

Tips & Tricks After Signing Up



Once you're an active Clover Connect customer and you are utilizing the CardPointe gateway for payment processing, you'll have the option to allow your customer to pay with a credit card the next time you email them an invoice. To adjust the default setting, go to Settings > Account Settings > Transaction Settings



Become PCI Compliant: As a Clover Connect merchant, your PCI compliance status is determined by your standing in the SecureTrust portal. You can access this portal under the My Account tab on your CardPointe account. Merchants have a 3-month grace period to become PCI Compliant

- **Importance of PCI:** As technology has grown, so has the amount of information passed in each transaction. In turn, this has created a greater need for security than ever before to protect personal information and ensure security when transactions are processed.



If you have blocks in place with your bank, whitelist Clover Connect's ACH ID G592126783 so you don't have any funds rejected.

For More Support



CardPointe is Clover Connect's transaction management platform. With CardPointe, you can accept and manage payments from multiple locations with data that is easy to sort and filter. To access CardPointe, go to [CardPointe.com](https://cardpointe.com).



Want to receive notifications for events like declined transactions or chargebacks? Under the Administration tab in CardPointe, select the name you want to update under the Users tab and then click the Email Notifications tab.

Need More Training?

Contact CardPointe support by calling **877.828.0720**. When prompted say "Cardpointe Support" to be transferred directly. They are available from 8:30am EST to 9:00pm EST.