SimpleConsign

Clover Compact User Guide

Setting up your Clover Compact is quick and easy!

Pro Tip: *Before you begin, please ensure you have your device order email (subject: You CardPointe Terminal Order Has Shipped!") handy. You'll need the registration code included in the email to register the device.*

Network Requirements

The Clover Compact connects to your network using ethernet, WiFi, or LTE. If you're using **WiFi**, please consider the following best practices:

- The device **does not** support the use of a TLS proxy for internet access and requires a direct connection from your network to the internet

- Configure a DHCP IP address range to connect your device to a dedicated subnet
  - Alternatively, use a static IP addresses reserved for your devices

- Configure a new WPA WiFi network (with password requirement) for the new device subnet
  - Optionally, restrict access to this network to specific MAC addresses or IP addresses
  - For extended security, you can restrict the services or ports that are allowed to communicate over the network

Setting Up the Clover Compact

After you unbox your Clover compact, follow these simple instructions:

1. Connect the power cable to the deivce
2. The device will power on and display a welcome screen
3. Select a language and press **Set Language**
4. On the network screen, configure the device's network connection:
   - To connect to a WiFi network, tap **Configure** next to **WiFi** and select your network
     - **Note:** PCI compliance standards require secure, password-protected networks

Setting Up the Clover Compact (cont)

- To connect to an LTE network, tap **Configure** next to **Mobile (SIM card)**
    - The device will briefly display 'Successfully Connected to Server' once the network configuration is complete — the device will then begin to download the Cardpointe app and other required components
    - Once complete, the CardPoint app will launch and display the terminal registration screen

Registering the Clover Compact

Once the Clover Compact setup is complete, you must register the device with CardPointe Integrated Payments.

When the CardPointe app launches, it will display the **terminal registration** screen and prompt you to enter the registration code you received to register the terminal. Before you begin, ensure you have your order confirmation email and registration code handy!

To register your device, simply:

1. While on the **terminal registration** screen, tap the empty field to open a keyboard
2. Enter the 8-digit order ID provided in your welcome email, then tap **Continue**
3. On the **registration complete** screen, tap **Continue** to complete the device registration
4. The CardPointe app will display a welcome screen
    - **Note**: If you encounter an error, tap the 'Terminal registration failed' banner at the top of the display for troubleshooting information; be sure to record the error codes in the event you need to contact support

Modes of Operation

Installed during the device set up and activation process, the CardPointe app supports two modes:

1. **Merchant Mode:** With the 'merchant-facing interface', you can access the CardPointe admin panel to manage the CardPointe app and terminal settings; you can also access Android device settings
2. **Customer Mode**: With the 'customer-facing' interface, the customer can submit a payment

Launching the CardPointe App

From the **CardPointe app launcher**, tap the **CardPointe icon** to start accepting payments. To modify your Android device settings, simply launch the **Settings** app.

The CardPointe app will initially launch in **merchant mode**, displaying a welcome screen.

- If the device is successfully connected to the CardPointe service, the status will show **Connected**, indicating you're ready to take payment
- If the status displays **Disconnected**, the device is unable to communicate with the CardPointe integrated terminal service — in this case, use the **admin panel** to troubleshoot the network connection

To begin accepting payments, tap the **customer mode** button.

[Pro Tip] We strongly recommend your device remains in **customer mode** during normal operations. You can enable the **lock customer mode** option to launch the CardPointe app in customer mode.

Using the CardPointe App in Merchant Mode

Merchant mode provides access to the **CardPointe admin panel**, a merchant-facing interface you can use to configure and troubleshoot the CardPointe app. To switch to **merchant mode** from **customer mode**, tap the top two corners of the touch screen simultaneously.

While in merchant mode, you can access the CardPointe admin panel, which provides access to the following information:

Label	Description
Status	- **Connected:** The device is successfully connected and authenticated to the CardPointe integrated terminal service - **Disconnected:** The device isn't connected to the CardPointe integrated terminal.
HSN	Displays the terminal hardware serial number (HSN) — if you need to contact CardPointe Support, you will need to provide the HSN.

Using the CardPointe App in Merchant Mode (cont)

Label	Description
Customer Mode Lock	Enabling this setting forces the terminal to bypass the unlock screen and automatically start in **customer mode**
Internet Connection	Displays the internet connection status and configuration
Properties	• Displays the CardPointe integrated terminal properties, CardPointe app version, and Payment Card Industry (PCI) PIN transaction security (PTS) validation level • This menu provides useful information for troubleshooting CardPointe application and device issues
Advanced Configuration	• Launches the Android Settings app to adjust operating system settings. • **Note:** To return to the CardPointe application, swipe up on the screen to return to the home screen and select the CardPointe app

Support

The following topics provide troubleshooting information for common issues you may encounter. For additional assistance, contact CardPointe Support at 877.828.0720.

Device Registration Issues

If you encounter an issue registering your device, please confirm it's connected to your network. If you receive one of the following error messages when attempting to register the device, complete the steps (listed on the next page) to resolve the issue:

- Order not valid for terminal
- Terminal already registered

Device Registration Issues (cont)

To resolve the issue, simply:

1. On the **registration failed** modal, tap **Retry** to return to the **terminal registration** screen

2. On the **terminal registration** screen, tap the **Go to Reinit** message at the bottom of the screen to access the **terminal reinitialization** screen

3. Contact **CardPointe Support** to obtain a reinitialization key

4. On the **terminal reinitialization** screen, enter the **reinitialization key**

*If you receive any other error messages, contact CardPointe Support for assistance

Network Connectivity Issues

If your device is experiencing network connectivity issues, please follow these steps:

1. If the CardPointe app is in **customer mode**, press all four corners of the touch screen to switch to **merchant mode**

2. In **merchant mode**, tap the **admin panel** button on the welcome screen

3. On the **admin panel**, tap **Internet Connection** to view the connection status and properties

4. To modify or reconfigure the network settings, tap **Advanced Configuration** to access the Android device network settings

Locking Customer Mode

We recommend enabling Customer Mode Lock to ensure your device is always in customer mode:

1. If the CardPointe app is in **customer mode**, press all four corners of the touch screen to switch to **merchant mode**

2. In **merchant mode**, tap the **admin panel** button on the welcome screen

3. On the **admin panel**, tap the **Lock Customer Mode** toggle to enable to disable the feature

Switching User Modes

To switch between customer and merchant mode, simply:

1. To switch from **customer mode** to **merchant mode**, tap all four corners of the touch screen simultaneously

2. To switch from **merchant mode** to **customer mode**, tap the **customer mode** button on the welcome screen

Reinitializing the Clover Compact After a Factory Reset

If you perform a factory reset on the Clover Compact, you will be prompted to register the device before you can launch the CardPointe App; the device must also be reinitialized:

1. On the **terminal registration** screen, tap the **Go to Reinit** message at the bottom of the screen to access the terminal reinitialization screen

2. Contact the CardPointe Support team to obtain a reinitialization key

3. Enter the reinitialization key on the **terminal reinitialization** screen