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Clover Pay

Installation and Setup Guide

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Prepared By: Ellis Werbow

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Overview

This document will provide details on the steps for preparation and configuration of the Clover Device and for the installation and configuration of the Clover Pay application. Additonally there will be trouble shooting steps and notes.

Pre-Requesits

In order for Clover Pay to work on the workstation, the following requirements must be met:

- Retail Management Hero (RMH) version 3.11 or higher needs to be installed
- Windows 10
- SQL 2019 or higher needs to be installed

During the installation process, other applications will be installed:

- .NET 6.0 Desktop Runtime
- Clover SDK
- Clover Production Certificate

If CPay is installed it must be un-installed. Also, delete from **C:\Program Files (x86)\Retail Hero\RMH POS\Extensions** the **CPayExtension** folder.

Clover Device

Setup

Note: Upon completion of these steps, customer will receive email to create account for Clover.com, please let them know to watch for email and to create account.

- This section will cover the setup and configuration of the device.
- Remove all items from the boxes.
- Turn the device over and connect the cable attached to the Port Hub. Using the provided tool, secure the cable to the bottom of the device.
- Connect the ethernet cable and the AC cable to the denote ports on the Hub.
- Upon powering up, an update of the device will automatically be done.
- Log into Clover home at https://www.clover.com/
- Under Merchants, enter name of site.
- Select appropriate site from results list
- Select **Open Dashboard**
- From top of screen, locate serial number for device and on device enter the 8-digit code provided
- Upon entry, installation of Apps on device will automatically take place.
- Will be prompted to create password, enter **9999**
- Select **Continue** button

Network Pay Display App Installation

- Go to **More Tools**
- In App Market, search for **Secure Network Pay Display**
- Select **Open**
- Device will be assigned IP and will be shown on display, note this so can set later to static settings.
- Select Settings
    - Check box for **Server is Secured**
    - Confirm Server Port is **12345**
    - Uncheck **Enable Pairing Screen**
    - Uncheck **Enable Development Certificate**
- If any settings are changed, select **Config and Restart**
- If no changes are made, select Left-Arrow at bottom of screen
- If receive Certificate error, uncheck **Server is Secured**, select **Config and Restart**, check **Server is Secured**, and **Select Config and Restart**
- Select **Start**
- Check box for **Don't Remind**
- Touch all 4 corners of display
- Enter **9999**
- Select **Start**

Configure Device Settings and Display

Note: Touch 4 Corners to enter

Re-arrange screen

- Find **Secure Network Pay Display**
- Hold and Drag to Top
- Find **Sale**
- Hold and Drag to Top
- Find **Transactions**
- Hold and Drag to Top

Configure Settings

Note: To get to settings, pull down from top screen twice

To set Static IP

- Select **Gear** icon
- Select **Network**
- Select **Ethernet**
- Scroll to **Static**
- Enter Static IP information
- Select **Save**

To Configure Display Timer
- Select **Gear** icon
- Select **Display**
- Set to **30** minutes for **Timeout**
- Select **Save**

To Configure Device Name
- On Main screen, select **Setup**
- Select **Devices**
- Enter Name for Device
- Select **Save**

To Configure Signature Settings
- On Main screen, select **Setup**
- Select **Payments**
- Select **Signature Settings** and set appropriate option
- Select **Save**

Clover Pay Application

Installation

Note: Upon completion of installation files are located in:

       C:\Program Files (x86)\Retail Hero\RMH POS\Extensions folder

       C:\Program Files (x86)\CloverPayforRMH

- o Log files are in this folder in file CloverPay.txt
- Navigate to installation files
- Select **CloverPaySetup.exe** and **Run as Administrator**
- Enter connection string information
  - o Will not proceed if cannot get connection and will show reason
- Select **Install**
- Select **Finish**

RMH Configuration

Note: Need to create and/or edit tender that will be assigned to Clover Pay

- Open **RMH Store Manager**
- Select **Setup**
- Select **Financial**
- Select **Tender Types**
- Select appropriate Tender and select **Edit**, or select **New** to create one not listed.
- Set **Tender Type** to **Other**
- Uncheck boxes for **Prevent Cashier Overtendering**, **POP Cash Drawer**, and **Require Signature**
- Check box for **Allow multiple entries**
- Select **Save and Close**

Clover Pay Configuration

- Locate **STG Clover Pay for RMH** in application list
- Enter Configuration Password **Stg1159$**
- Will see full list of registers
- **RMH Tender** field will be blank
- Select drop-down for **RMH Tender** and select tender that was denoted in RMH Configuration
- Select **Register**
- Select **Edit**

  Note: If select **Edit**, before select **Register**, will close application. Re-open application and complete process above.

- Enter IP address of device including port (ie. Xxx.xxx.xxx.xxx:12345)

  Note: If did not not earlier, start Network Pay Display and will be shown

- Select **Save & Close**

  Note: It is possible to configure all registers and the select **Save & Close**

- On Clover Device, open Network Pay Display

- Open **RMH POS**
- Need to enter **Pairing Code**
  - Enter Manager Password **9999**
  - Enter **Pairing Code** shown on POS screen

    Note: If not visible, toggle window as may have gone behind POS screen
  - Select **OK**
- Login into RMH POS

To confirm connection
- Add item to screen and will be shown on Clover Display
- Select Tender and confirm amount is displayed

Cashier Usage
- Select **Tender**
- Select denote Tender and enter amount to be charged, select Enter
- Once customer taps, inserts or swipes, controls will become unavailable
- If customer cancels from Clover Device,
  - **Retry** to again process credit card
  - **Cancel** to return to Tender screen and make changes if needed
- On device customer may select More Options and will be prompted for Manual entry. Follow prompts.

Technical Notes

- If receive Connection error, then the phone or watch may not have been open or tap was not acknowledged. At that point customer can only insert or swipe. If customer or cashier selects **Cancel** and then **Retry** then will be able to use phone, watch or tap.
- **Recall for Return** will only return without re-entering card information from 20 minutes from time of original transacton after that card will need to be present to complete return.
- Updates will install overtop as connection string has been saved
- If un-install and re-install will need to re-enter connection string
- Turn WIFI off if using ethernet as cannot use both