

Payments-Debits-Invoices App

Introduction:

- To get started, sign-up for 'Payments-Debits-Invoices' App on Clover app market. Below we sometimes refer to the app as (PDI) for short name.
- The PDI app icon will appear on associated Clover stations and Flex devices.
- Merchants can start using PDI app on Clover device immediately after sign-up.

To find answers to frequently asked questions, click on [?] top Right of main app support page.

Frequently Asked Questions

- ? 1: How to sign up for PDI App on Clover App market
- ? 2: Set-up Invoice header & Logo & Business details.
- ? 3: To change 'Debit' order to 'for Invoicing' & visa-versa
- ? 4: To generate PDF Invoices for one or some or All 'Invoiceable' orders:
- ? 5: To show Order Reference text-number on Order title & on Invoice lines
- ? 6: End-Customer's Online Portal, to view Transactions & Pay-Online

Please email new questions to app@retailcp.ie.

See link to Video [<https://retailcp.ie/pdi.mp4>] showing how app works Clover station or Flex. Can see 'Debit' & 'Payment' orders being added to Customer Account Balance:

After sign-up, PDI app icon appears on your Clover stations and Flex.



Payment-Debit-Invoice

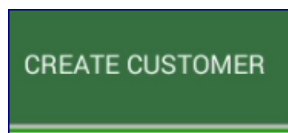
Click on icon to open PDI app on Clover:

Search existing customer: (From existing Clover Customers records):

- Type first few characters to get short list & click 'Select' button.

Payment-Debit-Invoice		CREATE CUSTOMER
<input type="text" value="tom"/>		
Tom Wates OXEGMKMRCVBBY		Select
Tom Flynn 355NZ229SJR8J		Select

Add or Create a new customer using PDI App on Clover: Click on 'Create Customer' top right of above screen:



To get below input screen:

Create Customer

First Name

Last Name

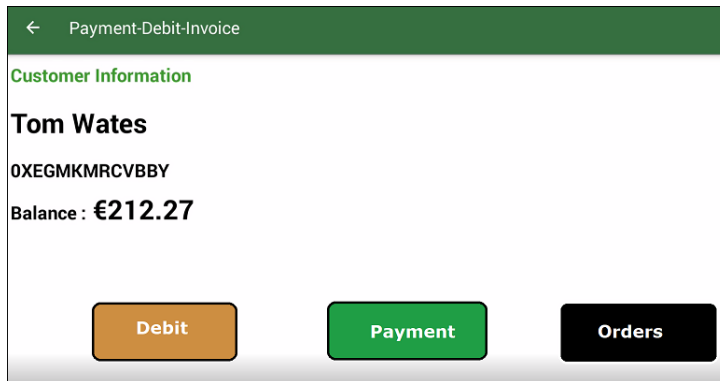
Email (Optional)

Phone number (Optional)

Create
Cancel

- Enter new customer details, click on 'Create' button
- PDI app will update Clover Customer records with details entered.
- When Clover merchant first signs up for this app, the Payment-Debit-Invoice online Web-app automatically sets up in the background.

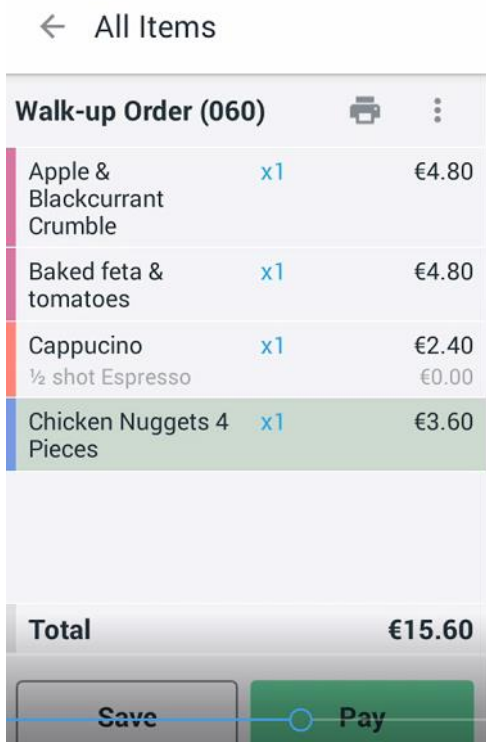
- When a Debit Order or Payment is processed using the Clover Payment-Debit-Invoice app, the first time for each customer:
 - The app automatically creates an 'Accounts Receivable web-app customer account' for that customer.
- When you open customer account, using the PDI Clover app, the app will automatically call the Web-app to get latest balance.



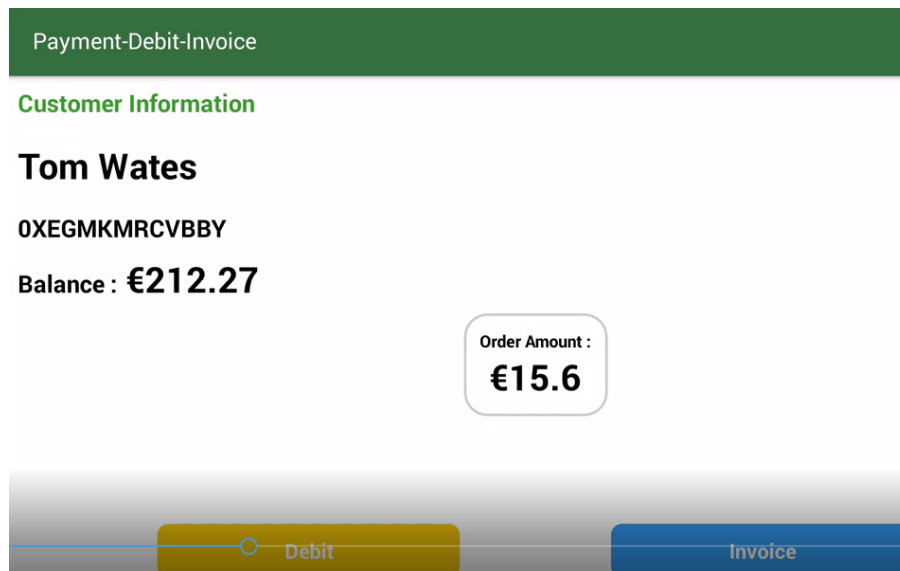
- Above account balance (€ 212.27). This is always up-to-date to include recent Debit & Payment transactions-orders.

Three 'action' buttons: Debit, Payment & Orders, as above:

- To start a new Order, click on 'Debit' button. Our app will redirect to Clover Register: Enter items as standard for Register, as below:



- When line items are entered & Clover cashier selects 'Pay', the screen returns to our PDI app & shows customer account balance status:
 - Debit Amount is added to balance.
 - Payment amount is subtracted from balance.



Order for goods-services can be marked as either 'Debit' or for 'Invoice', on the PDI App on Clover station:

For orders marked as 'Debit': The Clover order amount is immediately 'debited' against customer's web-app account.

To process Orders as 'Invoiceable' & later generate an Invoice:

- see FAQ no 4 on support website for detailed notes on how to generate PDF Invoices

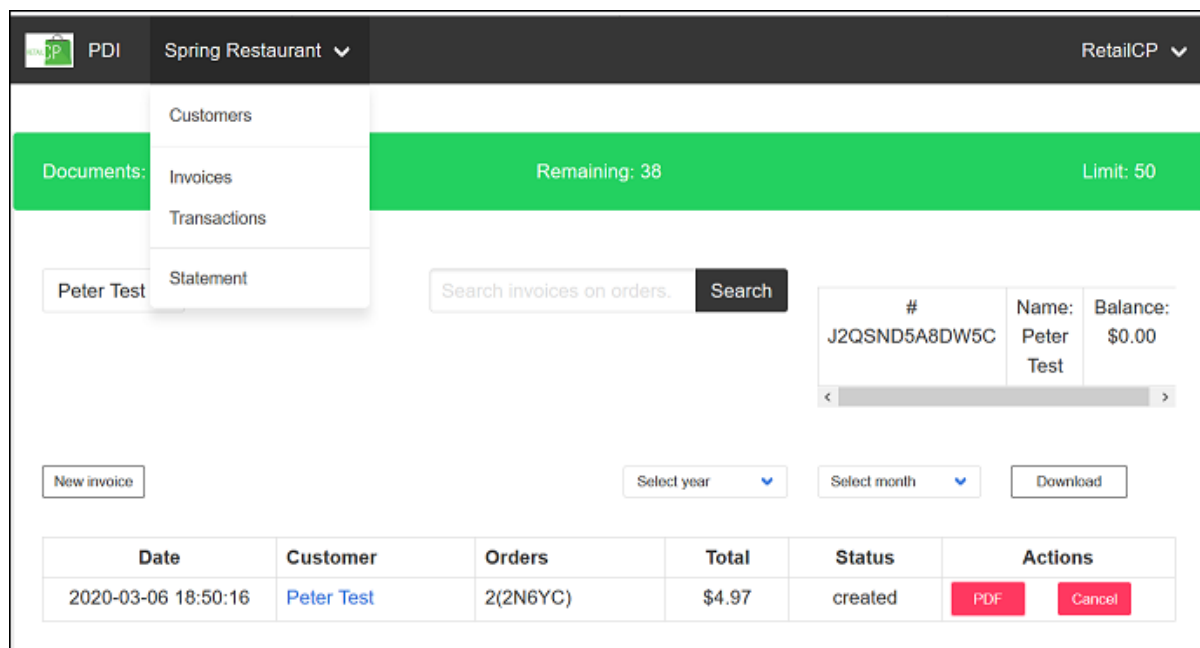
Orders marked for 'Invoice' will be available on the Web-app as 'Invoiceable', so that they can be included in a PDF Invoice doc.

'Invoiceable' orders are not yet 'Debits' on customer account.

A debit is generated on web-app when the invoice is generated.

The invoice total will show as a 'Debit' amount on Web-app account.

General notes on (A-R) Accounts Receivable Web-app which is fully integrated with Clover Payment-Debit &for-Invoice orders:



Clover station Payments & Debit-Invoice orders are automatically saved to Web-app customer account.

Saves time. No double entries. Very accurate.

Customer portal allows end-customer to sign-up with own password. In future the 'signed-up' customers can view their transactions history & PDF Invoices & Statements by month. And can pay balance online. See FAQ no '6' for step-by-step screen views.

Examples of Clover merchant types who will benefit from using this app:

Goods & services businesses whose customers need detailed PDF invoice doc: with inventory line item, qty & price from 'on Tab' orders: **For those customers, mark paid order as 'Invoiceable'**

If Clover merchants & their customers need to know the balance on account and it must always be instantly up-to-date, then **mark paid order as 'Debit'**.

Coffee shops at work locations, hospitals, offices, factories, where regular daily customers prefer not to use card for each purchase, and wish to pay end-of-week etc.

Each 'Debit/ purchase is processed very fast.

- Simply click on 'Pay' & mark order as a 'Debit'.

Can process customer advance payment-deposit, or 'Partial payment' or 'Pay full balance'.

- Account balance is always up-to-date (Debits, minus Payments = Account balance).

Events for association members who pay at the end of 2-3-or 4 days for goods or services:

Events where visitors-clients pay registration fee & put items & meals on tab.

At end of 2-3-or-4 day event, customers can pay balance via PDI at Clover device or via online customer portal.

New customer projects, which require a deposit when ordering goods or services:

Projects such as 'Weddings', 'Custom furniture', 'Dental treatment',

Home & office maintenance services (Plumbing, Electrical, Repairs, Decorating)

Professional services. Accountants, Lawyers, Consultants or Physio-therapists:

whose customers pay an advance deposit & make 'partial payments'

Who will 'pay balance' at end of a project or set of visits.