



## Customer Assigner

Customer Assigner opens the customer selection dialog as soon as the first item is added to an order, so sales are not left anonymous. It also keeps a list of tax-exempt customers: when one of them is on the order, the tax on that order is dropped. On the Clover home screen the tile reads **Assigner**. Setup, the exempt list and Reports also open in a browser.

\$0.99 / month

Free trial: 30 days

Clover POS (United States and Canada)

### OVERVIEW

#### How it works

##### 1 It asks for the customer at the right moment

With the switch on, the customer selection dialog opens as soon as the first item is added to the order in the Register. It opens once per order; an empty order never prompts.

##### 2 Tax exemption comes from a list

When a customer from the list is on the order, the app marks that whole order tax-removed in Clover, so every tax on it is dropped. Take the customer off the order and the tax comes back. It is an all-or-nothing switch on the order, not a per-item exemption.

##### 3 The customer's name goes into the order note

Assigning a customer writes their first and last name into the Clover order note. Removing the customer clears the note. Anything you typed there is overwritten.

##### 4 Only assigned, paid sales are reported

A line is written when the order has a customer assigned, is paid in full and totals more than zero. Date, amount and customer ID, with a period total and a share action. Anonymous sales never appear.

## 5 Exemption paperwork is still yours

The app applies what you told it. Collecting and keeping the exemption certificates, and being able to show them, stays your responsibility.

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

### FEATURES

## What it does

01

### Automatic customer prompt

Trigger the app in the Register opens customer selection when the first item is added to the order. It opens once per order.

02

### Tax-exempt list

Mark the customers who are exempt. When one of them is on the order, the app clears the tax on that whole order in Clover; take the customer off and the tax comes back.

03

### Search and filters

Type a name to filter the list. A query that contains digits is sent to Clover as a phone-number lookup, so the whole list changes. In Reports the filter picks one customer.

04

### Reports

Date and time, amount, customer ID and details for each paid order that had a customer assigned, with the period total.

05

### Share the log

Create the report, scan its QR code or e-mail the link when accounting asks for it. Access to the report expires.

06

### Web version

[customerassigner.payplaxe.com](https://customerassigner.payplaxe.com) (<https://customerassigner.payplaxe.com>) opens Setup, the tax-exempt list and Reports in a browser. It is the same app you already have on Clover — the setup side of it, with nothing extra to buy. Sign in with **Login via Clover**. The work at the register stays on the Clover device.

## INSTALL

### Price & installation

**\$0.99** / month

📥 **Install on Clover App Market** (<https://www.clover.com/appmarket/apps/9G4Z3B4V92QNC>)

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

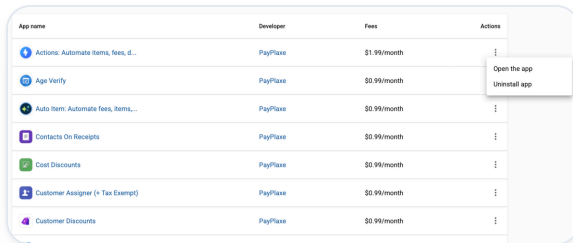
### How to install

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

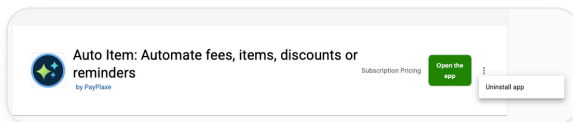
Cancelling means uninstalling the app — there is no separate billing screen.

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...  | PayFlaxx  | \$1.99/month | ⋮       |
| Age Verify                           | PayFlaxx  | \$0.99/month | ⋮       |
| Auto Item: Automate fees, items, ... | PayFlaxx  | \$0.99/month | ⋮       |
| Contacts On Receipts                 | PayFlaxx  | \$0.99/month | ⋮       |
| Cost Discounts                       | PayFlaxx  | \$0.99/month | ⋮       |
| Customer Assigner (+ Tax Exempt)     | PayFlaxx  | \$0.99/month | ⋮       |
| Customer Discounts                   | PayFlaxx  | \$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.

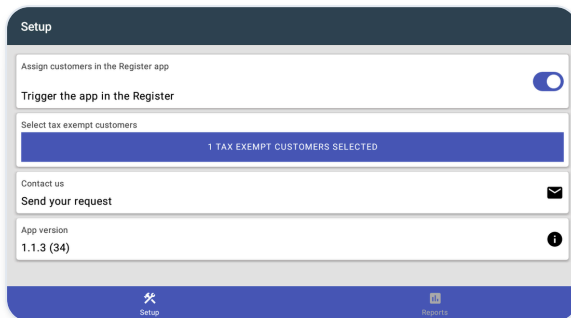
Install and cancel any time from the Clover App Market.

## START HERE

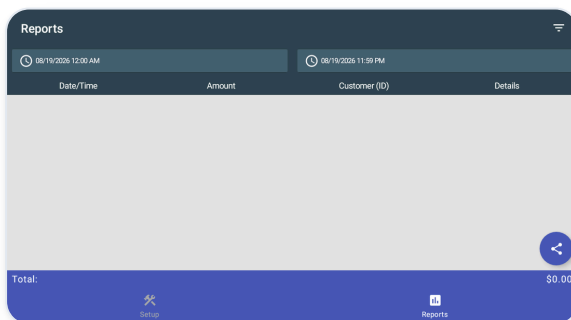
### First setup

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

1. Add the customers to the Clover **Customers** app first.
2. Open **Assigner** on the Clover home screen — the app and the App Market listing are called **Customer Assigner** — then **Setup**.



3. Check **Trigger the app in the Register**. It is on by default, and it belongs to this device, so repeat the check on every Clover device.
4. Open **Select tax exempt customers**, tap the round **+** button, then search the customer list and tap an exempt organisation to add it. The screen closes after each customer, so tap **+** again for the next one. The red **DELETE** on a card takes one off the list.
5. Run a test sale with an exempt customer and check that no tax is charged on the order.
6. Open **Reports** to confirm the sale was recorded. It appears only after the order is paid in full.



The app applies your list; keeping valid exemption certificates on file remains your responsibility.

## CONFIGURATION

### Setup scenarios

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

## 1 Never lose a customer on an order again

Loyalty, customer discounts and history all depend on the customer being attached to the sale.

1. Open **Assigner** on the Clover home screen → **Setup**.
2. Check **Trigger the app in the Register**. It is on by default, so this is a check, not a change.
3. The switch is saved on the device it is set on — set it on every Clover device that rings up sales.
4. Add the first item to the order in the Register — the customer selection dialog opens. It opens once per order.
5. Pick the customer, or tap **CANCEL** if it is a walk-in.
6. Pair it with **Customer Discounts** so the right discount follows the person automatically.

Assigning a customer overwrites the Clover order note with that customer's first and last name, and removing the customer clears the note. Anything typed in the order note is lost.

## 2 Tax-exempt customers

Schools, charities and resellers must not be charged tax, and the paperwork has to hold up.

1. Open **Select tax exempt customers** — the button shows how many are selected.
2. Tap the round **+** button, search the customer list and tap an exempt organisation — it is added straight away and the screen closes. Repeat for each organisation.
3. There is no confirm step — each customer is saved as soon as you tap them. Tapping one that is already on the list answers **You already added this customer**.
4. To take an organisation off the list, open the same screen and tap the red **DELETE** on its card.
5. Ring up a sale, assign that customer and check the tax on the order.
6. Keep the customer records in Clover complete, with the exemption reference in the customer's details.

The exemption is all or nothing: every tax on that order is dropped, not one item's. **DELETE** removes a customer from the list at once, with no confirmation. The app applies your list; keeping valid exemption certificates on file remains your responsibility.

### 3 Report on assigned sales

Accounting wants the list of orders tied to customers or exempt from tax.

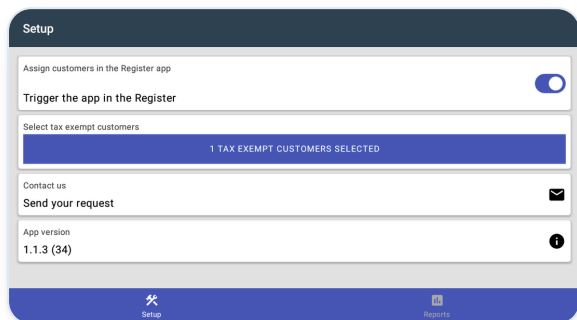
1. Open the **Reports** tab.
2. Set the start and end of the period you need — each field asks for a date, then a time.
3. Review the orders: date and time, amount, customer ID. Only paid orders that had a customer assigned are listed.
4. Tap the details icon on a row to open **Info** with date, amount and customer ID, and **Reprint Receipt** for that order.
5. Use the filter icon to open **Set filters** and pick one customer; the icon turns yellow while the filter is on.
6. Tap the share button and confirm **Create report?** — the app warns that access to the report expires after one hour. Then scan the QR code under **Link generated!**, or tap **SEND VIA EMAIL** and enter an address.
7. Check the total at the bottom against your Clover reporting.

## REFERENCE

### Screens and settings

Every screen of the app and what each setting does. (4)

#### Setup



#### Trigger the app in the Register

The switch on the **Assign customers in the Register app** card. Opens customer selection when the first item is added to an order. On by default, and saved on this Clover device only.

#### Select tax exempt customers

Opens the exempt list; the button reads **N Tax Exempt Customers Selected**.

#### Contact us

Support request from the app.

#### App version

The installed version.

#### Bottom tabs

Setup · Reports.

## Tax Exempt Customers

### Search field

Filters the list by first or last name.

### Customer card

First name and last name of one exempt customer.

### DELETE

Removes that customer from the exempt list at once, with no confirmation.

### + button

Opens **Select Tax Exempt Customers** to add one.

### Empty list

Reads **Tap on the "Plus" button to add tax-exempt customers.**

## Select a customer

### Search field

Filters by name. A query with digits is sent to Clover as a phone lookup.

### TAX-EXEMPT

Red badge on a customer who is on the exempt list.

### Assigned

Green ribbon on the customer currently on the order; that card moves to the top.

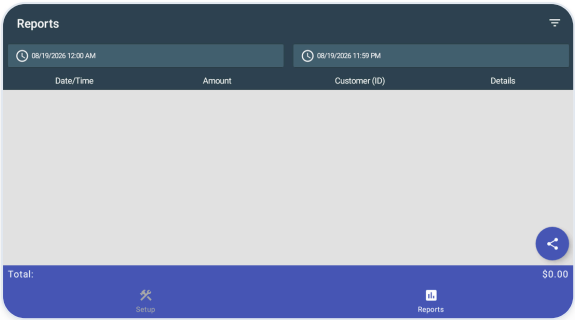
### REMOVE FROM ORDER

Red bar on the assigned customer. Takes them off the order, clears the order note and puts the tax back.

### CANCEL

Closes the dialog and leaves the order as it is.

# Reports



## Date range

Two fields set the start and the end of the period; each asks for a date, then a time.

## Columns

Date/Time, Amount, Customer (ID) and Details.

## Rows

One line per paid order that had a customer assigned.

## Details icon

Opens **Info** with date, amount and customer ID, and **Reprint Receipt** for that order.

## Filter icon

Opens **Set filters** to show one customer's orders. The icon turns yellow while the filter is on.

## Share button

Creates the report, shows a QR code of a temporary link and can e-mail it.

## Total

The sum for the selected period.

## AT THE REGISTER

### Everyday use

What the cashier does after the app is configured.

1. Add the first item to the order; the customer dialog opens — pick the customer or tap **CANCEL** for a walk-in.
2. Assigning a customer replaces the Clover order note with their name, so keep nothing else in the order note.
3. For an exempt customer, check that no tax is charged before taking payment — the app drops every tax on that order.
4. Review Reports at the end of the period and share the log with accounting.

#### IF SOMETHING IS WRONG

### Troubleshooting

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

**The dialog does not appear.**

It opens on the first item added to an order, and only once for that order — reopening the same order does not prompt again, and an empty order never prompts. If it never opens at all, check **Trigger the app in the Register** in Setup on that device; the switch is per device.

**Tax is still charged for an exempt customer.**

The customer was not added in **Select tax exempt customers**, or was not assigned to the order. A list change made in the browser reaches the device only after it syncs — open Setup on the Clover device.

**A customer is missing from the list.**

Add them in the Clover Customers app, then reopen the picker. To find someone by phone number, type the digits — Clover answers that search.

**A sale is missing from Reports.**

Only orders that had a customer assigned, were paid in full and total more than zero are recorded. An anonymous or unpaid order is never listed.

**The order note was replaced by a customer name.**

That is the app: assigning a customer writes their first and last name into the Clover order note, and removing the customer clears it. Keep order notes you need somewhere else.

**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**

### Where do customers come from?

From the Clover customer list — add and edit them in the Clover Customers app. In the register dialog you can also type a phone number; Clover answers that search.

### Does the prompt slow the cashier down?

It opens on the first item added, once per order, and **CANCEL** closes it, so a walk-in sale is not blocked.

### Does it handle tax exemption automatically?

It works from the tax-exempt list you build in the app. When a customer on that list is attached to the order, the app clears the tax on the whole order in Clover; remove the customer and the tax returns.

### What is the Customer Assigner button on the payment screen?

The app registers a Clover tender named **Customer Assigner** the first time it is opened. Tapping it opens the same customer selection dialog instead of taking a payment, so take the payment with your usual tender.

### What is the difference from Customer Discounts?

This app assigns the customer and manages exemption; **Customer Discounts** decides what discount that customer receives.

### Can I do this from a computer?

Partly. [customerassigner.payplaxe.com](https://customerassigner.payplaxe.com) (<https://customerassigner.payplaxe.com>) opens the same app in a browser, with Setup, the whole tax-exempt list (add and delete) and Reports. Sign in with **Login via Clover** — your Clover account, no QR code and no password. Everything at the register stays on the Clover device: the customer prompt, assigning a customer to a live order, the **TAX-EXEMPT** badge, **REMOVE FROM ORDER**, the tax removal and **Reprint Receipt**. The switch is read-only in the browser and answers **Can be changed on Clover POS only**. Open the app once on the Clover POS first, otherwise the site answers **Open Customer Assigner on your Clover POS, then try again**. A list change made in the browser reaches the device when the device syncs — when Setup is opened there or an employee signs in.

## How much does it cost?

**\$0.99** 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.

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

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

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