

Gift & Loyalty: Transaction Guide

For Clover Flex, Clover Mini and Clover Station (First Data) with INTEGRATED PAYMENTS

NOTE 1: If the transaction option you're looking for is not displayed on the screen, select the **DOWN ARROW** or **MORE** to scroll down through the menu.

NOTE 2: Following a power interruption or re-initialization of the terminal, you will be prompted to enter the **SUPER PASSWORD**.

NOTE 3: This guide is for the Clover devices that have the **PAYMENT INTEGRATION** option enabled.

Getting Started

1. Select **DATA CANDY**
2. If prompted, enter the SUPER PASSWORD (1234) and press **OK**.
3. You may be prompted to enter an EMPLOYEE ID and an EMPLOYEE PASSWORD.
 - a. Enter your EMPLOYEE ID and press **OK**.
 - b. Enter your EMPLOYEE PASSWORD and press **OK**.
4. Next, you will be prompted to swipe a card or enter a card number. Do so to access the correct sub-menus for that card, OR press the X button and select the desired sub-menu.

Accessing the Prepaid or Loyalty menu

Swipe the card when prompted at the DataCandy menu OR Select **DATA CANDY**, then select **PREPAID** or **LOYALTY**.

If you accessed the menu manually, swipe the card when prompted.

Checking the balance of a gift or loyalty card

Verifies the balance on a card.

1. Open the DATA CANDY application
2. If prompted, enter the SUPER PASSWORD (1234) and press **OK**
3. Select **BALANCE**.
4. When prompted, swipe the card. If the card is de-magnetized, you can manually enter the card number.
5. The balance is displayed on the screen.
6. Press **OK** to print a receipt displaying the card balance.

Activating a gift card

Activates a gift/prepaid card with a specific amount.

1. Open the DATA CANDY application
2. If prompted, enter the SUPER PASSWORD (1234) and press **OK**
3. You may be prompted to enter an EMPLOYEE ID and an EMPLOYEE PASSWORD.
 - a. Enter your EMPLOYEE ID and press **OK**.
 - b. Enter your EMPLOYEE PASSWORD and press **OK**.
 - c. Next, you will be prompted to swipe a card or enter a card number. Do so to access the correct sub-menus for that card, OR press the X button and select the desired sub-menu.
4. Select **ACTIVATE**.
5. When prompted, swipe the card through the reader.
6. Enter the transaction amount and press **OK**.
7. An invoice number is automatically generated. Press **OK** to use this number OR enter a new number to override and press **OK**. A receipt is printed.

*Use the **REPRINT** function from the DataCandy menu if you want print a copy of the customer's receipt.

Reloading a gift card

Adds an amount to a previously activated gift card. This function is only available on prepaid/gift cards that are rechargeable.

1. Open the DATACANDY application.
2. If prompted, enter the SUPER PASSWORD (1234) and press **OK**.
3. Select **RELOAD**.
4. Enter the transaction amount and press **OK**.
5. Enter the invoice number and press **OK**.
6. A receipt is printed.

Reimbursing a gift card balance

Where required by law (Ex. Province of Quebec). Cardholders with a remaining balance of 5.00\$ or less who request it, must be reimbursed in cash. This transaction will empty the card.

1. Open the DATACANDY application.
2. If prompted, enter the SUPER PASSWORD (1234) and press **OK**.
3. Select **CASH REMITTANCE** and press **OK**.
4. A receipt is printed.

Paying with a gift or loyalty card

Allows a cardholder to pay for a purchase with the amount on the prepaid/gift card or to pay with their accumulated points.

NOTE: You cannot collect TIPS with a gift or loyalty card unless they are used as **partial payment method**. If used as partial payment, make sure to process it **BEFORE** the debit/credit or cash for the tips options to appear at the end of the sales transaction.

1. Select the **SALE OR REGISTER application**.
2. Enter the transaction amount.
3. Select the **DATACANDY icon** OR the **3 DOT icon**
4. Swipe or scan the card; the screen will show the available balance (in dollars)
5. Enter the amount you wish to redeem and press **OK**
6. An invoice number is automatically generated. Press **OK** to use this number OR enter a new number to override and press **OK**. A receipt is printed.

****If a balance is still due on the sales amount**, you will be redirected to the payment screen once more to choose an alternate method of payment for the remaining amount.

Paying with a gift or loyalty card (Continued)

If you have a LOYALTY program

After each payment done with a gift or loyalty card, the device will ask you if you want to do a loyalty accumulation for this transaction. The option will appear on the screen **A FEW SECONDS** after the receipt is printed.

If you skip this prompt, your loyalty accumulation transaction will need to be done with the final prompt for the whole amount, or directly in the DATACANDY application at the end of your sales transaction.

Note that if you have multiple payment types you will be prompted to do an accumulation **after each payment type** so you can decide whether you want to do an accumulation or not on the amount paid.

Adding Loyalty Points - Integrated

Accumulates points on a loyalty card during your payment.

1. When prompted, select **YES**.
2. Swipe the card.
3. The accumulation amount will be prepopulated with the payment amount entered previously - Confirm accumulation amount and press **OK**.
4. An invoice number is automatically generated. Press **OK** to use this number OR enter a new number to override and press **OK**.
5. A receipt is printed.

****If the complete payment is perceived, the transaction will be done.**

****If only a partial payment was collected**, we will prompt you to use a new DataCandy card to do a second payment with a gift or loyalty card.

- a. If yes, **select YES** and continue with the transaction as detailed in the previous steps.
- b. If no, **select NO** and you will return to the sale functionality to process a credit/debit card or perceive a cash payment.

Adding Loyalty Points – Not Integrated

Accumulates points on a loyalty card after your payment transaction.

1. Open the DATACANDY application.
2. If prompted, enter the SUPER PASSWORD (1234) and press OK.
3. Select **ACCUMULATE**.
4. Enter the transaction amount before taxes and press **OK**.
5. An invoice number is automatically generated. Press **OK** to use this number OR enter a new number to override and press **OK**.
6. A receipt is printed.

Cancelling part of a transaction

Partially cancel a previous gift or loyalty card transaction.

NOTE: You must have the original receipt with the Confirmation and Invoice Numbers

1. In the DATACANDY application, select **PARTIAL CANCEL**.
2. Enter the partial transaction amount and press **OK**.
3. Enter the Confirmation Number found on the original receipt and press **OK**.
4. Enter the Invoice Number of the transaction found on the original receipt and press **OK**.
5. A receipt is printed.

Cancelling an entire transaction

Completely cancel a previous gift or loyalty card transaction.

NOTE: You must have the original receipt with the Confirmation and Invoice Numbers

1. In the DATACANDY application, select **COMPLETE CANCEL**.
2. Enter the transaction amount and press **OK**.
3. Enter the Confirmation Number found on the original receipt and press **OK**.
4. Enter the Invoice Number of the transaction found on the original receipt and press **OK**.
5. A receipt is printed.

Daily Reports

These reports are organized by employee. They allow employees to balance their cash at the end of their workday.

1. Open the DATACANDY application.
2. If prompted, enter the SUPER PASSWORD (1234) and press OK.
3. When prompted to swipe a card, select CANCEL.
4. Select DAILY REPORTS from the DataCandy menu.
5. Select the desired report.
 - i. Employee Summary: includes a total amount for each transaction type.
 - ii. Employee Details: includes all the transactions for the employee logged into the terminal, including any made on other terminals.
 - iii. Merchant Summary: includes the transactions for all employees on all terminals.
6. Select the desired period of the report.
7. A receipt will be printed, select OK to go back to the previous menu.

*All reports are based on a 24-hour day running from 00:00:00 to 23:59:59.