



Customer Engagement Import White Paper





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Introduction

Welcome to Clover! With a Clover® all-in-one POS, you have access to a standout POS system and the Clover Customer Engagement suite. Our suite of tools is designed to help you connect with your customers and make it easy for you to build and deepen your relationships. Importing your customer and loyalty data from a different rewards program to Customer Engagement is easy. Our team of import experts will help you through the move, each step of the way.



Meet Clover Customer Engagement

Strong customer relationships are the heartbeat of small businesses. Clover Customer Engagement is included with your Clover system and helps you grow, nurture, and strengthen your customer relationships. This section will introduce the diverse tools in the suite.

Clover Feedback enables your customers to give you direct feedback.

Many businesses already respond to customer reviews publicly on sites like Google® and Yelp, but Feedback keeps your customer conversations private. On every receipt and in the Clover mobile app, customers are invited to send you a message about their experience. If you receive negative feedback, you can respond privately via email or on the web dashboard, and offer a coupon, discount, or refund to acknowledge customers, alleviate their frustrations, and encourage them to give your business another chance.

[Learn more >](#)

Feedback



Clover Promos is an excellent communication tool.

After you have an audience set up in Clover Customers, Promos lets you send messages to them via text message, or notifications in the Clover mobile app. It even lets you post your offers directly to Facebook® and Twitter. Your patrons who sign up for Promos will also have their file automatically created in Customers.

[Learn more >](#)

Promos



Loyalty programs are an excellent way to keep your best customers coming back.

With Clover Rewards, you can create a simple, free, custom program in minutes. You can also designate your own perks or rewards, to best fit your business model. Points are automatically awarded for purchases, and you can customize the settings so that points accrue based either on the purchase amount or qualifying inventory items. Rewards even allows customers to keep a credit card on file, making contactless payments simple. Customers who register through Rewards are automatically added to your database, so you can send them promotional and marketing communications.

[Learn more >](#)

Rewards



Clover Customers is a great way to identify and catalog your audience.

Think of it as a digital rolodex or an embedded customer relationship management (CRM) system. This app lets you see transaction-level history for every customer, analyze their buying habits, understand their interests, and more. You can even add detailed information to their file, like workplace, birthday, or any details they share with you that you'd like to remember.

[Learn more >](#)

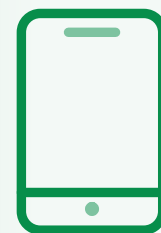
Customers



An important tool in the Customer Engagement suite is the Clover mobile app.

This consumer-facing app is available for free on iOS and Android. It allows customers to track their progress to rewards, as well as submit feedback. It's a simple app that customers can use for any Clover merchant-owned businesses they frequent. We strongly recommend that you download and use the app yourself, so you can better understand the customer experience!

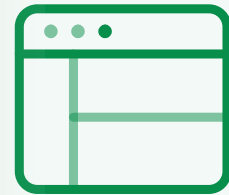
Clover mobile app



Clover Online Ordering complements the Customer Engagement suite and addresses

the challenges small business owners in the food & beverage space are now facing. This service allows you to connect your online menu and business information to generate a mobile-specific website customers can use to place orders. Payments are easy, and customers can even add gratuity at the time of ordering. After payment is verified, the restaurant is notified of the order, the order is fired to the kitchen printer, and you can get it ready for pickup. Clover Online Ordering can also serve as an aggregator for other online ordering platforms like Grubhub and DoorDash. Best of all, Clover Online Ordering carries no additional cost to Clover merchants.

Clover Online Ordering



As a reminder, while Clover Customer Engagement apps (Feedback, Promos, Rewards and Customers) are available in the **Clover App Market**, you can also find and activate them immediately on your **Clover Dashboard**. Simply launch the tools (you'll see their icons on your dashboard) and tap the toggle switch to activate them. Congrats! Your new tools are activated and ready to go.

Installation



Clover Customer Engagement Basic is a great way to start your journey to deeper, stronger customer relationships. Merchants who want even more can upgrade to an expanded plan for a flat monthly fee of \$99.* With Customer Engagement Plus, you'll find many more benefits including, but not limited to, multiple reward offers in Clover Rewards, VIP and Welcome bonuses, birthday bonuses, and automated, targeted offers through Clover Promos.

* Terms and conditions apply.

[Learn more >](#)

Customer Engagement Plus



Understanding the Customer Import

The Customer Import feature helps merchants who are migrating to Clover import their existing list of customers into the Clover Customers app and makes those customers contactable in Promos. It also allows merchants to move their rewards program from more expensive competitors, like Fivestars and Square, and preload loyalty points into a Clover Rewards account for each customer.

Our teams are committed to supporting you through your move to the Clover Customer

Engagement platform. Just supply your customer data, and our team does the import for you.

Our Clover support team has the experience and know-how to address any problem that surfaces during your import. For questions about your customer import, you can reach the import team at rewards@clover.com. And for all other questions about your Clover system, simply contact the Clover support team at support@clover.com or **(855) 853-8340**.



As you use the Clover Customer Engagement Basic plan, you may find your growing

business in need of the added features of the Plus plan. Having our team of experts support your customer import sets you and your business up for growth from the start, so you won't have to make significant changes later.



Fully Supported By Experts



Positioned for Growth



Clover Customer Engagement comes built into your Clover POS.

As your business grows, you can take advantage of our Plus plan, at highly competitive prices.



Cost-Efficient



Moving to Clover Customer Engagement is a one-time event.

After the move, you'll have everything, including your Rewards program, in one system. That means greater efficiency.



One-Stop Management

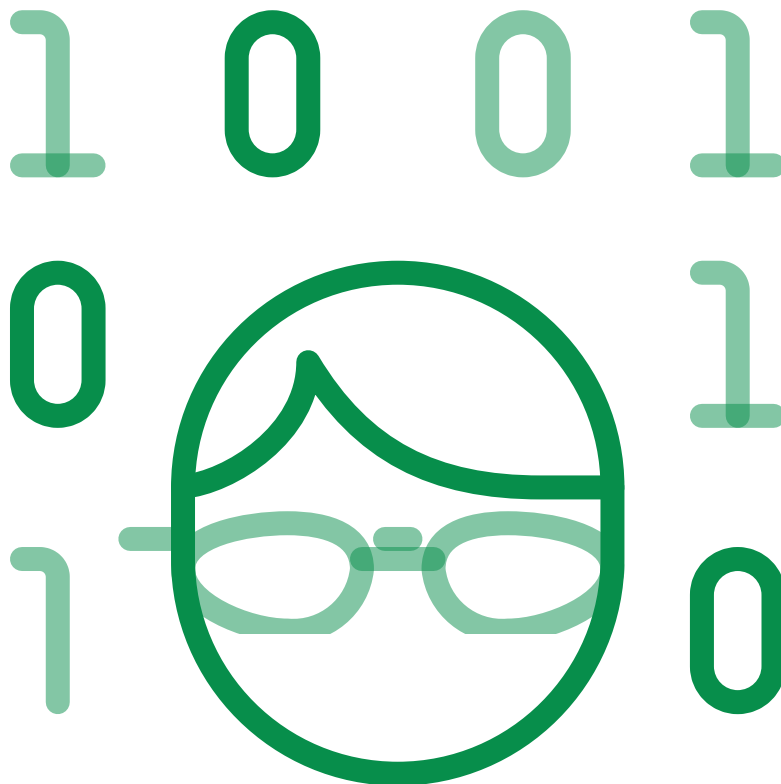


Preparing for Your Import

Importing data from your existing customer rewards program to Clover involves a simple sequence of 5 steps. Our team of experts handles the actual migration for you.

Step 1: Build Your Program

Once you have your Clover POS, Customer Engagement setup is easy and takes just a few minutes. The system will walk you through creating a program in Clover Rewards.



What are your new Reward perks?

Before the Clover support team can import your customer data, it's important that you select the perks you want to offer your customers. Keep in mind that the Clover rewards program is points-based, which means you can offer perks like free items, dollars off a purchase, or a percentage discount when a customer acquires a certain number of rewards points. If you're currently using a punch-card program, our import team can provide guidance on converting it to a points-based program.

Step 2: Export Your Customer List

If you **don't** already have a rewards program, you can move on to Step 3.

If you **do** have an existing rewards program, the Clover support team will need the following information from you:

- **Existing Rewards Program** - The Clover team will ask you what program or product you've been using in order to determine how to map your existing customer data to your new Clover system.
- **New Reward Perks** - You'll also need to let the Clover team know what perks you'll offer as part of your new Clover Rewards program. Your new rewards program is points-based—it's not a punch-card program.
- **Customer List** - Clover will need your entire list of customers and the associated metadata in order to determine how that information will map to your Clover system. We recommend a CSV file export. If you're not able to pull a CSV file, contact your current vendor to request an export of your customer data.

Your CSV file should contain the following headers/columns:

- First Name
- Last Name
- Email
- Phone
- Birthday
- Current Points
- Lifetime Points or Total Money Spent
- First Visit Date
- Is Marketing Allowed?



Have you seen the checklist?

The Customer Import Checklist is a tool we provide to help you prepare for your customer import. Before you submit your import request to Clover, run through the Clover Customer Import Checklist.

Step 3: Submit Your Request

To begin the import process, email your import request to our support team at rewards@clover.com and include the details of your Rewards program offer and your customer data attached as a CSV file. When we receive your import request, we'll review your customer data. If our team identifies missing data, we'll let you know and work with you to address those missing items.

Customer import usually takes about 5 business days.

Ensuring all your customer data is accurate is an iterative and collaborative process, so it's likely you'll be contacted by the support team to review data or answer questions throughout the import process.



My business has multiple locations. Does that matter?

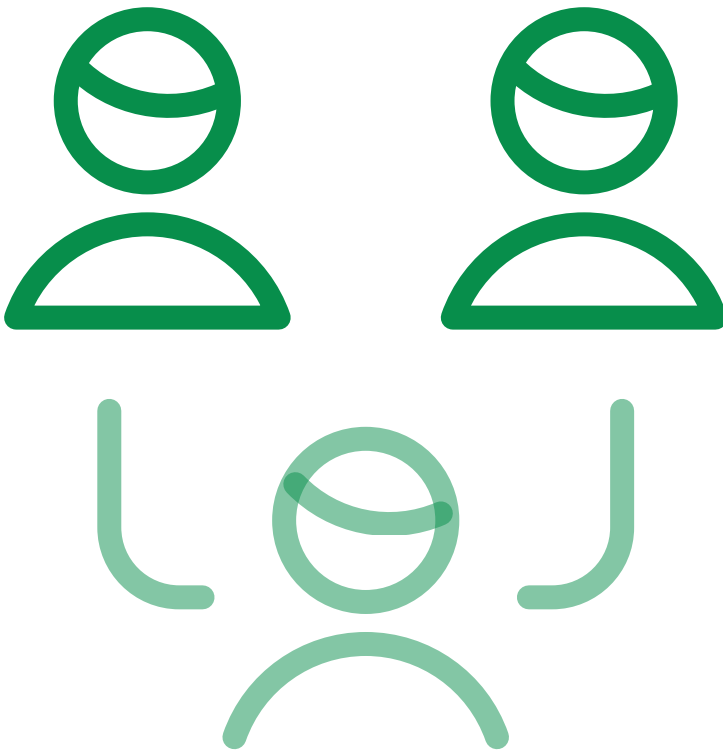
At this time, we cannot yet support customer imports for businesses with multiple locations. We are actively working to address this opportunity and will keep you posted on our progress.

Step 4: Reach Out to Your Customers

While the import process proceeds, we recommend letting your customers know your rewards program is moving to Clover.

You might want to provide your customers the following information:

- The rewards program is moving and being updated.
- An estimated timeline to completion
- Your customers will receive an email from Clover with information about the new program.



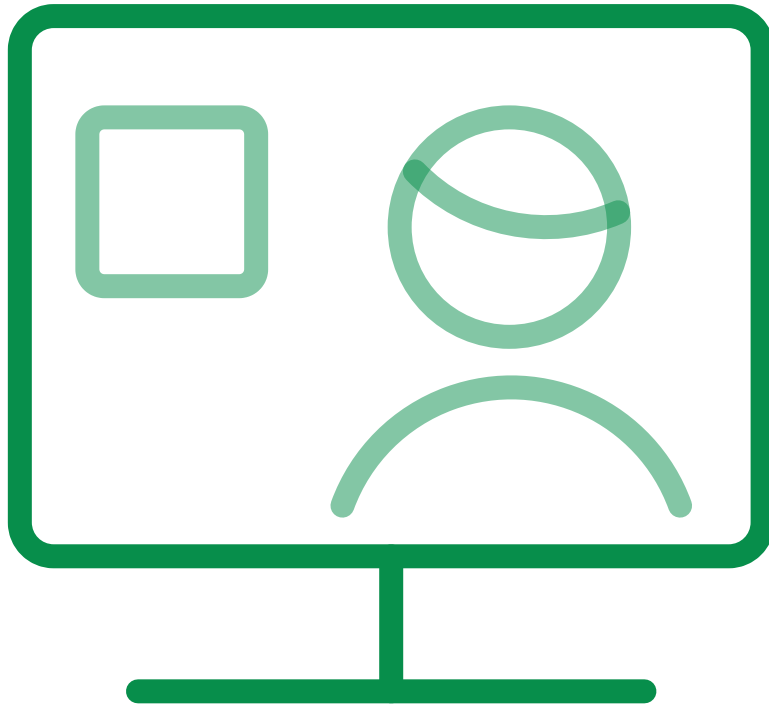
When should you roll out your new Clover Rewards program?

After your customer import is complete. If you try rolling out your new program before the import process completes, you risk corrupting your customer data. It's important to wait for the all-clear from us before you roll out your Rewards program.

Step 5: Prepare to Roll Out Your Program

As soon as your import's complete, we'll notify you and let you know you can begin

rolling out your new Rewards program. We will also send an automatic email notification to all of your customers about your new Rewards program, their available rewards points, the Clover mobile app, and opting into communications.



How to
manage
your
Rewards
program?

Right from your Clover web dashboard. Find out more about the dashboard and managing reward points in **this article**.

Your Import Checklist

Please review this checklist before you submit your import request. The checklist will help you gather the information needed for a successful customer import.

Do you have an existing customer loyalty program?

If you answered yes, you'll be asked to provide a detailed overview of your previous program, confirm the import file is up to date, and that you've stopped awarding points via your old program.

When would you like your new program to go live?

We require a minimum of 5 business days to transfer legacy customer loyalty program data to the Clover system. Please ensure you submit your import request 5 or more business days before you plan to go live.

Do you plan to use any Customer Engagement Plus features?

You'll likely need a Plus subscription if you'll want multiple Rewards programs, customer bonuses, win back lost customers, or unlimited promos. [Learn more about upgrading to Plus.](#)

What kind of Rewards program would work best for your business?

Clover supports points-based rewards, like free items, X dollars off a purchase, and percentage-based discounts. Although we don't support punch card programs, we can provide guidance on converting your existing punches to points.

What would you like to offer to your customers?

You'll be asked to confirm the details of your Rewards program prior to the import. To ensure an accurate import, our support team needs specific information about your rewards program, like \$X off after spending \$Y, X% off after spending \$Y, or Free X after spending \$Y. Learn more about [Creating a Rewards Program](#) in our Help Center.

If you've subscribed to the Plus plan, we may request additional information from you.

Are you able to provide written confirmation of members' marketing preferences?

If you'd like to be able to send promotions to your customers via Clover Promos, we'll need written confirmation from you that you have permission to send marketing communications to your customers. You can provide your written confirmation in an email to our support team.

Have you considered the data fields and types you need?

To import your customer information successfully, our team needs a minimum of two pieces of data per customer: a contact method (phone number and/or email address); and point balances. See Section 2 if you have questions about data fields or types.

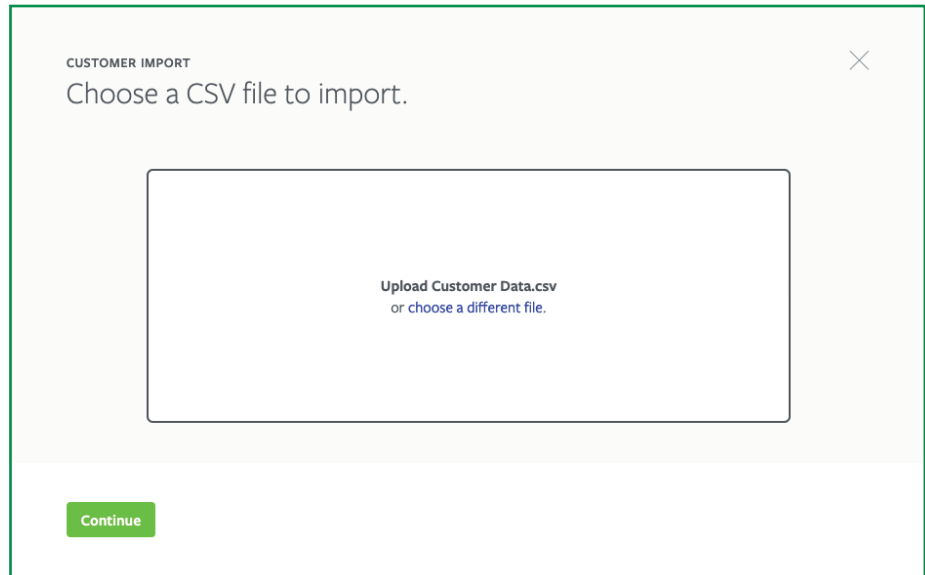


How the Import Process Works

Our Clover import support team shoulders the heavy lifting of the customer import and has the expertise and experience to tackle any challenge or question that arises during the import. This simple five-step guide offers a view of the process we follow to move your customer data into your Clover system accurately and efficiently.

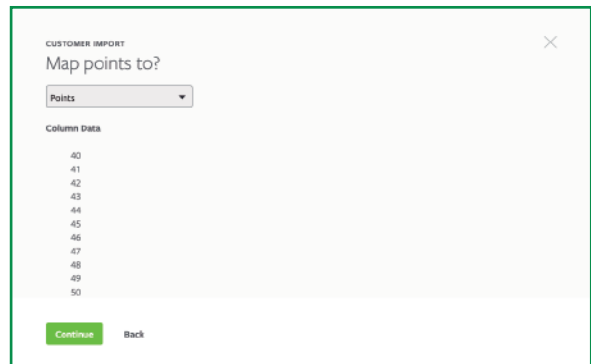
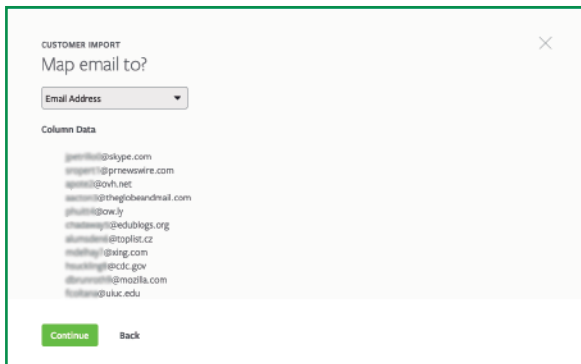
1. We import your data file.

First, our team locates and imports your CSV file. Exporting your customer data in a CSV file is crucial to enabling our team to import your data. If we find any data is missing, we'll work with you to address the gaps in data.



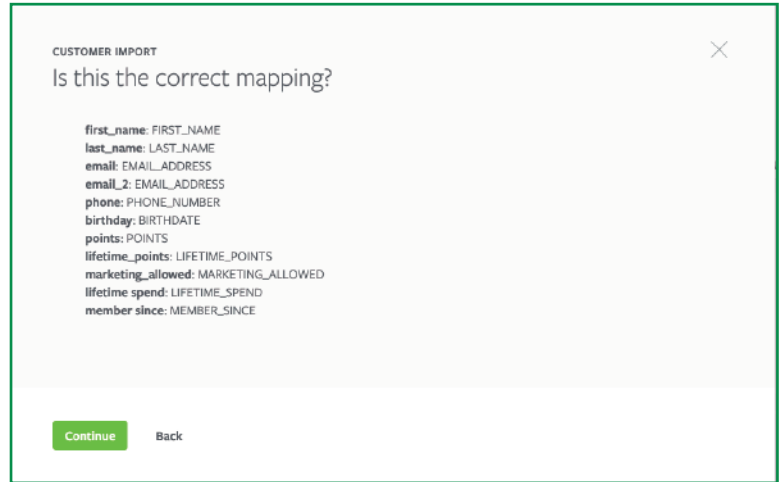
2. We map the data fields.

After your CSV file is imported, the team gets to work mapping all the data in your file to the respective data fields available in your Clover system. For a complete list of supported data fields, please see **Section 6**.



3. We check mapping accuracy.

Because the effectiveness and success of your Rewards program and Promos depend on accurate data, our team makes it the highest priority to confirm that your data has been imported fully and mapped correctly.



4. We communicate with your customers.

As soon as your customer list is imported, your customers will be contacted automatically by email or SMS text, based on their preferences, with information about your new Rewards program.



5. We let you know the import is complete.

Once our support team confirms all customer data has been mapped correctly and your customers have been notified, we'll let you know your import is complete and that you can begin rolling out your new Rewards program.



Who imports your customer data into your Clover system?

Our import support team does the heavy lifting of moving your customer data into your Clover system. They review your data to make sure no critical pieces are missing, and facilitate and support the whole import process. Our support team has worked with many Clover merchants to import customer data and has the know-how and experience to tackle just about any challenge they encounter.

Frequently Asked Questions

This is a list of questions most commonly asked by Clover merchants.

I'm missing some customer data. What can I do about that?

To import your customer information, our team needs a minimum of two pieces of data per customer: a contact method (phone number and/or email address); and that customer's point balances. Our team can help you work through any additional data needed for the import.



What data and data types are supported by Clover?

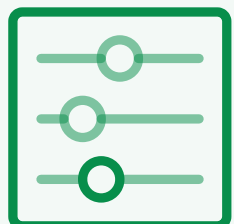
Your Clover system supports an array of data fields, including:

- First Name
- Last Name
- Email
- Phone
- Birthday
- Current Points
- Lifetime Points or Total Money Spent
- First Visit Date
- Is Marketing Allowed?



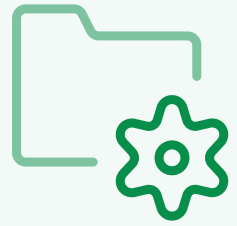
Where can I find more information about customer preferences?

Please see this [Clover article](#) for information on managing customer communication preferences.



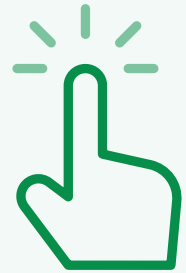
What if issues arise during my import?

The Clover support team has your back. If issues arise during your import, we'll work with you to resolve them. With Clover, you have an expert team on the job with broad experience in importing customer data for merchants like you. They're ready to address any challenge that surfaces.



What else do I need to know about lifetime points?

Lifetime Points are useful for Rewards customers who may not currently have reward points. Please note that if a customer has no reward points or Lifetime Points, that customer will not be imported into the Rewards program. Instead, they will be treated as a new customer and can be added to your new program, after you set it up.



How can I confirm my customers have opted in to marketing communications?

To ensure we can reach out to your customers on your behalf, we'll ask you for written confirmation that your customers have previously opted in to communications from you. If you're moving from another program, you likely have opt-in permission from your customers. However, if you've handled your rewards program manually, you may not have that opt-in permission. Our support team can advise you on how to get that permission as you prepare for import.



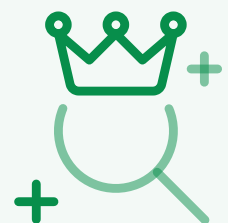
How will the import support or impact Clover Promos?

The import will ensure a process is in place to confirm customers being imported have opted in to receive communications from the merchant and that Clover has permission to work with customer data. Please note that if you plan on using promos to send out communications via text, you can simplify the move by importing only phone numbers rather than email addresses, for example.



I haven't set up my Rewards program yet. Should I do that before or after the import?

You should set up your Clover Rewards program before you request an import of your customer data. Our support team will need the details of your rewards program to help set up your customer data set. Please note that you should not roll out your new Clover Rewards program to your customers until our support team has completed the import and given you the all-clear.



Conclusion

Our hope is that our Customer Engagement Suite will empower you on your journey to delight customers and build even stronger relationships. Know that we're available to help support your customer data import and to serve you as you serve your customers and communities.

If you have questions about your customer import, you can reach us anytime at **rewards@clover.com**. For all other questions about your Clover system, feel free to contact the Clover support team at **support@clover.com** or **(855) 853-8340**.

