

Clover Virtual Processing Sales Proven Process

Purpose: To process a payment using Clover Virtual Terminal.

Objectives: To provide the capability for our virtual receptionist to process payments.

Time frame: Training is implemented when virtual receptionists are trained and ready to process payments.

Oversight Responsibility: Virtual Receptionist Manager, Client Experience Coordinator and Bookkeeper

Performance Responsibility: Client Experience Coordinator and Bookkeeper

1) Login to Clover.com

- Select the “hamburger menu” in the upper left-hand corner of your screen.
- Select “Virtual Terminal”
- “Take payment” and Transaction Type of “Sale” will default.

2) Enter client’s transaction data

- Enter Total of eVet Invoice.
- Select the checkbox for “MOTO” (indicates this payment was taken over the phone)
- Enter in the Note Text Box – Receipt Number and If the card is a different person than the primary or secondary person on the eVet account (boyfriend, mother etc.)
- Enter name on the card (example: RN 30780 – Kathy Charette)

3) Enter Client’s Payment Info

- Enter Credit Card Number
- Enter Credit Card Number Expiration
- Enter Credit Card CVV
- Enter Credit Card Billing Zip Code

4) Enter Customer first and last name only.

5) Review Order Summary

- If the order summary is accurate, select “Charge”.
- If the order summary is not accurate, select “Cancel” and repeat steps above.

6) Transaction Complete

- Do not send a receipt. Complete the transaction in eVet and send the eVet receipt.
- Select the eVet payment type of “Clover Gravity”.

7) Reporting Review

- Select reporting from the menu on the left-hand side of your screen.
- Select Employees
- Select Date Range
- Review your employee sales.
- Select transactions.
- Select date range.
- View your transactions.