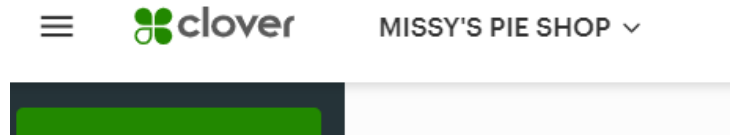


Clover - New Ownership/Same Devices

- Any merchant that has a change in ownership, but stays with Streamline and is using the same equipment can get access to the old info through the old dashboard.
- If a manager/employee had access to the old dashboard, once they are added to the new account they can log in like they always have and at the top of the screen there will be a toggle to switch from their old account to their new account. (See below)

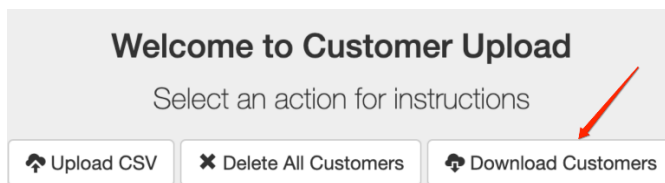


- **Inventory**

- To get the old accounts inventory onto the new account follow these steps:
 - On the **old** account, go to the Inventory tab on the left-hand side.
 - On the top right of the screen there will be 3 little dots that you can click to import or export the items to a spreadsheet. Click export.
 - Once exported, open the file and delete everything in the first column (Clover ID) from row 2 down. (These items will receive a new Clover ID once imported to the new account). Save the file to your computer.
 - On the dashboard, switch to the **new** account. Go to Inventory, click the three dots, and import the file.
 - All of the inventory should load right in with no problems.

- **Customers**

- The only way to import the customer database from an old account is by using an app called “Customer Upload” by Abreeze Technology. There is a \$9.99 one-time fee to do this.
- Download your customers from your **old** Clover account by launching the Customer Upload app in your and old account and clicking the **Download Customers** button. This will send an email to the merchant with a CSV file attachment of their customers. Save that file.



- Switch to the **new** account, launch the app from the list on the left side of the screen and upload the saved file and the customers will be loaded into the new account.
- If your merchant does not want to take the time to do this, the app will handle the entire process for them for a one-time fee of \$39.95.

- **Gift Cards**

- This is dependent on which gift card platform the merchant is using. Third party apps will have a different process than regular Clover gift cards.
- If using Clover First Data gift cards, all you have to do is fill out a **Gift Card Multiple Location Form**. This will just add the new MID to the gift card entitlement of the old MID and allow them to be used with the new account.

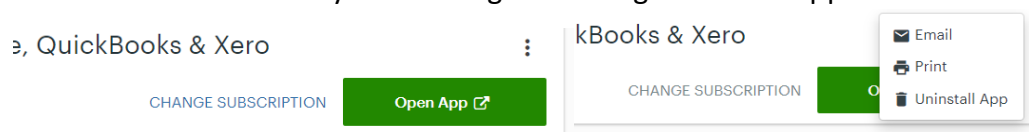
- If using a third-party app, normally all that they will have to do is download that app on the new account and log in. The cards should then work on the new account.

- **Rewards Program**

- If they are using the native Clover Rewards program and need to get that transferred to the new account.
- The only way to accomplish this would be by the merchant themselves calling into the Rewards helpdesk @ 888-957-3752.
- They will then open a ticket and have it converted over by their team.
- If they are using a third party app, just like gift cards, once the app is downloaded and they are logged into their account it should all transfer over.

- **IMPORTANT - Uninstall Apps from old Account**

- Any third-party apps that the merchant was paying monthly for on the old MID will have to manually be uninstalled by them on the old MID's dashboard or they will continue to be charged.
- To find out what apps they were paying for:
 - On the old dashboard, go to **Account & Setup**
 - Click **Monthly Statements** under Billing & Statements
 - Open their most recent statement under **Clover Plan & App Statement**
 - There they will see which apps, if any, they are paying for.
- To uninstall the apps:
 - On the dashboard click **More Tools** on the left-hand side.
 - Underneath that after clicked they will see **Installed Apps**.
 - Find the apps that are being paid for and click on them.
 - You will see three little dots on the right side of the screen, click those and select **Uninstall**. After that they will no longer be charged for that app.



- The apps will not automatically be downloaded to the new account, *it will be as if it is a brand-new merchant who has never had Clover*, any apps needed will have to be reinstalled on the new account through the **More Tools** app market.