



Services SaaS Go-to-Market Plan

Clover Commercialization & GTM

August 2024

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Executive Summary



Service vertical Product Vision – Appointment based service

Enable service merchants with a comprehensive **appointment booking** solution to **run and grow** their business, manage employees, engage with customers and take payments.

MVP

Target sub vertical: Beauty and wellness (Salons, Spa, massage parlors, tattoo, barbershops)



Clover is launching Services SaaS to expand verticalized offerings

Objectives

- Own core capabilities** such as Website, Appointment Scheduling, Inventory Management, and Employee management, to close the gap with competitors
- Increase penetration** in verticals that heavily rely on software to enhance business efficiency
- Build a strong presence** in software by developing brands with merchants and partners, driving enhanced acquisition effectiveness
- Grow ARPU** by driving adoption for verticalized solutions that address rapidly growing merchants needs
- Expand share of wallet** with merchants and partners in Services vertical

New SaaS Plans 2024

Services Growth

- Initial focus on Personal Services
- Hair Salons
 - Nail Salons
 - Spa
 - Beauty
 - Massage
 - Other appointment based services (e.g. party services)

New & Enhanced Offerings

Appointment Management

Branded Website

Inventory Management

Employee Management

Customer Loyalty



Why?



Services Merchants Find it Difficult to Navigate High Failure Rates and Thin Profit Margins

High Failure Rates

1. **Market Saturation:** Intense competition and a crowded market make it difficult for new and established businesses to stand out
1. **Economic Pressures:** Fluctuating economic conditions and changing consumer preferences contribute to business instability
1. **Operational Hurdles:** Inefficient processes and lack of effective tools can lead to higher failure rates and business attrition



Thin Profit Margins

1. **Rising Costs:** Increased expenses for labor, materials, and overheads squeeze profit margins
1. **Pricing Pressures:** Competitive pricing strategies often force merchants to lower prices, impacting profitability
1. **Inefficient Operations:** Outdated or fragmented systems can result in higher operational costs and reduced margins.



Clover is Addressing Key Pain Points for Merchant's Day

Need for Scalable Tools & Resources

90%

Reduction in no-shows when using online booking systems with automatic reminders

Inefficient, Manual Day-to-Day

5-10_{hours}

Is spent on administrative tasks every week including appointment management

Online Booking Trends

70%

Of customer prefer to book appointments online

Acquiring and Retaining Customers

52%

Of Spas and Salons saw an increase in customer satisfaction when using business management software

Cash Flow Management

17%

Reduction in cancellation rate with pre-payment option

Streamlined Operations

62%

Of Spas and Salons saw reduced manual effort and paperwork that use business management software



Clover's Solution Addresses these Challenges

Scalable Growth	Simplified Operations	Enhanced Customer Management	Access to Capital
As your business expands, Clover's ecosystem grows with you. Whether you're adding new services, staff, or locations, our tools scale effortlessly to support your needs	Clover simplifies daily business tasks with integrated appointment scheduling, employee management, and payment processing - enabling merchants to concentrate on growing their business	Leverage Clover's robust tools, including loyalty programs, appointment management, and personalized engagement features, to improve customer satisfaction and retention	Utilize Clover's financial management solutions, including cash advances and instant transfers, to maintain healthy cash flow and fund business growth when needed
Increase margins by 45%	Reduce Operational Costs upto 20%	Achieve upto 2.5X ROI	Increase Retention by 20%



Utilizing Clover's Suite of Tools Increases Margins

**Clover can help personal services merchants uplift margin by 45%+
Merchants can achieve up to 2.5X value ROI**

			Merchant 1		Merchant 2		Merchant 3	
			Annual GPV	\$200,000	Annual GPV	\$500,000	Annual GPV	\$800,000
Clover Solution	Benefit to Restaurant	Financial impact	Solution used	Annual Impact	Solution used	Annual Impact	Solution used	Annual Impact
Website	Increase digital presence and reach more new customers	Revenue growth	Yes	\$9,820	Yes	\$24,820	Yes	\$39,820
Customer Loyalty (Partner)	Reduce customer churn		No	0	Yes	\$29,076	Yes	\$47,076
Clover Gift cards	Increased spend by customers per visit		No	0	Yes	\$5,000	Yes	\$8,000
Appointment Scheduling	Save hrs with automated appointment scheduling process and reduce manual errors	Cost savings (Labor)	Yes	\$5,400	Yes	\$3,600	Yes	\$5,400
Accounting Sync	Save hrs spent on manually transferring data from POS to accounting platforms		Yes	\$1,080	Yes	\$1,080	Yes	\$1,080
Employee Time Tracking and Payroll	Save hrs with automated remedial tasks Save fines from non-compliance		No	0	Yes	\$8,050	Yes	\$8,050
Inventory Management	Save on stocking, handling and other inventory cost	Cost savings (Inventory)	No	0	No	\$0	Yes	\$12,000
Margin (%) Increase			6%		8%		9%	



Competitors Are More Costlier than Clover

Clover		Square		Mindbody		Cojilio	
SaaS Plan	Services Growth (\$84.95/mo.)	Appointments Premium (\$69/mo.)		Salon & Spa Accelerate (\$289/mo.)		Small Biz Elite (\$99/mo.)	
	Avg Cost / mo.	Avg Cost / mo.	Save by switching to Clover	Avg Cost / mo.	Save by switching to Clover	Avg Cost / mo.	Save by switching to Clover
Services (GPV \$200K)	\$632	\$651	3%	\$810	22%	\$698	9%
Services (GPV \$500K)	\$1,365	\$1,398	2%	\$1,653	17%	\$1,508	9%
Services (GPV \$800K)	\$2,145	\$2,147	0.1%	\$2,660	19%	\$2,438	12%

- ✓ Mindbody could be **as much as 22% more costly** vs Clover; Cojilio 12% and Square 3%
- ✓ **Lower total cost** for existing Clover merchants (lower HW cost)
- ✓ Clover's total cost takes **~3%** of the merchant revenue

Assumptions

All scenarios based on purchased hardware

Clover acquiring rates using average onestar prices

Fees only include CPF and Clover Managed Security; one-time fees like set-up fees are excluded

Referring Clover HW and processing rates for Cojilio

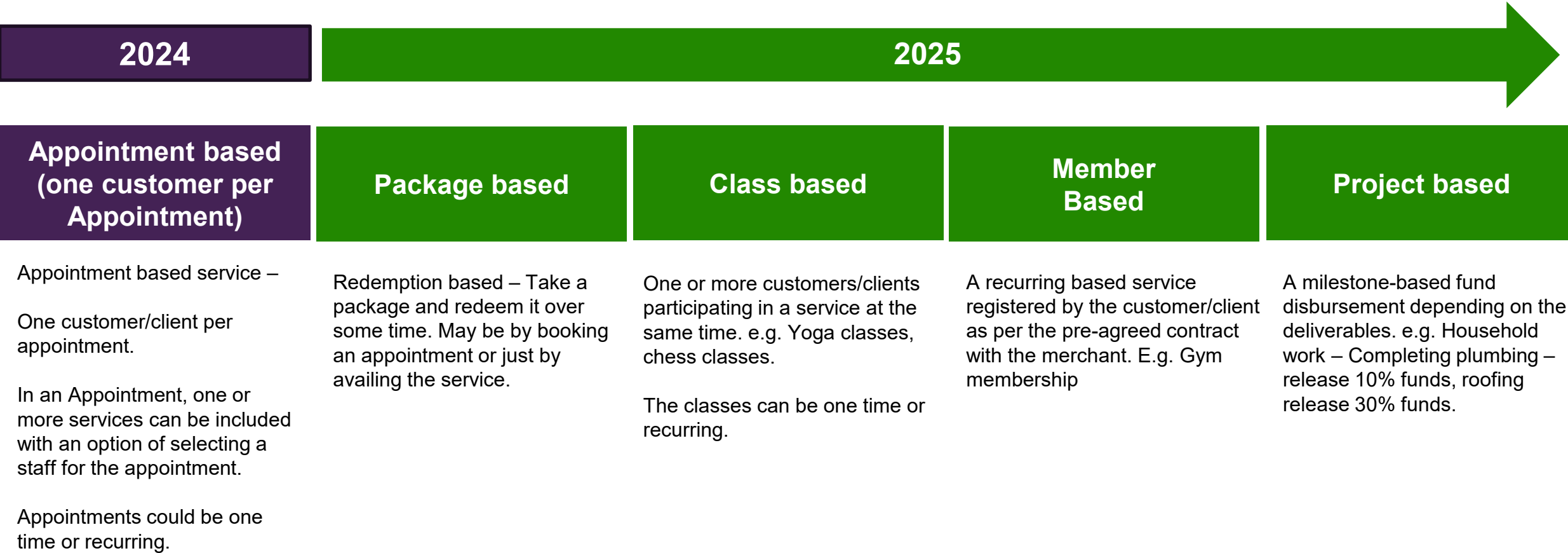
Avg ticket size (\$50,\$70,\$100) based on Clover Services merchants data and market research



Clover Solution for Services Providers



Services roadmap



Clover Solution Set for Services

Software Plans

Value-Added Software & Services

Selected Solutions

Hardware

Software Plan	Monthly Price
Services Growth	1st Device: \$84.95 Add'l Device: \$19.95
Essentials	1st Device: \$14.95 Add'l Device: \$11.95
Payments	1st Device: \$0.00 Add'l Device: \$11.95

Solution	
Financial Services	Clover Capital
	Rapid Deposit
	Bill Pay (Melio)
	Sales Tax (Davo)
Customer Engagement	Clover Gift Card
	Clover Loyalty
Employee Management (TBD)	Time Clock
	Payroll



Station Solo

Station Duo

Mini



Flex



Go

New in 2024



Flex Pocket



Compact



Clover offerings for Services*

Solutions	Status		Status	
Hardware	• Flex - Mobile POS	✓	• Station Duo - Includes customer facing terminal	✓
	• Flex Pocket - Lightweight and sleek Mobile POS	✓	• Mini	✓
	• Station Solo - High performance countertop device	✓	• Clover Go	'25
Payments	• Accepts all credit & debit cards and bank payments	✓	• Surcharging (with or without a device)	✓
	• Take payments with Virtual Terminal	✓	• Cash Discounting	Q3
	• Access to developer tools for custom integrations	✓	• Apple tap to pay	✓
	• Take payments with mobile point-of-sale	✓	• Recurring payments	✓
Appointment Scheduling	• Create services and calendar view	Q3	• Notification by email / SMS ('25)	Q3
	• Appointment lifecycle management	Q3	• Cancellation & No-Show Fees	'25
	• Merchant / customer scheduling appointments	Q3	• Resource management	'25
Employee Management	• Tips direct distribution	✓	• Scheduling & Time tracking	✓
	• Control and permissions	✓	• Payroll integration	'25
Website & Online Store	• Create website with templates	Q3	• Display items and sell online	Q3
	• Buy online pick up in store	'25	• Google Shopping integration	'25
			• Delivery & Shipping	'25
Customer Engagement	• Gift cards	✓	• Customer profiles and history	✓
	• Loyalty and rewards	✓	• Customer Feedback	✓
	• Automatic accrued loyalty points	'25	• Merchant facing loyalty prompt	Q3



* Subject to change

Clover offerings for Services (Continued)

Solutions	Status		Status	
Inventory Management	• Real-time tracking of inventory levels	✓	• Add products to appointments during checkout	'25
	• Upload images for items	Q3	• Item tracking and history	'25
	• Item variants	Q3	• Vendor and PO management	'25
Financial Management	• Working capital	✓	• Accounting	✓
	• Instant transfer	✓	• Automated Sales Taxes	✓
Reporting and Analytics	• Sales reports and trends analysis	✓	• Data visualization tools for business insights	✓
	• Labor cost and employee performance reports	✓	• Custom report generation	✓
	• Inventory and cost of goods sold (COGS) reports	✓	• Appointment reporting	'25
	• Financial and tax reporting	✓		
Security and Compliance	• PCI compliance for secure payment processing	✓	• Data encryption and backup	✓
	• User authentication and access control	✓		
Integration Capabilities	• Third-party app marketplace	✓	• Integration with accounting softwares, CRM tools, and marketing platforms	✓
	• API for custom integrations	✓		



Appointment based solution

Create a Service

- Create a Service (Item type = Product, Service)
- Item attributes – Price, Image, description, category
- Duration, Employee to Service mapping
- Resource mapping ('25)

Customer Engagement

- History of Appointment and Services
- Communication - SMS ('25), Email and Push notifications
- Customer COF
- Loyalty, Gift and Promo (existing)



Merchant Booking an Appointment

- Calendar view of Appointments
- Appointments – Select Service, employees, availability
- Appointment status change, edit, take payments
- Appointment overview

Customer booking an Appointment

- View Services on Merchant website
- Select service and time to book an appointment
- Login or book as Guest
- Book and pay post at the time of Appointment



Winning Against Competition



Winning from white space and from competitors

Clover Differentiator

Empower service businesses to effortlessly discover, sell to, and retain customers—all within a single, unified platform.

Winning from whitespace

- **Specialized software:** Tailored tools to help businesses run smoothly
- **Simple:** Easy for staff to learn and use
- **Integrated:** One system that connects all parts of the business
- **Engaging:** Offer tools to increase customer spending, bring back customers, and encourage referrals

How to sell

- Emphasize the **ease of use** for Clover solutions as it simplifies complex tasks such as managing appointments, employees, and inventory.

Winning from competitors (Square etc.)

- **Customizable solution:** Tailor your POS experience with a variety of hardware options and Apps to get all your needs covered
- **Reliable processing:** Back by fortune 500 company to provide
- **High value for money:** Essential features are included, usually with no extra fees
- **Professional support:** Know you are in good hands with Clover's 24/7 support via phone, chat, and email

How to sell

- Focus on the **long-term benefits** of increased customer engagement, such as lower total cost of ownership and higher lifetime value.
- Provide onboarding support to ensure a **smooth transition** from the current provider.



Clover Services Growth Plan provides core capabilities and a well-rounded feature set



Clover Services Growth
\$84.95/mo for first device
\$19.95/mo for additional device

Square Appointments Premium
\$69/mo. One location and 3
calendars

**Mindbody Salon & Spa
Accelerate**
\$289/mo. one countertop POS
device per location

Cojilio Small Biz Elite
\$99/mo. one location and 5
calendars

Acquiring	(Set by Acquirer)	2.6% + 10¢ (CP) 2.9% + 30¢ (CNP)	2.75%(CP) 3.5%+15¢ (CNP)	Clover rates
Hardware	Mini, Solo, Station	Choose your own	Limited options with Wise POS E Terminal	Clover devices
Appointments	<div><div>✓</div> Merchant and client booking</div> <div><div>✓</div> Email / SMS ('25) notifications</div> <div><div>✓</div> Cancellation & No-Show Fees ('25)</div> <div><div>✓</div> Resource mgmt. ('25)</div> <div><div>✗</div> Cross-location booking ('25)</div>	<div><div>✓</div> Merchant and client booking</div> <div><div>✓</div> Email / SMS notifications</div> <div><div>✓</div> Cancellation & No-Show Fees</div> <div><div>✓</div> Resource mgmt.</div> <div><div>✓</div> Cross-location booking</div>	<div><div>✓</div> Merchant and client booking</div> <div><div>✓</div> Email / SMS notifications</div> <div><div>✗</div> Cancellation & No-Show Fees</div> <div><div>✓</div> Resource mgmt.</div> <div><div>✓</div> Cross-location booking</div>	<div><div>✓</div> Merchant and client booking</div> <div><div>✓</div> Email / SMS notifications</div> <div><div>✓</div> Cancellation & No-Show Fees</div> <div><div>✓</div> Resource mgmt.</div> <div><div>✗</div> Cross-location booking</div>
Employee Mgmt.	<div><div>✓</div> Access control and role- based permissions</div> <div><div>✓</div> Time tracking and scheduling</div> <div><div>✓</div> Integrated Payroll ('25)</div>	<div><div>✓</div> Access control and role- based permissions</div> <div><div>✓</div> Time tracking and scheduling</div> <div><div>✓</div> Integrated Payroll at \$35/mo. + \$6/mo. per employee</div>	<div><div>✓</div> Access control and role- based permissions</div> <div><div>✓</div> Time tracking and scheduling</div> <div><div>✗</div> Payroll (3rd pty) at \$40/mo. +\$4/mo. per employee</div>	<div><div>✓</div> Access control and role- based permissions</div> <div><div>✓</div> Time tracking and scheduling</div> <div><div>✗</div> Payroll (3rd pty) at \$79/Mo + \$4/Mo per employee</div>
Website & Digital Storefront	<div><div>✓</div> Custom website</div> <div><div>✓</div> Online booking</div> <div><div>✓</div> SEO & Social Media</div> <div><div>✓</div> Custom domain (Q1 '25)</div> <div><div>✗</div> Professional website tools</div>	<div><div>✓</div> Custom website</div> <div><div>✓</div> Online booking</div> <div><div>✓</div> SEO & Social Media</div> <div><div>✓</div> Custom domain</div> <div><div>✓</div> Professional website tools (\$29/mo.+)</div>	<div><div>✓</div> Custom website</div> <div><div>✓</div> Online booking</div> <div><div>✓</div> SEO & Social Media</div> <div><div>✓</div> Custom domain</div> <div><div>✓</div> Professional website tools</div>	<div><div>✓</div> Custom website (\$35/mo.)</div> <div><div>✓</div> Online booking</div> <div><div>✓</div> SEO & Social Media</div> <div><div>✓</div> Custom domain</div> <div><div>✓</div> Professional website tools</div>

Clover Services Growth Plan provides core capabilities and a well-rounded feature set



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\$99/mo. one location and 5 calendars

Customer	✓	Customer profiles and order history	✓	Customer profiles and order history	✓	Customer profiles and order history	✓	Customer profiles and order history
	✓	Loyalty and rewards	✓	Loyalty (Starts at \$45/mo.)	✓	Loyalty (Starts at \$45/mo.)	✓	Loyalty (Starts at \$45/mo.)
	✓	Marketing and email campaign integration	✓	Marketing and email campaign integration	✓	Marketing and email campaign integration	✓	Marketing and email campaign integration
	✗	Referrals	✗	Referrals	✓	Referrals	✓	Referrals
Inventory Mgmt.	✓	Real-time inventory tracking	✓	Real-time inventory tracking	✓	Real-time inventory tracking	✗	Real-time inventory tracking
	✓	Add products to appointments during checkout ('25+)	✓	Add products to appointments during checkout	✓	Add products to appointments during checkout	✗	Add products to appointments during checkout
	✓	Vendor & Purchase Order mgmt. ('25)	✓	Vendor & Purchase Order mgmt.	✗	Vendor & Purchase Order mgmt.	✗	Vendor & Purchase Order mgmt.
	✗	Multi-location item mgmt.	✓	Cross location sync	✓	Cross location sync	✗	Cross location sync
Financial Mgmt. (+\$\$)	✓	Working capital and Instant Funding	✓	Working capital and Instant Funding	✓	Working capital and Instant Funding	✗	Working capital and Instant Funding
	✓	Accounting sync	✓	Accounting sync	✗	Accounting sync	✗	Accounting sync
	✓	Automated Sales tax	✓	Automated Sales tax	✗	Automated Sales tax	✗	Automated Sales tax
	✓	Accounts payable	✓	Accounts payable	✗	Accounts payable	✗	Accounts payable
Support	✓	Phone (24/7)	✓	Phone (additional cost)	✓	Phone (12/7)	✗	Phone
	✓	Chat	✓	Online	✓	Online	✓	Online



Services Opportunity



Services vertical overview

Overall market assessment	<p>Overall, Services vertical is a fast-growing market</p> <ul style="list-style-type: none">• Total number of outlets growing at ~16% y-o-y• GPV is growing at ~19.4% y-o-y
Sub-Segment attractiveness	<p>Personal Services (> 600K outlets) is most attractive segment; winning here is critical to long-term success</p> <ul style="list-style-type: none">• Personal Services is projected to grow at a CAGR of 7.5% from 2024 to 2030.• Personal Services have a lower technology adoption rate which leave whitespace• 70% of our Personal Services merchants use a 3rd party App for appointment scheduling
Competitive landscape	<p>Clover provides an all-in-one business operating system for Services merchants</p> <p>a) In general POS market, Clover wins by offering a verticalized solution for Services merchants</p> <p>b) In specialized market, Clover wins by offering an integrated solution for merchants to</p>
Segment Needs	<p>In order to win and grow in the Personal Services, Clovers needs to provide:</p> <ul style="list-style-type: none">• Appointment Scheduling – reduce the cost and error• Employee Management – efficiently track employee schedule and time• Customer Loyalty – reduce customer churn and increase repeat businesses• Branded Website – increase exposure and expand customer base



Who are Services Growth SaaS target merchants?

- Initial focus on Personal Services
 - Hair salons
 - Nail salons
 - Beauty & Spa
 - Massage
 - Other appointment-based services
- Single location
- Physical store + online presence



Target personas

Persona name	Business type	GPV/yr	Challenges	Needs
Urban Cuts	Barber shop	\$200,000	Struggles with handling bookings, staff schedules, and inventory	Simplify operations, reduce no-shows, and improve client service
Luxe Hair Lounge	Hair salon	\$300,000	Has trouble tracking client needs, stylist schedules, and stock	Improve stylist schedules, client interactions, and increase sales
Gloss & Glam	Nail salon	\$150,000	Challenges with managing high appointments and client retention	Boost client loyalty, manage bookings, and grow business
Pure Escape Spa	Beauty and spa	\$400,000	Hard to maintain a high service standard while balancing staff and cost	Offer a seamless luxury experience while managing staff and stock easily
Harmony Massage Retreat	Massage shop	\$150,000	Struggles with managing clients, sessions, and payments smoothly	Provide high quality services while simplifying bookings and payments



Messaging and Positioning



Clover solve for key Services needs

Services merchants often look for a comprehensive and adaptable solution, addressing the specific challenges they face. They want a solution that empowers them to enhance operational efficiency, maintain consistency, and attract and retain more customers.



Services Needs	Clover Solutions
Simplify Appointment Management by automate the appointment scheduling process to reduce labor cost and errors and improve customer experience	Appointment Scheduling, Merchant / Customer booking
Operational efficiency achieved by automating manual tasks, streamlining processes, and providing faster service	Employee Scheduling, Time Tracking
Cash Flow Management SMB service merchants often struggle with managing cash flow, especially if they have irregular income or delayed payments from clients.	Clover Capital, Rapid Deposit
Reaching and retaining customers by creating exceptional digital presence, providing seamless online experience, knowing customers preferences and encouraging repeat visits with rewards	Websites, Online Booking, Customer profiles, Rewards, Promotions, Gift cards
Managing disparate technologies by providing access and control to best-in-breed partner solutions within the clover platform	All-in-one operating system, APIs, Integrated partners, App Market

Clover for Services – Value Proposition

Simplified appointments

Make your day-to-day easier by automating bookings, reminders, and payments. Our solution takes care of the details so you can focus on serving your customers.

Bring in more customers

With Clover SaaS, you can see a 2X return on your investment and position your business for even greater success by automating key tasks, improving client experiences, and driving repeat business.

Scalable solutions for growth

Grow your business with a system that scales with you. Add services, staff, or locations easily - Clover platform evolves as you do.



Messaging examples

Key Message	Save time and effort with Clover's Services SaaS to effortlessly manage your business and put your customer first
Easy	Our intuitive feature lets clients book, reschedule, or cancel appointments with ease, reducing your administrative load and enhancing customer satisfaction.
Efficient	Your business never closes. With our online scheduling tool, clients can book appointments anytime, anywhere —no phone calls required.
All-in-one	Simplify your checkout process with built-in payment solutions, allowing clients to pay in advance or at the time of service. This integration streamlines your financials and enhances client convenience.
Mobile	Manage your appointments with Clover Go on your phone, giving you the freedom to run your business from anywhere



Experience



Customer Booking an Appointment

Provide an ability to view services
online and book an Appointment.

View Services on Merchant
website

Select service and time to
book an appointment

Login or book as Guest

Google Appointment
redirection

her.
studio

Her Studio Salon

Book Appointment

About

Services

Haircuts

Coloring

Facial Treatments

HAIRCUTS

Men's Haircut • 1 hr

\$35.00

Includes wash and styling



Women's Haircut • 1 hr

\$95.00

Includes wash and blow dry



Bang Trim • 15 mins

\$15.00

Add face framing-detail to your look with a bang trim.



Ghost Trim • 15 mins

\$20.00

Cutting only dead ends. No layers, texturing, shaping, or thinning.



COLORING

Free Consultation • 30 mins

\$0.00

We will discuss in person your hair history, inspirations, and what is realistically achievable.

Balayage • 3 hrs

\$300.00

Subtle "sunkissed" dimension to the hair. Great for lower maintenance. Includes lightening, toner, and...



Global Bleach • 3 hrs

\$100.00

Bleach the entire head.



Peekaboo Highlight • 3 hrs

\$250.00

Lightening the bottom half of your hair for a subtle but trendy effect. Great for adding fun colors or...

Global Bleach Root Touch Up • 2 hrs

\$105.00

Touching up roots with 1/2 inch of roots or less. Typically done in 4-6 weeks after a global bleach.

Single Process, Root Touch Up • 2 hrs

\$80.00

Permanent color to cover grey or slightly lift natural hair color. DOES NOT INCLUDE BLEACH.

FACIAL TREATMENTS

Aqua Peel • 1 hr

\$50.00

Aqua Peel is a natural remedy that has been proven effective in treating acne and skin imperfections. It is ideal for multiple skin...

Hydrolifting • 1 hr 30 min

\$150.00

This anti-aging treatment profoundly improves the visible toning of the face and neck and improves hydration for an age-defying...

Collagen 90+ Treatment • 1 hr 30 min

\$200.00

This exclusive, highly acclaimed, intensely rejuvenating treatment dramatically reduces visible lines and wrinkles.

Botox Treatment • 1 hr 30 min

\$200.00

Innovative and non-invasive, with instant and long lasting visible results, perfectly describes this treatment.

HER STUDIO SALON

613 Florida St, San Francisco

+1 555 500 5123

info@herstudiosalon.com



HOURS

Sunday

10:00 AM - 4:00 PM PDT

Monday

10:00 AM - 2:00 PM PDT

Tuesday

10:00 AM - 2:00 PM PDT

Wednesday

10:00 AM - 2:00 PM PDT

Thursday

10:00 AM - 2:00 PM PDT

Friday

10:00 AM - 2:00 PM PDT

Saturday

10:00 AM - 4:00 PM PDT

clover

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Download on the

App Store

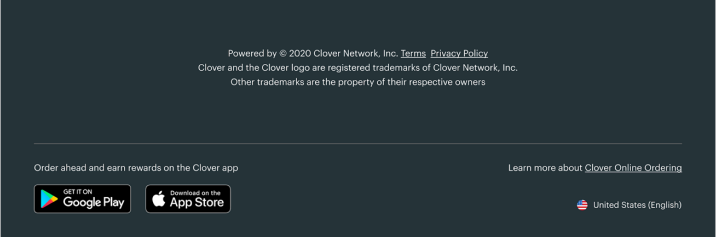
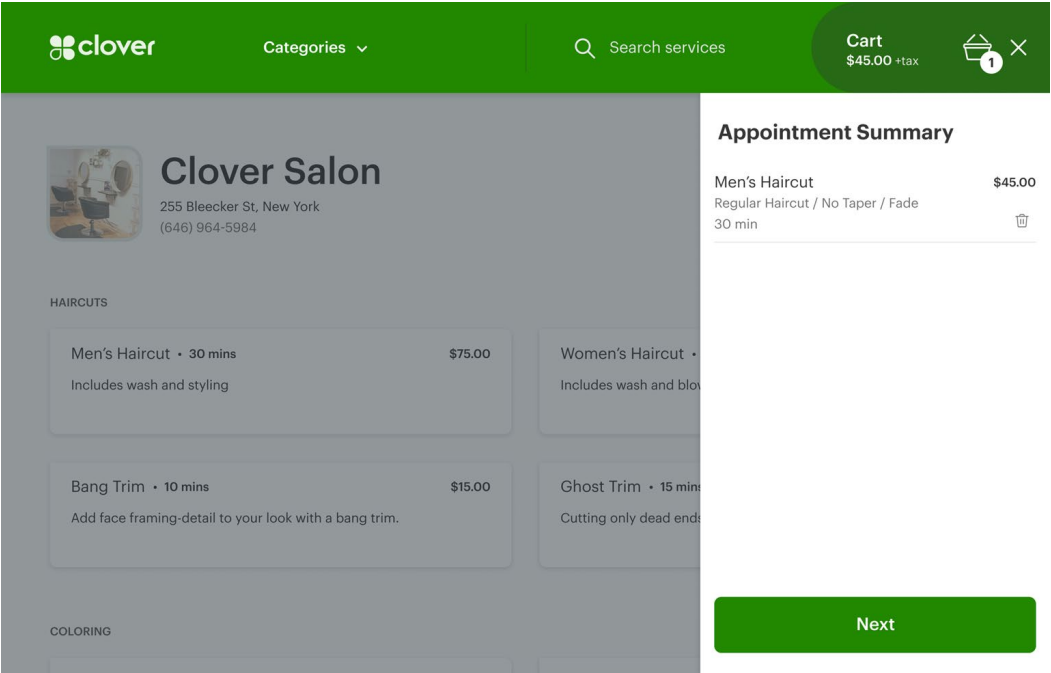
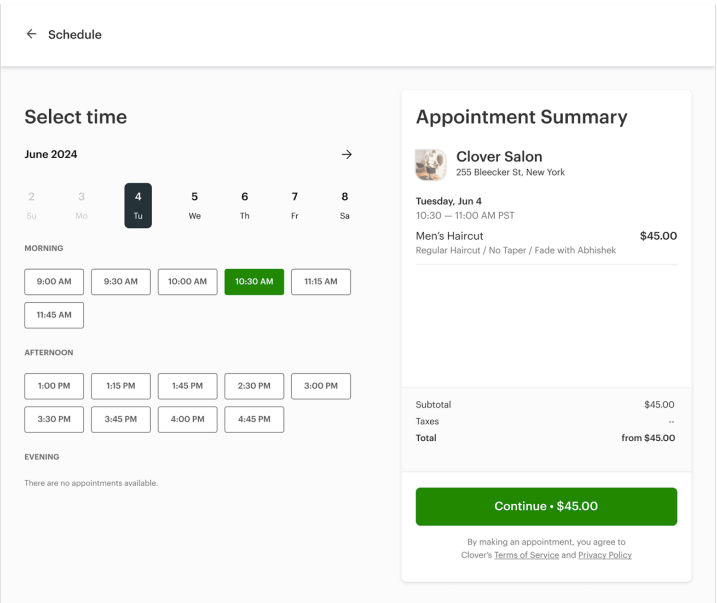
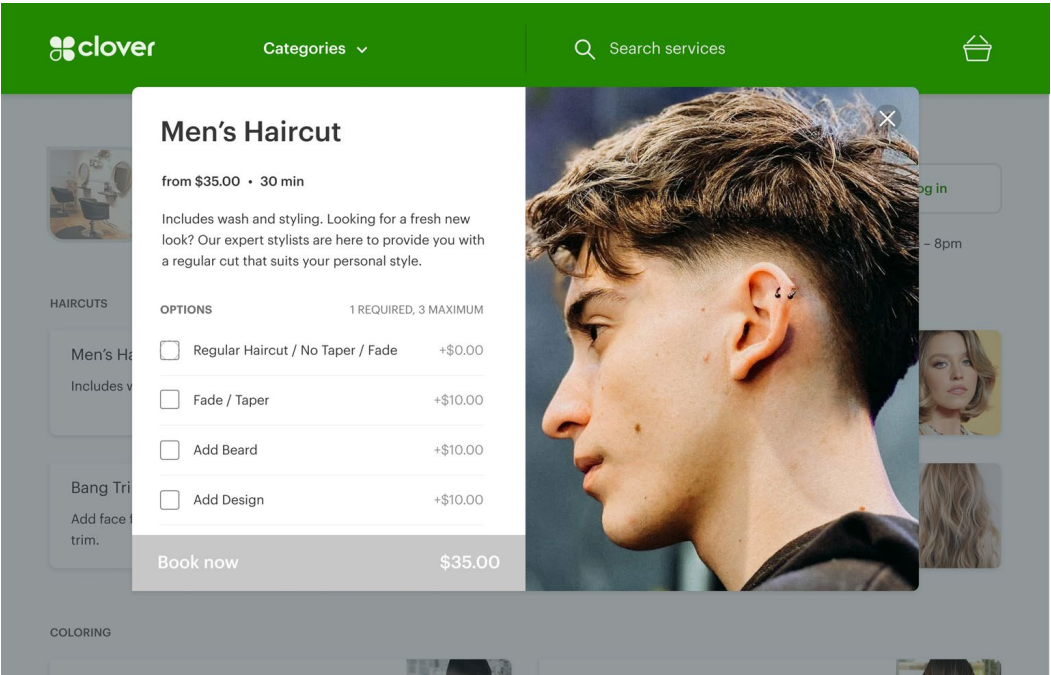
United States (English)

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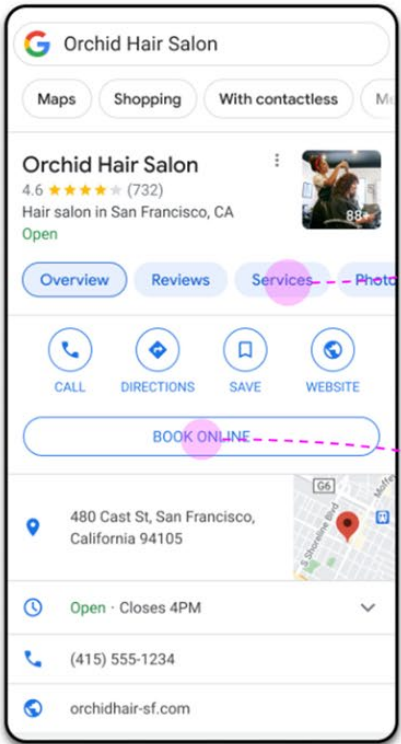
Customer Booking an Appointment

Provide an ability to view services
online and book an Appointment.

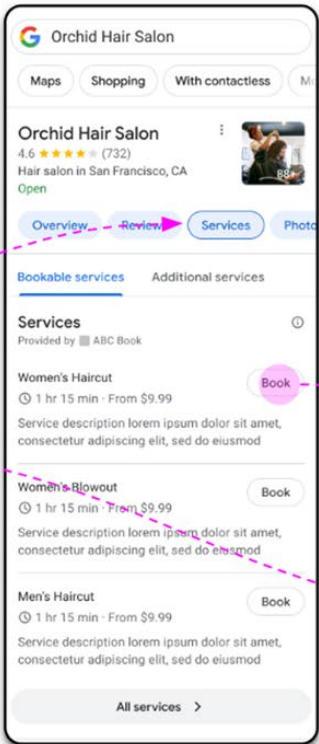


Customer Booking an Appointment

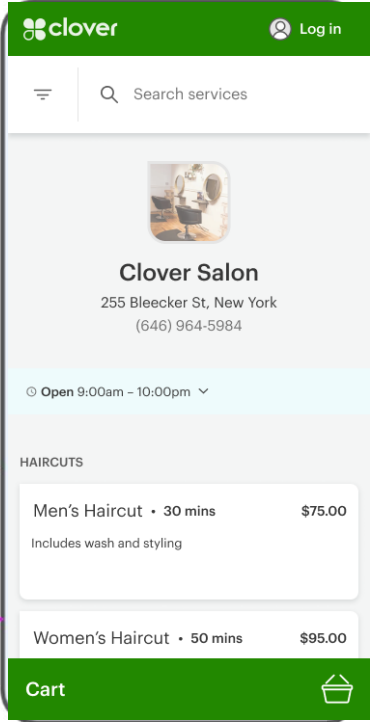
Clover will be added as a partner for Google's Reserve with Google service.



Business Profile with "Book Online" Button



Services tab with a list of bookable services



User discovers bookable service merchants on Google, but is redirected to an external site to complete the transaction

View Services on Merchant website

Select service and time to book an appointment

Login or book as Guest

Google Appointment redirection



Create a personalized website

Merchants can enhance their online presence by creating and personalizing their website

Other personalization options


Hero image and CTA buttons

Font and color palette that reflect merchant's brand identity

Explicitly select categories to display in navigation bar

Custom domains

Home page




Home page banner image
candles-hero-image.jpg

Welcome message
Artisan candles made from locally sourced materials

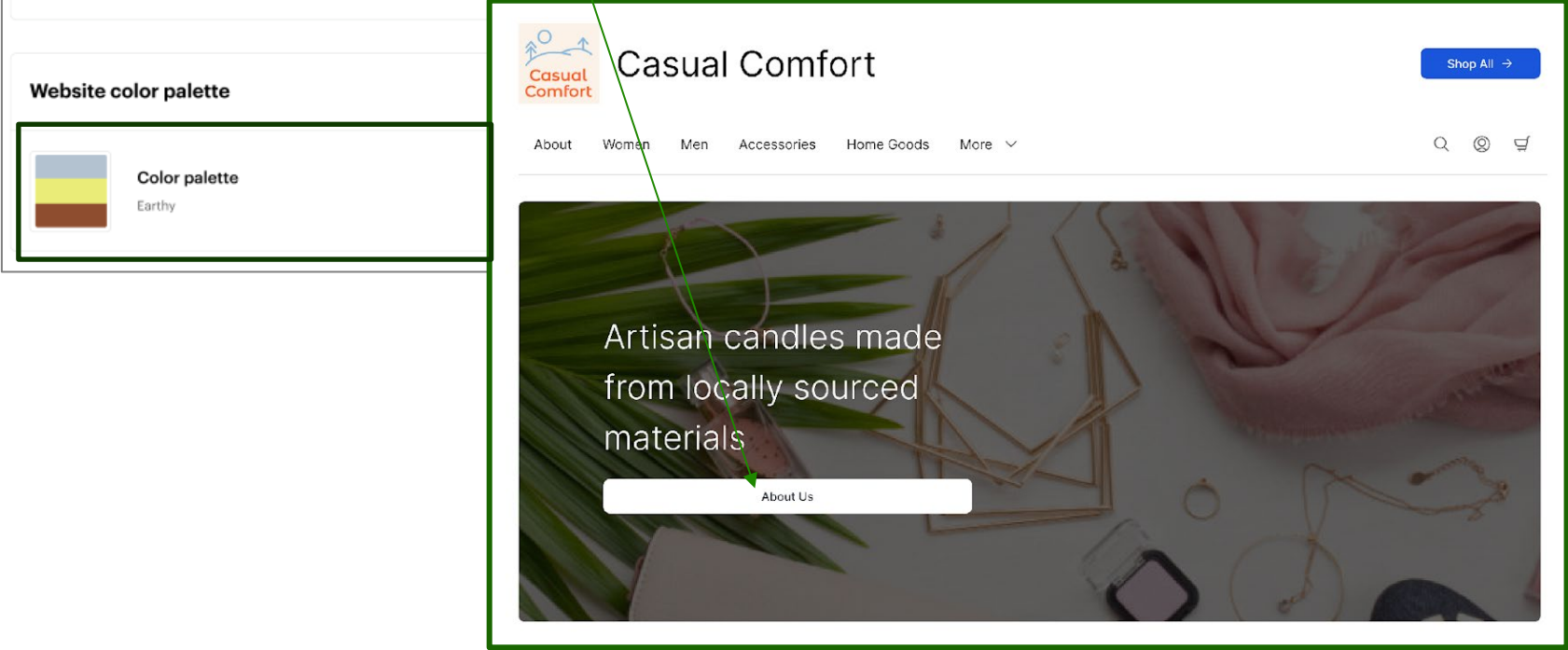
Button text
About Us

Button destination
/about-us



Featured category
Active
Category name

Product display for featured category
Description-focused



Create a Service

Merchant can create services which extends the Items with additional fields specific to Services.

Create a Service (Item type = Product, Service)

Item attributes – Price, Image, description, category

Duration, Employee to Service mapping

Resource mapping

Business name

New Sale

← Service and item list

Home

Appointments

Sales

Reports

Finances

Services and items

Service and item list

Categories

Modifier groups

Resources

Printer labels

Revenue classes

Discounts

Employees

Customers

More

Women's haircut

Duplicate

Details

Basic service details for both point of sale (POS) and online

*Required

Service or item type

This is set as a Service, making it bookable on your appointment calendar or online by customers.

Edit

On device

Show on POS

Service name*

Women's haircut

Price*

\$50.00

per service

Price type

Fixed

Service duration*

-- hr -- min

Optional service padding time

-- hr -- min

Description

Enter a description of the service. It will appear in the details and on

Change your item or service type

Would you like to reclassify this item or service?

Designate whether this should be found under bookable "Services" that you offer or retail "Items" that you sell.

☒ Service

Best for anything you want to be bookable on your appointment calendar or online by customers.

☐ Item

Best for physical goods or products that don't need to be offered as appointments.

Cancel Save



Create a Service

Merchant can create services which extends the Items with additional fields specific to Services.

Business name

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Show on POS

Service name*

Women's haircut

Price*

\$50.00

per service

Price type

Fixed

Service duration*

— hr — min

Optional service padding time

— hr — min

Description

Enter a description of the service. It will appear in the details and on the online menu.

Printer labels

Revenue classes

Discounts

Employees

Customers

More

Show on POS

Service name*

Women's haircut

Price*

\$50.00

per service

Price type

Fixed

Service duration*

— hr — min

Optional service padding time

— hr — min

Description

Enter a description of the service. It will appear in the details and on the online menu.

Image

Create a Service (Item type = Product, Service)

Item attributes – Price, Image, description, category

Duration, Employee to Service mapping

Resource mapping

Assign employees

Select all employees that customers should see as options for this service when booking online.

Employee Name

Employee price for this service

\$50.00

Employee Name

Employee price for this service

\$50.00

Employee Name

Employee price for this service

\$50.00

Employee Name

Employee price for this service

\$50.00



Provide merchant an ability to book an Appointment, manage Appointment life cycle.

Calendar view of Appointments

Appointment status change,
edit, take payments

Appointment overview

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[Privacy Policy](#) 

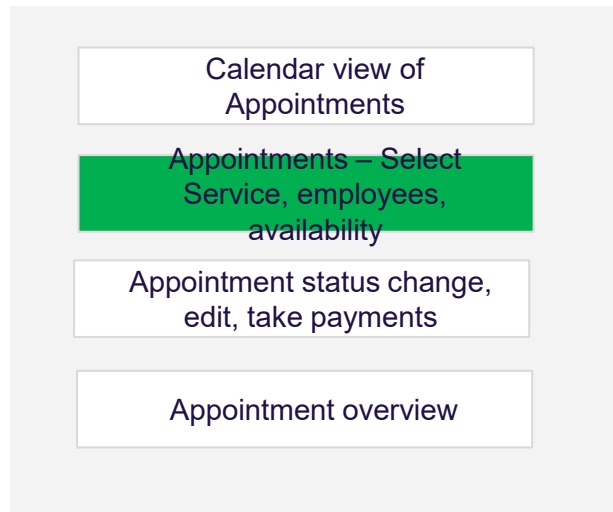
[Accessibility](#) 

[English \(United States\)](#)

[Product Suggestions](#)

Provide merchant an ability to book an Appointment, manage Appointment life cycle.

Provide merchant an ability to book an Appointment, manage Appointment life cycle.



New Sale

Home

Appointments

Overview

Calendar

Sales

Reports

Finances

Services and items

Employees

Customers

More

< Calendar

Create appointment

Customer information

An email or phone number is required.

*Required

Name*

Josie Smith

Email

josiesmith1234@gmail.com

Phone number

(212) 333-4444

Appointment details

*Required

Service*

Wome[

Modifier

Choose modifier

Resource

Choose resource

Employee

First available

Service

Facial massage | \$40 | 30m

Modifier

Choose modifier

Resource

Choose resource

Employee

Ashley Barnes

+ Add another service

Date*

mm/dd/yyyy

Time*

12:00 pm

☐ All day

☐ Repeat

Find availability

Add discount

Add taxes and fees

Find availability

×

Date

mm/dd/yyyy

←

July 2024

→

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Availability for Monday, July 20

10:00 am

10:30 am

11:30 am

12:00 pm

10:00 am

10:30 am

11:30 am

12:00 pm

10:00 am

10:30 am

11:30 am

12:00 pm

10:00 am

10:30 am

11:30 am

5 more

Cancel

Confirm

Merchant Booking an Appointment

Provide merchant an ability to book an Appointment, manage Appointment life cycle.

Calendar view of Appointments

Appointments – Select Service, employees, availability

Appointment status change, edit, take payments

Appointment overview

New appointment

Alicia SilverstoneRegular

EmailAlicias123@gmail.comPhone(212) 333-4444

StatusPending

11:00 - 11:45am (45mins)
Tuesday, July 2

Employee - Customer assigned
Ashley B. (Sammy)

Services - Repeated

Men haircut - \$45
11:00 am • 45 mins\$45.00

Subtotal\$45.00

Discounts-\$10.00

Taxes and fees\$5.00

Total\$50.00

Take payment

Client notes

1/11/24 Friendly and a good tipper

Add note

Booking source

Online booking

Appointment history

Tuesday, July 2, 2023, 2:00 pmCompleted
Haircut
Staff: Tony T.

Wednesday, March 27, 2022, 4:00 pmCompleted
Haircut
Staff: Tony T.

Friday, January 9, 2024, 1:00 pmCompleted
Haircut
Staff: Tony T.

View full history

Decline appointmentEditAccept

New appointment

Alicia SilverstoneRegular

EmailAlicias123@gmail.comPhone(212) 333-4444

StatusPending

11:00 - 11:45am (45mins)
Tuesday, July 2

Employee - Customer assigned
Ashley B. (Sammy)

Services - Repeated

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Haircut
Staff: Tony T.

View full history

Decline appointmentEditAccept



Merchant Manage Appointments

Merchants can drag and drop certain appointments on the calendar according to their schedule and preferences

New Sale

Home

Appointments

Sales Activity

Reports

Finances

Items and Services

Employees

Customers

Apps

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Bob's Barber Shop

🔔

?

⚙️

👤

Appointments

Date range

Day

Tue, Jul 2, 2024

<

>

Employee(s)

Add new

AB

Ashley

CL

Coretta

TT

Tony

PG

Paolo

9:00 AM				
9:37 AM				
10:00 AM	<div>Tom Jones Men's haircut 10:00 - 11:00am</div>	<div>Client Name NoShow Service lorem ipsum 11am - 12pm</div>		<div>Client Name Service lorem ipsum</div>
11:00 AM	<div>Chris Bantam Beard trim</div>	<div>Client Name Service lorem ipsum 10 - 11am</div>		<div>Client Name Service lorem ipsum 12:00 - 1:00pm</div>
12:00 PM	<div>Dan Dragondrop Men's haircut 12:00 - 1:00pm</div>	<div>Client Name Service lorem ipsum 11am - 12pm</div>	<div>Client Name Service lorem ipsum</div>	<div>Client Name Service lorem ipsum 1:00 - 2:00pm</div>
1:00 PM			<div>Client Name Service lorem ipsum</div>	<div>Client Name Service lorem ipsum 1:30 - 2:30pm</div>
2:00 PM	<div>Client Name Service lorem ipsum</div>	<div>Phineas Fiddleback Service lorem ipsum 1:00 - 2:00pm</div>	<div>Client Name Service lorem ipsum 12:00 - 12:45pm</div>	
3:00 PM	<div>Client Name Service lorem ipsum 3:00 - 4:00pm</div>	<div>Client Name Service lorem ipsum 2:30 - 3:15pm</div>	<div>Client Name Service lorem ipsum 12:00 - 12:45pm</div>	
4:00 PM			<div>Phineas Fiddleback Service lorem ipsum</div>	



Customer Engagement

Engage with customer with periodic communication.

History of Appointment and Services

Communication - SMS, Email and Push notifications

Customer COF

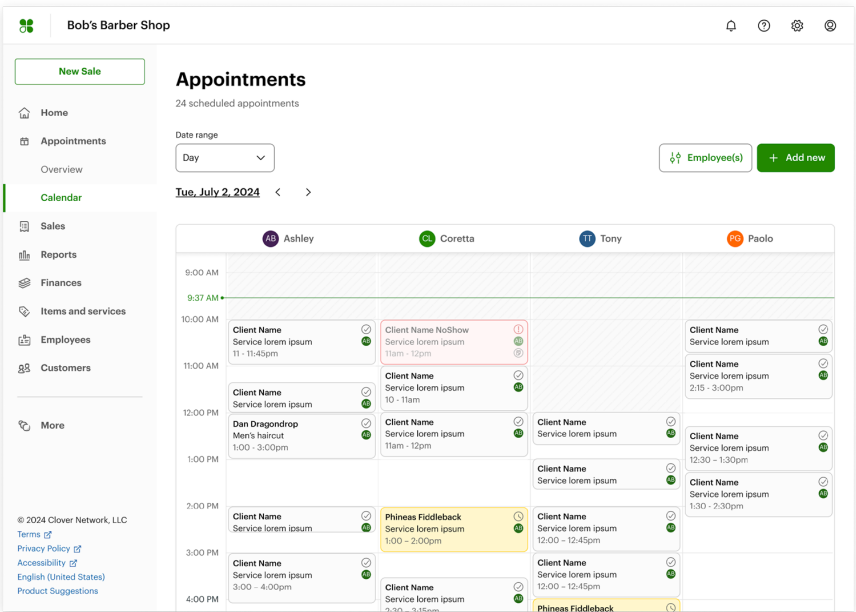
Loyalty, Gift and Promo (existing)

	A	H	I	J	K	L	
1	Triggers for Notifications	To Customer	Email Notification	SMS Notification	B/E Service to Meet the Request	Notes	1
3	Security: OTP for Online Booking (customer to submit appointment request)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Auth Microservice	Configured in the background - default to SMS	
4	Security: OPT for Customer Online Login	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Auth Microservice	Configured in the background - default to SMS	
5	New Appointment Request has been submitted	N/A	N/A	N/A	N/A	Customer will see on-screen confirmation once they submit the request	
6	Approved or Declined: Notification to advise Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notification Service	Critical notification - both SMS and email are selected by default	
7	Merchant Created Appointments						
8	Appointment created on the Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notification Service	Critical notification - both SMS and email are selected by default	
9	Modify Appointments						
10	Marked as no-show	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notification Service	At a minimum, Customer needs to receive email notification	
11	Marked as cancelled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notification Service	At a minimum, Customer needs to receive email notification	
12	Updated service provider	N/A	N/A	N/A	N/A	Does not warrant Customer notification	
13	Time Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notification Service	Merchant can configure how notification goes out	
14	Service Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notification Service	Merchant can configure how notification goes out	
15	Reminders						

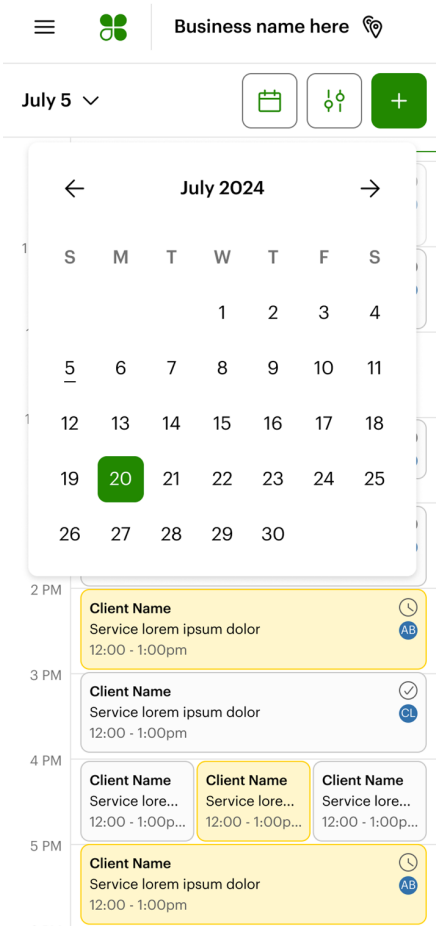


Clover Hardware, Web Dashboard and Clover Go

Merchant web dashboard



Clover Go*



Flex and Mini



Flex



Flex Pocket

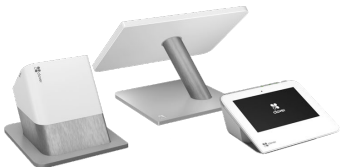


Mini 3

Solo and Duo



Solo



Duo

Key Points to Note



Plan Selection and Pricing

- Plan starts at \$84.95 for the first device and \$19.95 for each additional device.
- Merchants will see the Retail Growth and Services Growth Plans on the Change Plan screens. Register SAAS will not be listed here unless that is an existing merchant who is currently on Register.
- When a Register SAAS Merchant tries to change SAAS Plans, they will be notified that they will not be able to switch back if they were to change plans after Oct'24

YOUR PLAN		NEW	NEW	NEW	
Payments	Essentials	Retail Growth	Services Growth	Counter Service Restaurant	Table Service Restaurant
\$0.00 per month	\$14.95 per month	\$84.95 per month	\$84.95 per month	\$59.95 per month	\$89.95 per month
with up to one device. \$11.95 per month for each additional device.*	with up to one device. \$11.95 per month for each additional device.*	with one device. \$19.95 per month for each additional device.*	with one device. \$19.95 per month for each additional device.*	with one device. \$19.95 per month for each additional device.*	with one device. \$19.95 per month for each additional device.*
Select plan	Select plan	Select plan	Select plan	Select plan	Select plan
Highlights: <ul style="list-style-type: none">✓ Payments acceptance for in-store and online sales	Highlights: <ul style="list-style-type: none">✓ Order management✓ Basic inventory management and reporting✓ Customer management✓ Branded website	Highlights: <ul style="list-style-type: none">✓ Sales tracking✓ Advanced inventory management and reporting✓ Customer engagement✓ Online store	Highlights: <ul style="list-style-type: none">✓ Appointment scheduling✓ Customer engagement✓ Employee management✓ Branded website	Highlights: <ul style="list-style-type: none">✓ Advanced inventory management and reporting✓ Online ordering	Highlights: <ul style="list-style-type: none">✓ Advanced inventory management and reporting✓ Table mapping and tableside ordering

Confirm plan change ×

i The Register plan has been discontinued. You may select another plan but will not be able to select Register again.

Review the details of the Register plan before confirming. The new plan price will be prorated for this billing cycle.

Includes

- ✓ Advanced inventory management and reporting
- ✓ Customer engagement
- ✓ Employee management

Details

Your devices	-
Cost	\$49.95 per month with one device. \$14.95 per month for each additional device.
Total cost	\$0.00

App uninstalls with the plan change

Cancel Change plan

