

# Navigating the Clover Dashboard

Log in to the Clover Dashboard at [www.clover.com](http://www.clover.com) and check your configurations.

**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](http://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.

"Setup" -> "Business Information" to ensure the Troop Name & Council info is correct and upload council logo.

**2**

Business Information

Business Name: GSSJC Troop 123

Address Line 1: 1234 Address Street

Address Line 2:

Address Line 3:

City: Anywhere Town

State / Province (Put n/a if not applicable): State

Postal / Zip Code: 12345

Select "Orders" to make sure "Allow notes..." is checked.

**3**

Setup - Orders

Orders

- Automatically group similar items
- Allow notes on orders
- Remain in category after adding an item to an order

Save

Select "Order Receipts" to make sure "Group line items" is checked.

**4 Group line items on receipts**

Setup - Order Receipts

Order Receipts

- Print order receipt - Please choose an option
- Require order receipt requires manager Passwords
- Order Receipt Appearance
  - Use large font
  - Add blank lines to the top of the receipt
- Order numbers
  - None
  - Automatic (order over)
  - Set over order number after: 10
  - Manual (cashier enters number/text)
- Order Receipts
  - Use alternate inventory names
  - Group the items
  - Show modifier group names
  - Condense modifiers
  - Group modifiers
  - Show customer info
  - Use alternate inventory names

Save

Select "Payments" to turn on cash and check tracking, if you'd like to track these sales in Clover.

**5 Allow cash and check transaction tracking**

Setup - Payments

Payments

- Log out after each order
- Enable Fast Pay with Cash in Register
- Tenders Accepted
  - Add Tender

Payment Receipts	Accept	Name	Opens cash drawer
Printers	<input checked="" type="checkbox"/>	Cash	<input checked="" type="checkbox"/>
Reporting	<input type="checkbox"/>	Credit Card	<input type="checkbox"/>
Taxes	<input checked="" type="checkbox"/>	Check	<input checked="" type="checkbox"/>
Service Charge	<input type="checkbox"/>	External Gift Card	<input checked="" type="checkbox"/>
Tips	<input type="checkbox"/>	External PIN Debit	<input type="checkbox"/>
Account Settings			

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!

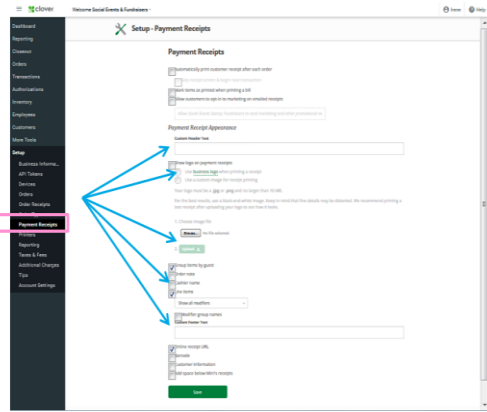
Please note: Not all apps/features (e.g. Signature Options, cashback, gift cards, pin debit) are currently supported within the Clover Go app

Select "Payment Receipts" to make sure "use business logo" is checked and to customize receipt header & footer if needed. Configure offline payment options.

## 6 Customize receipts

Go to the "Payment Receipts" tab.

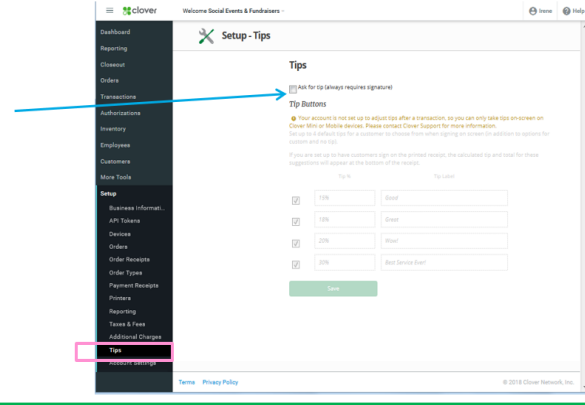
- You can customize receipt header and footer information, if desired
- You can enter any text desired. For example, you could type "Thank You for Supporting Amazing Experiences for Girls!" in the footer and leave the header blank
- Also, make sure that the "Show logo on payment receipts" is checked 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"



Select "Tips" to make sure that "Ask for Tips" is not checked.

## 7 Tips must be turned off

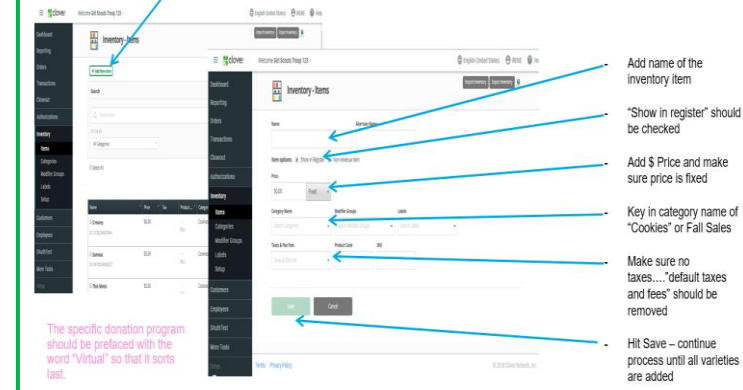
- So that the Tip screen does not display in the Clover Go App, make sure "Ask for Tip" is **not** checked.



Select "Inventory" to add your cookie inventory.

## 8 How to Add Inventory

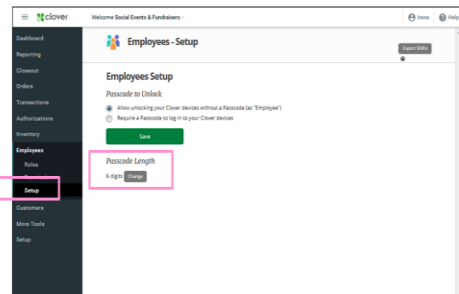
- Use the Inventory app to create your inventory list
- Click on "Add New Item"



Select "Employees" -> "Setup" to shorten required passcode length to four digits if desired.

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

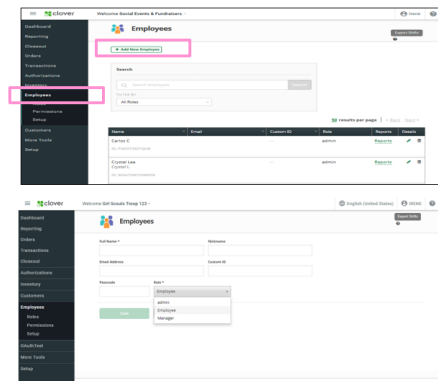
- Default setup for new accounts is to use a 6 digit passcode. The password can be changed to 4 digits so it's easier for girls to remember.
- Note: Clover Go does not allow for unlocking the device without a Passcode and will always require a passcode to login. Troop Leaders can access the password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



Select "Employees" to set up your Clover admin account and add all the girls in your Troop.

## 10 How to set up your Clover admin 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"

- Full name and email address are required.
- Nickname will be how girl's name appears on the receipt. **Do not put her last name!**
- Assign her the role of "Manager". This is so she will have the ability to issue a refund for her own transactions, if needed
- 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.
- Click "Save"

Required:  
• Add your Council leader with role = Admin

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