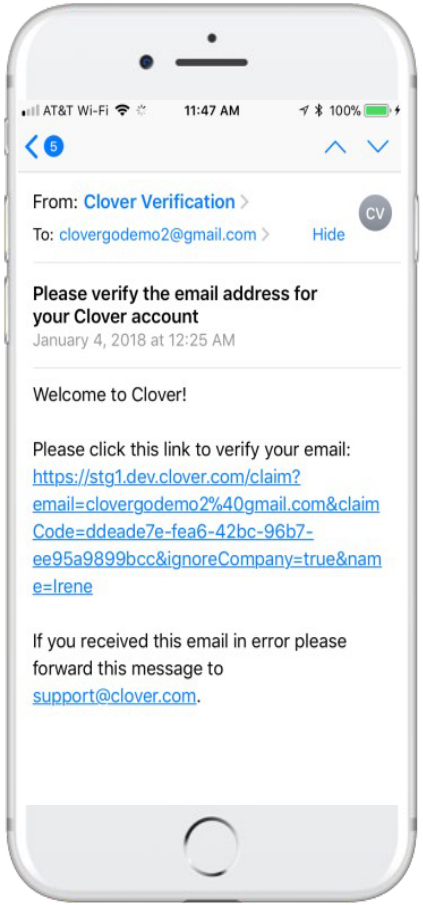
The Customer Support team at is here to help. Have your Merchant ID ready, or check the Clover Dashboard to quickly find it.

After your troop's merchant account has been approved, several welcome emails are sent.

The email pasted to the left is the first you will receive. No action is required here – keep an eye out for the second email (on following page) that prompts you to set up your Clover account.

Troop leaders can disregard the information about Clover Insights, Clientline and Business Track – the Council will be handling this for the troop.

1 Follow instructions in second welcome email from Clover to verify your email and create your password

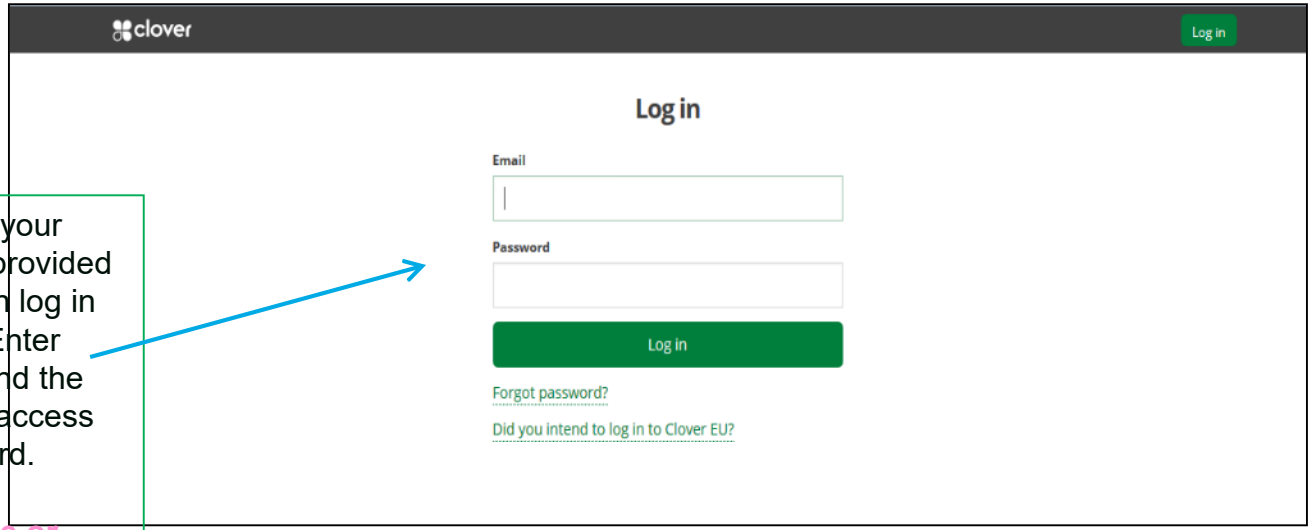


This email provides a link to the Clover Dashboard and asks you to verify your Email Address and Create a Password.

1 Create Clover username and password

Once you've created your password at the link provided to your email, you can log in to www.clover.com. Enter your email address and the password created to access your Clover Dashboard.

If you did not receive or cannot find the welcome email, click "forgot password" link.



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2 How to set up your Clover admin account for your troop

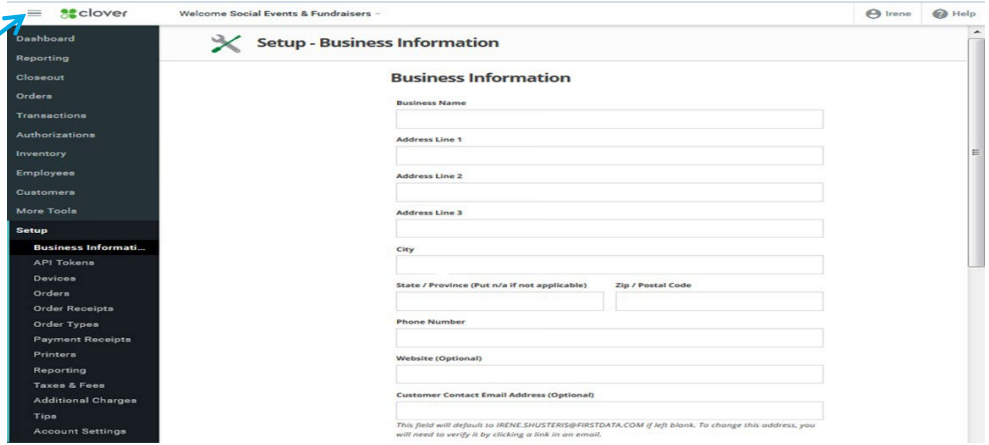
To-Do List: *Perform these steps at least 2 weeks before your troop starts selling cookies*

1. **Once the password is set, log in to the Clover Dashboard at www.clover.com and check your configurations**
   a. Select the "Setup App"
      i. Select "Business Information" to ensure that the Troop Name and Council info is correct and upload the Council logo
      ii. Select "Orders" to make sure "Allow notes…" is checked
      iii. Select "Order Receipts" to make sure "Group line items" is checked
      iv. Select "Payments" to turn on cash and check tracking, if you'd like girls to track these sales in Clover Select "Payment Receipts" to make sure "use business logo" is checked and to customize receipt header and/or footer information if you wish and to configure your offline payment options
      v. Select "Tips" to make sure that "Ask for Tips" is not checked
   b. Select the "Inventory App" and add your inventory
   c. Select the "Employees App"
      I. Select "Setup" to shorten required passcode length to four digits to simplify the login process for girls
      II. Set up your Clover admin account and add all the girls in your Troop

Please note – There are many free applications available in the Clover App store (under "More Tools"), but do not install these applications if there is a fee associated with them. The fee will be listed next to "Price".

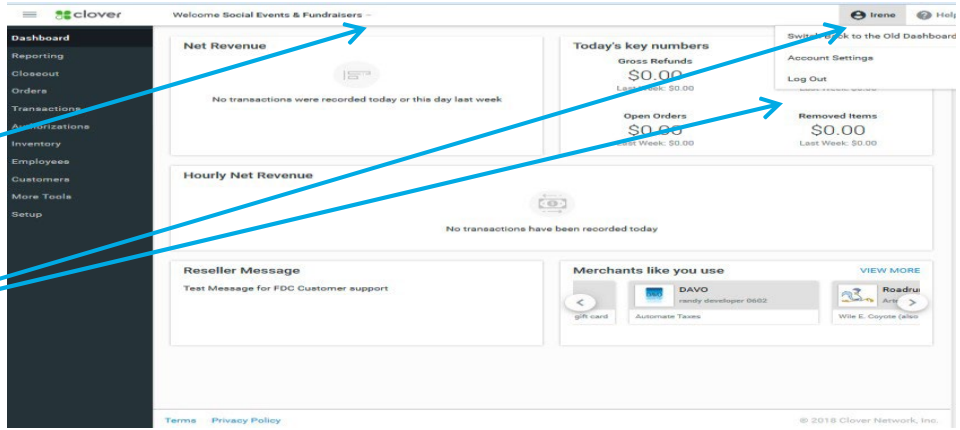
2 Navigating within the Clover Dashboard

- Any time you want to go to a different app, make sure the menu is open and navigate to any of the items on the list



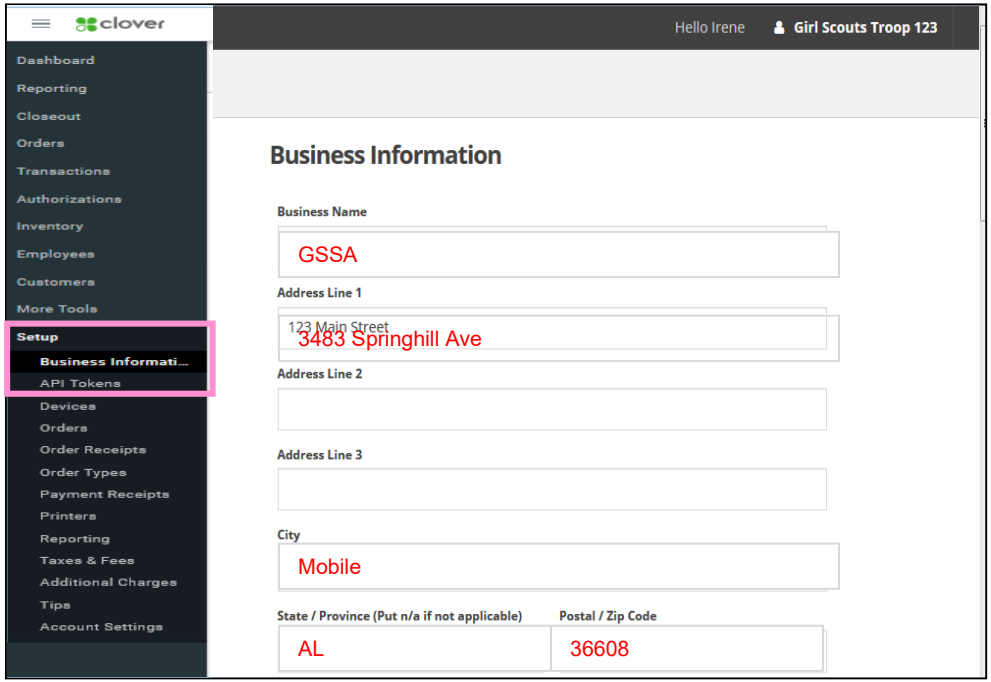
- If your email ID is associated with more than 1 troop account, click here to see a drop down of all and toggle between them. This can be done from any screen.

- This is also how you log out of the application…the logout option is at the bottom of this dropdown



2 Confirm address information is correct

Under “Business Information”, you will be able to ensure that the Business Name, Address, Phone number, and logo are present and is the Council’s address not your Troop leader address, as this is what will appear on receipts sent to customers.



2 Upload Council logo

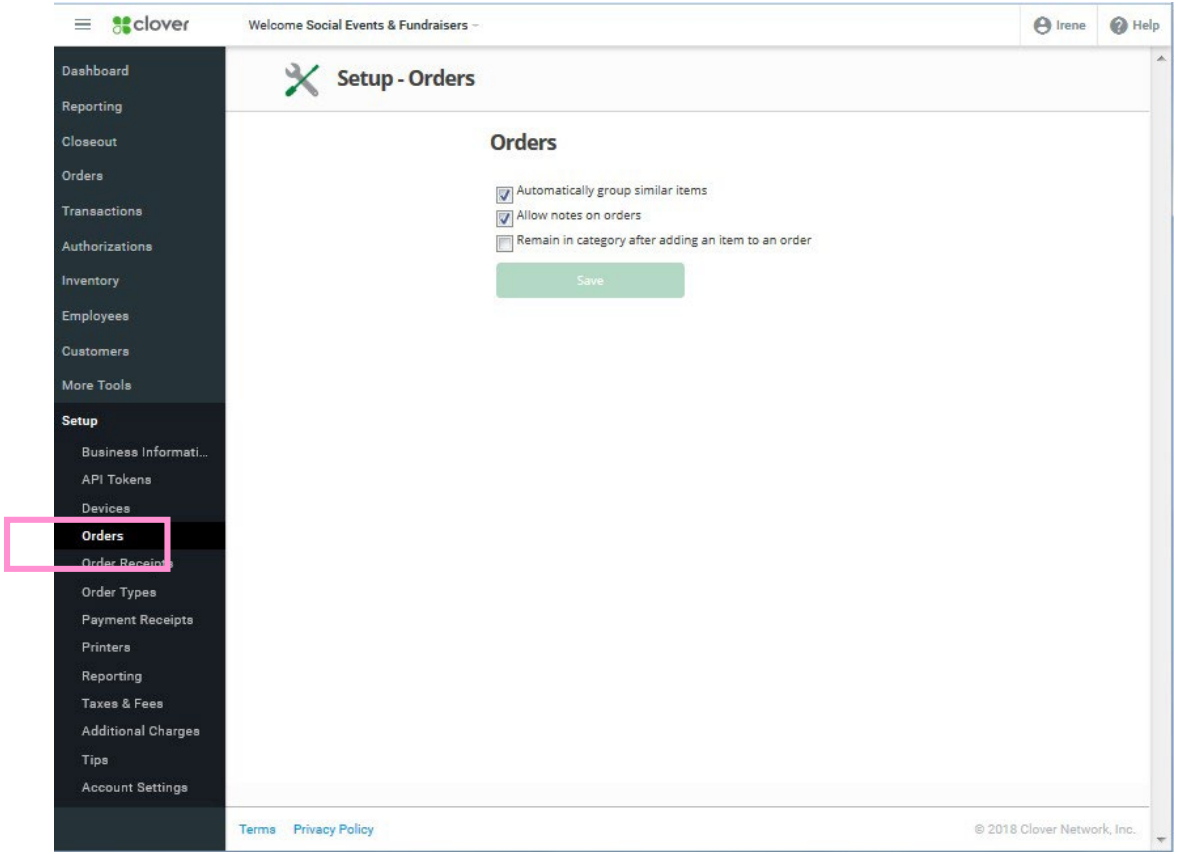
To do this, save the image on the right side of this screen on to your hard drive. Go to Google Image Search, search your council's name, and download a copy of this logo directly from the council site.

Back in the Clover Dashboard, click upload on the "Business Information" logo section, and select the file where you saved it on your computer.

Hit save.

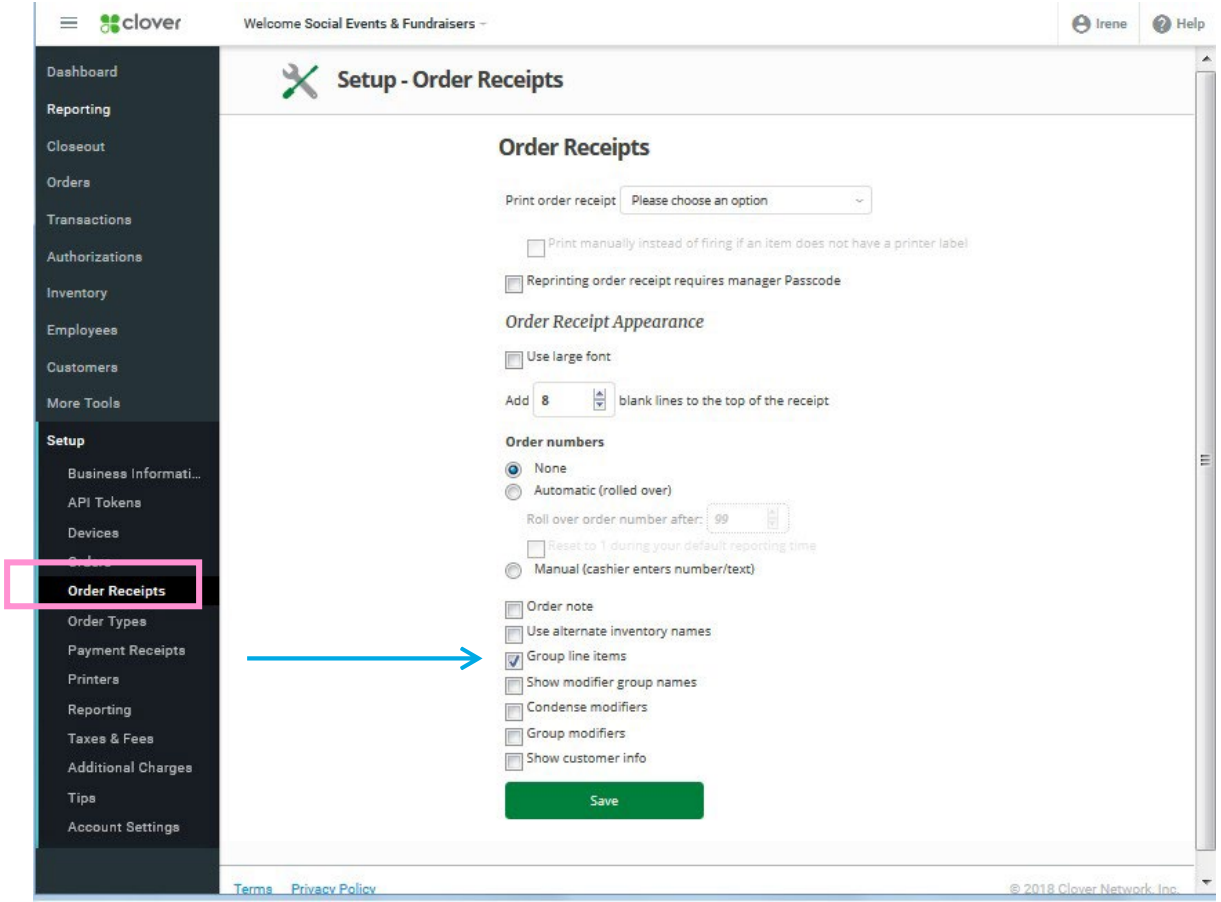
2 Allow notes so you can track booth sales

Click “Orders” and make sure “Allow notes on orders” is checked. This makes sure Payment Notes are carried through to reports, so girls can notate which sales were made at booths.



2 Group line items on receipts

Click “Order Receipts” and make sure “Group line items” is checked. This makes sure that same items are grouped together on receipts.

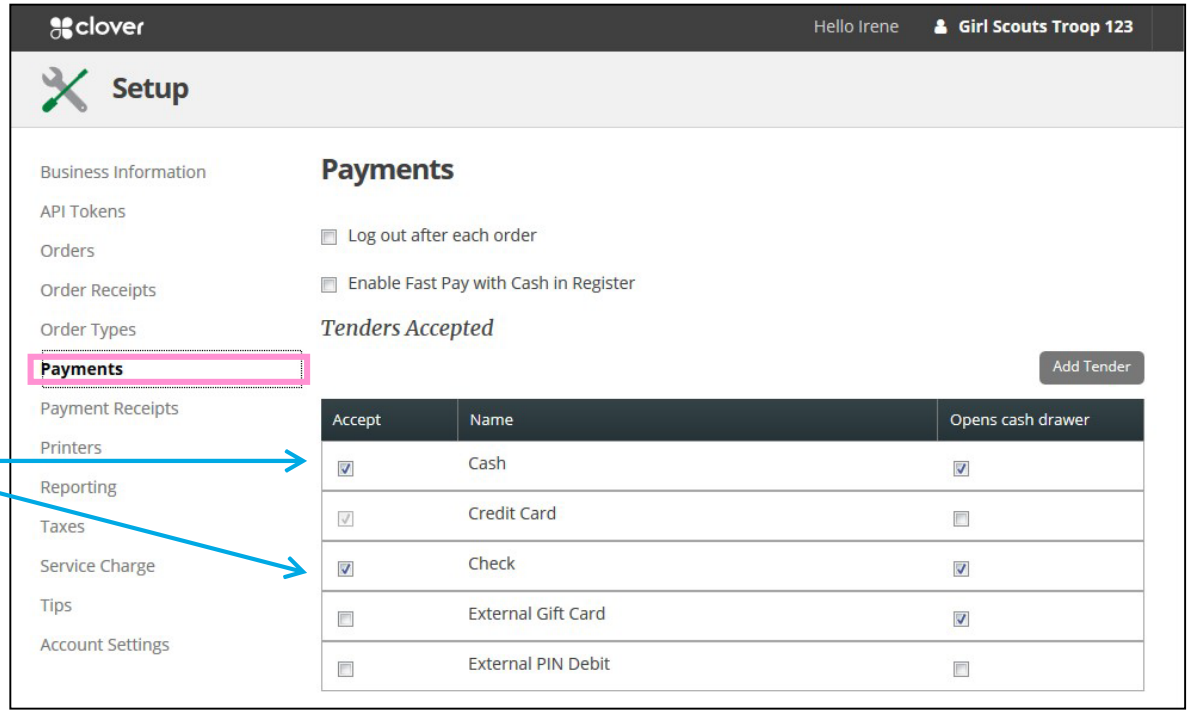


2 Allow cash and check transaction tracking

Go to the “Payments” tab.

If you want to be able to track all sales (not just credit card sales) through Clover, you can enable cash or check recording. This makes cash or check available as a payment type within the app. This can be useful for tracking inventory live across your troop!

Please note: Not all apps/features (e.g. Signature Options, cashback, gift cards, pin debit) are currently supported within the Clover Go app



2 Allow Offline Payments

Stay on the “Payments” tab.

Make sure “Do not prompt for Invoice number” is checked.

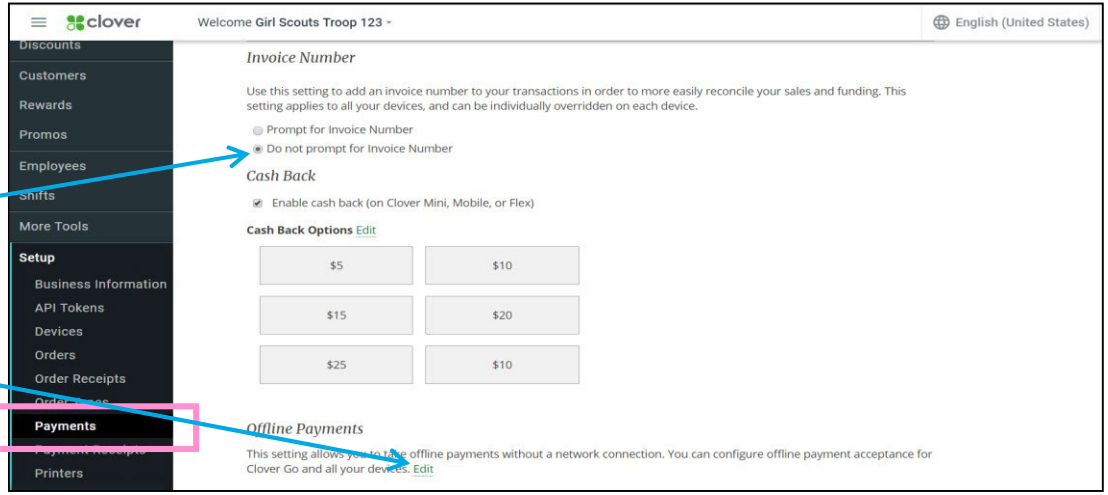
If you want to be able to take payments when there is an outage or no connectivity, you can configure that option here.

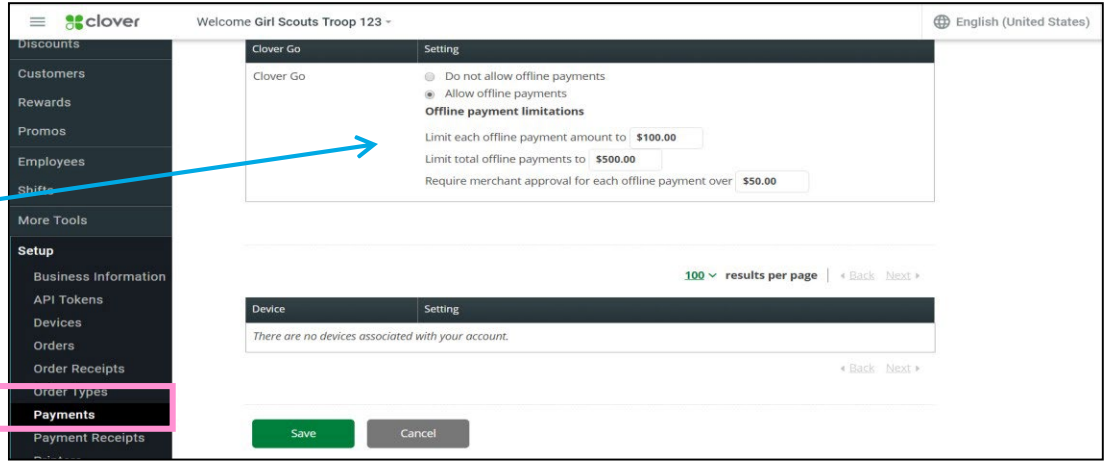
While in offline mode transactions are not authorized. Once connectivity is available the transactions will then be sent for authorization.

NOTE: If there are not enough funds on the card you may receive a decline and since the cardholder is no longer present you will not receive funds for this purchase. This is a risk so please make sure you clearly understand funds could be lost in offline mode.

Tap, “Allow offline payments”

Then, configure the amounts that the girls will be able to accept while offline.





2 Offline Payments

Limit each offline payment amount:

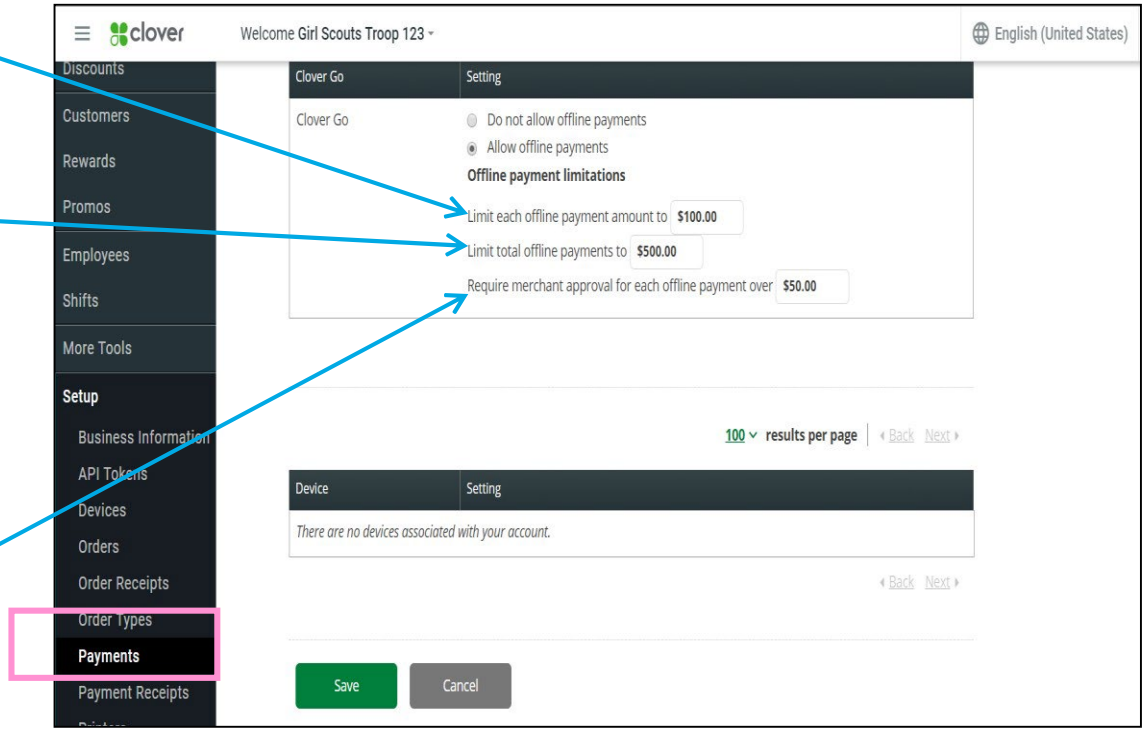
- You can set a limit of the amount of each purchase made while offline. Any amount over this set $ amount will not be allowed.

Limit total offline payments:

- You can set a limit of the total $ amount allowed for offline payments. Anything over this amount will not be allowed until user goes online and uploads already processed transactions.

Require merchant approval of each offline payment over:

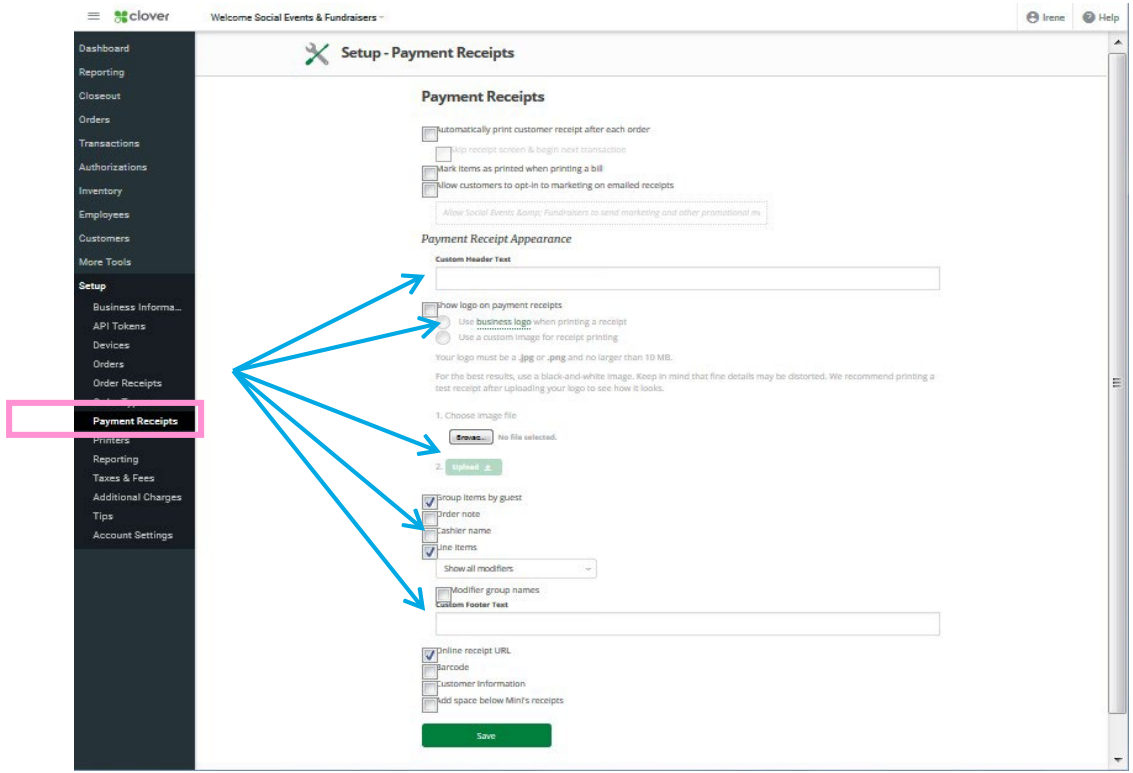
- If you set an amount, then any transaction that is over that amount, but under the offline payments amount limit, will prompt the user with: “Are you sure you want to send this transaction in offline mode” to make sure they want to take that transactions offline.



2 Customize receipts

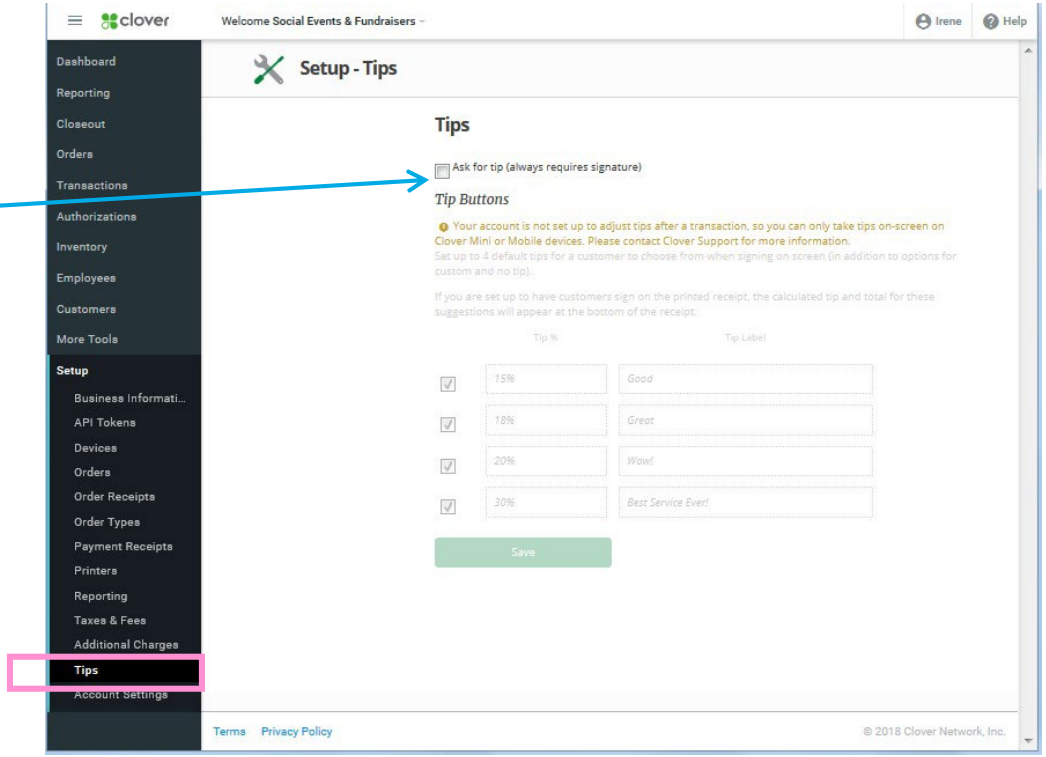
Go to the “Payment Receipts” tab.

- You can customize receipt header and footer information, if desired
- You can enter any text desired. For example, you could type “Thank You for Supporting Amazing Experiences for Girls!” in the footer and leave the header blank
- Also, make sure that the “Show logo on payment receipts” is checked and that “use business logo” is selected
- Upload your Council logo so it will show on receipts
- If you do not want the “cashier name” to appear on the receipt, make sure that box is not checked, otherwise the “nickname” that is entered within the Employee tab will appear on the receipt as the “cashier name”



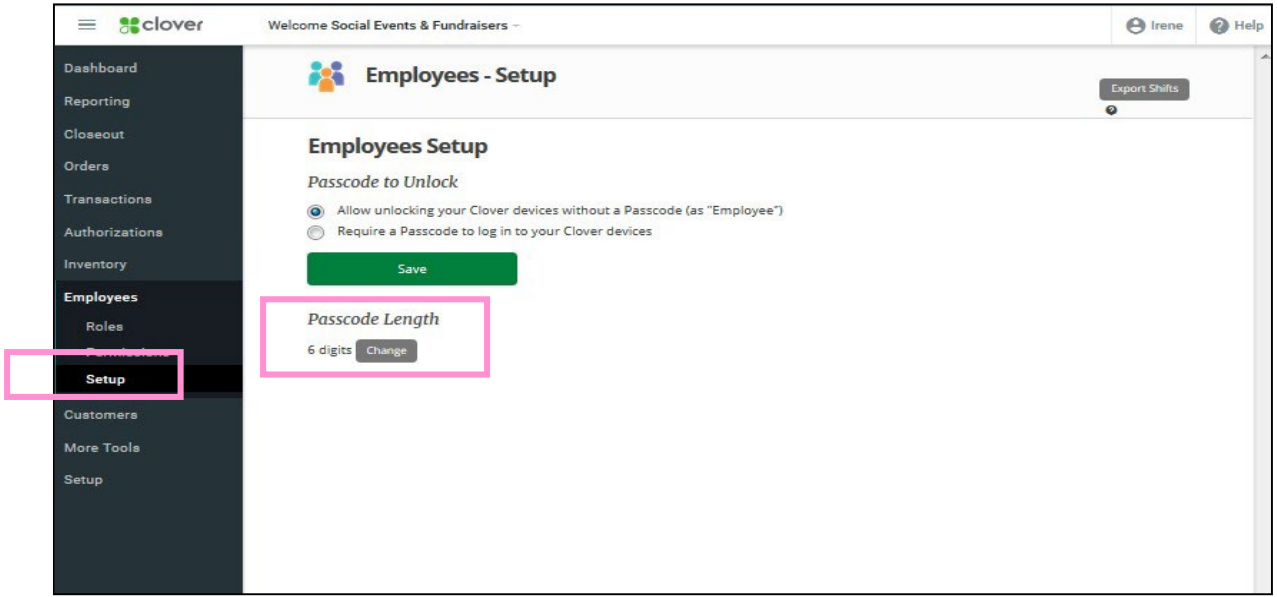
2 Tips must be turned off

- So that the Tip screen does not display in the Clover Go App, make sure “Ask for Tip” is ***not*** checked.



2 To simplify login for girls, shorten required passcode length to four digits

- Default setup for new accounts is to use a 6 digit passcode. The password can be changed to 4 digits so it's easier for girls to remember.
- Note: Clover Go does not allow for unlocking the device without a Passcode and will always require a passcode to login. Troop Leaders can access the password and provide it to the girls if they forget it and can change it if needed



Clover Go should only be used at cookie booths.

We are not intending on having the girls have an individual sign in to capture sales at a booth. Girls should be using the credit card feature within Digital Cookies if they are taking individual orders (while NOT at a cookie booth). While clover IS designed to have each girl log in and take orders under their own names, GSSA is not encouraging this.

- You will not be reprimanded if you choose to add in girls as employees, we are just suggesting that you don't to make it easier/quicker to accept payment at a cookie booth.

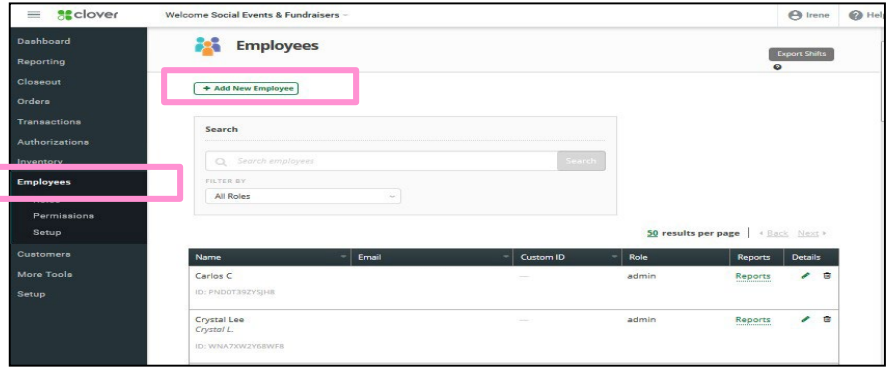
My suggestion would be to create multiple log-ins (depending on your troop size) for the troop to use as a whole. That way, if you have two or more cookie booths operating at the same time (or taking multiple payments at the same time at the same booth), you all can use the app. You CANNOT use the same log-in to take multiple payments at one time.

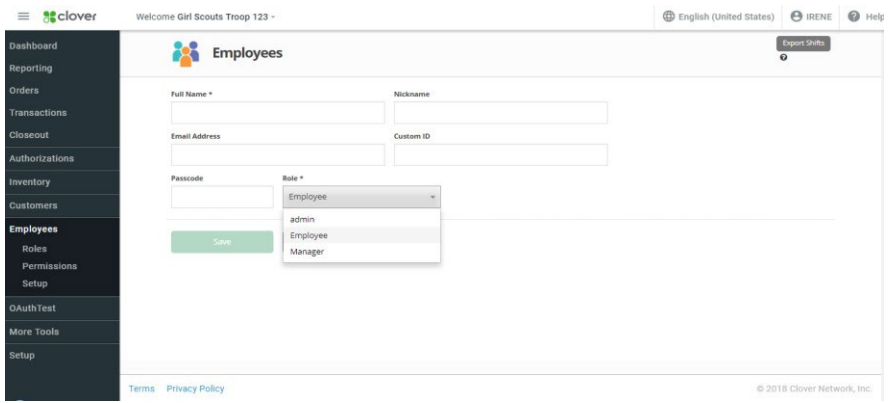
The next screen shows you step-by-step on how to create employees (i.e., different log-ins for your troop).

If you are a small troop and don't plan on running multiple booths at one time or taking multiple payments at the same booth at the same time, I would suggest setting up at least two log-ins.

2 How to set up your Clover account

Each Clover account must have a unique email address. There are several workarounds to help get all girls added that are outlined on the next slide.





Select "Employee" to add the girls and administrators in your troop
Also use "Employees" to change, or delete any girls or administrators

Click "Add New Employee" from within the "Employee App"

a) Full name and email address are required.
b) Nickname will be how girl's name appears on the receipt. **Do not put her last name!**
c) Assign her the role of "Manager". This is so she will have the ability to issue a refund for her own transactions, if needed.
d) Optionally, you can assign a passcode or allow the girls to choose their own when activation the Clover Go app. Please note that each passcode must be unique within the account.
e) Click "Save"

Required:

- **Add your Council leader with role = Admin csigmund@girlscoutssa.org – Cathleen Sigmund**

Note: Each person added will receive an email from Clover with a link to verify their email and password. They will need to do that before they can activate the app

2 What if I don't have enough email addresses to use?

Clover requires each user to have a unique email address, to set up an account.

- **If you don't have enough troop leaders/parents in your troop to assign as an employee and use their email address, but you use a Gmail account,** it's easy to use an "alias" without having to create a new email address. You can add any text after a "+" sign and all the mail goes to the same inbox, no set up required. For example, if your email address is TroopMom@gmail.com, you receive all email for TroopMom+1@gmail.com AND all email for TroopMom+2@gmail.com without needing to do anything special in Gmail. So one Clover account can be registered under TroopMom+1@gmail.com and one can be registered under TroopMom+2@gmail.com

- **If none of the above options work**, you may need to create a new email address. It's free to create an address on Gmail.com, and it can be set up to forward to your preferred primary email address. While this may be a nuisance, you need only open this account once to activate Clover.

2 Troop Leaders have different access rights

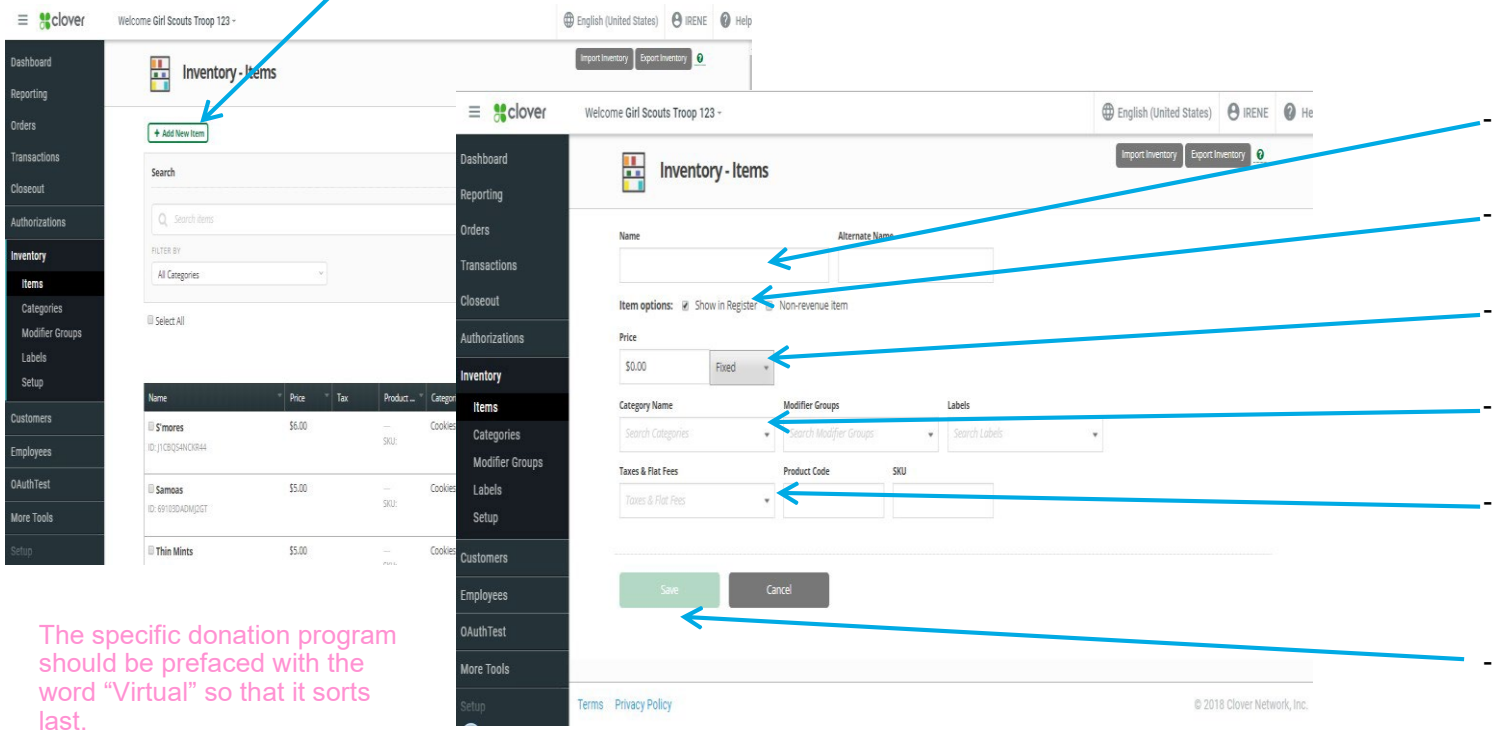
Functionality	Admin (Council + Troop Leader)	Manager (Girl Scout)
Clover Go		
Run Transactions	Yes	Yes
Perform Refunds	Yes	Yes
Access Transactions	All	All
Modify carbon copy receipts	Yes	
Delete Open Orders	Yes	Yes
Configure Custom Item Name and/or Payment Note	Yes	
Set up Default Payment Note	Yes	
Create a Payment Note instruction	Yes	
Clover Dashboard		
Access to Web Dashboard	Yes	Yes
Access App Market	Yes	
Access Employees App	Yes	
Access Setup App	Yes	
Access Inventory App	Yes	

Anyone with a role of “Manager” can only perform refunds on their own transactions in Clover Go

2 How to Add Inventory

All cookies and prices are listed on the next page.

- Use the Inventory app to create your inventory list
  - Click on “Add New Item”



- Add name of the inventory item
- “Show in register” should be checked
- Add $ Price and make sure price is fixed
- Key in category name of “Cookies” or Fall Sales
- Make sure no taxes….”default taxes and fees” should be removed
- Hit Save – continue process until all varieties are added

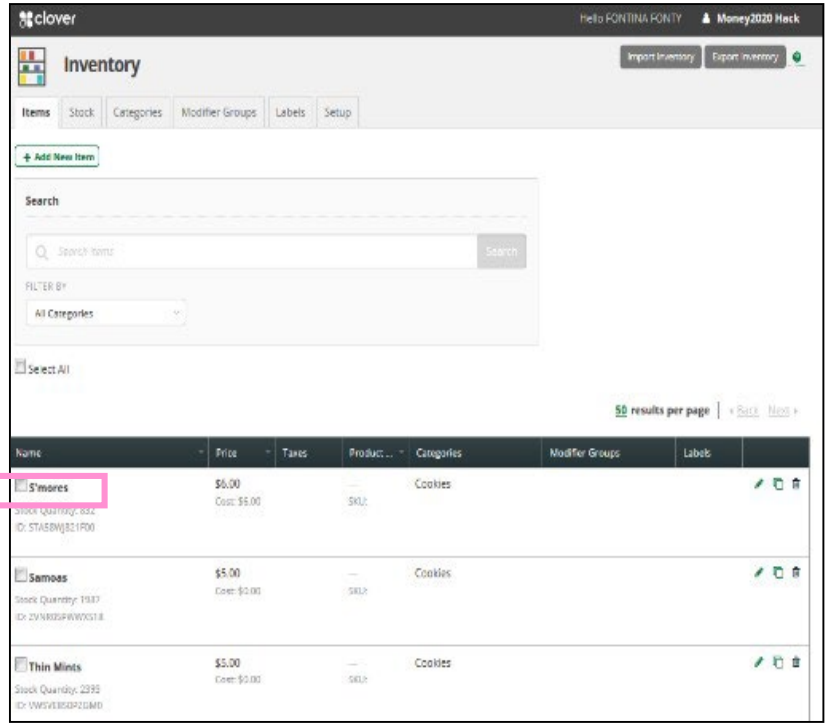
The specific donation program should be prefaced with the word “Virtual” so that it sorts last.

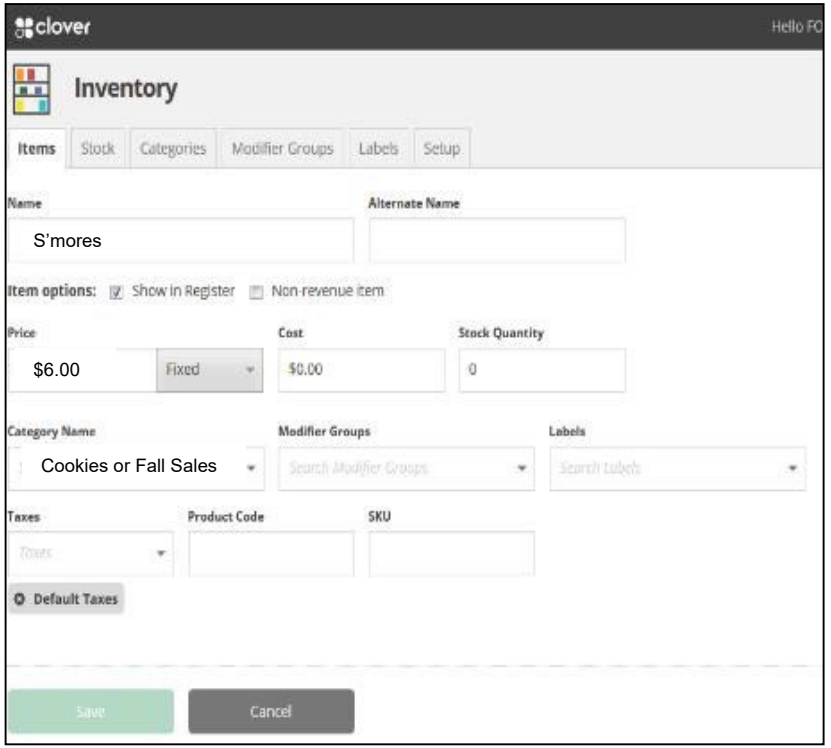
GSSA Cookies and Prices for 2023 to be uploaded to Clover

Adventurefuls	$5
Lemon Ups	$5
Trefoils	$5
Do si Dos	$5
Samoas	$5
Tagalongs	$5
Thin Mints	$5
Girl Scout Smores	$5
Toffee-tastic	$5
Virtual Hometown Heroes	$5

2 Update Inventory if Needed

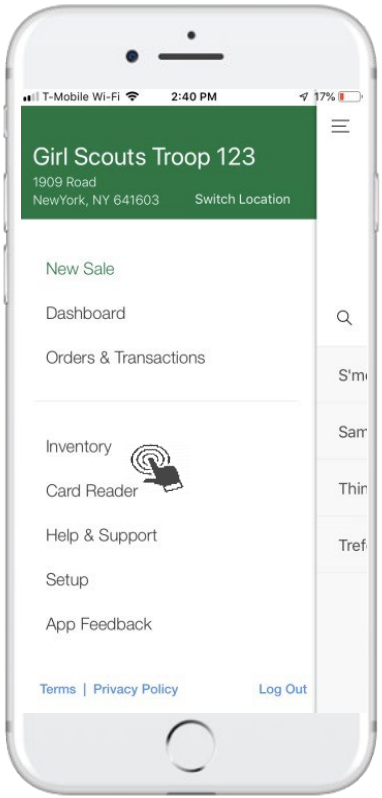
- Check the box of the item to be updated and click on the edit pencil

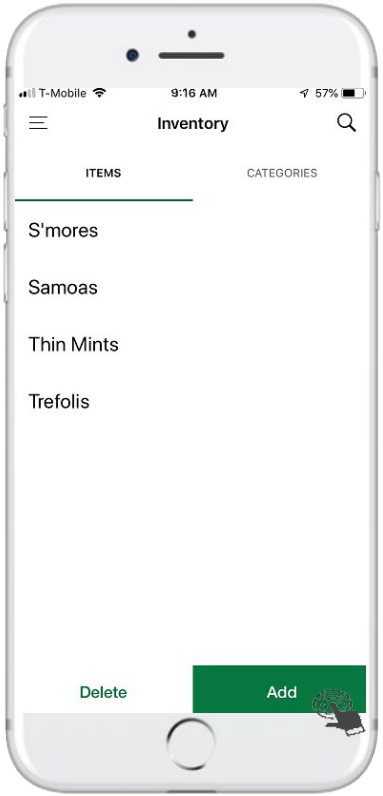


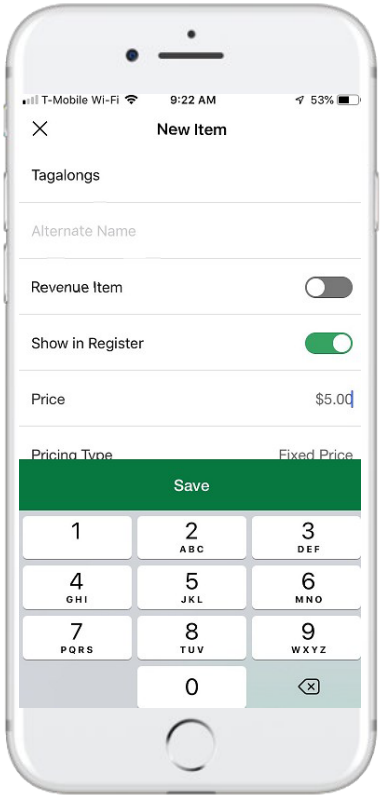


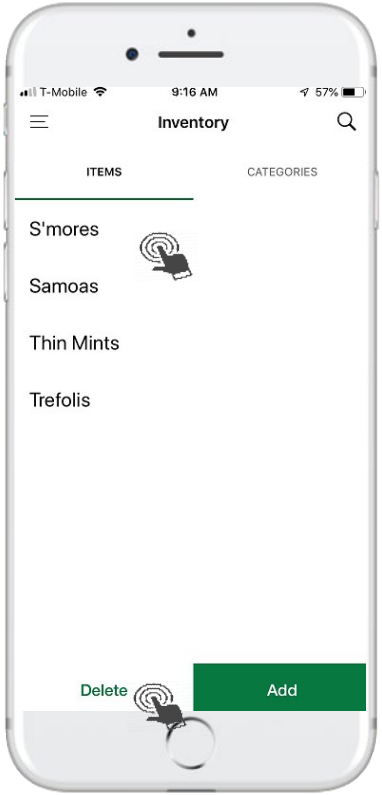
2 Inventory can also be managed in-app, if needed

- To Edit an item, tap on the item
- To Delete 1 or multiple items, tap "Delete"









Clover Go Training for Troop Leaders: Table of Contents

1. Troop Boarding
2. How troop coordinators / cookie coordinators can set up their troops Clover
3. How girls / parents can make a Clover Go transaction
4. How to handle account issues or problems making a transaction and other FAQs
5. How administrators can track the sale using Clover Dashboard reporting
6. Additional Information

3 Safety First! Rules for using Clover safely and securely

1. **When using Clover, girls should always be supervised by a parent or adult troop volunteer**

2. **Girls need their parent(s) or guardian(s)'s permission to use Clover; Clover accounts should only be associated with parental email addresses, not girls' own personal addresses**

3. **Never share girls last names or personally identifiable information with customers**
   1. Only girls' first name and last initial should appear on Clover receipts
   2. Do not contact booth customers outside the booth context for any reason, even if – for example – they provide their email address to receive a receipt from Clover

4. **Girls should never hand over their phone or tablet at any point during the transaction; girls should hold their device while customer signs or types in information during check-out**

5. **Only process a transaction if the customer's card is in front of you to reduce the risk of compromising customer card details and to limit the risk of processing fraudulent cards**
   1. Don't take payments over the phone or over email
   2. Don't take payments for anything other than cookies or fall inventory items

Parents: By participating in the Clover technology pilot, you and your daughter(s) agree to follow the safety rules above as well as any additional Council guidelines, including the Safety Activity Checkpoints

3 Download the Clover Go App

You're done in the Dashboard! Time to set up your Clover Go App.

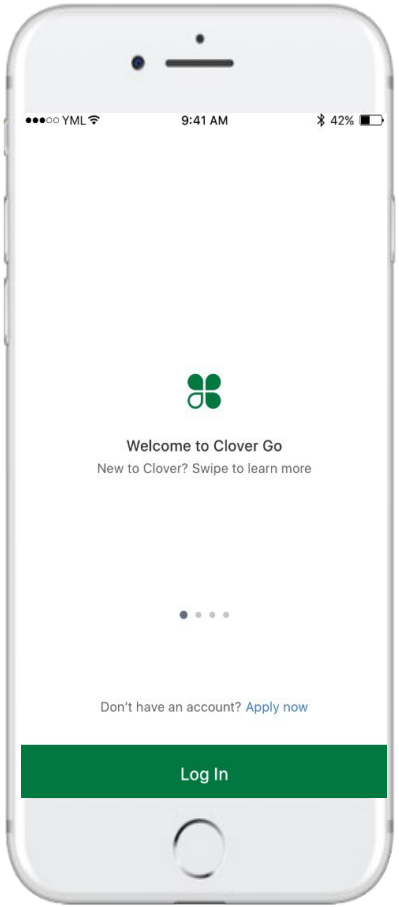
1. **Download the *Clover Go App* from the App Store or Google Play Store on the smartphone or tablet your daughter(s) will use while selling cookies or for the fall sale**
   - *Note – If you have previously downloaded the Clover Go application make sure you have the most current version by checking for any updates in the App store. If you do not have the latest version you may get a network error and not be able to process transactions until you apply the update.*

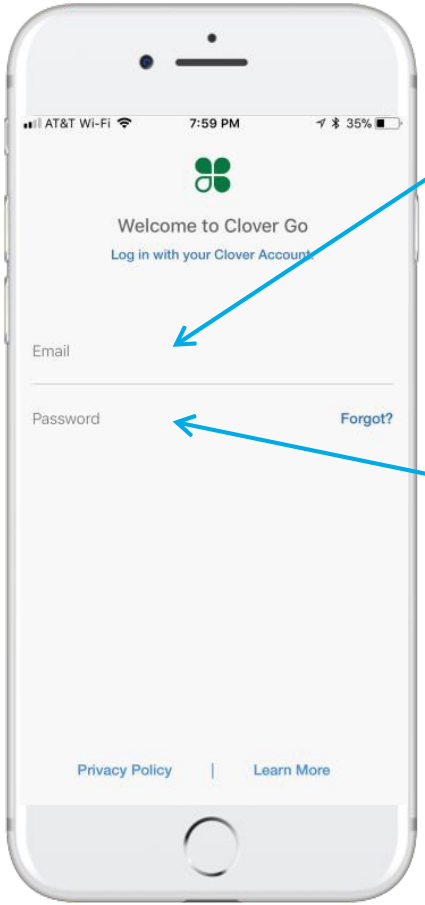
2. **Open the *Clover Go App* and log in**
   - Enter the email address and password that you created
   - Set up a quick-access numeric passcode that you will use for future logins
   - Switch the toggle on top right of screen so that you see inventory names listed

3. ***Before booth sales:*** **create a unique email address just for the booth sales and add it to the Clover dashboard via the Employees tab.**

3 Download the *Clover Go App* from the App Store or the Google Play Store and open the *Clover Go App*

Value prop screens present at first time login. User has the option to scroll through the 4 screens or Tap “Log In” at anytime to login in to Clover Go

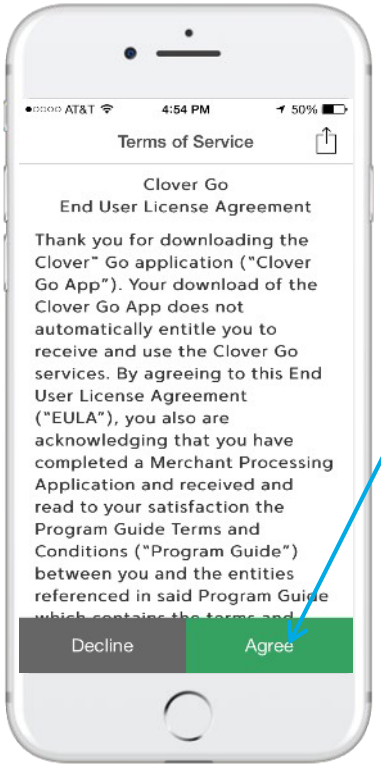




Enter the email address that the Clover welcome email was sent to

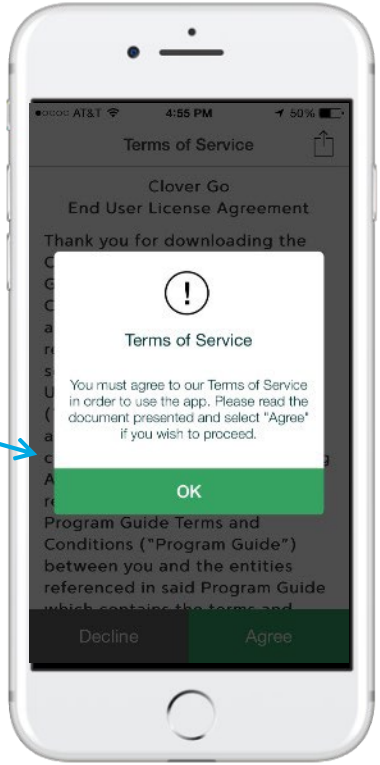
Enter the Password created via the Clover Dashboard when clicking the link provided in the Welcome Email

3 Accept the Terms of Service



The first time a user logs into the App, they will need to accept the Terms of Service

If 'Decline" is selected, the following message appears. App will not allow you to go further until you accept



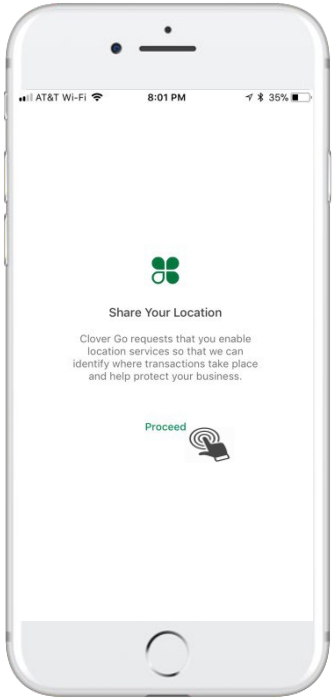
3 Activation / First Time User Experience

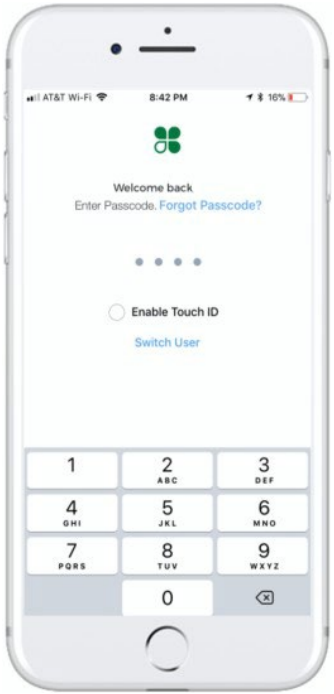
Allow Push Notifications
(not mandatory)

When prompted, share location services
(mandatory - if not set application may not work properly)

When prompted, create your desired 4 digit passcode

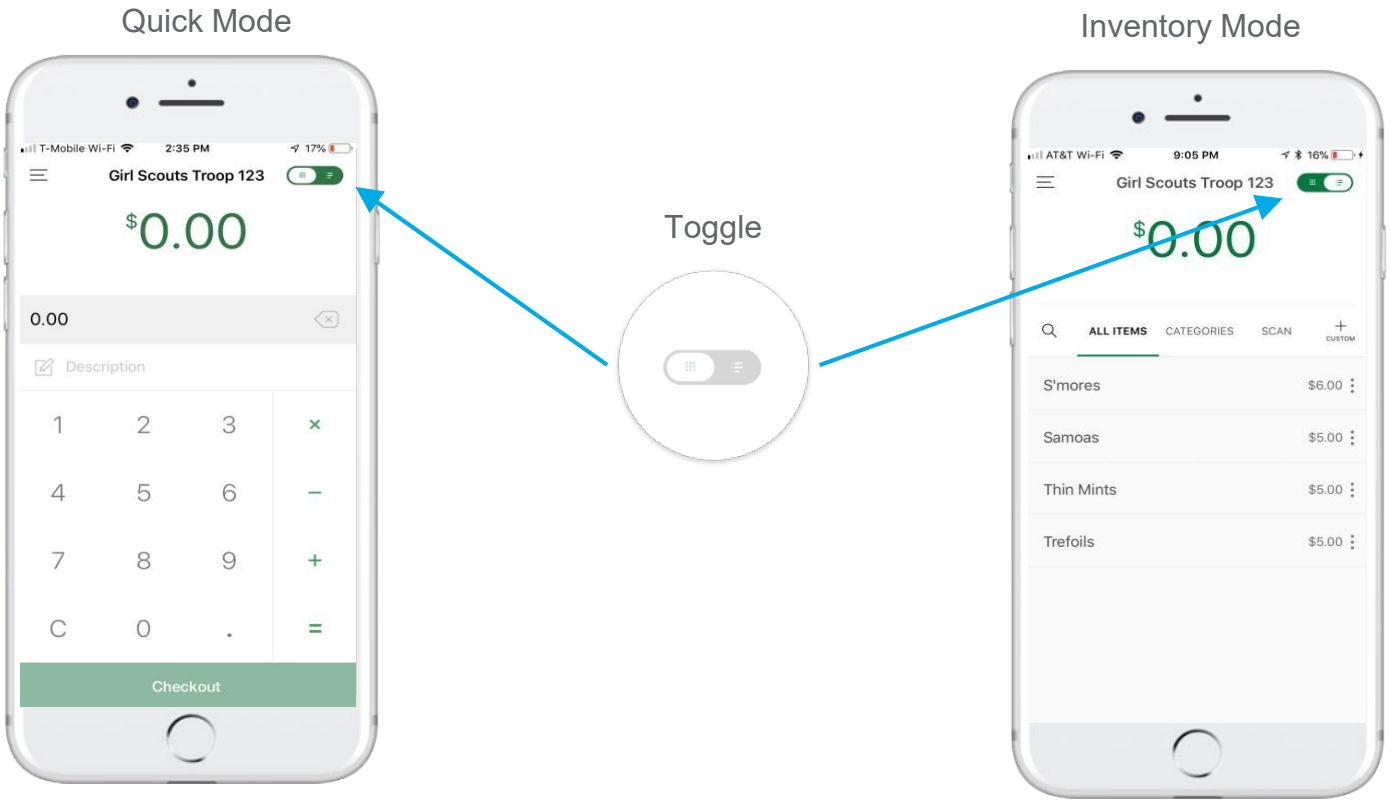
Pair your card reader. Alternatively, you can select “Skip for Now” and pair it later by accessing the Card Reader section within the Menu





3 Prepare to take an order

The first time you use the app, it will land in Quick Mode. You will need to slide the toggle to switch to Inventory Mode. After the initial time, app will remember the last setting and open in Inventory Mode right away.

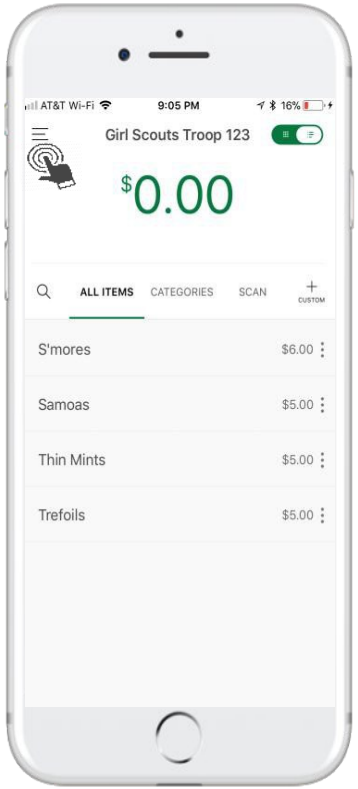


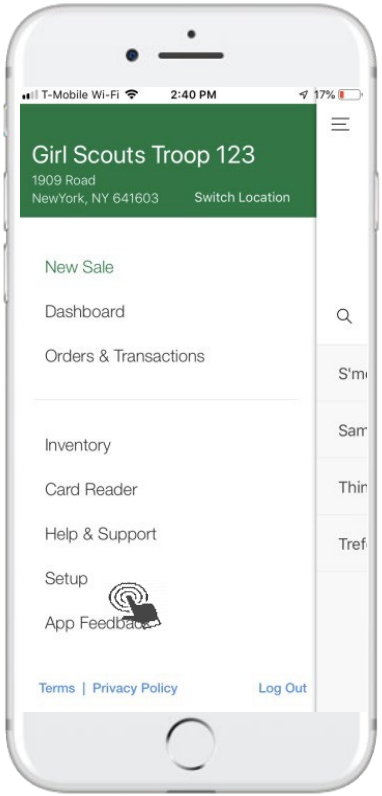
3 Instructions for tracking booth sales

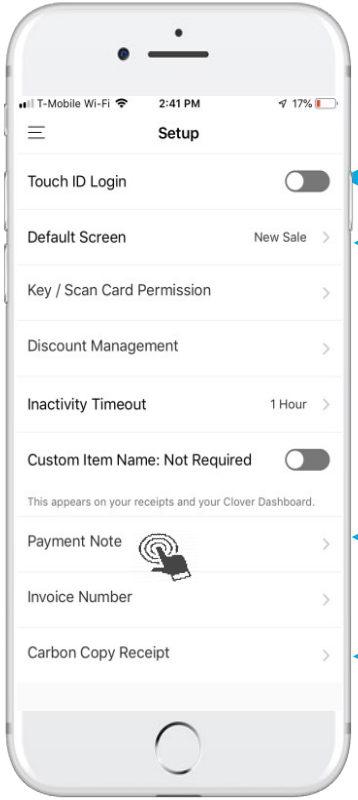
Add a Payment Note Instruction so girls know how to correctly track booth sales

Open Menu

Tap Setup







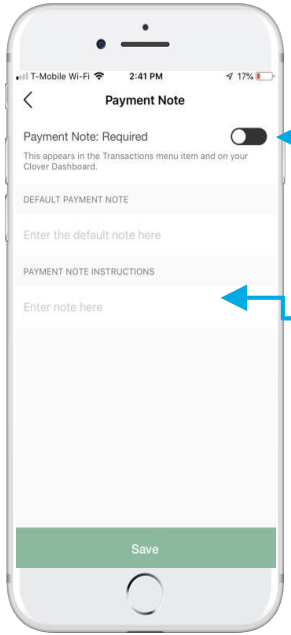
Touch ID can be enabled or disabled for login purposes at any time

Default Screen should be "New Sale"

Configure Payment Note options (see next screen)

Optional: Configure Carbon Copy receipts

Carbon Copy receipts automatically sends copies of receipts to up to 3 specified emails, every time a transaction is receipt is sent to the customer



No need to require a payment note – turn this off

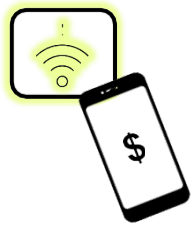
Provide instructions about what kind of notes girls should enter. This should be updated to say, **"If you're at a booth**

ether or not a

sale, enter the word “booth” as well as the location here (e.g. Walmart Booth)”. The preferred way to track booth sales is to create a new unique email address

receipt is sent to the customer

3 *Note for Troop Leaders*: How to use Clover at a Booth Sale



1. **All girls participating in the booth sale who have parental permission *and* access to device with wireless connectivity can use their own Clover login credentials at the booth**
   - Make sure at least one chaperoning parent has performed the set up with his/her daughter the night beforehand so they're ready

2. **Multiple girls using multiple phones or tablets can share the troop's *Clover Go Card Reader* device. Just pair the Reader with all devices and use as normal.**

3. **Cookie box credit must be split up afterwards by the Cookie Manager, as normal, so it's okay if transactions are all done on a single app (i.e., of the chaperoning parent at the booth).**
   - If not every girl has a phone, encourage booth sellers to take turns so they can each try Clover!

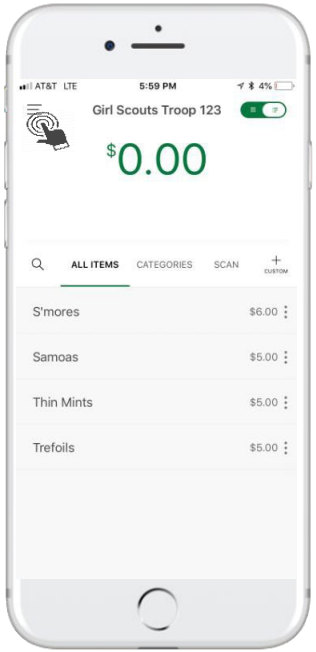
4. **To correctly track sales, girls should create a new, unique email address (e.g. using Gmail). They only need to do this for the first sale of the day**
   - Troop Leader or Cookie Manager can set this up in the Clover dashboard

5. **After the Booth, Troop Leader or Cookie Manager can log in to www.clover.com and select the "Transactions App." Reports pulled will have the unique email address, making it easy to spot when a girl's transactions were at a booth versus when they were her selling on her own**

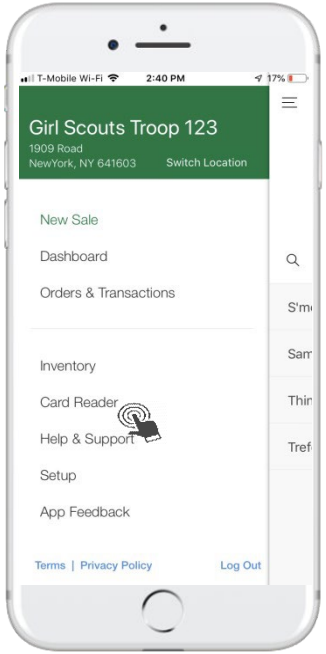
3 Pair Your Card Reader

To-Do List: *Card reader should be charged overnight prior to an event*

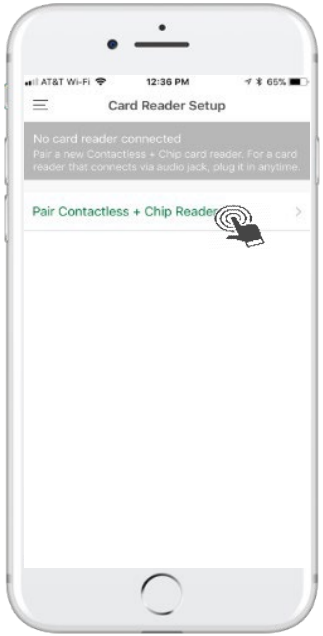
Open the Menu



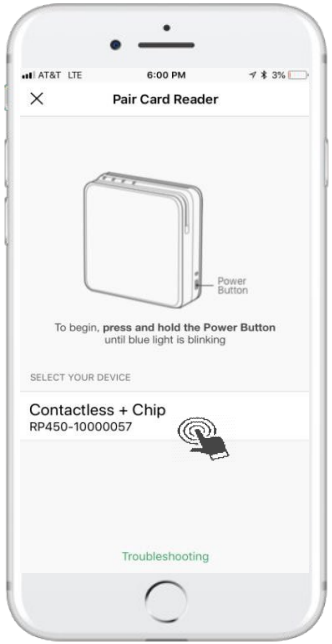
Tap “Card Reader”

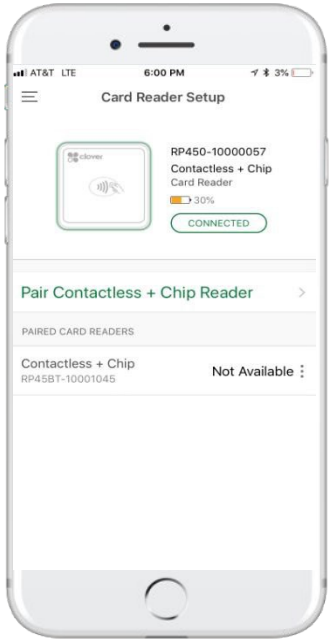


Make sure card reader is turned on and tap “Pair Contactless + Chip Reader”



The card reader that is on will be detected and listed as a selectable option



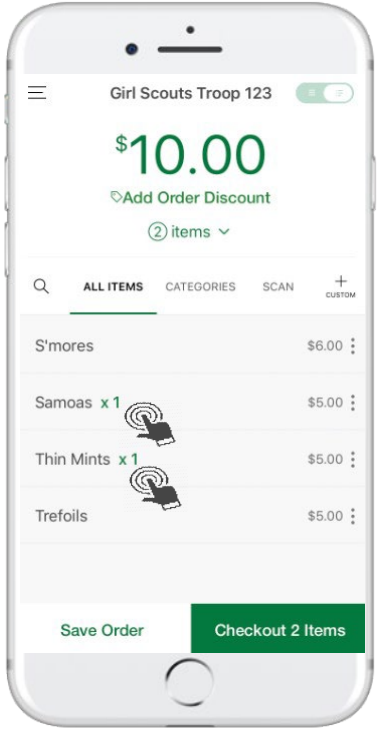


Note: A previously paired card reader should connect automatically to the same phone/tablet that it was paired to in the past. If not, you can

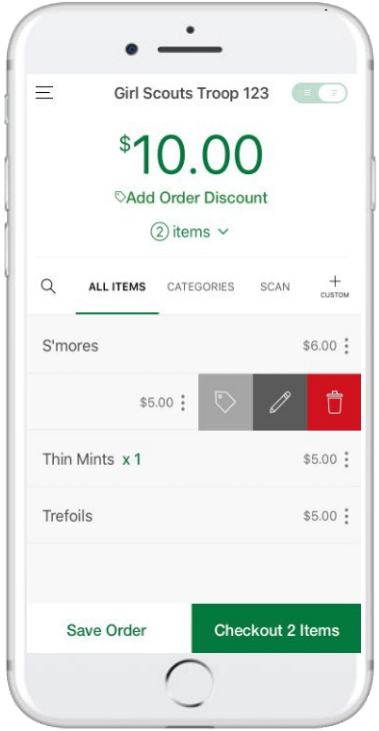
always pair it as shown here.

3 Take an Order

Add items to your order by tapping on each item. Tap as many times as the number of items needed

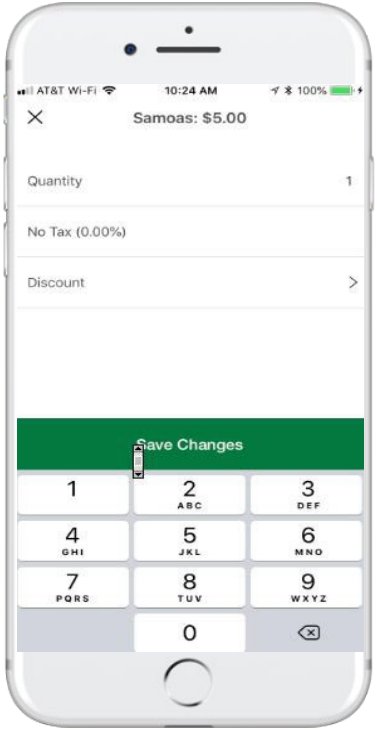


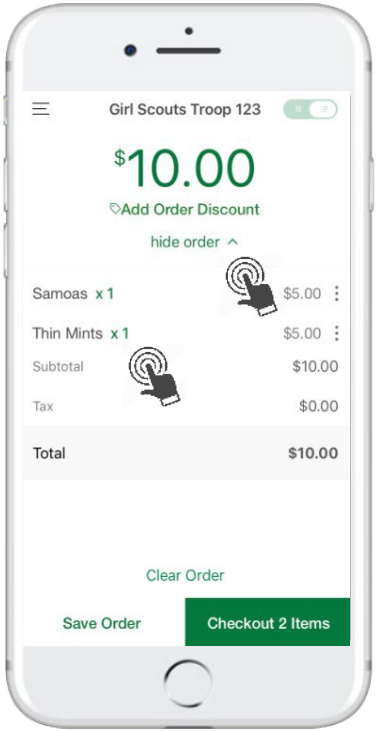
To change quantity or remove an item from the order, swipe left and select Edit or Remove



This can be especially useful if large quantities of a single item are ordered

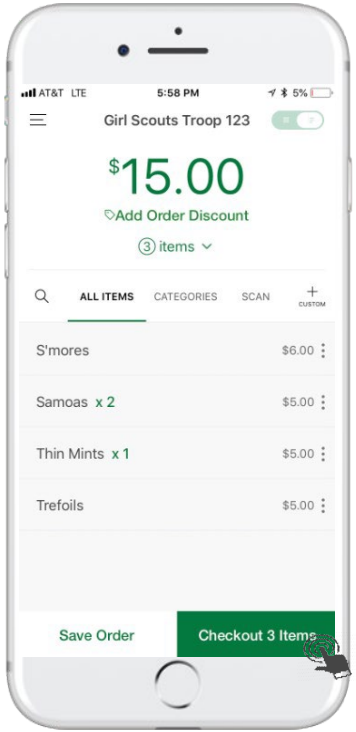
Alternatively, you can tap on the caret to open up the cart and edit or remove items from there as well

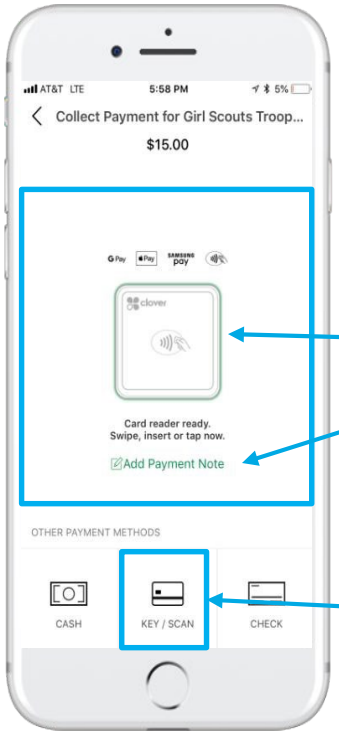

AT&T Wi-Fi
10:24 AM
100%
Samoas: $5.00
Quantity
1
No Tax (0.00%)
Discount
Save Changes
1
2 ABC
3 DEF
4 GHI
5 JKL
6 MNO
7 PQRS
8 TUV
9 WXYZ
0


Girl Scouts Troop 123
$10.00
Add Order Discount
hide order
Samoas x 1
$5.00
Thin Mints x 1
$5.00
Subtotal
$10.00
Tax
$0.00
Total
$10.00
Clear Order
Save Order
Checkout 2 Items

3 Checkout and Collect Payment

Once order is built, tap “Checkout”





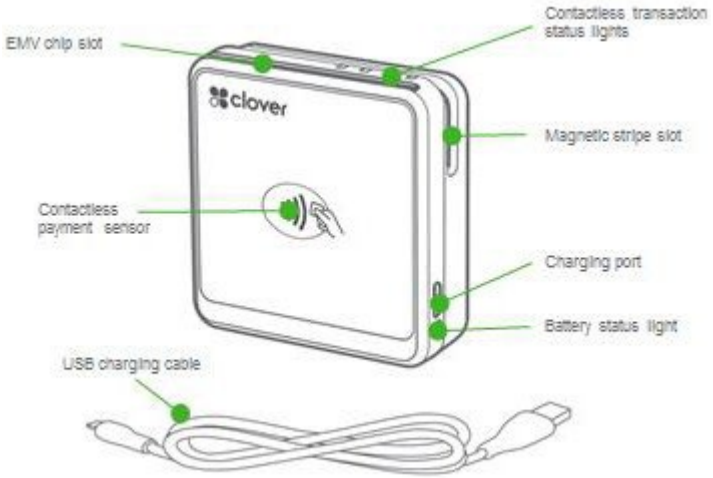
Booth selling with Clover Go Card Reader: To process a payment with the Clover Go Card Reader, you can swipe, dip, or tap right from this screen! The green halo around the image of the card reader in the center will show you if the Clover Go card reader is charged and connected. You can enter a payment note here as well: “Walmart Booth on 1/15/2018”

Individual Selling or selling without reader: To process payment without Clover Go Card Reader, tap “Key In Card”

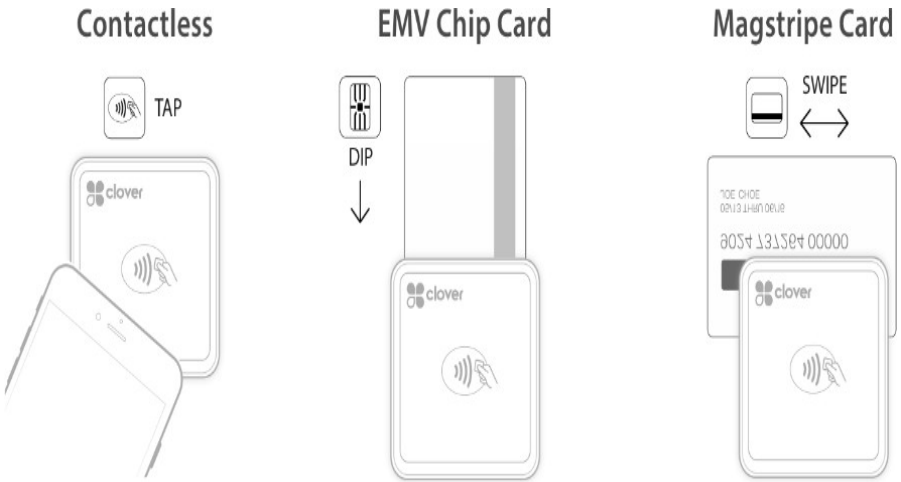
Insert, Swipe, Tap card/phone/watch and then follow the on-screen instructions

TIP: *You can also record cash and check sales in the Clover Go app to help speed up reconciliation and inventory tracking for your troop! Just tap “cash” or “check” after entering order.*

3 Collecting Payment on Clover Go Card Reader



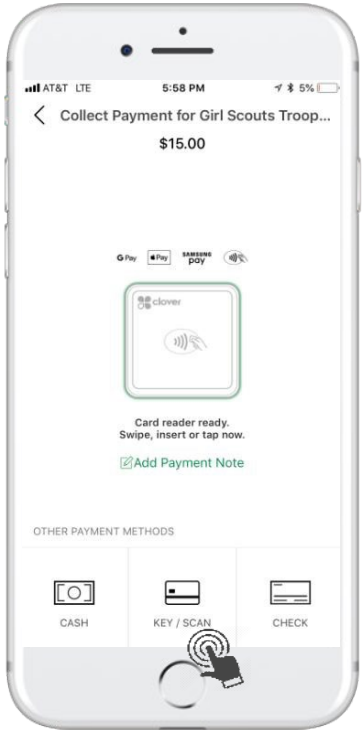
Images below depict How to Insert, Swipe, or Tap a card.

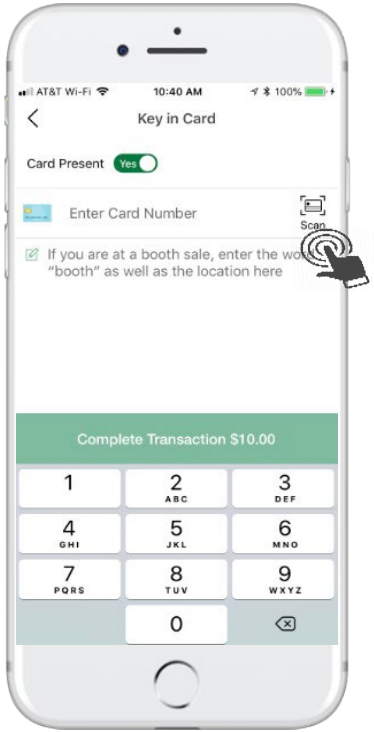


Apple Pay, Samsung Pay and Android Pay (via phones and Apple watches) are accepted via the Contactless Tap.

3 Collecting payment if using card reader and the card swipe, tap, or dip fails

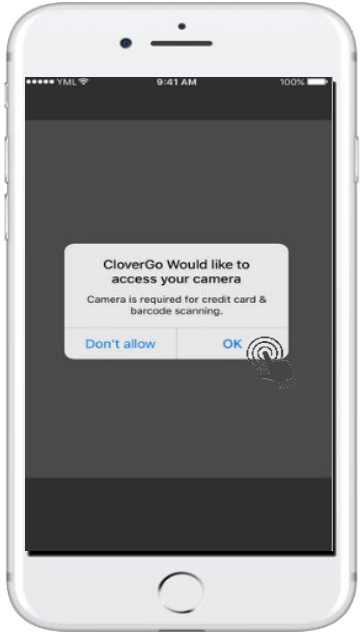
- If card provided is unreadable, or a “transaction failed” message is received, you may need to key in the card number

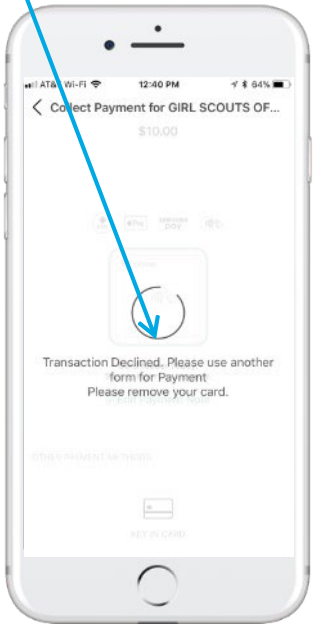




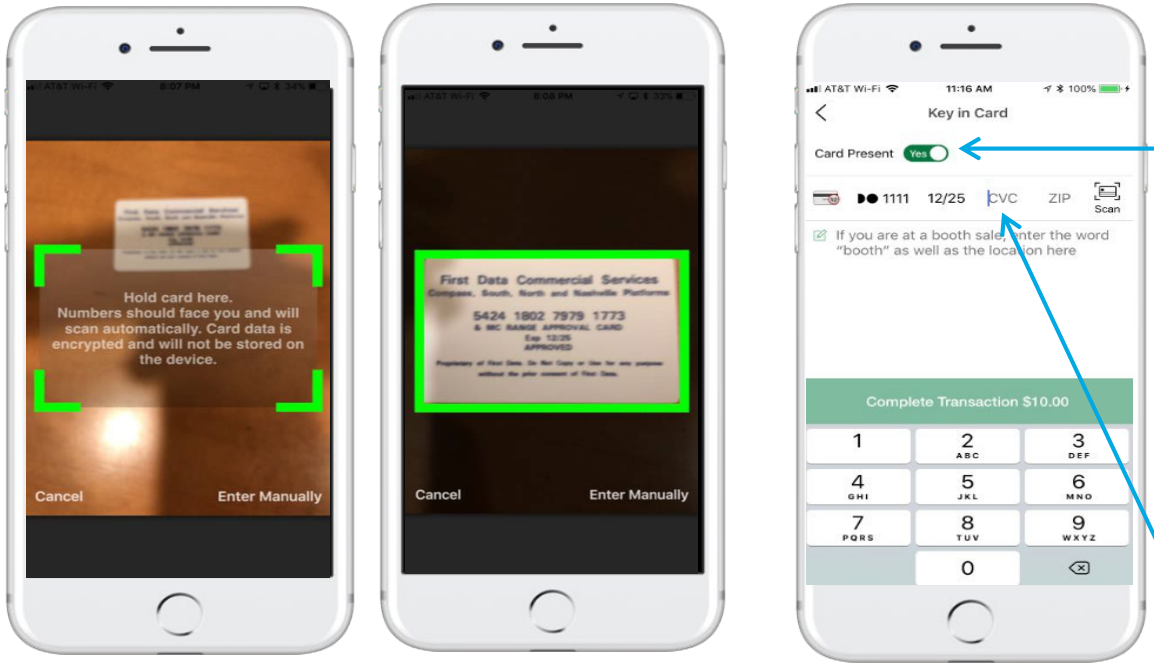
Either hand key a card number.or use the camera of the device to scan it in

- If, however, a “Transaction Declined” message is received, you will be taken back to the “collect payment screen and should ask for a different card or a different form of payment, such as cash





3 Collect Payment Using OCR Card Scan



You will only be able to use OCR Card Scan if the toggle is set to “Card Present”.

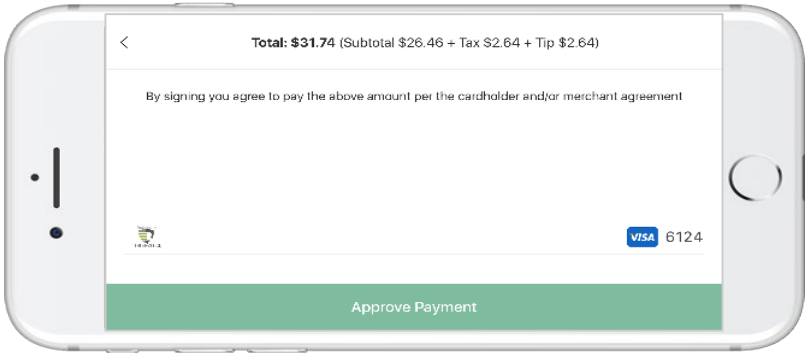
For security purposes, you should only run a transaction where the card is in front of you. ***Don’t ask your customers to share payments over the phone or online!***

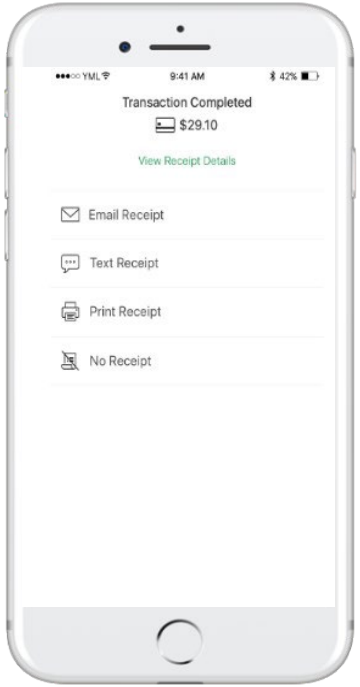
Note: The card number can be scanned in, but other information (CVV, Zip) will still need to be keyed

3 Signature

Once the transaction completes, if signature is required, the signature screen will present.

Note: Signature is not always required, such as in the cases of Apple Pay transactions and even certain cards.





If Customer would like a receipt, you can

- Send via email
- Sent via text
- Airprint/GooglePrint if such a printer is in range

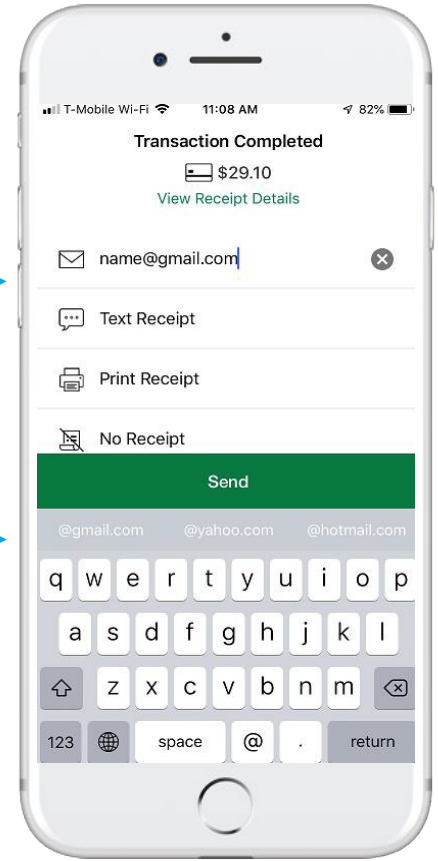
Or, you can complete without sending a reciept

3 Email/Text Receipts

1

Type the email address of the customer.

If this customer used the same card with you before, his/her email address or phone number may appear automatically. You can then either send to that address, or enter a new one



2

Or, select the “+” button that will deep link to the contacts of the device to allow user to retrieve the information from their contacts.

3

The top 3 email extensions used by Clover Go users will be included as selectable options.

Clover Go Training for Troop Leaders: Table of Contents

1. Troop Boarding
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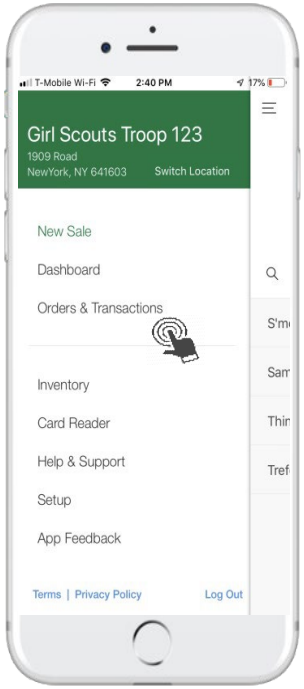
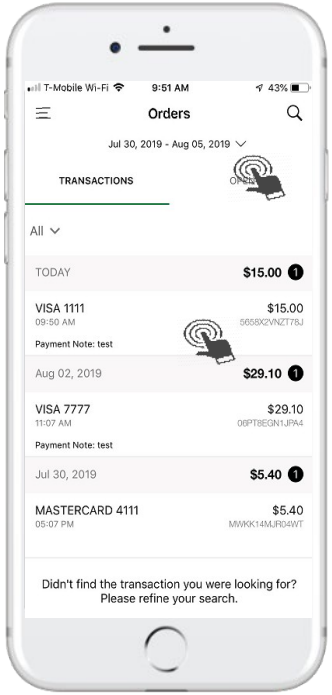
5. How administrators can track the sale using Clover Dashboard reporting
6. Additional Information

4 How do I issue a refund or resend a receipt?

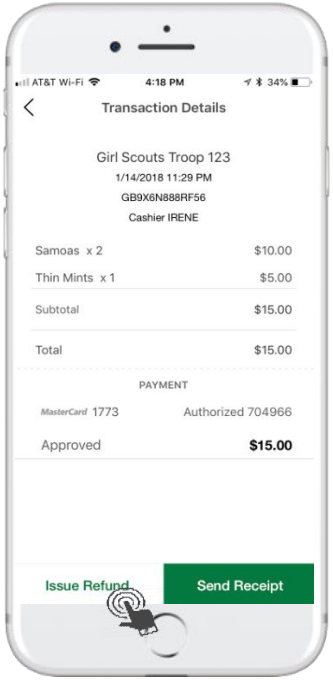
- Access Transaction History to see all transactions, with summary of $ and # of orders for that day
  - The full order will stay with the day it was processed, but refund entries will appear under the day each refund was processed as an informational item
- Once a specific transaction is selected, a girl can issue a refund or resend a receipt
  - Can only refund a transaction to the card used to purchase the item
  - You can refund 1 or all boxes, but each individual item will be refunded in full
- Refunds should be issued for mistaken entries (i.e., charged for 3 boxes instead of 2) or charging the wrong credit card. If customer has a quality complaint or issue with their purchase, they should contact the Council directly

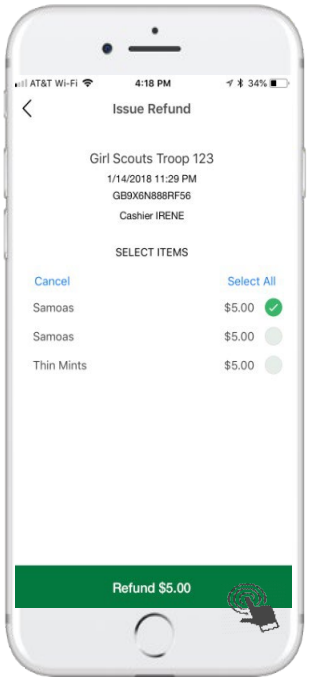




Opening the Transaction History initially pulls 7 days worth of history. If that doesn't pull up the transaction you need, tap the caret by the displayed date range and enter a different range.

Select specific transaction and reissue receipt or refund



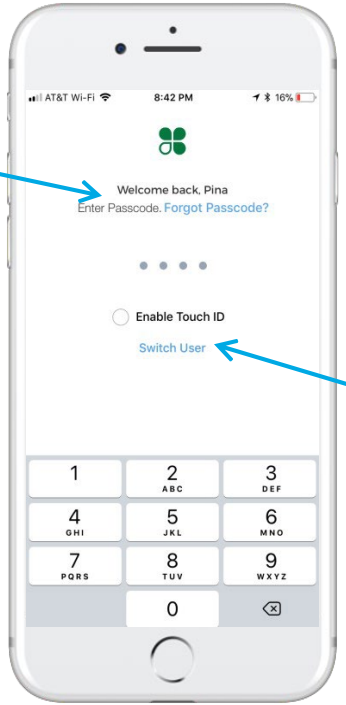


If you tap "issue refund", you can refund one, multiple, or all boxes.

4 Can multiple girls share the same phone?

Answer: Yes, but each girl has to log in with her OWN Clover Go credentials

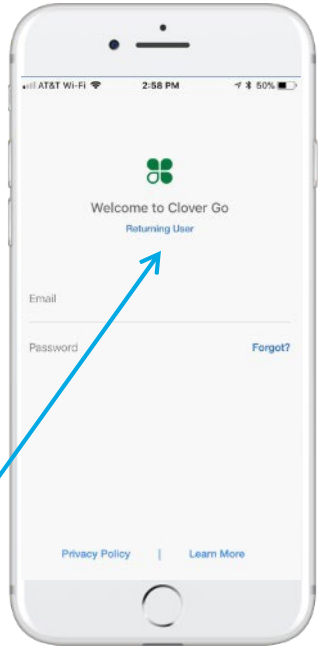
If you were the last person to use the app on this phone/tablet, your name should appear on this screen (“Welcome Back, xxxx”). In that case, just enter your pin (which could be either 6 digits of 4 digits, depending on how your account is configured). The screen will display the proper amount of digits based on that configuration.



If you were not the last person to use the app on this phone/tablet last, select “Switch User”, in which case the screen on the right will be displayed with all users that have previously activated on this phone/tablet. If you see your email address, select it and the pin screen will appear with your name after the words “Welcome back”

To remove a previously activated user, tap “x”

If you do not see your email address in the list, you can tap “+ Add New User”, which will bring up the screen below and allow you to activate a new user on this phone/tablet

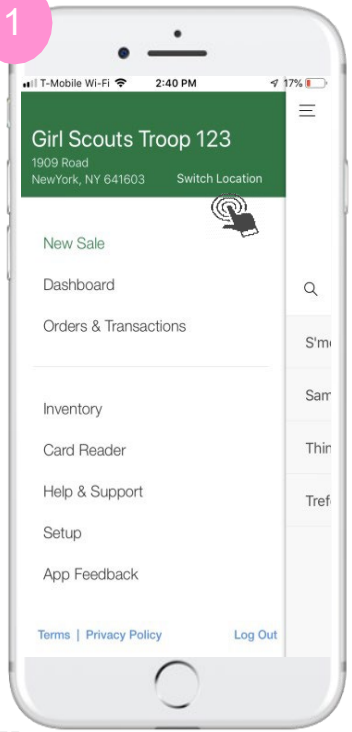


If you tapped “+ Add New User” in error and want to go back to the screen with the list of emails, just tap “Returning User”

4 Can a parent/volunteer manage multiple troops from within the same account?

If you have more that 1 merchant account / troop tied to your email address, you will be able to log in with one set of credentials (the ones that belong to your “primary merchant” account and then switch between them within the app with ease). Note that each girl needs her own account to get proper credit for her sales – see prior page

1



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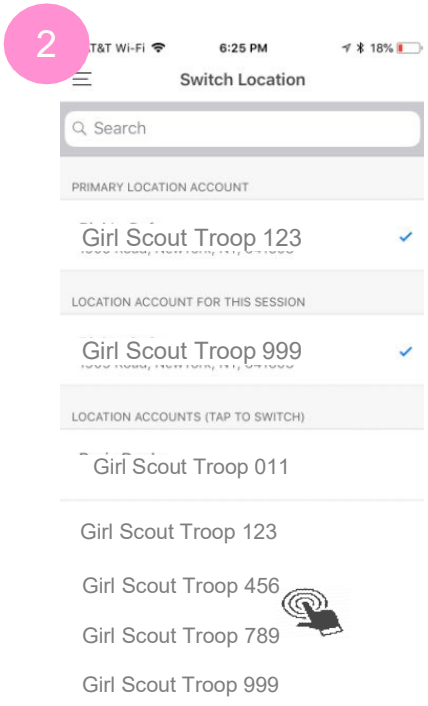

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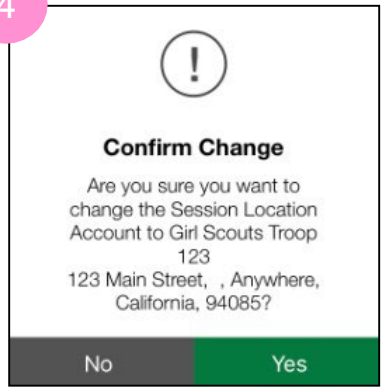
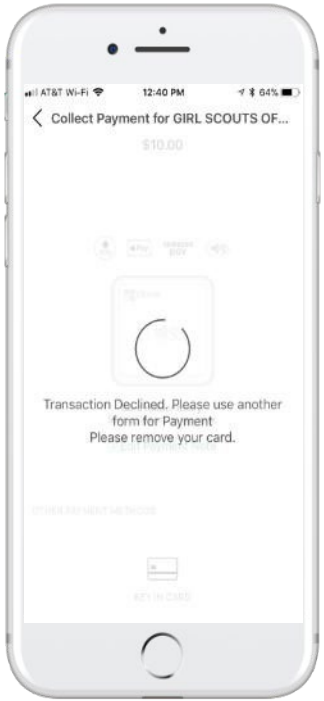


4 Using Clover Go Card Reader: troubleshooting tips

- Clover Go has a 1-hour inactivity timeout as well as a session timeout. If you see a message like this, tap “OK” and re-enter your passcode

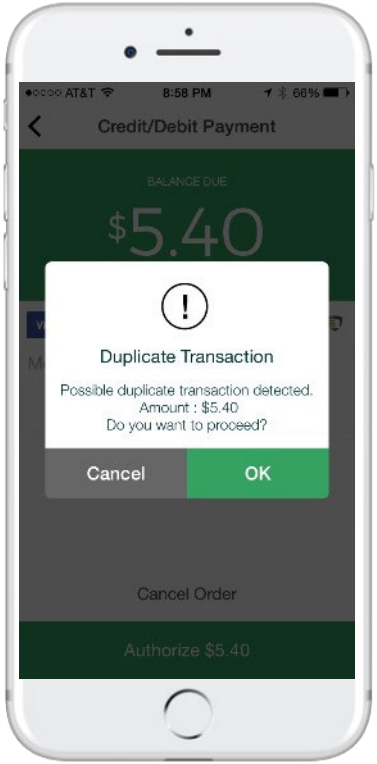
- If a “Transaction Declined” message is received, you will be taken back to the “collect payment” screen and ask for another form of payment

- If a “Transaction Failed” message is received, go back to the collect payment screen and select “key in card” or ask for another form of payment



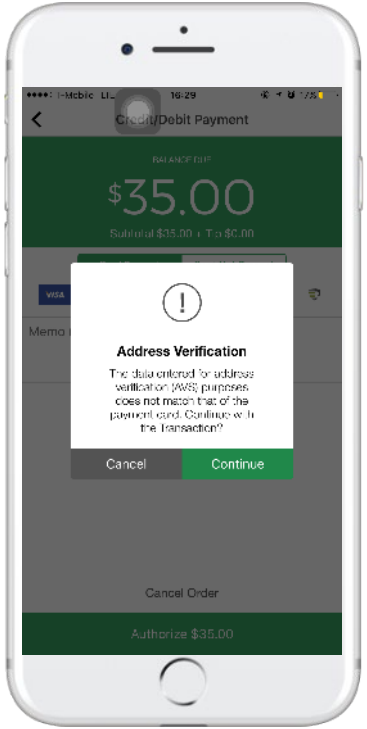
4 Using Clover Go Card Reader: troubleshooting tips

Duplicate Transaction Detection



- Duplicate transactions can occur due to connectivity issues at the point of sale.
- If fields are identified as similar to a previous recent (within an hour) transaction then a notification is presented
- User can chose to continue (OK) or cancel the current transaction.
- If desired, user can go to the settings icon, then tap transaction history and look at the prior transaction

For keyed transactions, there is an address verification check



- A failure message will be presented if AVS (Address verification) fails
  - User will be alerted to the failure, but will be given the option to continue or cancel the transaction
  - If they choose to continue with the transaction, the app will go to the next step, e.g. signature screen
  - If they choose to cancel the transaction, user will be retuned to the collect payment screen (we will not clear out the order) where they can chose another form of payment or cancel the transaction

4 Using Clover Go Card Reader: troubleshooting tips

- The first time you see a chip read failure message, check to make sure that you have inserted the card correctly, e.g. in the right direction

- The second time a chip read failure message is presented, you will be prompted to try swiping the card. If this fails as well, you can go back to the “Collect Payment” screen and either try to key in the card or ask for another form of payment

4 What kind of smartphone or tablet do I need to use?

Are there minimum phone or tablet operating system requirements?

The minimum operating system supported today is iOS 10 and Android5.

Does Clover Go Work over WiFi and Cellular Network?

Yes, Clover Go works over both Wi-Fi and Cellular Network.

Does Clover Go Work when there is no connectivity?

Clover Go can work in Offline Mode if device is set to “airplane mode” and Offline Payments are enabled for the account.

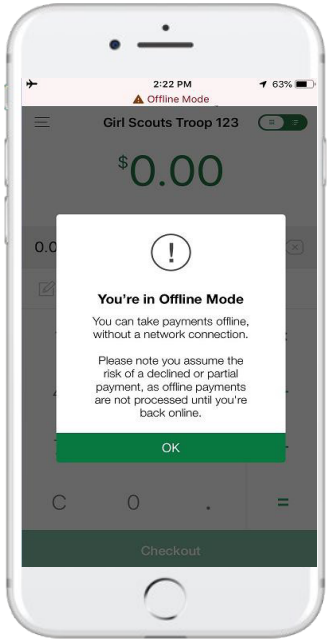
Why does the app ask me to enter my passcode again?

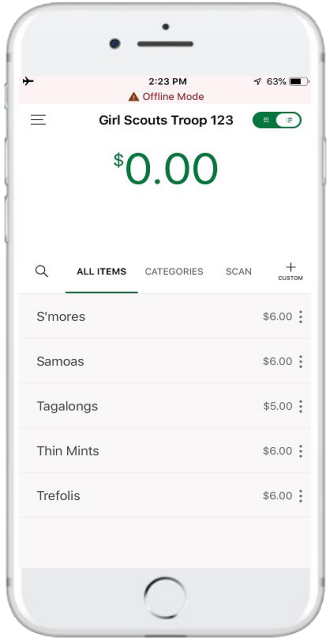
Clover Go implemented a 60 minute inactivity timeout, after which the application will log the user out and require them to enter their passcode/PIN to log back in. Any interaction with the app will reset the activity timer, until the session times-out at 3AM local time. Activity does not reset the session timer. For example, if user logs in at 2:30 AM, we will still time the session out at 3AM, regardless of activity.

Additional FAQs can be accessed via https://www.clover.com/us/en/help/clover-go/

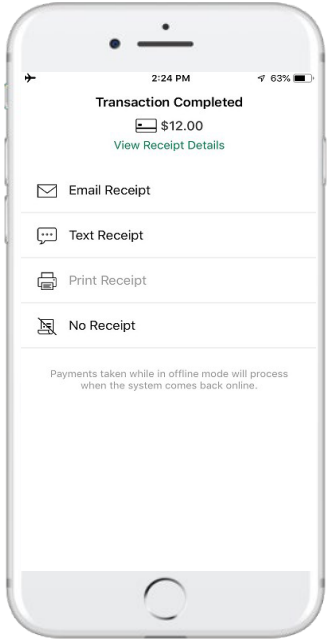
4 Using Clover Go When There is an Outage or No Connectivity

- Note: To use Clover Go when there is an outage or no connectivity, Offline Payments must be enabled. See slide 22 for instructions re: ow to enable.
- Please note: You must activate your Clover Go while online. Bluetooth card reader can be connected while offline, but only one that has already been paired/configured while online.
- Please note: You must log in to the app while online in order for the transactions to upload and process. Please make sure that you do not delete and reinstall the app if you have taken payments offline, but they have not been uploaded.

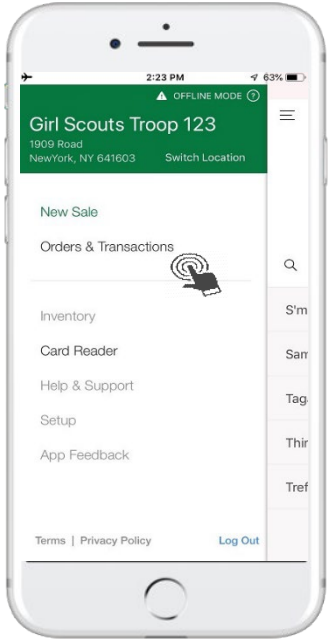




Clear messaging will be presented

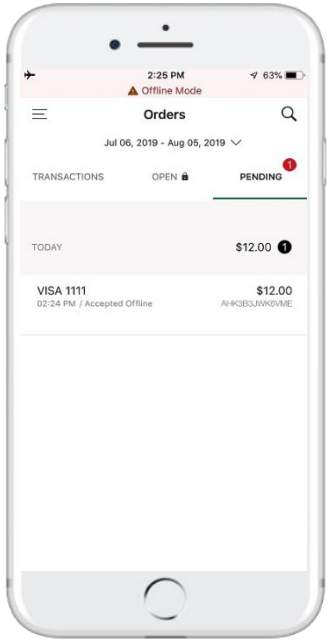


Receipts will be sent to your customers after you are back online and the transaction has been processed and approved.



Not all functions are available while offline. Those that are not, will be greyed out and not tappable.

- Pending section contains all payments taken offline, but not yet uploaded. These transactions will be sent for processing automatically, once you are back online. If the upload should fail, you will continue to see the badge icon with the number of transactions that are pending and have the ability to resend.
- Refunds can be given, but only in full. In that case, the transaction will just be deleted and not uploaded when you are back online.
- Receipts will be queued up and sent when you are back online.



4 Frequently Asked Questions

How long will it take to see funds in my account for cookies sold?

Your funds will be in your account in 24-48 hours.

How do I charge the reader and how long will it take?

You can charge the reader by connecting the accompanying USB cable to any power source. It will take around 1-2 hours to fully charge the reader, but this varies depending on your charging source (i.e. charging via a power socket vs charging via a USB plugged into a laptop or desktop). However, it is recommended that you charge the reader overnight prior to an event.

How many transactions can I process on a full charge?

It depends on the type and combination of transactions. Contactless transactions alone = roughly 130 transactions. EMV/Chip contact transactions (dipped) alone = roughly 160 transactions. Swiped transactions alone = roughly 160 transactions.

How long will the battery last?

Your experience may vary, typically, with a full charge, the Contactless + Chip reader will last for about 20 hours. Please note that in order to conserve the battery, your reader will automatically turn itself off after 15 mins of inactivity unless connected to the optional stand or a wall charger.

If I am not using the card reader, will it still lose charge?

Yes. There will be a low level battery drain. Over 3 months without using this card reader at all, the device would still support more than 15 EMV transactions and more than 50 swipe transactions.

Additional FAQs can be accessed via https://help.clover.com/devices/clover-go/

4 Other FAQs about the Clover Card Reader

How far can the reader be from the device and still work?

Approximately 30 feet, with no obstacles in the way.

How do I turn the Contactless + Chip card reader on and off?

To turn on the reader, push and hold the power button on the reader until you see the blue LED light. To turn off the reader manually, push and hold the power button until the blue LED light turns off. The reader will also auto turn off after 15 minutes of inactivity. If the reader is turned off, simply turn the reader back on again and the reader will auto connect with the app. Or, open the Menu, then tap “card reader” to connect manually.

Can I control the volume of the sound coming from the contactless + chip card reader?

You can raise or lower the volume of the sound or mute it completely by using the sound volume controls on your phone or tablet.

What is an Open Order?

Open orders are a way to create and save an order, then process the payment at a later time. This feature also allows users to create an order on one Clover device and process the payment using the Clover Go app or vice versa.

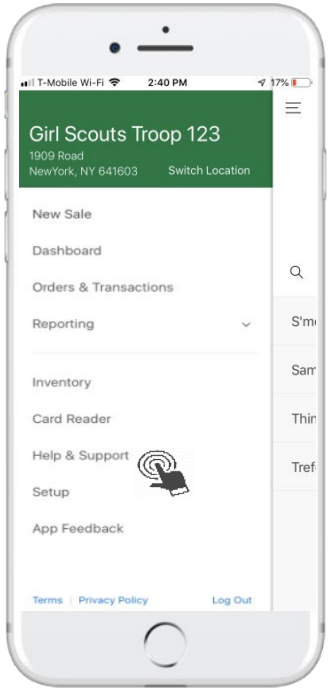
I did not create any Open Orders, so why am I seeing them?

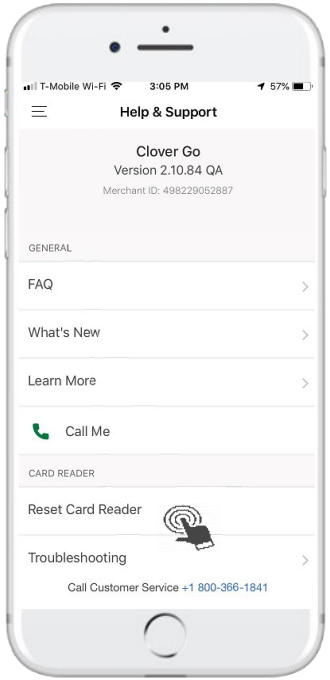
At this time, failed payments are also being saved as Open Orders and may explain why you are seeing these entries.

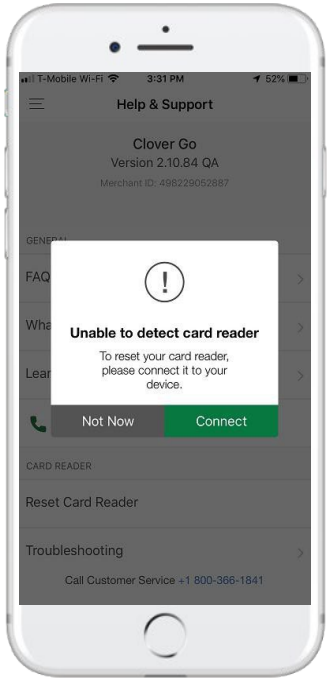
Additional FAQs can be accessed via https://help.clover.com/devices/clover-go/

4 If your card reader is not working, you can try to reset it

Note: If you are still experiencing issues with the card reader after completing this step, use the “Call Me” function and troubleshoot with a Clover Support agent

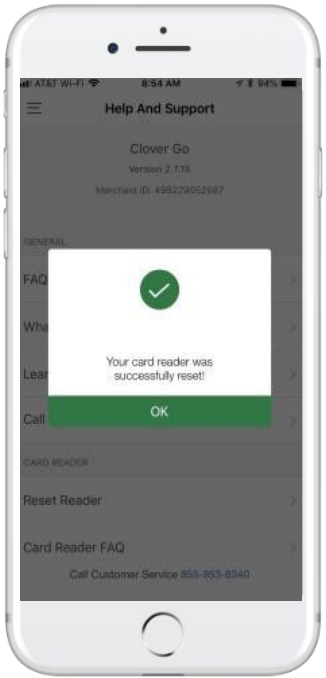




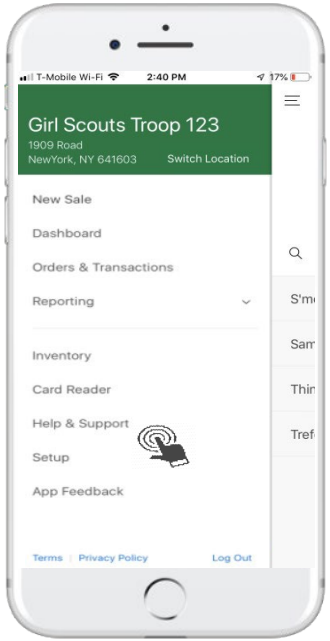


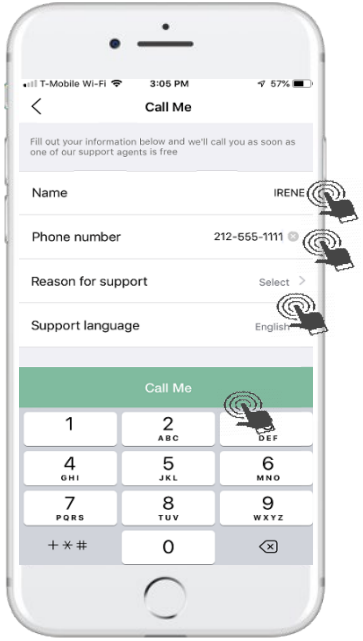
If user taps “reset card reader”, but there is no card reader connected, they will be prompted to connect the card reader first, or cancel by tapping “Not Now”

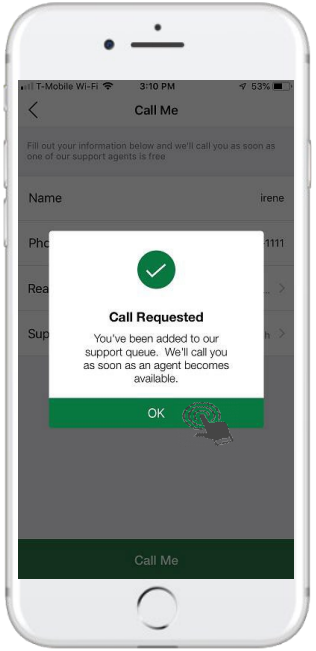
Otherwise, app will initiate the card reader configuration process

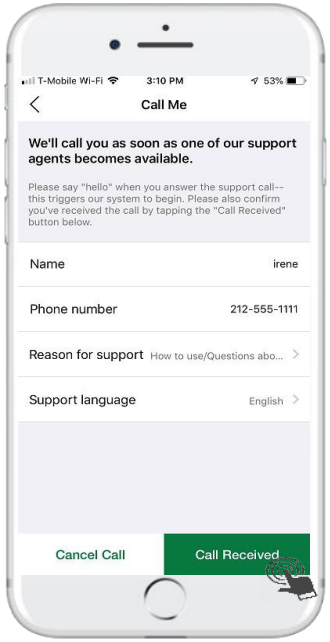


4 You can initiate a request to have a Clover Support agent call you right from within the app









- Make sure the name displayed is your name
- Make sure the phone # displayed is where you want the Clover Support agent to call you
- Select the reason for support from the list presented
- Select the language
- Tap “Call Me”

After call has been received and completed, tap “Call Received”. Or, to cancel a call before it has been received, tap “Cancel Call”

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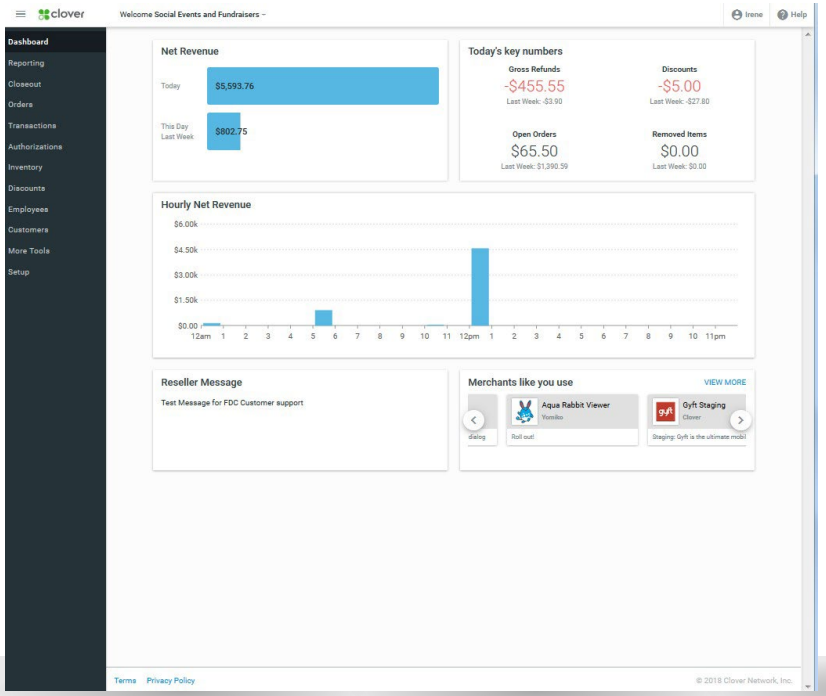
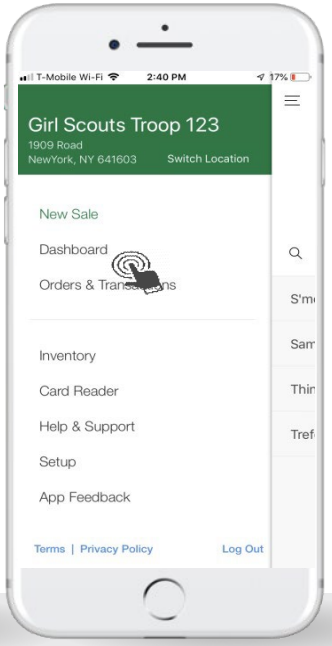
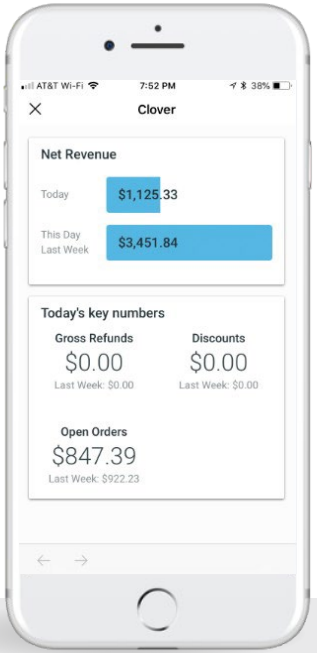
5 Access “Key Numbers” screen of the redesigned Dashboard from Clover Go Without Additional Login



Redesigned Clover Web Dashboard

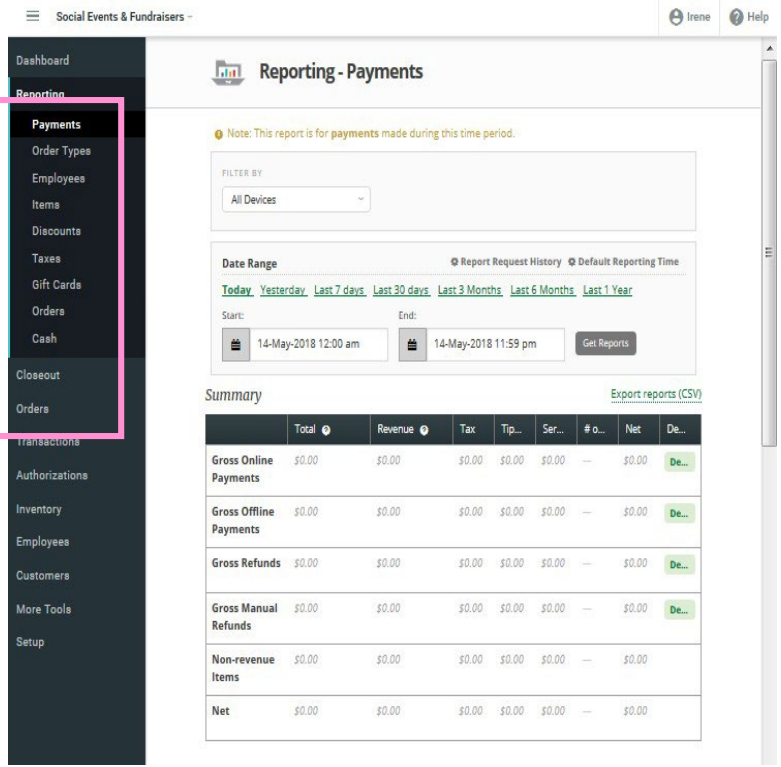


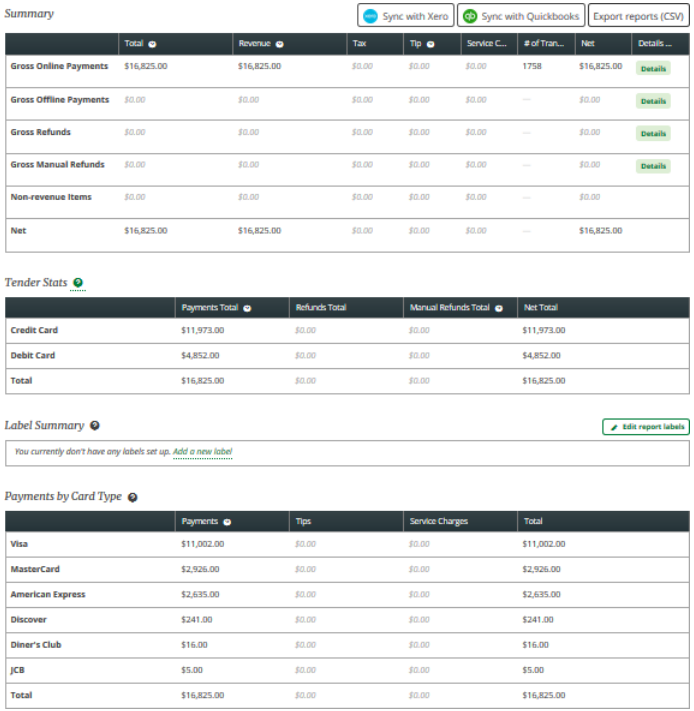


Will only be displayed in the Clover Go app to those that have the Redesigned Clover Web Dashboard as well as the Admin role. We will include changes to support permissions in an upcoming release.

5 Admins can access Clover reporting on the web

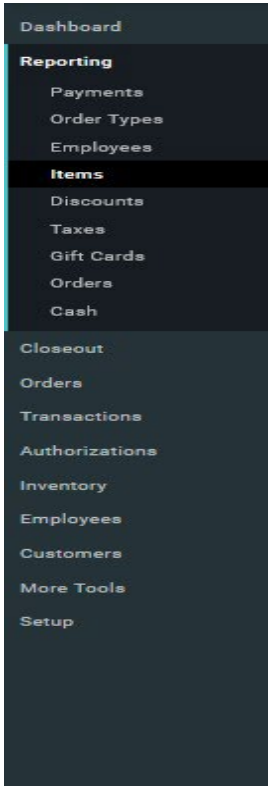
Go to Clover.Com and login with the same username and password combination. Access the “reporting app” to view summary data by tender type, card type, employee/Girl Scout and more! Note: when you put in the date range, you must click “Get Reports”





5 Clover reporting on the web: Sales by Inventory Item

To view sales by item, click on the “items” tab



Cookies

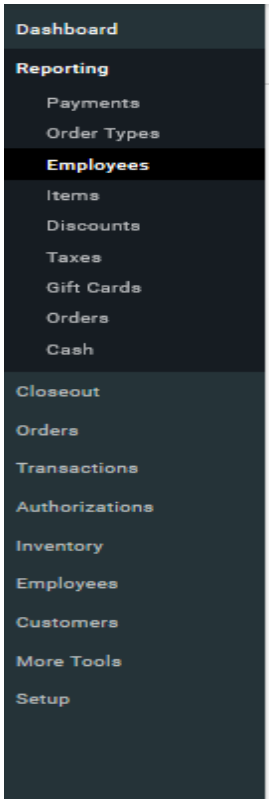
Name	Sold	Refunded	Item Rev...	Modifiers Revenue	Item Discounts	Order Discounts	Total
S'mores	539	0	$3,234.00	-	-	-	$3,234.00
Samoas	995	0	$4,975.00	-	-	-	$4,975.00
Thin Mint	1414	0	$7,070.00	-	-	-	$7,070.00
Trefoils	299	0	$1,495.00	-	-	-	$1,495.00
Total	3247	0	$16,774.00	$0.00	$0.00	$0.00	$16,774.00

Items With No Category

Name	Sold	Refunded	Item Rev...	Modifiers Revenue	Item Discounts	Order Discounts	Total
Donation (Custom Item)	1	0	$50.00	-	-	-	$50.00
Test (Custom Item)	1	0	$1.00	-	-	-	$1.00
Total	2	0	$51.00	$0.00	$0.00	$0.00	$51.00

5 Clover reporting on the web: Sales by Girl

To view sales by girl, click on the “employees” tab

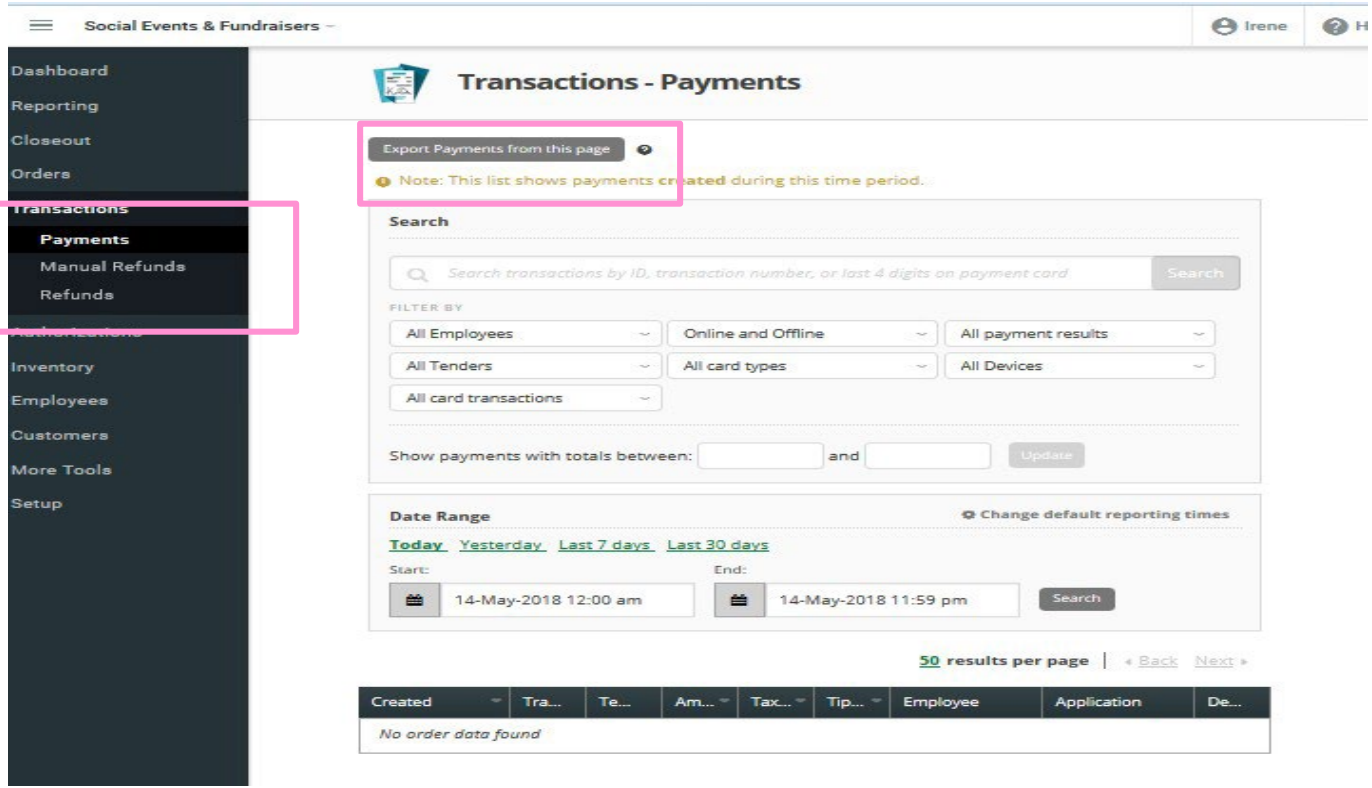


Name	Payments		Refunds		Manual Refunds		Service Charge	Tips	
	#	Amount	#	Amount	#	Amount			
Irene S	1	$1.00	0	$0.00	0	$0.00	$0.00	$0.00	Details
Learning Cabin 1	283	$2,467.00	0	$0.00	0	$0.00	$0.00	$0.00	Details
Learning Cabin 2	173	$1,624.00	0	$0.00	0	$0.00	$0.00	$0.00	Details
Learning Cabin 3	277	$2,748.00	0	$0.00	0	$0.00	$0.00	$0.00	Details
Learning Cabin 4	185	$1,788.00	0	$0.00	0	$0.00	$0.00	$0.00	Details
Learning Cabin 5	156	$1,618.00	0	$0.00	0	$0.00	$0.00	$0.00	Details

5 Clover reporting on the web: Pulling reports into Excel

Use the Transactions app to view transaction details, search on date range, and more!

These reports can be downloaded to Excel using the button on the top left hand of the screen

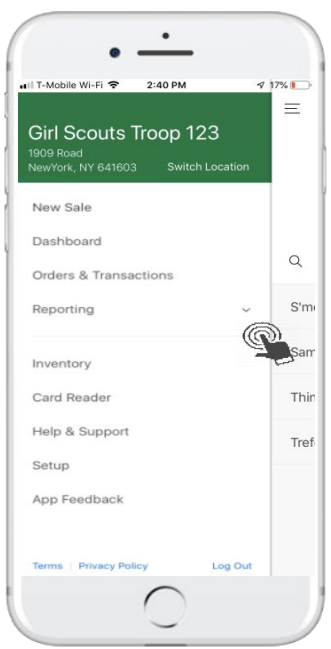


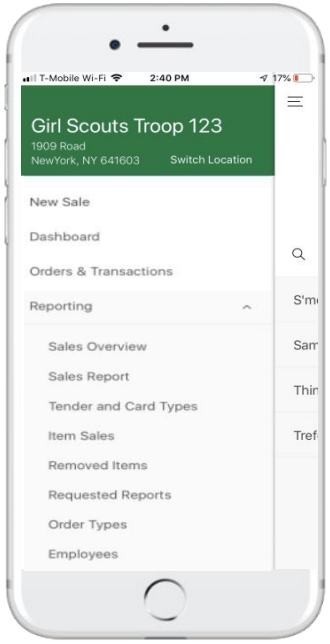
5 Booth sale reporting: Reports in Excel help Cookie Managers identify sales at booths that need to be credited to multiple girls

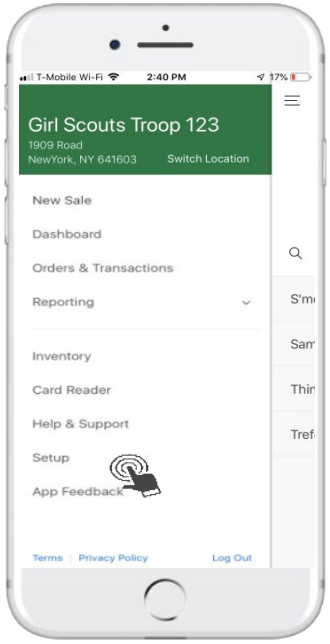
- Whenever you need to update Smart Cookies, pull all transactions since your last update
- Report has details by individual User (email address or girl)
- For the Days when there are booths, the Payment Note can be used to identify which sales should be credited to booths
  - When a girl is selling at a booth, she would note “Walmart Booth” for her first sale of the day
    - **NOTE: The preferred way to track booth sales is to create a unique email address/user for the booth sale. At the booth sale, make sure the participants log in using credentials associated with that email address/user. Optionally, the Payment Note can be used to document who was participating at the Booth Sale.**
  - Girls not selling at a booth that day who post transactions would have no Payment Note, so she is selling on her own
- Sales that occurred at a booth should be credited across the troop or to the girls who participated (as you normally would)

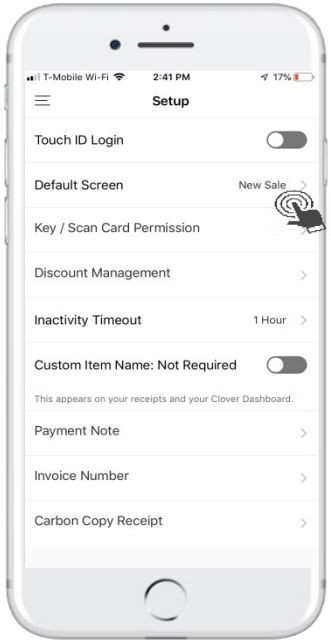
A	F	G	H	I	J	K	L	M	N	O	P	Q	R
Order Date	Employee Name	Note	Currency	Tax	Tip	Service Ch	Discount	Order Tot	Payments	Payment Note	Refunds T	Manual Re	Tender
08-Nov-2017 04:10 PM PST	Learning Cabin 7		USD	0	0		0	10	10		0	0	Credit Car
08-Nov-2017 04:06 PM PST	Ranger Station 21		USD	0	0		0	5	5		0	0	Credit Car
08-Nov-2017 04:05 PM PST	Ranger Station 25		USD	0	0		0	5	5		0	0	Debit Card
08-Nov-2017 04:04 PM PST	Learning Cabin 3		USD	0	0		0	5	5		0	0	Credit Car
08-Nov-2017 04:03 PM PST	Learning Cabin 2		USD	0	0		0	6	6		0	0	Credit Car
08-Nov-2017 04:03 PM PST	Learning Cabin 3		USD	0	0		0	20	20		0	0	Credit Car
08-Nov-2017 04:03 PM PST	Learning Cabin 5		USD	0	0		0	6	6		0	0	Credit Car
08-Nov-2017 04:03 PM PST	Learning Cabin 5		USD	0	0		0	6	0		0	0	
08-Nov-2017 04:02 PM PST	Ranger Station 21		USD	0	0		0	10	10		0	0	Debit Card
08-Nov-2017 04:02 PM PST	Ranger Station 25		USD	0	0		0	5	5		0	0	Debit Card

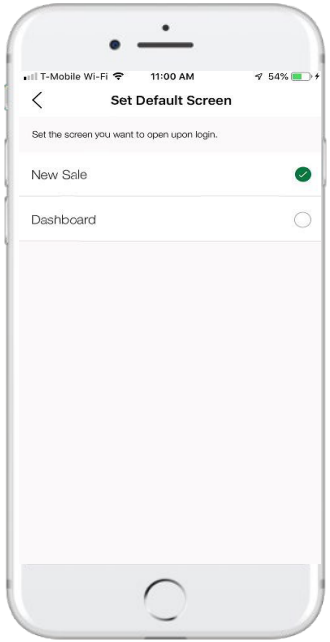
5 For on-the-go reporting, you can also access reporting in-app









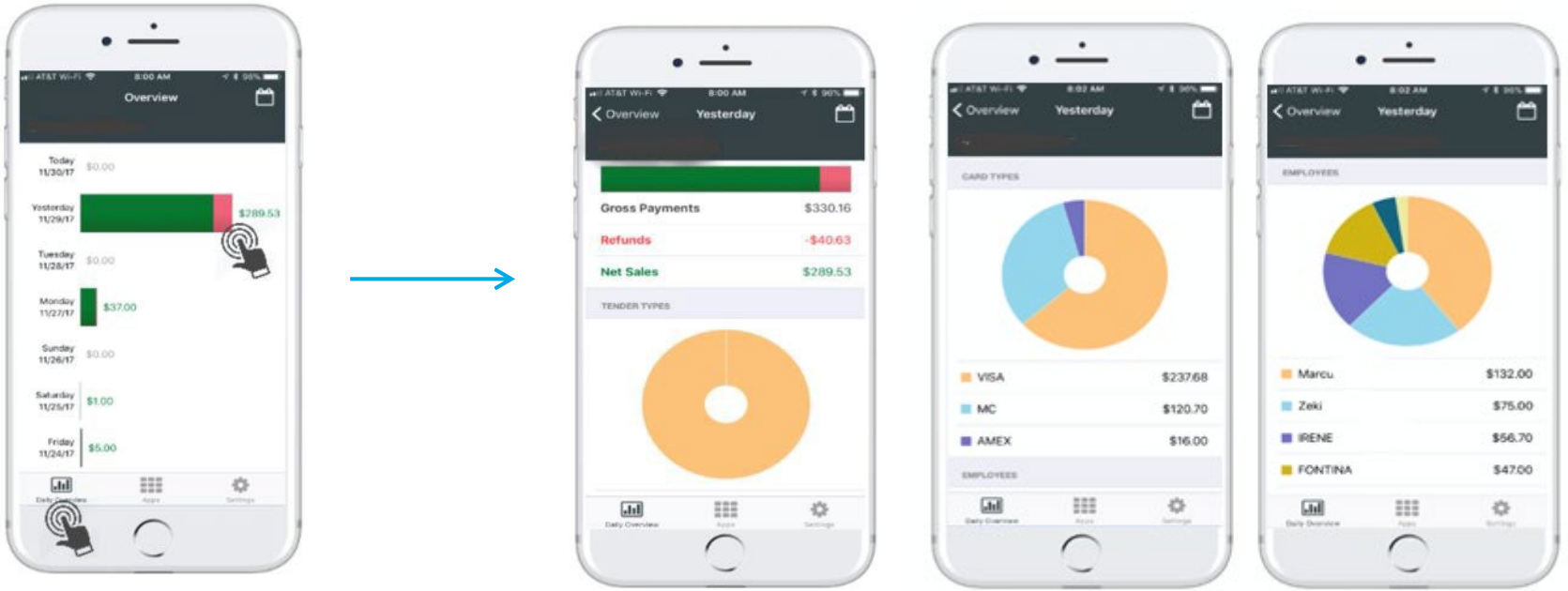


- Access to reports is permission based
- If user does not have access to any of the reports, they will not see the Reporting section within the Side Menu
- If they do have access, they will only see those reports to which they have access

- Admins and users with access can choose their landing page – either New Sale or Dashboard
- Default is New Sale

5 For on-the-go reporting, you can also download and use the Clover Dashboard app from the App Store or the Google Play Store

- Same email address/password combination that you use to log in to www.clover.com as well as to activate the Clover Go app will be used to log in to this app as well



Daily Overview provides an at-a-glance summary

Clover Go Training for Troop Leaders: Table of Contents

1. Troop Boarding
2. How troop leaders / cookie managers can set up their troops and add council Admin users in Clover
3. How girls / parents can make a Clover Go transaction
4. How to handle account issues or problems making a transaction and other FAQs
5. How administrators can track the sale using Clover Dashboard reporting
6. Additional Information

What fees are associated with my Clover account?

- The only fees the troop will incur is a device payment if they choose to purchase a device.
- Fees associated with transactions will not be incurred by the troop. Troops will NOT have to submit a fee schedule for reimbursement after the cookie program. Council will automatically absorb those fees.
- In order to receive full reimbursement of transaction fees, you must add Cathleen Sigmund as an Admin to your account. csigmund@girlscoutssa.org.

6

What if I still have questions?

Additional FAQs can be accessed via https://help.clover.com/devices/clover-go/

For questions about technical issues or problems with your Clover Go account or device, please call the Clover support team 24/7 at 855-276-5008

For questions regarding billing, chargebacks and all non Clover functionality questions, please call Customer Service at 855-276-5008

Now you are ready to begin onboarding!

Please click the link below to start the process of onboarding your troop for clover.

https://girlscouts.firstdata.com

THANK YOU!