

Clover Virtual Terminal

Fiserv Learning Organization
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Overview

What is Clover Virtual Terminal?

- Clover Virtual Terminal is a product that is part of the Clover Dashboard! Virtual Terminal gives merchants the flexibility and convenience of processing payments wherever they happen to be. Merchants only need to log into their Clover Web Dashboard from a smartphone, tablet, or computer and they are ready for business anytime, anywhere.

Who can utilize Clover Virtual?

- Any business can use Virtual Terminal to securely process credit cards – from restaurants and retailers to services businesses who take payments over-the-phone or by mail.

Value Add

- ✓ Accept credit and debit card payments directly on any computer, tablet, or smartphone.
- ✓ Request customer payments by email and allow customers to pay by credit or debit card online.
- ✓ Take care of all incoming payments: in-store orders, mail or telephone orders, or invoices.
- ✓ Send digital receipts via email.
- ✓ Store regular customers' card information securely for faster transactions.
- ✓ Protect against fraud with address verification service (AVS) and card verification value (CVV).



Setting up Virtual Terminal

Setting up Virtual Terminal

- Merchants may elect to change select options for their Virtual Terminal.
- From the Dashboard, Merchants may access the Virtual Terminal settings by going to **Account & Setup > Transactions > Virtual Terminal**

The screenshot displays the merchant dashboard interface. On the left is a dark sidebar with navigation options: Virtual Terminal (highlighted in green), Dashboard, Reporting, Transactions, Invoices, Recurring Payments, Closeout, Disputes, Inventory, More Tools, and Account & Setup (marked with a red circle containing the number 1). The main content area is titled 'Account & Setup' and is divided into several sections:

- Profile**: Shows user information for Shane Toogood, Admin, with contact details and a link to 'Edit your profile'.
- Employee Access**: Includes links for 'Employees', 'Employee Roles', 'Employee Permissions', and 'Device Passcode'.
- About Your Business**: Contains links for 'Business Information', 'Bank Information', 'Devices', and 'Merchants'.
- Billing & Statements**: Includes links for 'Monthly Statements', 'Service Plan', and 'Form 1099-K'.
- Business Operations**: Includes links for 'Reporting', 'Tips', 'Printers', and 'API Tokens'.
- Transactions** (marked with a red circle containing the number 2): Includes links for 'Payments', 'Payment Receipts', 'Virtual Terminal' (marked with a red circle containing the number 3), and 'Disputes'.

At the bottom left of the dashboard, the text '© 2022 Clover Network, Inc.' is visible.

Setting up Virtual Terminal

- Merchant will be able to adjust the following settings:
 - Transaction types
 - Fee options
 - Customer Information
 - User may be also select if certain customer information is required
 - Recurring Payments
 - Carbon Copy receipt

Note: Some options may not be able to be changed. The check box will be grayed out if not able to be edited.

Virtual Terminal Setup

Transaction Settings

Customize what types of transactions you want to process and what fees you want to charge.

Enable	Transaction types
<input checked="" type="checkbox"/>	Authorization ⓘ
<input checked="" type="checkbox"/>	Verification ⓘ

Enable	Fees
<input checked="" type="checkbox"/>	Tip
<input type="checkbox"/>	Convenience Fee ⓘ
<input checked="" type="checkbox"/>	Sales Tax

Customer Information

Build your customer database by collecting information about your customers.

Enable	Type	Set as required
<input checked="" type="checkbox"/>	Name	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Billing Address	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Phone Number	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Email Address	<input type="checkbox"/>
<input type="checkbox"/>	Business Name	<input type="checkbox"/>

Save customer credit card information
Save your customer's credit card details to speed up additional transactions. Card-not-present rates apply.

Recurring Payments

Enable recurring payments to have the option to send automated invoices

Manage additional settings for recurring payments and payment plans under Employee Permissions.

Carbon Copy Receipt

Send a carbon copy of each receipt after a successful transaction to the owner's email address

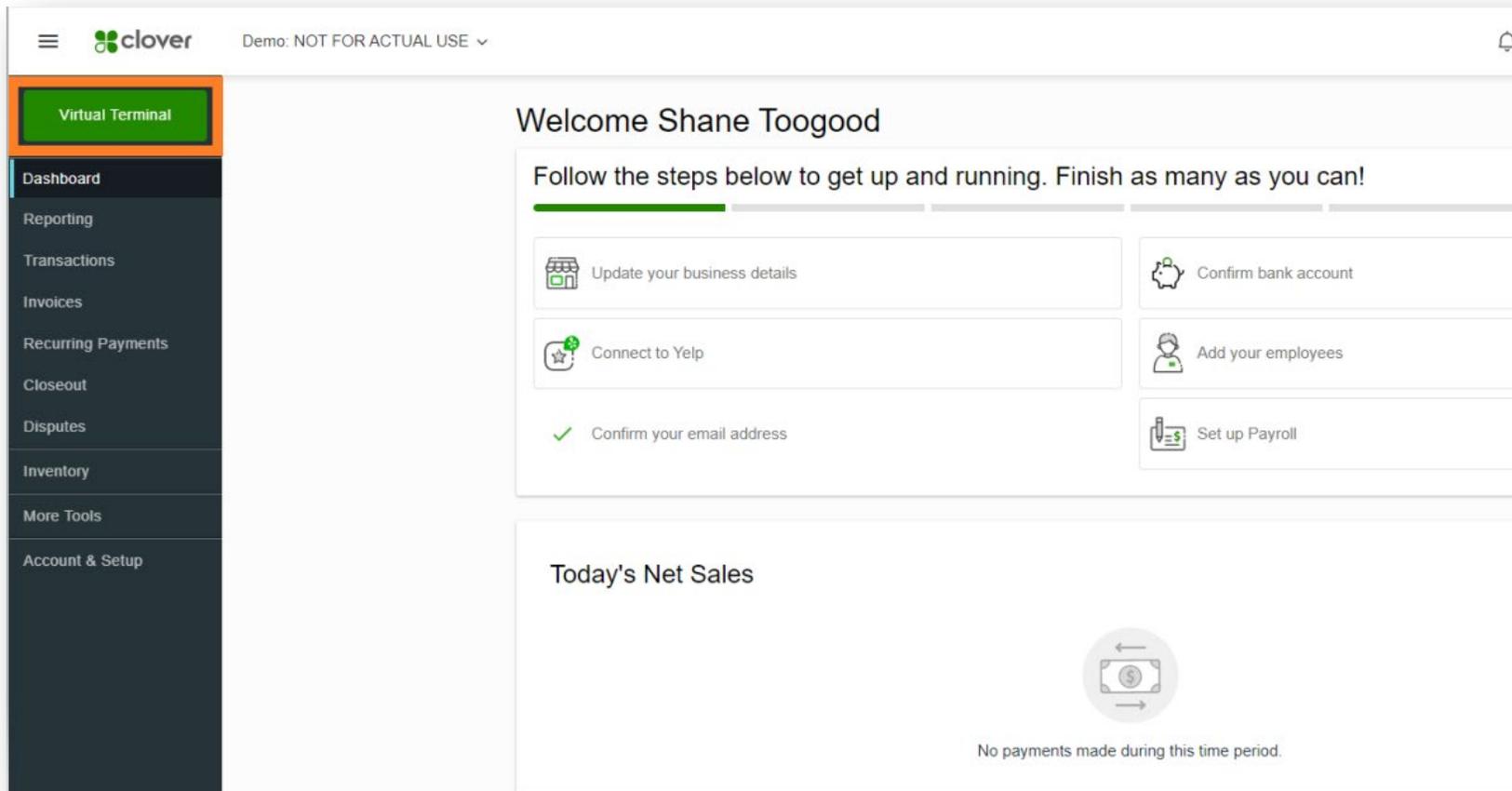
Save



Accessing Clover Virtual Terminal

Accessing Clover Virtual Terminal

- Clover Virtual Terminal is accessed by logging into the Clover Dashboard.
- Once signed into the Clover Dashboard, the user will see a Virtual Terminal button. This is used to access the tool.



Accessing Clover Virtual Terminal

Once logged into the Virtual Terminal, users will be able to:

- Choose a Transaction type
- Enter Transaction (Sale) Details
- Enter Payment Information
- Elect to Email Receipt
- Confirm total amount and Complete transaction, as applicable

The screenshot displays the Clover Virtual Terminal interface. At the top, the title "Virtual Terminal" is centered. Below it is a dropdown menu for "Transaction Type" with "Take payment" selected. The "Sale detail" section, marked as "*required", contains a "Subtotal *" field with "\$0.00", a "Note for item or service" text area, and a checkbox for "This is a mail or phone sale (MOTO)". To the right of the MOTO checkbox is a "Tip" field with "\$0.00". Below these is a "Total \$0.00" label. The "Payment information" section, also marked as "*required", is partially visible at the bottom. At the very bottom of the form, there is a "Total \$0.00" label and a "Complete Payment" button.

Transaction Types

Currently, Virtual Terminal supports the following Transaction Types:

- Take Payment
- **Pre-Authorization (If applicable and enabled)**
- Invoice
- **Card Verification (If applicable and enabled)**
- Recurring Payment

Note: Merchants may be able choose to allow a pre-authorization or card verification by going to [Account & Setup > Transactions > Virtual Terminal](#) and then choosing the appropriate options.

User will select one of the various choices and then will be prompted to enter details covered in the next slides to complete the process.

Without Pre-auth/ Verification

The screenshot shows the 'Virtual Terminal' interface. At the top, it says 'Virtual Terminal'. Below that is a dropdown menu labeled 'Transaction Type' with 'Take payment' selected. A hand cursor is pointing at the dropdown arrow. Below the dropdown, the 'Take payment' option is highlighted in blue. Underneath, the options 'Invoice' and 'Recurring payment' are visible.

With Pre-auth/ Verification

The screenshot shows the 'Virtual Terminal' interface with additional options. At the top, it says 'Virtual Terminal'. Below that is a dropdown menu labeled 'Transaction Type' with 'Take payment' selected. A hand cursor is pointing at the dropdown arrow. Below the dropdown, the 'Take payment' option is highlighted in blue. Underneath, the options 'Pre-authorization', 'Invoice', 'Card verification', and 'Recurring payment' are visible. A vertical scrollbar is on the right side of the list.



Transaction Type

Take Payments

Take Payment

Take Payment is used to accept a new transaction. Users will have to input the following details in the Sale detail section:

- Subtotal
 - Base amount of the transaction
- Note for item or service
 - Used for tracking purposes **only**
- Indicator if transactions is MOTO
- Tip amount, if applicable
- Total amount of Sale will be calculated at end

Sale detail *required

Subtotal *
\$100.00

Note for item or service
Transaction Processing

This is a mail or phone sale (MOTO)

Tip
\$0.00

Total \$100.00

Take Payment

Following the Sale detail, Merchant will enter the Payment information:

- **Optional:** If this is for a recurring/ existing customer, Merchant may search for the customer details. By doing so, the card details will automatically populate.
 - Merchant may also “Add New Customer” to save the details for future payments
- If no customer information is needed, merchant will input the following:
 - Card Number
 - Card number will auto truncate. To view what has been keyed, hit the “eye” to untruncate.
 - Expiration date (MM/YYYY)
 - CVV
 - Zip Code

Payment information *required

🔍
[ADD NEW CUSTOMER](#)

Card Number * 👁

4012 00** **** 0026

0000 0000 0000 0000

Expiration *

03/2022

MM/YYYY

CVV *

111

000

Zip / Postal Code *

68046

Add a customer to save a card on file

Take Payment

- Receipt delivery options are
 - Email
 - None
- If email is selected, merchant will be required to input an email address for delivery.
 - Once email address is entered, Merchant can click **Complete Payment**
- If no email is needed, user can click **Complete Payment**

With Email:

Receipt delivery

Email None

*required

Email Address *
CloverVT@Clover.com

Total \$100.00 **Complete Payment**

Without Email:

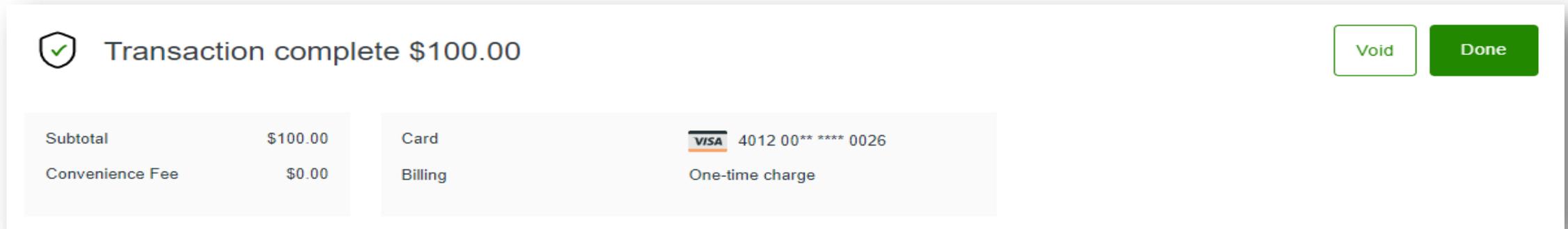
Receipt delivery

Email None

Total \$100.00 **Complete Payment**

Take Payment

- Once **Complete Payment** is clicked, Merchant will get a pop-up advising of the transaction status.
- If accepted, Merchant will be able to **Void** the transaction or select **Done** to process the next transaction.



A screenshot of a transaction completion pop-up. At the top left, there is a green checkmark icon followed by the text "Transaction complete \$100.00". At the top right, there are two buttons: a white "Void" button with a green border and a solid green "Done" button. Below this, there is a summary table with two columns. The first column lists items: "Subtotal" with a value of "\$100.00" and "Convenience Fee" with a value of "\$0.00". The second column lists card and billing information: "Card" with a VISA logo and the number "4012 00** **** 0026", and "Billing" with the text "One-time charge".

Subtotal	\$100.00	Card	 4012 00** **** 0026
Convenience Fee	\$0.00	Billing	One-time charge

- Hitting **Done** will refresh the page, ready for the next transaction.

Take Payment

- If merchant chooses to Void, they will be prompted to confirm the action:

Are you sure you want to void transaction?

Subtotal	\$100.00	Card	 4111 11** **** 1111
Convenience Fee	\$0.00	Billing	One-time charge

- By hitting: **Yes, Cancel**, Merchant will see the following note:

Transaction has been voided. The Customer will not be billed for the \$100.00 sale amount.



Transaction Type

Invoice

Invoice

Important:

- The **Invoice** option is used to create an invoice for the merchant. This does not immediately charge the customer; however, this selection does notify the customer of the billing and allows the customer to pay later.
- Invoices due dates are set to 7 days from creation. *This option can not be modified.*
- Invoices expire after 180 days from creation.
- Merchant can review their invoices via their dashboard to see the status.

Invoice

- To create an **Invoice**, Merchant will input the sales amount
 - Merchant may also input a Note and Tip amount, if applicable.
- Merchant must either:
 - Search for **existing customers**
 - If this is a **new customer**, then the user must add a new user before the invoice can be created
- Once cardholder information is added, user can create the invoice.

Sale detail *required

Subtotal *

\$100.00

Note for item or service

On-Site Training

Tip

\$0.00

Total \$100.00

Payment information *required

Search customer or business name

ADD NEW CUSTOMER

Total \$100.00

Create Invoice

Invoice – Existing Customer

- If the customer **does** exist in the device, the customer may be searched and selected. This will pull the customer information to create the invoice

The screenshot shows a 'Payment information' form. At the top, there is a search bar with the placeholder text 'Search customer or business name' and the text 'zachary' entered. Below the search bar, a dropdown menu is open, showing a search result for 'Zachary Nisley' with the email address 'zachary.nisley@fiserv.com'. A hand cursor is positioned over the search result, indicating it is being selected. A blue arrow points from the search result down to the 'Payment information' section of the form. In this section, the selected customer information is displayed: 'Zachary Nisley', 'zachary.nisley@fiserv.com | 111111111', and an 'EDIT CUSTOMER' link. A '*required' label is visible to the right of the form. At the bottom left of the form, the text 'Total \$100.00' is displayed. At the bottom right, there is a green button labeled 'Create Invoice'.

Invoice – New Customer

- If the customer does **not** exist, merchant will select **ADD NEW CUSTOMER**, enter the information required and hit **Save**

Payment information *required

ADD NEW CUSTOMER



Add New Customer ×

New Customer will be saved in your directory

Full name

First Name
Zachary

Last Name
Nisley

Contact

Phone Number
(402) 111-1111

Email *
Zachary.Nisley@fiserv.com

Billing Address

Street Address
6855 Pacific Street

Apt/Suite

City/Town
Omaha

State
NE

Postal
68106

Cancel

Save

Creating an invoice

- Once Complete, merchant will get the following notification in their dashboard

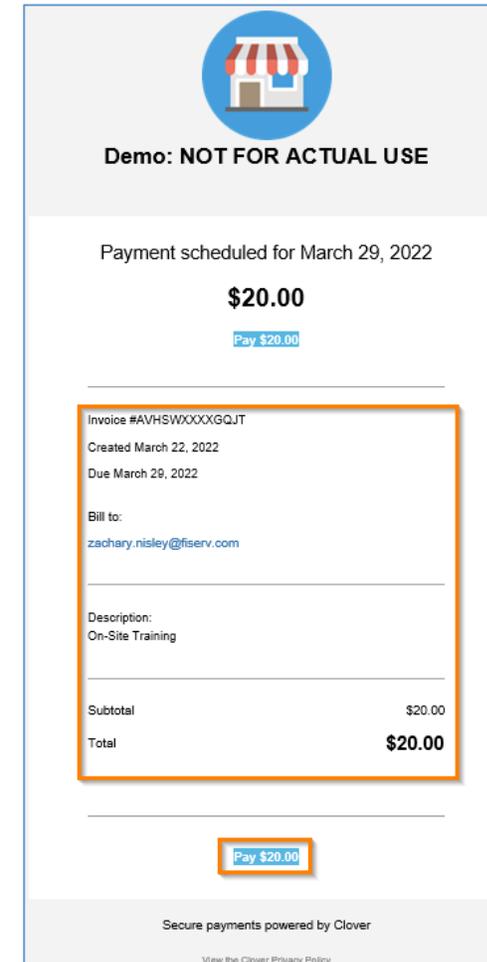
 Invoice created for \$20.00 Done

Subtotal	\$20.00	Customer	Zachary Nisley
Convenience Fee	\$0.00	Email	zachary.nisley@fiserv.com

- The Merchant will receive an email invoice and can pay the invoice via a secure link that is provided as part of the email invoice

Invoice

- Customer will receive the invoice via email.
- The invoice will show the following details
 - Invoice #
 - Created date
 - Due date
 - Bill to
 - Description
 - Total
- The invoice will also provide a link, at the bottom, for the customer to click on to pay



The image shows a demo invoice interface. At the top, there is a circular icon of a storefront with a red and white striped awning. Below the icon, the text reads "Demo: NOT FOR ACTUAL USE". The main content area is white and contains the following information: "Payment scheduled for March 29, 2022", a large bold "\$20.00", and a blue button labeled "Pay \$20.00". Below this is a summary box with an orange border containing: "Invoice #AVHSWXXXXGQJT", "Created March 22, 2022", "Due March 29, 2022", "Bill to: zachary.nisley@fiserv.com", "Description: On-Site Training", and a table with "Subtotal \$20.00" and "Total \$20.00". At the bottom of the summary box is another blue "Pay \$20.00" button. The footer of the invoice is a grey bar with the text "Secure payments powered by Clover" and a small link "View the Clover Privacy Policy".

Demo: NOT FOR ACTUAL USE

Payment scheduled for March 29, 2022

\$20.00

[Pay \\$20.00](#)

Invoice #AVHSWXXXXGQJT
Created March 22, 2022
Due March 29, 2022

Bill to:
zachary.nisley@fiserv.com

Description:
On-Site Training

Subtotal	\$20.00
Total	\$20.00

[Pay \\$20.00](#)

Secure payments powered by Clover

[View the Clover Privacy Policy](#)

Invoice

- **Cardholder Experience:** Once the customer has clicked on the amount in the invoice, customer will be prompted to input card data and hit Pay “\$X.XX”. Customer will get a confirmation of payment. Merchant will be able to confirm the payment in the clover dashboard.



Invoice Request

Invoice creation
March 22, 2022

Invoice number
AVHSWXXXXGQJT

Total	\$20.00
--------------	----------------

Card Information

4012 _____ 0026  03/22 111 68106

[Pay \\$20.00](#)

By paying, you agree to Clover's [Terms of Service](#) and [Privacy Policy](#)





Payment Received

Hey, Zachary

Your payment has been received.

Invoice number
AVHSWXXXXGQJT

 Visa 0026

Total
\$20.00



Transaction Type

Recurring Payment

Recurring Payment

- To use the **Recurring Payment** option in Virtual Terminal, Merchants must create a **Recurring Payment Plan** in their dashboard.
- To create a plan: Merchants will go to **Recurring Payments > Create new plan:**

Virtual Terminal

Dashboard

Reporting

Transactions

Invoices

Recurring Payments **1**

Closeout

Disputes

Recurring Payments

Search plan name

Frequency: All Frequencies

Status: All Statuses

50 results per page | < Prev Next >

Plan	Subtotal [?]	Total amount (YTD)	Customers	Frequency	Last run	Status
Recurring Training	\$100.00		1	Monthly	3/28/22	Active

2 Create New Payment Plan

Recurring Payment

- To setup a **Plan**, Merchant needs to indicate the following:
 - Plan Name
 - Default Subtotal
 - Frequency
 - **Options:** Daily, Weekly, Bi-weekly, Monthly, Bi-Monthly, Quarterly, 4 Months, Semi-Annually, Annually
 - Additional options: Default tax and default tip amount
 - Activate plan

Create New Payment Plan

Plan name*
Recurring Training

Default subtotal (\$0.00)*
\$100.00

Frequency*
Monthly

Default tax

Default tip amount (\$0.00)
\$0.00

Activate plan

Cancel Save

Recurring Payment

- To do a recurring payment, a payment plan needs to be set.
 - Once the plan is set, the subtotal and tip amount will automatically fill based off plan settings.
 - A note may be added for the customer if chosen.

Transaction Type
Recurring payment

Sale detail *required

Payment plan *
Recurring Training

Subtotal *
\$100.00

Note for item or service

This is a mail or phone sale (MOTO)

Tip
\$0.00

Total \$100.00

Recurring Payment

- The final part is to set the **Start date**.
- Merchant may elect to set an **end date** but may also leave default (MM/DD/YYYY), if no end date is applicable.
- Once a Start date is set, Merchant can create the Recurring payment

Billing information

On this plan the customer will be billed once every 1 month

Start Date *

03/29/2022



End Date

mm/dd/yyyy



Total \$100.00

Create Recurring Payment

Recurring Payment

- Merchant will get a confirmation and recap of the recurring payment.

 Recurring payment created for \$100.00

Done

Subtotal	\$100.00	Customer	Zachary Nisley
Convenience Fee	\$0.00	Email	zachary.nisley@fiserv.com
		Card	 4012 00** **** 0026
		Billing	Recurring charge - 1 month commitment.

 Customer card was saved.

Recurring Payment

- Customer will receive notification of the recurring plan via email

Demo: NOT FOR ACTUAL USE

6855 Pacific St, Omaha, NE 68106
5319103088

Recurring Training

Recurring payment created for

\$100.00

Please review the information below and contact the merchant with any questions or concerns.

Bill to:

zachary.nisley@fiserv.com

Recurring payment:

First payment starts March 29, 2022

Repeats monthly until canceled by the merchant.

 0028 saved on file

Description:

Subtotal	\$100.00
Taxes	\$0.00
Tip	\$0.00
Total	\$100.00

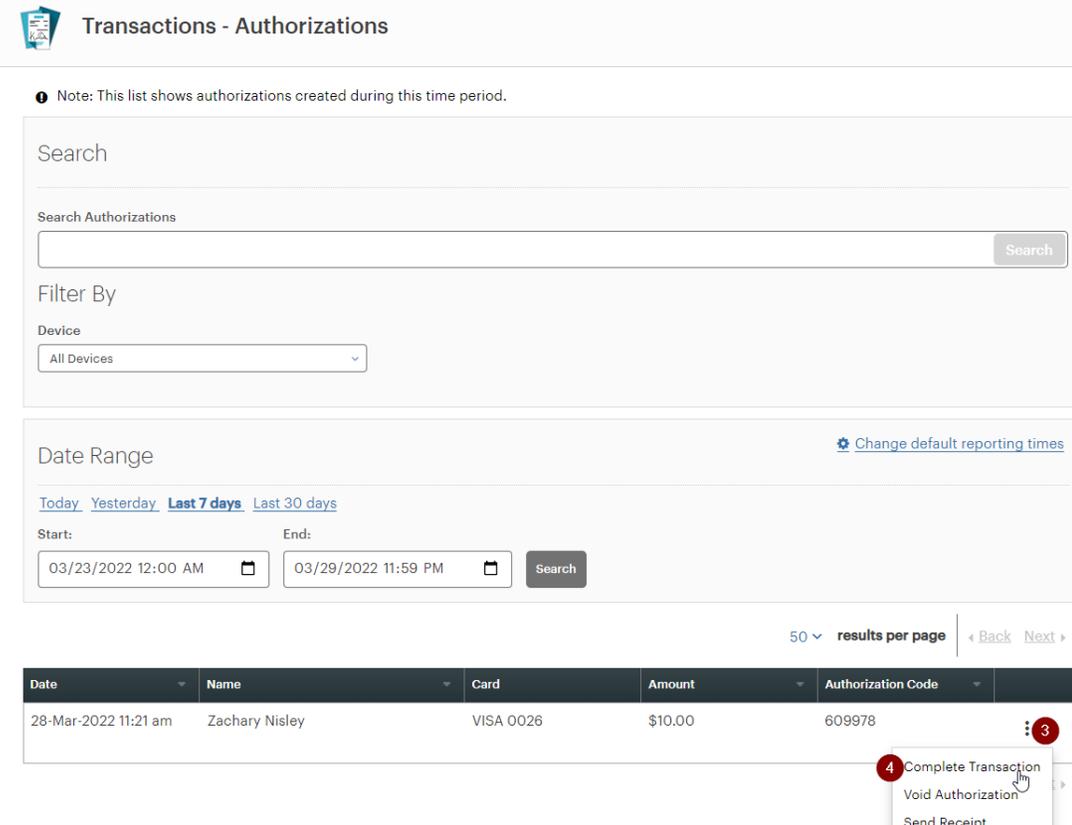
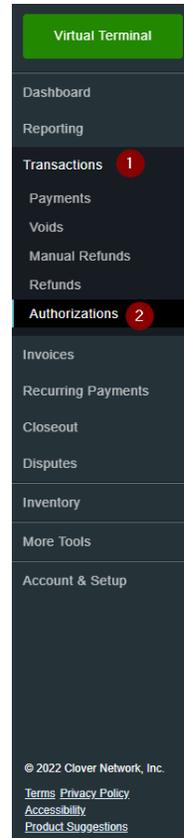


Transaction Type

Pre-Authorization & Card Verification

Pre-Authorization

- Pre-Authorization needs to be manually enabled in the dashboard before merchant can process a Pre-Authorization.
- Pre-Authorization is used to hold an amount of funds on the cardholder's bank account.
- The process of completing a Pre-Authorization is the same as Take Payment.
- **Important Note:** The transaction does not complete until the user completes the transaction. This is done by going to **Transactions > Authorizations > find pending auth > Clicks Complete Transaction**



Card Verification

- **Card Verification** is an optional feature that needs to be manually enabled before able to process.
- Card Verification is used to check if the card can process.
- No funds are held.

The screenshot shows the 'Virtual Terminal' interface. On the left is a dark sidebar with navigation options: Virtual Terminal (highlighted), Dashboard, Reporting, Transactions, Invoices, Recurring Payments, Closeout, Disputes, Inventory, More Tools, and Account & Setup. At the bottom of the sidebar are links for Terms, Privacy Policy, Accessibility, and Product Suggestions. The main content area is titled 'Virtual Terminal' and has a 'Transaction Type' dropdown set to 'Card verification'. Below this is the 'Payment information' section, marked as '*required'. It contains a search box for customer or business name, an 'ADD NEW CUSTOMER' link, and a card number field with '4012 00** ***** 0026'. Below the card number is a masked card number '0000 0000 0000 0000'. There are three fields for 'Expiration *' (03/2022), 'CVV *' (111), and 'Zip / Postal Code *' (68046). Below these is a button that says 'Add a customer to save a card on file'. At the bottom of the form, it says 'Total \$0.00' and a green 'Verify Card' button.

 Card verification was successful

Done

Card  4012 00** ***** 0026



Reporting

Take Payment

- Payments taken by the Virtual Terminal are indicated in the **Payments** tab.
- User may elect to filter to display only Virtual Terminal Payments by filtering the Payment source to **Other Payment Sources** and set the Payment Source to reflect **Virtual Terminal**

The screenshot displays the 'Transactions - Payments' interface. On the left is a navigation sidebar with 'Virtual Terminal' highlighted. The main area includes a search bar, filter options, and a table of payment records. A red circle '1' is next to 'Transactions' in the sidebar, '2' is next to 'Payments', and '3' is next to the 'Payment Source' filter dropdown. The 'Payment Source' dropdown is set to 'Virtual terminal'. The table below shows a payment record with the 'Application' column highlighted, showing 'Virtual Terminal ID: 8QGXS9 K35KSRM'.

Virtual Terminal

Dashboard
Reporting
Transactions 1
Payments 2
Voids
Manual Refunds
Refunds
Authorizations
Invoices
Recurring Payments
Closeout
Disputes
Inventory
More Tools
Account & Setup

Transactions - Payments

EXPORT PAYMENTS FROM THIS PAGE

Note: This list shows payments created during this time period.

Search

Search transactions by ID, transaction number, last 4 digits on payment card, external ID, or invoice ID

Filter By

Employee: All Employees | Online Or Offline: Online and Offline | Payment Result: All payment results

Tender Type: All Tenders | Card Type: All card types | Card Transaction: All card transactions

Payment Source: Other payment sources | Other Payment Sources: Virtual terminal

Show payments with totals between: \$ and \$ Update

50 results per page | < Back Next >

Created	Trans #	Tender	Amount	Tip Amount	Employee	Customer	Application	Details
22-Mar-2022 1:39 pm ID: P4VRKJG23Z0J		Credit Card	\$100.00	\$0.00	Zachary Nisley		Virtual Terminal ID: 8QGXS9 K35KSRM	Details

Invoice

- Merchants can view their **Invoices** by clicking on the invoices tab of their dashboard.
- Once in the dashboard, users will be able to:
 - View Collected Stats
 - Collectively see how many are unpaid, pending, been paid or are overdue
 - Search by various means to find invoices
 - View the invoices

The screenshot displays the 'Invoices' section of a merchant dashboard. At the top, there are navigation links for 'Virtual Terminal', 'Dashboard', 'Reporting', 'Transactions', 'Invoices', 'Recurring Payments', 'Closeout', 'Disputes', 'Inventory', 'More Tools', and 'Account & Setup'. The 'Invoices' tab is selected, indicated by a red '1' next to it. The main content area shows a summary of invoice statistics, a search bar, and a table of individual invoices.

Summary Statistics:

Amount collected (YTD)	Amount collected (30 days)	Unpaid balance	Pending	Paid	Overdue
\$20.00	\$20.00	\$10.00	1	1	0

Search and Filter Options:

- Search name, email, or phone (3)
- Sent Date (dropdown)
- Date Range: All (dropdown)
- Status: All (dropdown)

Table of Invoices:

Sent Date	Customer	Invoice ID	Total	Due Date	Status
3/22/22	Zachary Nisley zachary.nisley@fiserv.com (402) 111-1111	AVHSWXXXXGQJT	\$20.00	3/29/22	Paid (4)
3/22/22	Zachary Nisley zachary.nisley@fiserv.com (402) 111-1111	7GVWP37G122V4	\$10.00*	3/29/22	Pending

Recurring Payments

- Merchants will be able to view existing plans and may edit, view or delete the plan by clicking the ellipsis (three stacked dots on far right), if needed.
 - Note: When Editing a plan, the frequency is not adjustable. A new plan would have to be created.
 - Note: If Pausing a plan, billing will suspend on all active customers tied to the paused plan. Merchant will be asked to confirm choice.
- User may also elect to add customer to the plan by hitting the “number” under customers. This will show the list of customer tied to the current plan.

Virtual Terminal

Dashboard

Reporting

Transactions

Invoices

Recurring Payments **1**

Closeout

Disputes

Inventory

More Tools

Account & Setup

Recurring Payments

Create New Payment Plan

Search plan name

Frequency: All Frequencies

Status: All Statuses

50 results per page | < Prev Next >

Plan	Subtotal	Total amount (YTD)	Customers	Frequency	Last run	Status
2 Recurring Training	\$100.00		1 4	Monthly		Active 3

Edit

Pause

Delete

Recurring Payment

- Clicking the Number of customers will show:
 - Plan details (amount, customers, frequency, status)
 - Customers tied to plan and status
 - User may also edit the customer details as it relates to recurring payment
- Customers may also be added by clicking **Add Customer** button located in the upper right.
- User may also select to **Edit**, **Pause** or **Delete** the plan by selecting the 3 Dots next to Add customer

The screenshot displays the 'Recurring Training' plan details page. On the left is a navigation sidebar with options: Virtual Terminal, Dashboard, Reporting, Transactions, Invoices, Recurring Payments (highlighted), Closeout, Disputes, Inventory, More Tools, and Account & Setup. The main content area shows the plan name 'Recurring Training' and an 'Add customer' button. Below this is a summary card with the following data:

Amount collected (YTD)	Recurring amount	Customers	Frequency	Last run	Plan Status
\$0.00	\$100.00	1	Monthly		Active

Below the summary card are search and filter options: a search bar for 'Search name, email, or phone', a 'Start Date' dropdown set to 'All', a 'Date Range' dropdown set to 'All', and a 'Status' dropdown set to 'All Statuses'. At the bottom right, it shows '50 results per page' and navigation links for 'Prev' and 'Next'.

The customer list table below has the following data:

Customers	ID	Subtotal	Start Date	End Date	Count	
Zachary Nisley zachary.nisley@fiserv.com	H5XXHW0ZP0QWY	\$100.00	3/29/22		0	Active

Thank You!