



# Actions

Actions runs a rule you set up once. It can add a service charge, an item, a discount or a note to an order, and it can remove an item or a charge. The rule either runs on its own or asks the cashier first.

\$1.99 / month

Free trial: 30 days

Clover POS (United States and Canada)

## OVERVIEW

### How it works

#### 1 A rule has six settings

Title, prompt or automatic, what it does, the object it works on, when it fires, and which order type it applies to.

#### 2 Two moments to fire

A rule fires when the first item goes into the cart, or when the payment screen opens. Nothing happens in between.

#### 3 Prompt or silent

**Prompt me** shows a dialog the cashier confirms or declines. **Add automatically** applies the rule without asking.

#### 4 It changes the order, not the payment

Rules add or remove items, service charges, discounts and notes on the Clover order. Payments and taxes stay with Clover.

#### 5 You can undo it

What a rule did to the current order can be undone from the **Actions** tender button on the Register payment screen: what it added comes off, what it removed goes back on.

#### 6 The same rules everywhere

Rules sync to every Clover device, so one register cannot drift from the others.

The app never replaces the Clover Register — it adds to it. Payments, taxes and reporting stay in Clover.

## FEATURES

### What it does

01

#### Nine things a rule can do

Add Service Charge, Set Order Note, Add Item, Add Custom Item, Add Custom Item - % of order subtotal, Add Order Discount (percentage), Add Order Discount (amount), Remove Item, Remove Service Charge.

02

#### Prompt or automatic

**Prompt me** asks the cashier. **Add automatically** applies the rule without asking — a short message such as **'Delivery Fee' Applied** appears on the Register.

03

#### Two trigger moments

**You put the first item to the cart** or **You open the payment screen**.

04

#### Order type filter

Limit a rule to one Clover order type, so a delivery fee never lands on a walk-in order.

05

#### Your wording on the dialog

Rename the apply and cancel buttons and set their text colour.

06

#### Revert

Undo what a rule did to the current order: on the Clover Register payment screen tap the **Actions** tender button, then the red **Revert applied actions** button at the bottom of **Select action**. What a rule added comes off the order; an item or a service charge a rule removed goes back on.

07

### Apply a rule by hand

The same **Actions** tender button opens **Select action**, where every rule has an **APPLY** button. The cashier can run a rule on the open order at any moment — paused rules and rules for other order types are on the list too.

08

### Sync and protection

Rules sync to every register. **Restrict access** stops employees from editing them.

09

### Set it up from a browser

[actions.payplaxe.com](https://actions.payplaxe.com) (<https://actions.payplaxe.com>) opens the rule list and the six-step editor in a browser, signed in with **Login via Clover**. It is the same app, not a separate product: the browser is where it is set up, with the same Clover account and nothing extra to buy. Everything that happens at the register stays on the Clover device: the browser shows no prompt, applies and reverts nothing on an order, and has no **Actions** tender button.

## INSTALL

### Price & installation

**\$1.99** / month

↓ **Install on Clover App Market** (<https://www.clover.com/appmarket/apps/J9G6Q8DTJC0KP>)

Every app has a 30-day free trial. Clover bills the subscription with your monthly Clover invoice.

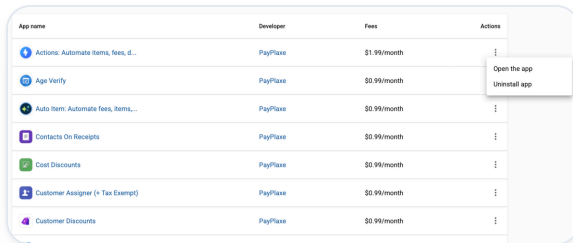
### How to install

1. Open the **Clover App Market** — on the device, or at `clover.com/appmarket` in your web dashboard.
2. Find the app by name, or open its direct link from the button above.
3. Tap `Connect` / `Install` and accept the permissions the app requests.
4. The 30-day free trial starts automatically. The subscription then appears on your monthly Clover invoice.
5. Open the app on the Clover device and sign in with a **Manager** or **Admin** employee account to configure it.
6. To cancel later, uninstall the app from the App Market — the steps are right below.

## How to cancel the subscription

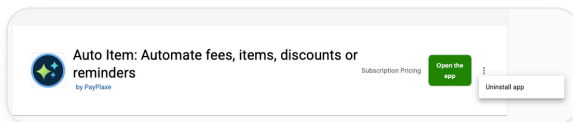
Cancelling means uninstalling the app — there is no separate billing screen.

1. Open the **App Market** — on the Clover device, or in the web dashboard.
2. Open **My Apps**. Every app you pay for is listed there with its monthly fee.



| App name                             | Developer | Fee          | Actions |
|--------------------------------------|-----------|--------------|---------|
| Actions: Automate items, fees, d...  | PayPlace  | \$1.99/month | ⋮       |
| Age Verify                           | PayPlace  | \$0.99/month | ⋮       |
| Auto Item: Automate fees, items, ... | PayPlace  | \$0.99/month | ⋮       |
| Contacts On Receipts                 | PayPlace  | \$0.99/month | ⋮       |
| Cost Discounts                       | PayPlace  | \$0.99/month | ⋮       |
| Customer Assigner (+ Tax Exempt)     | PayPlace  | \$0.99/month | ⋮       |
| Customer Discounts                   | PayPlace  | \$0.99/month | ⋮       |

3. Tap the ⋮ button on the app's row and choose **Uninstall app**.
4. The app's own page works too: ⋮ next to the green **Open the app** button → **Uninstall app**.



5. Confirm. The subscription stops there and then — the app is off your next Clover invoice.

Install and cancel any time from the Clover App Market.

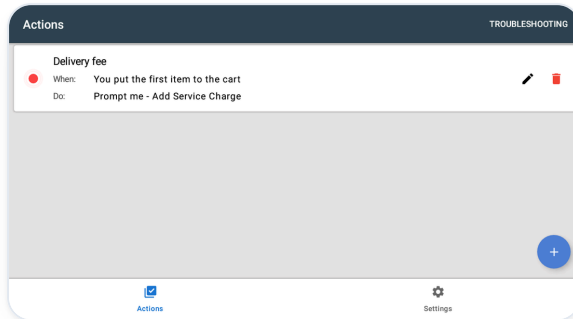
## START HERE

### First setup

Do this once, in this order. It takes a few minutes and the app is then ready for the shift.

1. Open **Actions**. The list shows every rule with its **When** and **Do** lines; the dot on the left says whether it is active.

An empty list reads **You have no triggers for the Register app** — on this screen the app calls a rule a trigger.



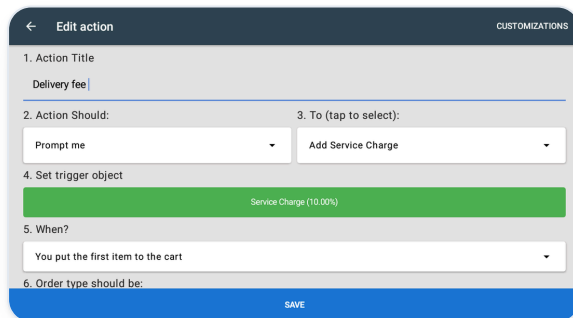
2. Grant the **draw over other apps** permission when the app asks for it.

Until it is granted the app shows a **Warning!** dialog on every open and sends you to the Android permission screen. Without the permission the **Apply action** prompt cannot appear at the register.

3. If the rule needs a service charge, create it first in Clover: **Setup** app → **Additional Charges** (Register plan or higher).

Shortcut: in the service charge picker of step 4 tap **How to setup?**, then **Open Clover Setup**.

4. Tap **+** and fill the six steps of the editor from top to bottom.



5. Step 4 — **Set trigger object** is the red bar: tap it and enter the item, amount, note or discount the rule works with.

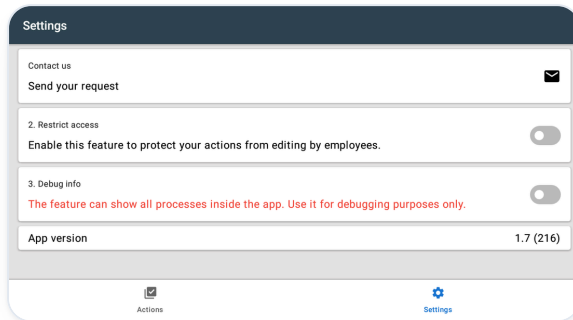
A rule without it cannot be saved. The one exception is **Set Order Note**: it saves with the note left blank — an automatic rule then writes nothing, and a **Prompt me** rule asks the cashier to type the note.

6. Use **CUSTOMIZATIONS** in the top bar to rename the apply and cancel buttons and set their colours.

7. Save, then test the rule on a real order before the shift starts.

8. Open **Settings**. Leave **2. Turn on the app** switched on and turn on **3. Restrict access** so employees cannot edit or disable your rules.

With **2. Turn on the app** off this device applies no rule at all, although the list still shows them as active.



A rule with no order type selected applies to every order type.

## CONFIGURATION

### Setup scenarios

Each scenario is a complete configuration — follow the steps in order.

Most configuration screens require the Clover employee role of Manager or Admin.

## 1 Delivery fee added automatically to delivery orders

The fee should appear on every delivery order without the cashier remembering it.

1. Open **Actions** and tap **+**.
2. Step 1 — **Action Title** : **Delivery Fee**.
3. Step 2 — **Action Should** : choose **Add automatically**.
4. Step 3 — **To** : choose **Add Custom Item**.
5. Step 4 — **Set trigger object** : name it **Delivery**, set the amount and tick **Taxable** if it is taxed.
6. Step 5 — **When?** : **You put the first item to the cart**.
7. Step 6 — **Order type should be** : select your delivery order type, then **Save**.

Fees apply to the order the same way for every payment method, so they are not card surcharges. If you want to offset processing costs, that is what the cash discount program in [Order Discounts](#) does — ask your processor what your account is allowed to run.

## 2 Ask the cashier before adding a service charge

Large parties get a service charge, small ones do not — so the cashier decides at the payment screen.

1. In Clover open the **Setup** app → **Additional Charges** and create the service charge with its percentage (a Register plan or higher is required).
2. In **Actions** create a rule with **Action Should** = **Prompt me** and **To** = **Add Service Charge**.
3. In **Set trigger object** select the service charge you created in Setup. If the list is empty, tap **How to setup?** in that dialog, then **Open Clover Setup**.
4. Set **When?** to **You open the payment screen**.
5. Open **Customizations** and rename the buttons, e.g. **Add 18%** and **No thanks**.
6. Save — at payment the cashier gets a two-button prompt.

### 3 An order note on delivery and pick-up orders

Some order types need a line the kitchen or the packer must see. A note is written on the Clover order, so it travels with the ticket.

1. Open **Actions**, tap **+** and name the rule, for example **Delivery note**.
2. **Action Should:** = **Add automatically** if the note must always be there, or **Prompt me** if the cashier should confirm it.
3. **To (tap to select):** = **Set Order Note**.
4. Tap the red **Tap here to set** bar and type the note text, for example **Check the address and phone before handing over**.
5. **When?** = **You put the first item to the cart** so the note is on the ticket from the start.
6. **Order type should be:** = your delivery type. Repeat the rule for pick-up if that type needs a different note.
7. Save and ring a test order of that type. The note appears on the Clover order and prints with the ticket.

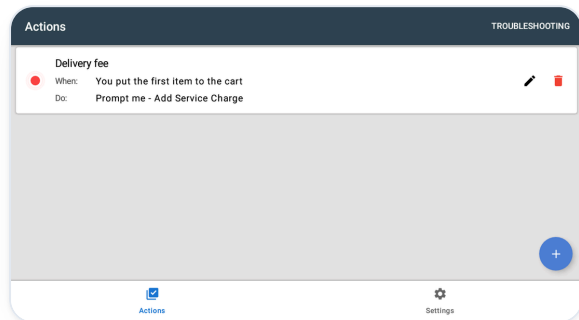
One rule writes one note to one order type. For a second order type, create a second rule. If the rule itself must not be changed by staff, turn on **Restrict access** in Settings. A **Prompt me** note rule still lets the cashier retype the note in the dialog, up to 100 characters — choose **Add automatically** if the wording has to stay fixed.

## REFERENCE

### Screens and settings

Every screen of the app and what each setting does. (8)

#### Actions list



#### Status dot

Green — the rule is active. Red — it is paused and does not fire on its own. Tap the dot to pause or resume the rule: the app asks **Do you want to disable this trigger?**. A paused rule can still be applied by hand from the **Actions** tender button.

#### When

The trigger moment: first item in the cart, or the payment screen.

#### Do

What happens, e.g. **Prompt me – Add Service Charge**.

#### Pencil

Opens the rule editor.

#### Bin

Deletes the rule after an **Are you sure?** confirmation. It disappears from every device and cannot be brought back — pause it with the dot instead if you may need it again.

#### TROUBLESHOOTING

Opens the built-in answers for the most common problems.

#### + button

Creates a new rule.

#### Empty list

**You have no triggers for the Register app** — no rule has been created yet.

## Rule editor

Six numbered steps. Work top to bottom — later steps depend on earlier ones.

The screenshot shows a mobile app interface for editing a rule. It has a dark blue header with a back arrow and 'Edit action' text, and a 'CUSTOMIZATIONS' label in the top right. The main area is divided into six numbered steps: 1. Action Title (Delivery fee), 2. Action Should (Prompt me), 3. To (tap to select) (Add Service Charge), 4. Set trigger object (Service Charge (10.00%)), 5. When? (You put the first item to the cart), and 6. Order type should be: (empty). A blue 'SAVE' button is at the bottom.

### 1. Action Title

Your own name for the rule, e.g. **Delivery Fee**. It is not shown to customers.

### 2. Action Should

**Prompt me** asks the cashier; **Add automatically** applies without asking.

### 3. To (tap to select)

The action: Add Service Charge, Set Order Note, Add Item, Add Custom Item, Add Custom Item - % of order subtotal, Add Order Discount (percentage), Add Order Discount (amount), Remove Item, Remove Service Charge.

### 4. Set trigger object

The concrete object: the amount, the note text or the discount value. **Add Item** and **Remove Item** open the **Select an item** picker; **Add Service Charge** and **Remove Service Charge** open the list of Clover service charges, which also carries **How to setup?** → **Open Clover Setup**.

### 5. When?

**You put the first item to the cart** or **You open the payment screen**.

### 6. Order type should be

Limits the rule to one Clover order type. Leave empty for all.

## CUSTOMIZATIONS

Apply and cancel button titles and their text colours.

## Select an item

### Where

Step 4 of the editor, for an **Add Item** or a **Remove Item** rule.

### Search...

Filters your Clover items by name.

### Tapping an item

Picks it for the rule — one item per rule. For an item priced per unit the app then asks for the quantity in `Set count`.

## Apply action — the prompt

### Title

`Apply action 'Delivery Fee'` — the name of the rule that is asking.

### Note field

Only for a **Set Order Note** rule: the preset text, which the cashier can retype, up to 100 characters.

### Apply button

Your wording and colour from `CUSTOMIZATIONS`. It writes the change to the open order.

### Cancel button

Declines the rule. The decline is recorded against the order, so that rule does not ask again on it. If it was declined by mistake, apply the rule by hand from the `Actions` tender button.

## Select action — the Actions tender button

### Where

Clover Register → the payment screen → the **Actions** tender button.

### The list

Every rule you have, with its **When** and **Do** lines — paused rules and rules for other order types included.

### APPLY

Applies that rule to the open order straight away, with no prompt. It changes the order, so read the rule name first. A service charge that is already on the order is refused with **This action is already applied**, but an item can be added twice.

### Revert applied actions (N)

The red button at the bottom; N counts the rules already applied to this order. It opens **Revert actions** and stays grey while nothing has been applied.

## Revert actions

### Where

The red **Revert applied actions** button at the bottom of **Select action**.

### The list

The rules already applied to this order. With none it reads **You don't have applied actions for this order**.

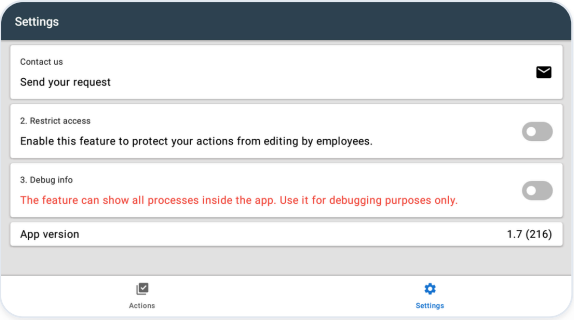
### REVERT

Undoes that rule on the order: an item, service charge, discount or note it added is taken off, and an item or service charge it removed is put back.

### Back to actions

Returns to **Select action**.

# Settings



## 1. Contact us

Sends a support request from the app.

## 2. Turn on the app

The master switch for this device. With it off no rule fires here — no fee, no note, no discount — although the list still shows them as active. Leave it on.

## 3. Restrict access

When on, employees cannot edit your rules — only managers and admins.

## 4. Debug info

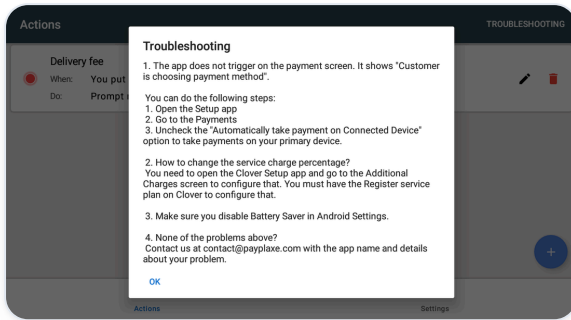
Shows internal processing; for support sessions only.

## 5. App version

The installed version.

## Built-in troubleshooting

The same answers are always one tap away on the device, in English or Spanish depending on the device language.



### Rule does not fire at payment

Uncheck **Automatically take payment on Connected Device** in Clover Setup → Payments.

### Service charge percentage

Configured in Clover Setup → Additional Charges; needs the Register plan.

### Device sleeps or misbehaves

Disable Battery Saver in Android settings.

### Anything else

Email [contact@payplaxe.com](mailto:contact@payplaxe.com) with the app name and details.

## AT THE REGISTER

### Everyday use

What the cashier does after the app is configured.

1. Nothing to do for automatic rules — they apply themselves.
2. For a **Prompt me** rule a dialog headed **Apply action** appears at the trigger moment: confirm or decline with the buttons you named. A note rule shows the note text, which can be retyped, up to 100 characters. Declining counts as handled — that rule does not ask again on this order.
3. If a rule was applied by mistake, go to the payment screen in the Clover Register, tap the **Actions** tender button, then the red **Revert applied actions** button at the bottom of **Select action** and revert it there.
4. The same **Select action** dialog applies a rule by hand: tap **APPLY** on its row. Every rule is listed, paused ones included, and the change lands on the open order at once — read the rule name before you tap.
5. If a rule must be paused for a day, tap the coloured dot on its row and confirm **Do you want to disable this trigger?** instead of deleting it.

#### IF SOMETHING IS WRONG

### Troubleshooting

Symptom on the left, what to do on the right.

**Please set action** when saving.

Step 4 ( **Set trigger object** ) is empty. Tap the red bar and choose the item, charge, note or amount.

**Please select your service charge** .

The service charge no longer exists in Clover, or none was picked. Create it in Clover Setup → Additional Charges and select it again.

**It's illegal to apply surcharges in your state** .

In CT, MA and PR the app refuses to save an **Add Service Charge** or **Add Custom Item - % of order subtotal** rule whose title or object name contains 'card', 'cash', 'surcharge' or 'nca'. Rename the rule, or run a cash discount program with [Order Discounts](#) and check with your processor first.

**This action can be editable by managers and admins only** .

**Restrict access** is on in Settings. Sign in as a manager or admin to change the rule.

**No rule fires on this device at all.**

Open **Settings** and check **2. Turn on the app** . With that switch off the device applies no rule, even though the list still shows them as active.

**The Prompt me dialog never appears.**

The app needs the **draw over other apps** permission and shows a **Warning!** dialog on every open until it is granted. Confirm that dialog and switch the permission on for Actions.

**A prompt was declined by mistake.**

The decline is recorded against the order, so the rule does not ask again on it. Apply it by hand: payment screen → **Actions** tender button → **APPLY** on the rule's row.

**The rule fires on the wrong orders.**

Check step 6 — with no order type selected the rule applies to all of them.

**Action can't be reverted** .

The app could not push the change through Clover, so nothing was taken off the order. Try again while the order is still open on the Register; if it fails again, remove the item, fee or discount by hand in the order.

**The app's dialog never appears on the payment screen; Clover shows "Customer is choosing payment method".**

Open the Clover **Setup** app → **Payments** and uncheck **Automatically take payment on Connected Device** , so payment is taken on the primary device.

### Settings cannot be opened or changed.

Sign in with an employee whose Clover role is **Manager** or **Admin**. Some apps also have their own **Restrict access** switch that locks the configuration.

### The app works erratically, or stops reacting after the device has been idle.

Turn off Battery Saver in the device's Android settings and keep the device online.

### A change made on one device is not visible on another.

Settings sync through the cloud; give it a minute and make sure both devices have a network connection.

## QUESTIONS

### FAQ

#### Does Actions add credit card surcharges?

No. Fees apply to the order identically for every payment method. To offset processing costs, merchants usually run a cash discount program with **Order Discounts**. What your account may do is set by your processor and by card network rules — ask them first.

#### Do rules work on all my devices?

Yes — settings sync between devices, so a rule created on one register applies across the store.

#### Can I set up rules from a computer?

Yes. [actions.payplaxe.com](https://actions.payplaxe.com) (<https://actions.payplaxe.com>) opens the same rule list and the same six-step editor in a browser: create, edit, delete, pause and resume rules. Sign in with **Login via Clover** — your Clover account, no separate password; an employee account can look but not edit. Open the app once on the Clover POS first, otherwise the site answers **Open Actions on your Clover POS, then try again**. Nothing that happens at the register happens in the browser: no prompt, no **Actions** tender button, no revert, and the switches **Turn on the app**, **Restrict access** and **Debug info** exist only on the Clover device.

#### The rule does not fire on the payment screen. Why?

Open the Clover **Setup** app → **Payments** and uncheck **Automatically take payment on Connected Device**. Also make sure Battery Saver is off in Android settings.

### How do I change a service charge percentage?

Service charges live in Clover, not in the app: open **Setup** → **Additional Charges**. The Register service plan is required.

### How much does it cost?

**\$1.99** per month, with a 30-day free trial.

## SUPPORT

### Contacts

#### EMAIL

[contact@payplaxe.com](mailto:contact@payplaxe.com)

#### TEXT MESSAGE

**743-800-4077**

#### WEBSITE

[payplaxe.com](https://payplaxe.com) (<https://payplaxe.com>)

#### IN-APP SUPPORT

**Settings → Contact us**

#### ANSWER TIME

**5–15 minutes**

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Unofficial documentation set generated for PayPlaxe Clover POS apps. Prices and features follow the published product pages.

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**Clover Apps (US)** (<https://www.clover.com/appmarket/developer/851YWYC4PW440>)

**Clover Apps (EU)** (<https://www.eu.clover.com/appmarket/developer/FBG7E8TY6C95W>)