CSIWORKS

2025 Agent/ISO Portfolio Guide

Solutions for Consumer Goods Retailers.

Convenience, Liquor Store, Tobacco Store, Grocery Store, Butcher Shop, Fish Market, Seafood Wholesale Candy Store, International Market, Deli, Bodega, Corner Store

Table of Contents

About CSI Works

CSI Works Solutions are keeping approximately 13K merchants using their respective POS devices processing over 17,188,754 orders monthly with their respective agents. Each order averaging $31.70 making the total order amount our merchants sold in one month is $544,883,487.25.

CSI Works is a pure ISV, dedicated to developing recurring SaaS solutions that empower agents, ISOs, and financial institutions. We do not sell merchant services—never have, never will. That is our pledge to the sales community. Partnering with an ISV like CSI Works is the safest, most natural, and profitable collaboration for any agent or ISO.

We also established FinCore.Dev, a joint venture that provides access to an experienced fintech development team, enabling agents, ISOs, and banks to source custom fintech solutions tailored to their needs.

We consider the following milestones to be most meaningful in our journey so far.

CSI Works by the numbers

2017
Published 31+ Apps on Clover POS
(We serviced every merchant type, on any Clover POS device.)

2022
Private Label ISO Cash Discount App
(We became white label development service provider for ISO's nationwide)

2024
CorePOS Released (Basic POS Software)
(Core POS + CSI Works solutions on any Clover or Pax hardware with any processor.)

CSI Works is Born On Clover POS
(Published apps dependent on Clover, we exist only inside Clover Platform)

2020

We Focused! Consumer Goods Retailers
(Convenience, Liquor, Grocery, Tobacco Shop, Butcher, Deli, Bodega Corner Store)

2023

FinCore.Dev is Born Fintech Solution Provider to ISO
(Fintech developers experienced & trained in CSI Works sourced to ISO & Banks)

2025

Now is the time for you to partner with CSI Works. We will bring prosperity and growth to your merchant portfolio with solutions most relevant to your merchants.

CSI Works Solutions: Expanding Impact and Reach

Good News for Agents!

CSI Works is redefining the POS industry with a fully open and flexible POS platform called CorePOS, launching on June 11, 2025.

CorePOS runs on any hardware while remaining payment processing agnostic—on PAX, it gives ISOs and agents the same payment flexibility they currently have, while on Clover, it remains locked to Fiserv. However, CorePOS can replace Clover's software plans, including the Register App and other core POS functionalities, allowing merchants to use CorePOS while still leveraging Clover hardware.

Unlike others, CSI Works isn't in merchant services sales—we build tools that empower agents, not compete with them. With the CorePOS App Market, we're fostering an open ecosystem, allowing both CSI Works apps and third-party developers to expand vertical solutions.
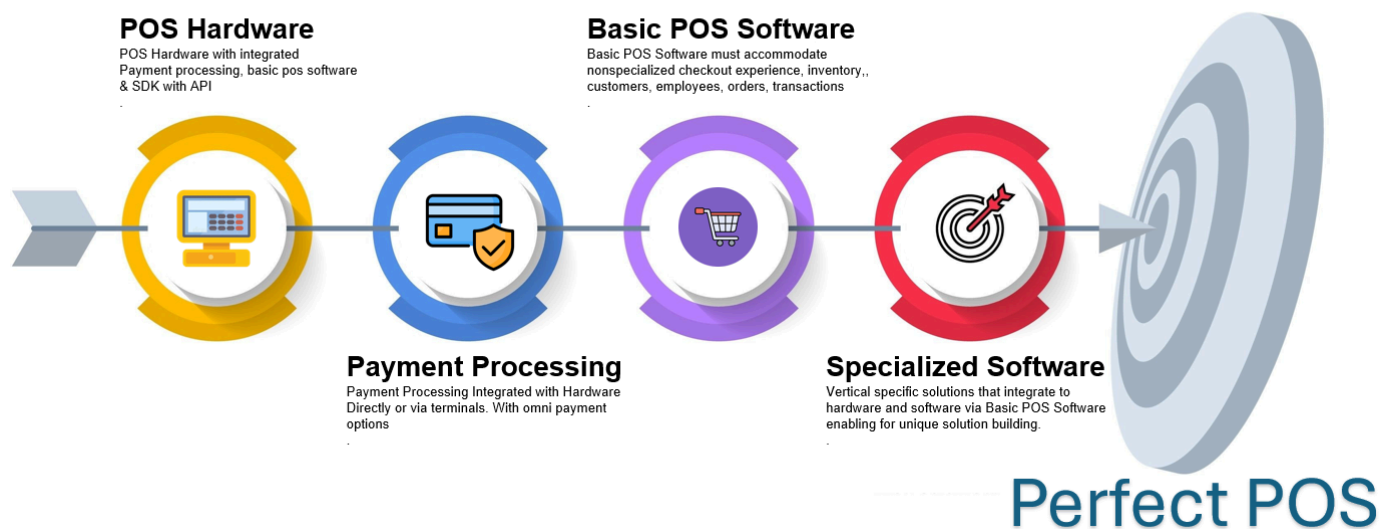
	Clover Platform	Pax Platform
CSI Works Solutions	2017 - Present 10,000+ Merchants	**June 11, 2025 Initial Release**
Hardware		
Basic POS Software Provided By	Register Inventory Orders Transactions	CorePOS — Checkout, Inventory, Orders, Transactions — By CSIWORKS
Appmarket (API/SDK)	Clover App Market	CorePOS App Market
Vertical Solutions	CSI Works Apps *Any 3rd party developer*	CSI Works Apps *Any 3rd party developer*
Payment Processing	Fiserv Clover Only	Payment Processing Agnostic.

Independent consumer goods retail industry snapshot

Green Field Vertical Uncovered!

The Consumer Goods Retail vertical is expanding across the U.S. (**See study**). It includes merchants selling items by weight, EBT/SNAP-subsidized products, and age-restricted goods, such as convenience stores, liquor stores, tobacco shops, grocery stores, bodegas, meat and seafood markets, and international stores.

Despite their growth, these independent businesses lack standardization. Every merchant needs POS hardware, payment processing, basic POS software, and customizations to fit their model. These four components form the foundation of an ideal POS system, with variations in cost, brands, operations, and software choices.

POS Hardware
POS Hardware with integrated Payment processing, basic pos software & SDK with API

Basic POS Software
Basic POS Software must accommodate nonspecialized checkout experience, inventory,, customers, employees, orders, transactions

Payment Processing
Payment Processing Integrated with Hardware Directly or via terminals. With omni payment options

Specialized Software
Vertical specific solutions that integrate to hardware and software via Basic POS Software enabling for unique solution building.

Perfect POS

CSI Works has mastered the art of retaining independent consumer goods retailers by offering a tailored portfolio of solutions designed specifically for their needs. Now, we invite you to leverage these solutions to attract merchants to your own portfolio— Download National Survey of Independent Consumer Goods Retailers – 2025 Report

Independent Retail Market Analysis – Exclusive POS Market Share Insights

🚀 **The Shocking Truth About POS Market Share!** 🚀

CSI Works went on an **epic** cross-country journey, uncovering **game-changing** insights from **300+ independent retailers** across **7 states and 30+ cities**. What we found will transform how you think about the POS industry!.

📊 Who's REALLY dominating the market?
💡 What are independent retailers doing that big players haven't figured out yet?
🔥 The hidden trends shaping the future of POS!

Don't miss out—**scan the QR code NOW** to unlock **exclusive, eye-opening data** that could change the game for your business!

Sell by Weight Merchant Needs

   Businesses that sell by weight—such as butcher shops, delis, seafood markets, grocery stores, spice shops, and more—face distinct operational challenges. Their success depends on accurate weighing, pricing strategies, compliance, and customer satisfaction, competition with enterprise operators, all of which require specialized tools and software solutions.

Key Needs of Sell By Weight Businesses:

✅ **Retail Scale Equipment & Training**   Proper setup and usage of scales to ensure accurate pricing and compliance.

✅ **Embedded Barcode Scanning**   Efficiently scan and price pre-packaged meats, poultry, seafood, and other weight-based items.

✅ **Unit Tare Management at Checkout**   Automatically deduct container weight to charge customers correctly for product weight only.

✅ **Automated Weight-Based Discounts**   Apply discounts based on weight, either manually or automatically, to accommodate promotions or bulk pricing.

✅ **EBT Compliance & Management**   Ensure proper handling of EBT transactions by correctly identifying eligible items and preventing processing errors.

✅ **EBT Incentive Programs**   Support for EBT Double Up, enabling businesses to provide additional value to qualifying customers.

CSI Works delivers the tools and software that empower these merchants to streamline operations, maximize efficiency, and stay compliant, allowing them to focus on serving customers and growing their business.

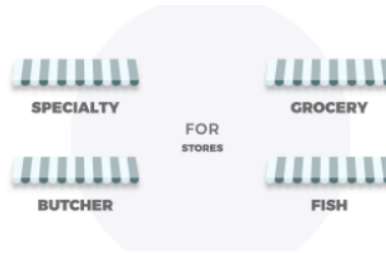| Variable Price Barcode Parser	Weight Embedded Barcode Parser	Unit Tare Weigh & Pay	CASScale.US Smart POS Scale

On All Clover Devices   **On All Pax Devices**

Variable Price Barcode Parser

Use label printing scale with your Smart POS
Read price embedded barcodes

Try on Clover POS   Try on Pax POS

For butcher shops, delis, and grocery stores, where accurate pricing and smooth checkout are essential, the Variable Price Barcode Parser ensures efficiency and accuracy. Label printing scales generate barcodes with total price data, which this app reads, allowing merchants to use any label printing scale regardless of brand. By automating price-based scanning, it eliminates manual entry errors and speeds up transactions.

Benefits	**Up to date Information**
- Compatible with Any Label Printing Scale – Works with all models and brands, offering flexibility for merchants. - Automated Price-Based Scanning – Reads price-embedded barcodes directly at checkout, ensuring accurate pricing. - Supports Prep & Packaging Stations – Enables pre-weighing and labeling for improved workflow efficiency. - Seamless Price Integration – Ensures the correct price is applied automatically, reducing manual adjustments. - Customizable Barcode Parsing – Advanced parsing options allow merchants to tailor barcode settings to their unique needs.	

Available On

Best service ever

★★★★★ 5

BERESFORD'S DELI

January 30, 2024

I installed this app and the variable weight barcode parser. I was unable to figure out on my own how to set up my clover system with my Hobart scale. After several failed attempts to get support from Hobart or clover I connected with the app support and was given personalized, fast and helpful support from a person who not only knew how the app worked but was also able to communicate clearly with me so that I was better positioned to get the most out of the hardware that I had purchased. Major life saver! Software has been running for 3 months and it is wonderful!

Clover All Generations
- Flex
- Pocket
- Station Solo/Duo
- Mini

Pax Devices All Generations
- A Series (6, 7, 8)
- A920 or A920 Pro/Max
- E700 or E700 Mini
- Elys Workstation
- M8

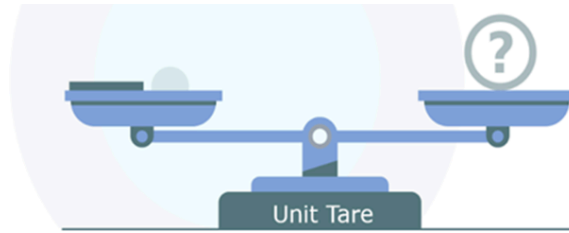| Watch It Work	App FAQ	ISO/Agent Webinar	Earn with this app	App Notes:
				Works with: Any Label Printing Scale Barcode Scanner (Non HID Mode)

Weight Embedded Barcode Parser

Use label printing scale with your Smart POS
Read weight embedded barcodes

Try on Clover POS **Try on Pax POS**

For meat markets, seafood stores, delis, and grocery stores, where accurate pricing and seamless checkout are essential, the Weight Embedded Barcode Parser ensures smooth operations. Label printing scales generate barcodes with total weight data, which this app reads, allowing merchants to utilize any label printing scale regardless of brand or model. By automating weight-based pricing, it eliminates errors and streamlines checkout, ensuring efficiency and accuracy.

Benefits	Up To Date Information
● Compatible with Any Label Printing Scale – Works with all models and brands, providing merchants with flexibility. ● Automated Weight-Based Pricing – Reads weight-embedded barcodes directly at checkout, ensuring accurate charges. ● Supports Prep & Packaging Stations – Enables pre-weighing and labeling, improving workflow efficiency. ● Works with Price-Embedded Barcodes – Supports both weight and price-embedded barcodes, adapting to different pricing strategies. ● Customizable Barcode Parsing Rules – Advanced parsing options allow merchants to tailor barcode settings for their specific needs.	

The only reason Clover gets my business
 	
★★★★★ 5
 	
OCEANSIDE SEAFOOD TRUCKS & MARKET
 	
January 7, 2023
 	
Without this, delis and grocery stores are a no-go on Clover. Selling a weighed product is impossible on Clover out of the box. This app is KEY to making it all work.
	Available On
	
	Clover All Generations
	  - Flex
	  - Pocket
	  - Station Solo/Duo
	  - Mini
	Pax Devices All Generations
	  - A77 & A 80
	  - A Series (6, 8)
	  - A920 or A920 Pro/Max
	  - E700 or E700 Mini
	  - Elys Workstation
	  - M8

Watch It Work **App FAQ** **ISO/Agent Webinar** **Earn with this app**	**Works With**
	Any Label Printing Scale Barcode Scanner (Non HID Mode)

Produce   Market

Bodega   Ice Cream

Unit Tare

Checkout

Unit Tare - Weigh and Pay

Get Net Weight
Weigh the product not the containers. Comply with Weights & Measures

Try on Clover POS   Try on Pax POS

The Unit Tare Weigh and Pay app is designed for produce markets, bodegas, and self-selection grocery stores, where items are weighed at checkout. It automates tare deductions, ensuring only product weight is charged by subtracting container weight—whether it's a store-provided or customer-supplied container. This eliminates manual tare adjustments, speeds up checkout, ensures pricing accuracy, and maintains compliance with weight-based pricing regulations.

Benefits	Up to date information
● Seamless POS Scale Integration – Works with POS-connected scales to automatically deduct container weight for precise pricing. ● Faster & More Accurate Checkout – Eliminates manual tare adjustments, ensuring customers are charged only for the product weight. ● Supports Customer-Provided Containers – Achieves net weight pricing, even when customers bring their own reusable containers. ● Works with Store-Level Containers – Standardized tare settings for commonly used in-store packaging, improving efficiency. ● Item-Specific Tare Automation – Assigns tare values at the item level, further streamlining the checkout process and reducing cashier workload.	

Love the app . ★★★★★ 5 OJAI BLISS AND MORE January 22, 2020 The support team is awesome. They walked me through everything. Definitely recommend it ☺	**Available On** Clover All Generations - Flex - Pocket - Station Solo/Duo - Mini Pax Devices All Generations - E700 - Elisys - A920

Watch It Work	**App FAQ**	**ISO/Agent Webinar**	**Earn with this app**	Works With
				CAS POS Interface Scale On Clover POS: SW-RS Model On Pax Devices: SW-RS, PD II - Model

CASScale.US

Get reliable NTEP legal for trade scale.
Not your regular dealer. Training & support by experts.

www.casscale.us

CAS Scale provides merchants using Clover or Pax POS with the flexibility to accommodate different weighing needs, whether at checkout or during food prep. CSI Works offers CAS brand scales in **20 lb, 30 lb, 60 lb, and 300 lb** capacities, ensuring seamless integration and accurate weighing for a variety of business use cases.

POS Interface Scales

SW-RS Series

POS Interface Scale

- POS Interface Scale, connects with many ECR's and POS Systems*
- Compact Design, use where space is limited
- AC or Battery Operated (6 "D" size batteries)
- Customer Rear Display Included
- Lb/oz/kg/g Switchable
- Soft Touch Tactile Keyboard
- Stainless Steel Platter
- Approvals: NTEP - 99-002|

Model		SW-RS 20 lb
Capacity & Resolution	lb	20 x 0.01 lb
	oz	400 x 0.2 oz
	kg	10 x 0.005 kg
	g*	10,000 x 5 g
Overall Size W x D x H	Inch	10.2 x 11.3 x 5.4
	mm	259 x 287
Platter Size W x D	Inch	9.1 x 7.5
	mm	231.1 x 190.5

Model	Description	MAP Pricing
SW-RS-R	20 LB Capacity, POS Connected, Regular Platter Size	**$525**
SW-RS-L	20 LB Capacity, POS Connected, With Larger Platter	**$625**

Watch It Work	**App FAQ**	**ISO/Agent Webinar**	**Earn with this product**	Works With
				Clover Station & Mini
				Pax Selected Devices

LP-1000N Series

Label Printing Scale

- 30 x 0.01 lb Capacity
- Stores up to 4,000 PLUs
- 30 Standard Label Formats   • 54 Preset Keys
- Standard RS-232C & USB*   • Auto-Prepack Feature
- Ingredients Printing: Up To 400 Char. per PLU
- Commodity Name: Up To 56 Char. per PLU
- Works w/LP Works software package
- USB Cable Included (Scale to Computer)

LP-1000N ◥   LP-1000NP ◥

Please note: The pole display is not an option. It is a separate model. Once you purchase an LP-1000N, you CANNOT attach a pole display.

Model	Description	MAP Pricing
LP1000N	30 LB Label Printing Bench Scale	**$1,435**
LP1000N(P)	30 LB Label Printing Bench Scale With Pole	**$1,495**

CL-5500 Series

Label Printing Scale

Model	Description	
CL5500B-60NE	CL5500B - 60 lb, Ethernet	$2,145
CL5500R-60NE	CL5500R Pole - 60 lb, Ethernet	$2,245
CL5500B-60W	CL5500B - 60 lb Wireless	$2,375
CL5500R-60W	CL5500R Pole - 60 lb Wireless	$2,475
CL5500B-30NE	CL5500 Bench - 30 lb, Ethernet	$2,145
CL5500R-30NE	CL5500R Pole - 60 lb w/wireless	$2,245
CL5500B-30W	CL5500B - 30 lb Wireless	$2,375
CL5500R-30W	CL5500R Pole - 30 lb Wireless	$2,475
CL5500H-60	CL5500H Hanging - 60 lb, Ethernet	$2,845
CL7200P-30W	CL7200 - 30 lb - Ethernet & Wireless	$2,695
CL7200P-60W	CL7200 - 60 lb capacity - Wireless	$2,745
CL7200PH-300W	CL7200 with Remote Platform - 300 lb	$3,195

		30 lb Models	60 lb Models
Capacity & Resolution	lb	15/30	30/60
		0.005/0.01	0.01/0.02

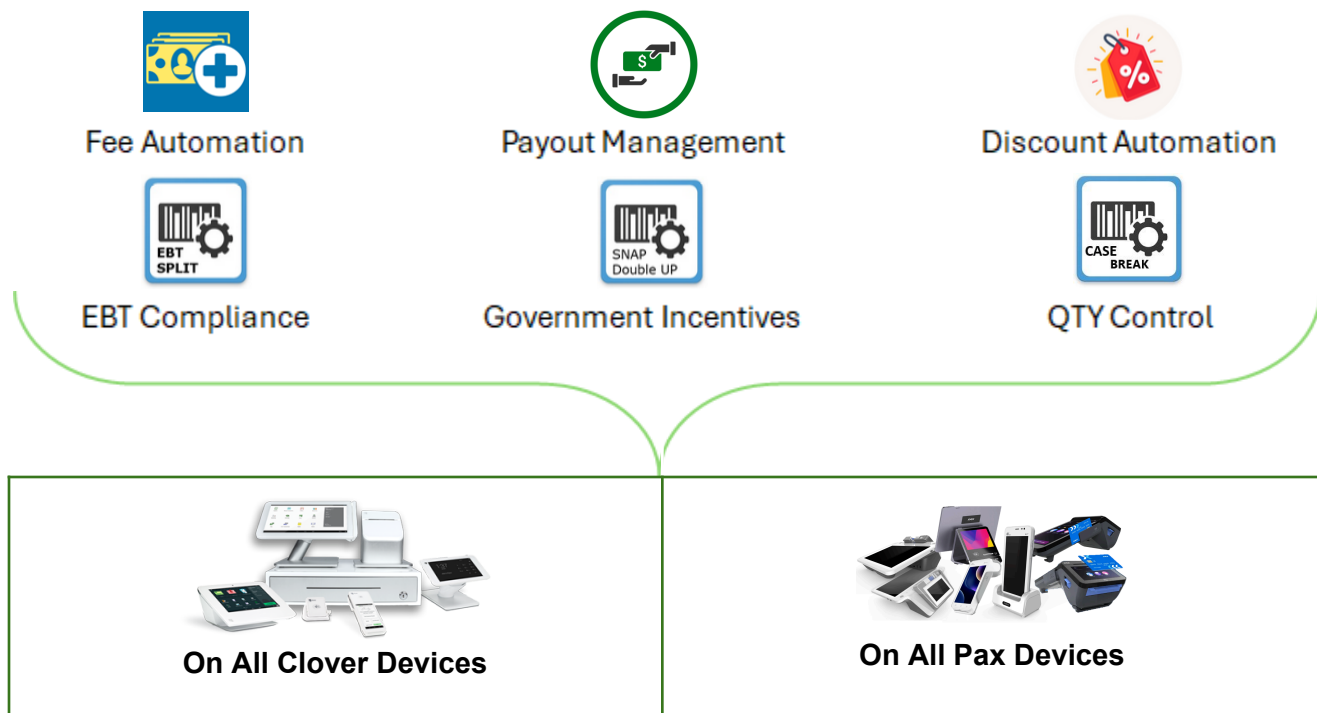| Model	Overall Size	Platter Size
CL5500B	16 x 17 x 6.8	15 x 9.6
CL5500R	16 x 17 x 23.9	15 x 9.6
CL5500H	17 x 11.5 x 27.8	17 x 11.5 x 1
CL5500RP	11.8 x 15.7 x 3.5	

Convenience Stores

Independent convenience stores provide fast, easy shopping experiences and often sell products by weight, such as deli meats, produce, and bulk items. The distinction between convenience stores and sell-by-weight businesses is often blurred, as many stores manage both pre-priced and weight-based items. This makes POS systems that can seamlessly handle both transaction types essential.

Competing with larger chains is a challenge for small businesses, but CSI Works offers the tools to level the playing field. Our solutions help automate discounts, manage loyalty programs, and ensure compliance, giving small stores the efficiency and flexibility to thrive alongside bigger competitors.

Key Needs of Convenience Stores:

✅ **Fast & Reliable Checkout**   Speed is essential for small convenience stores; POS systems must be efficient and intuitive.

✅ **Fee & Payout Management**   Effectively track and manage fees, payouts, and compliance-related Transactions.

✅ **Discount & SalesAutomation**   Apply manufacturer promotions and store-specific discounts while seamlessly handling both pre-priced and weight-based products.

✅ **Deli & Fresh Food Operations**   Accurately weigh and price deli items and other fresh food sold by weight.

✅ **EBT Compliance & Incentives**   Ensure EBT transactions are properly managed, preventing errors and maintaining compliance with federal regulations.

CSI Works provides the essential POS solutions and automation tools that convenience store owners need to streamline operations, enhance customer experience, and stay competitive in a rapidly evolving market.

Fee Automation

Payout Management

Discount Automation

EBT Compliance

Government Incentives

QTY Control

On All Clover Devices

On All Pax Devices

Advanced Fees App

Trigger Fees Automatically, Conditionally
Order Level, Item Level, Taxed or Not

Try on Clover POS   Try on Pax POS

The Advanced Fees app gives merchants complete control over order-level and item-level fees, allowing them to apply charges automatically or conditionally based on custom rules. Fees can be set as taxable or non-taxable, adapting to each store's pricing structure. Whether managing service charges, delivery fees, or surcharges, this app ensures seamless and accurate fee application, tailored to the unique needs of consumer goods retailers.

Benefits	Up to date information
Automate or Prompt Fee Application – Fees can be applied automatically or set to require cashier approval before adding to a transaction.	

Benefits

- **Automate or Prompt Fee Application** – Fees can be applied automatically or set to require cashier approval before adding to a transaction.
- **Item-Level & Order-Level Fees** – Assign fees to specific items or apply them across an entire order for flexibility in pricing structures.
- **Percentage or Fixed Amount Fees** – Set fees as a flat dollar amount or a percentage of the transaction total to match store policies.
- **Taxable or Non-Taxable Fees** – Choose whether fees are subject to taxation, ensuring compliance with state and local regulations.
- **Unlimited Fee Configurations** – Create and manage multiple fee types to accommodate various services, surcharges, and pricing strategies.

Up to date information

Seconds to setup

★★★★★ 5

K9 PAWVENGERS

April 26, 2023

Wow. Added an added fee that we needed to charge in seconds. So far the best added app we are using on Clover!

Available On

Clover All Generations
- Flex
- Pocket
- Station Solo/Duo
- Mini

Pax Devices All Generations
- A77 & A 80
- A6650
- A800 or A8700
- A920 or A920 Pro/Max
- E700 or E700 Mini
- Elys Workstation
- M8

Watch It Work

App FAQ

ISO/Agent Webinar

Earn with this app

Works With

Clover Register App
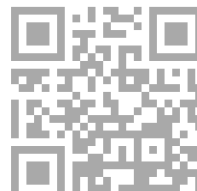
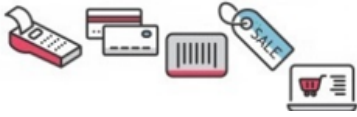CSI Works CorePOS App

Negative Tender App

Lottery Payouts, Bottle Returns,
Vendor Payouts, Owner Draw

Try on Clover POS   **Try on Pax POS**

The Negative Tender app helps merchants efficiently track and manage payouts, adjustments, and non-sales cash transactions within their POS system. Whether handling vendor payments, cash withdrawals, lottery payouts, or store credit adjustments, this tool provides a structured way to record and report these transactions, ensuring financial accuracy and transparency. Designed for consumer goods retailers, it helps businesses avoid miscalculations, maintain organized records, and streamline end-of-day reconciliation.

Benefits

- Manage Non-Sales Payouts – Record vendor payments, employee withdrawals, refunds, and lottery payouts directly through the POS.
- Track & Report Adjustments – Maintain clear transaction logs for store credits, cash drops, and expense tracking for better financial oversight.
- Prevent Accounting Errors – Ensure accurate reconciliation by logging every payout, reducing cash discrepancies.
- Customizable Payout Reasons – Set up specific categories for different payout types, improving record-keeping and accountability.
- Seamless POS Integration – Works within the existing POS environment, making it easy for staff to process and document transactions without manual tracking.

Up to date information

Amazing

★★★★★ 5

MOONSHINE LIQUORS OF BASS RIVER

December 15, 2021

This is the only app that will take care of lottery payouts, bottle returns, and miscellaneous vendor payouts in one place. It's fully integrated into the main 'Register' app. I had a problem with installation, called the number, and they got me up and running in no time. Great app and service!!

Available On

Clover All Generations
- Flex
- Pocket
- Station Solo/Duo
- Mini

Pax Devices All Generations
- A77 & A 80
- A Series 6,7, 8
- A920 or A920 Pro/Max
- E700 or E700 Mini
- Elys Workstation
- M8

Watch It Work   **App FAQ**   **ISO/Agent Webinar**   **Earn with this app**

Works With

Clover Payments App

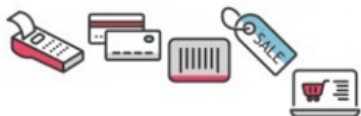CSI Works CorePOS App

Mix Or Match Discount Builder

Trigger Fees Automatically, Conditionally
Order Level, Item Level, Taxed or Not

Try on Clover POS   **Try on Pax POS**

The Mix or Match app gives merchants complete flexibility in setting up automated or manual discounts, allowing for BOGO, combo deals, percentage discounts, price overrides, and progressive discounts. Whether applying fixed promotions or dynamic pricing, merchants can create customized discount structures that trigger automatically at checkout or can be applied manually by cashiers. Mix or match different products, quantities, or categories to build personalized deals that drive sales and customer engagement.

Benefits	**Up to date information**
Flexible Discounting – Set up automated or manual discounts, including BOGO, combo deals, progressive pricing, and custom promotions. **Customizable Pricing Rules** – Apply percentage discounts, fixed-price overrides, or tiered pricing based on quantity, category, or product mix. **Seamless Automation** – Discounts can be triggered automatically at checkout or applied manually by the cashier for more control. **Boost Sales & Customer Engagement** – Encourage larger purchases and increase repeat business with strategic, customer-friendly promotions. **Works Across All Product Types** – Whether for pre-priced, weight-based, or multipack items, the app adapts to different business models and inventory structures.	

Time Saving

★★★★★ 5

BENZER KISSIMMEE

March 7, 2023

Before our retail locations downloaded this app, we would manually punch in our discounts on our register. It would require a lot of employee training and we would frequently lose track of what we were selling in our system. Now that our deals/promotions automatically discount for us, we have saved a lot of time in employee training and can focus on how to better sell more of our products.

Available On

Clover All Generations
- Flex
- Pocket
- Station Solo/Duo
- Mini

Pax Devices All Generations
- A77 & A 80
- A Series 6,7, 8
- A920 or A920 Pro/Max
- E700 or E700 Mini
- Elys Workstation
- M8

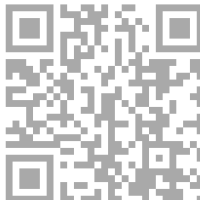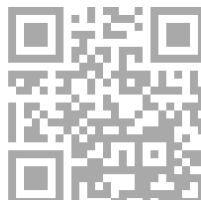| **Watch It Work**	**App FAQ**	**ISO/Agent Webinar**	**Earn with this app**	**Works With**
				Clover Inventory Register or Dining App CSI Works CorePOS App

Inventory Plus Plus

EBT Split, Snap Government Incentives
Case & Carton Break During Checkout

Try on Clover POS   **Try on Pax POS**

The Inventory Plus Plus app simplifies inventory management, EBT compliance, and bulk product handling for consumer goods retailers. It ensures only eligible items are paid for with SNAP/EBT benefits and supports EBT Double Up & Food Bucks programs. Case Break Functionality allows merchants to sell individual units from bulk cases while keeping stock accurate. The app also streamlines inventory workflows, making operations more efficient and reducing manual effort..

Benefits	Up to date information
- Ensure EBT/SNAP Compliance – Restrict EBT payments to eligible items only, reducing errors and maintaining regulatory compliance. - EBT Double Up & Food Bucks Support – Participate in government incentive programs that match qualifying EBT purchases. - Case & Carton Break Functionality – Sell individual packs or cans from bulk cases with automatic stock adjustments. - Automated Tobacco Scan Data Management – Streamline inventory tracking and reporting for Altria, Reynolds, and ITG compliance. - Bulk Product Editing & Workflow Automation – Manage inventory efficiently with mass product edits and workflow automation tools.	

	Available On
it's work great ★★★★★ 5 QUICK MART RANDALLSTOWN August 5, 2024 When we purchased as new customers we don't know much about it but now it's work great I'm using some other location to it's awesome Thanks ***** I want to try double up how it's work?	Clover All Generations - Flex - Pocket - Station Solo/Duo - Mini Pax Devices All Generations - A77 & A 80 - A Series 6,7, 8 - A920 or A920 Pro/Max - E700 or E700 Mini - Elys Workstation - M8

Watch It Work	**App FAQ**	**ISO/Agent Webinar**	**Earn with this app**	Works With
				Clover Inventory Register or Dining App CSI Works CorePOS App Tobacco Scan Data Guardoe For Merchant

Age Restricted Products

Merchants selling age-restricted products—such as gift shops, corner markets, liquor stores, and tobacco shops—must comply with strict regulations while managing promotions and customer expectations. CSI Works provides tools to automate compliance, manage manufacturer promotions, and enhance customer loyalty, helping independent stores compete with larger chains by ensuring they can participate in every available program.

Key Needs of Age Restricted Merchants:

✅ **Age Verification & Compliance** Ensure legal age requirements are met at checkout.

✅ **Manufacturer Promo Management** Apply manufacturer-sponsored promotions while maintaining Compliance.

✅ **Coupon & Loyalty Integration** Automate manufacturer coupons and store-specific incentives to drive repeat sales.

✅ **Multipack & Bulk Discounts** Automatically apply discounts for tobacco and liquor multipack purchases.

✅ **Case Break Functionality** Sell individual units from bulk cases while maintaining pricing accuracy.

✅ **Tobacco Scan Data Compliance** Track and submit rebates and loyalty program data seamlessly.

With **CSI Works solutions**, independent merchants can **compete with large chains** by leveraging **every available discount, loyalty, and compliance program** to attract and retain customers.

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Age Verification Technology

Supplier Funded Loyalty Program

Retailer Funded Loyalty Program

Tobacco Scan Data Program

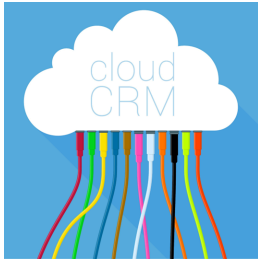Multi-Pack or Multi-Can Discounts

Consumer Loyalty & Commerce App

On All Clover Devices

On All Pax Devices

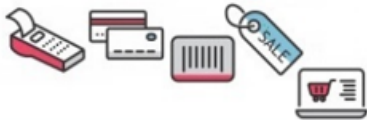# Customer Plus Plus | Cloud CRM

EBT Split, Snap Government Incentives
Case & Carton Break During Checkout

Try on Clover POS   Try on Pax POS

The Customer Plus Plus app streamlines customer management, loyalty programs, and age verification, helping merchants enhance engagement and ensure compliance. Designed for consumer goods retailers, it automates key processes, reducing manual work and improving the customer experience.

Benefits	Up to date Information
Seamless Age Verification – Instantly verify customer age at checkout by scanning a driver's license, ensuring compliance with regulations. **Manufacturer & Store Loyalty Program Integration** – Run your own in-store loyalty program while participating in manufacturer-sponsored promotions, maximizing customer rewards and engagement. **Coupon Redemption & Discounts** – Easily accept manufacturer coupons and store-specific promotions, automating discounts for smoother transactions. **Guardoe Consumer Loyalty App Integration** – Enhance the customer experience by connecting with Guardoe, allowing shoppers to track rewards, receive personalized offers, and increase store visits. **Automated Promotions & Rewards** – Apply loyalty discounts and incentives automatically, encouraging repeat business and boosting sales.	

general manager	Available On
★★★★★ 5 COOL RUNNINGS/ ISLAND GRILLE November 16, 2024 good nice	Clover All Generations - Flex - Pocket - Station Solo/Duo - Mini Pax Devices All Generations - E Series (7,8,9) - Elisys - A Series (6,7,8,9) - M

Watch It Work	**App FAQ**	**ISO/Agent Webinar**	**Earn with this app**	Works With
				Clover Register & Dining App. CSI Works CorePOS, Guardoe Loyalty Consumer App Tobacco Scan Data

Tobacco Scan Data

Compete with enterprise retailers, increase sales and profit.
Take advantage of manufacturer funded programs.

Try on Clover POS   **Try on Pax POS**

The Tobacco Scan Data app helps tobacco retailers compete with enterprise chains by automating manufacturer-sponsored discounts, multipack promotions, and rebate reporting. It ensures seamless compliance with Altria, Reynolds, and ITG programs while integrating with Customer Plus Plus (Cloud CRM) for loyalty tracking. Merchants can streamline age verification, discount management, and scan data submissions, ensuring they maximize rebates, increase sales, and improve operational efficiency.

Benefits	Up to date information
Automate Manufacturer Discounts – Apply multipack and loyalty-based promotions automatically at checkout. **Ensure Compliance with Rebate Programs** – Submit accurate scan data for Altria, Reynolds, and ITG to receive manufacturer reimbursements. **Streamline Age Verification** – Integrate with Customer Plus Plus (Cloud CRM) to ensure customers meet age requirements. **Reduce Manual Reporting** – Automate scan data submissions, eliminating errors and reducing workload. **Increase Sales & Profitability** – Compete with big retailers by leveraging manufacturer-funded programs that drive customer incentives.	

	Available On
CANAL CARRYOUT ★★★★★ 5 **CANAL CARRYOUT** April 3, 2024 Everything Works percect. Working with CSI Works is a super easy proccess and makes you able to compete with the large retailers	Clover All Generations - Flex - Pocket - Station Solo/Duo - Mini Pax Devices All Generations - E Series (7,8,9) - Elisys - A Series (6,7,8,9)

Watch It Work	**App FAQ**	**ISO/Agent Webinar**	**Earn with this app**	Works With
				Clover Register App Or CSI Works Core POS App Has its own API's

Discount Scheduler

Qualified Multi-Pack and Multican Discounts
Manufacturer Promotional Deal Automation

Try on Clover POS   **Try on Pax POS**

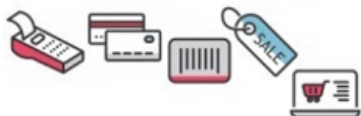The Discount Scheduler app automates time-based promotions, multipack discounts, and manufacturer-sponsored deals, ensuring accurate pricing without manual adjustments. Merchants can pre-set discount schedules, allowing promotions to activate and expire automatically. Designed for consumer goods retailers, this app helps businesses streamline pricing, stay compliant with rebate programs, and increase sales by ensuring discounts are always applied correctly and on time.

Benefits	Up to date information
Automate Time-Based Discounts – Schedule promotions in advance, ensuring accurate pricing without manual intervention. **Effortless Multipack & Bundle Discounts** – Apply manufacturer-sponsored multipack and combo discounts seamlessly at checkout. **Eliminate Manual Adjustments** – Prevent pricing errors by automating discount application based on pre-set rules. **Stay Compliant with Rebate Programs** – Ensure discounts meet manufacturer requirements, preventing missed reimbursements. **Maximize Sales & Customer Engagement** – Offer strategic discounts that drive purchases and increase transaction value.	

	Available On
Excellent Customer Service ★★★★★ 5 LUCKY ME LIQUOR April 24, 2023 Their team was very helpful!	Clover All Generations - Flex - Pocket - Station Solo/Duo - Mini Pax Devices All Generations - A77 & A 80 - A Series 6,7, 8 - A920 or A920 Pro/Max - E700 or E700 Mini - Elys Workstation - M8

Watch It Work	**App FAQ**	**ISO/Agent Webinar**	**Earn with this app**	Works With
				Clover Register, Dining, With CSI Works Tobacco Scan Data, & CorePOS

Guardoe Consumer Loyalty App

Digital loyalty program for age restricted merchants.
Buy Online pickup in store Ecommerce

Try on Clover POS   **Try on Pax POS**

The Guardoe app enhances customer engagement by combining loyalty rewards and e-commerce into a single platform. Merchants can offer custom loyalty programs, manufacturer-sponsored promotions, and online shopping experiences, making it easier for customers to earn rewards, shop online, and pick up in-store. Designed for consumer goods retailers, Guardoe automates rewards, drives repeat sales, and expands business reach through digital commerce.

Benefits	Up to date information
Custom & Manufacturer-Sponsored Loyalty Programs – Run in-store rewards while integrating manufacturer-funded promotions for maximum savings. **Buy Online, Pick Up In-Store (BOPIS)** – Offer e-commerce functionality, allowing customers to purchase online and collect in-store. **Seamless Customer Engagement** – Digitally track loyalty points, rewards, and promotions in one easy-to-use app. **Encourage Repeat Business** – Incentivize return visits with targeted offers, personalized deals, and automated reward tracking. **Designed for Age-Restricted Merchants** – Ensures compliance with loyalty programs for tobacco, liquor, and other restricted products.	

	Available On
Excellent ★★★★★ 5 BENZER 14 March 7, 2023 Intuitive software with great application for retail users	Clover All Generations - Flex - Pocket - Station Solo/Duo - Mini Pax Devices All Generations - A77 & A 80 - A Series 6,7, 8 - A920 or A920 Pro/Max - E700 or E700 Mini - Elys Workstation - M8

Watch It Work	**App FAQ**	**ISO/Agent Webinar**	**Earn with this app**	Works With
				CSI Works Cloud CRM & CorePOS Clover Register App

Vertical Agnostic Solutions

Merchants today face growing challenges in hiring and retaining staff, making automation and system integration more critical than ever. From transaction processing to financial reporting, businesses need solutions that ensure data flows effortlessly between POS systems, accounting software, and other essential platforms. CSI Works' vertical-agnostic solutions provide the connectivity, automation, and AI-powered support needed to fill staffing gaps, streamline operations, and reduce manual workloads.

Key Needs of All Merchants:

✅ **Seamless System Integration** — Ensure POS transactions sync with accounting systems for accurate financial reporting.

✅ **Payment & Transaction Tracking** — Maintain a system of record for all sales, refunds, and adjustments.

✅ **AI-Powered Merchant Assistance** — Use AI for order-taking, customer support, and inventory optimization, reducing reliance on in-store staff.

✅ **Product Data Synchronization** — Keep inventory, pricing, and product details consistent across multiple platforms and locations.

✅ **Customer & Order Sync** — Ensure customer profiles, transaction history, and loyalty data are unified across sales channels.

With CSI Works' integration and AI-driven solutions, merchants can connect, automate, and optimize their systems, overcoming staffing challenges while ensuring smooth transactions, accurate records, and sustainable growth.

From POS to QuickBooks

From QuickBooks to POS

POS & QB Custom Workflow

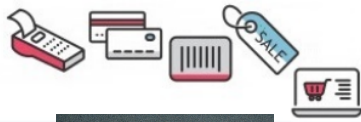AI Phone Order Taker

AI Phone Sales Consultant

AI Merchant Buyer Consultant

On All Clover Devices

On All Pax Devices

QuickBooks Workflow Integration

Seamless POS-to-Account Sync
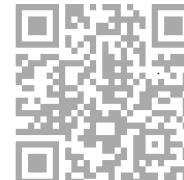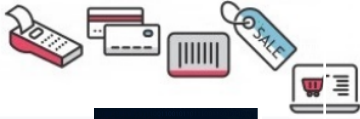Automate Financial Reporting & Bookkeeping

Try on Clover POS   Try on Pax POS

The QuickBooks Integration app automates sales, orders, payments, and refunds syncing between POS systems and QuickBooks, eliminating manual data entry. It offers hourly sales sync, detailed transaction mapping, and invoice integration, ensuring accurate financial reporting and seamless bookkeeping for consumer goods retailers.

Benefits

- Automated Sales & Transaction Sync – Eliminate manual bookkeeping by syncing POS data with QuickBooks in real time.
- Hourly Sales Reporting – Track hourly revenue breakdowns, improving financial oversight and decision-making.
- Detailed Transaction Mapping – Sync products, customers, orders, and refunds, ensuring accurate accounting records.
- Invoice & Payment Reconciliation – Create invoices in QuickBooks and sync payments from the POS system, streamlining accounts receivable.
- Error-Free Financials – Reduce discrepancies and ensure accurate, tax-ready reports for better business management.

Up to date information

Retail Made Easier

★★★★★ 5

BENZER 15

March 7, 2023

Have no major complaints, easy to set up on the back end

Available On

Clover All Generations
- Flex
- Pocket
- Station Solo/Duo
- Mini
Pax Devices All Generations
- E Series (7,8,9)
- Elisys
- A Series (6,7,8,9)

Watch It Work	App FAQ	ISO/Agent Webinar	Earn with this app

Works With

Quickbooks Desktop Any Version.
Clover Orders, Transactions, Inventory, Customers,
CSI Works CorePOS

AI Merchant Tools

Phone Order Taker, Phone Sales Consultant
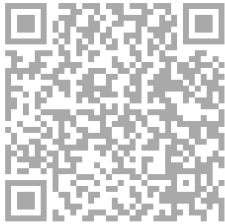### Merchandiser/Buyer Agent

Act Now

Merchants face ongoing challenges with sales, employees, costs, and regulations, requiring smart solutions to stay competitive. CSI Works is introducing AI-powered tools to enhance efficiency in order management, customer interactions, and inventory optimization. Powered by CSI Works' extensive industry data, these AI solutions are specifically trained for the retail environment, ensuring accuracy and effectiveness. By automating tasks and providing data-driven insights, they help merchants streamline operations, reduce costs, and make smarter business decisions.

Benefits

- **Drive More Sales & Engagement** – AI-powered tools personalize customer interactions, boost recommendations, and enhance shopping experiences.
- **Cut Costs & Streamline Operations** – Automate order-taking, inventory, and customer support to reduce labor costs and improve efficiency.
- **Optimize Inventory in Real-Time** – AI analyzes sales trends to maintain ideal stock levels, minimize waste, and keep top-selling products available.
- **Maximize Productivity** – Free up staff from repetitive tasks so they can focus on growth-driving activities.
- **Make Smarter Business Decisions** – Leverage data-driven insights to refine pricing, stocking, and promotions for sustained success.

Up to date Information

Lock in Lifetime Higher Revenue Margins – Act Now!

CSI Works is bringing AI-powered solutions to the retail industry, and we're inviting early agents to lock in lifetime higher revenue margins while helping us secure top AI talent to develop these innovations. By getting in early, you gain exclusive pricing advantages, while we ensure our AI solutions are built with the best expertise. This time-limited opportunity won't last—by the time you're reading this, it may already be gone. Contact CSI Works today to secure your spot and maximize your long-term earning potential

Available On

Clover All Generations
- Flex
- Pocket
- Station Solo/Duo
- Mini

Pax Devices All Generations
- E All Models
- Elisys
- A All Models
- M

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Works With

WIth Clover POS Orders and CSI Works Core POS.
Phone Service by Microsoft.
AI by Chat GPT
Anonymized Transaction Level Data by CSI Works

How Agents Can Work with CSI Works

Refer

How It Works

The CSI Works Referral Program offers a low-risk, high-reward opportunity for agents to earn commission with no upfront investment or long-term commitment. Simply refer merchants to CSI Works and get rewarded when they sign up.

✅ **Sign Up** – Register as a CSI Works agent.
✅ **Refer Merchants** – Share your unique referral link via email, social media, or directly with merchants.
✅ **Earn Cash Rewards** – Get paid when a referred merchant subscribes—earning the equivalent of one month's service fee.

💰 No Investment Needed – Earn commissions without handling merchant accounts.
⚡ Quick & Easy – Receive rewards as soon as merchants sign up.
🔄 Flexible Income – No quotas or commitments—refer at your own pace.
📈 Passive Earnings – A simple way to generate income without ongoing management.

Resell

How It Works

The CSI Works Resell Program is a wholesale opportunity for agents to purchase product seats in bulk at discounted rates and deploy them to merchants. The more seats agents purchase upfront, the lower the per-seat cost, maximizing ROI with every sale. This model allows agents to scale their business, retain full control over client relationships, and generate predictable returns.

✅ **Sign Up** – Register as a CSI Works Reseller Agent.
✅ **Purchase Wholesale Seats** – Buy seats in bulk at lower rates.
✅ **Deploy to Merchants** – Activate and manage product subscriptions.
✅ **Earn on Investment** – Set pricing, control margins, and secure a guaranteed return.

What Makes This Opportunity Unique?

📦 **Wholesale Pricing Advantage** – The more you buy, the lower your cost per seat.
📈 **Scalable Growth** – Expand at your own pace by onboarding more merchants.
💡 **Full Pricing Control** – Set your own margins and determine your revenue structure.
🤝 **Merchant Ownership** – Maintain direct relationships and manage product deployment.

Own

How It Works

The Own Model is a game-changing opportunity for agents to own and brand their own POS software. By purchasing Core POS, agents gain full control over their system, with the ability to customize, scale, and develop their platform to fit their business needs. Unlike reselling or referrals, this model ensures true ownership, allowing agents to build long-term value in their own software solution.

✅ **Contact a Sales Agent Today** – Get started with Core POS ownership.
✅ **Select Your POS** – Choose the configuration that best suits your business.
✅ **Own & Customize** – Work with **FinCore.dev** to brand and tailor the software.

What Makes This Opportunity Unique?

🏆 **Full Control** – Own your POS software and adapt it to your market.
📈 **Scalable Growth** – Build your own brand and expand as needed.
🔧 **Customization Flexibility** – Modify features, branding, and functionality.
💡 **Long-Term Value** – Create a sustainable business model with software ownership.

Own Your Portfolio – Own Your Future

Instead of reselling someone else's solution, own a POS system that works for you. CSI Works, through FinCore.DEV, has developed POS-in-a-Box, a fully integrated, open-platform POS system designed for ISOs to become ISVs. Build merchant loyalty, increase portfolio value, and take charge of your growth by offering a customizable software solution that adapts to your merchants' needs.

Why Owning POS Software Matters

✅ **Stronger Negotiation Power** – Control over payments, hardware, and software gives you leverage in partnerships.
✅ **Expand Partnerships & Offerings** – Open integrations allow you to collaborate with third-party providers and customize features for different business verticals.
✅ **Continuous Development & Support** – FinCore.DEV provides technical expertise, keeping your POS competitive with ongoing updates and improvements.
✅ **Explosive Income Potential** – Earn multiple revenue streams beyond just payment processing, including software licensing, integrations, and support services
✅ **Long-Term Stability** – Traditional ISO growth is costly and burdened by regulations—owning the POS removes dependencies and gives you control over your business future.

Shift the Paradigm – Unlock Unlimited Growth

ISOs are uniquely positioned to evolve into ISVs—and now is the time to make that move. Instead of relying on someone else's technology, own a flexible POS platform that allows you to choose your payment processor, integrate with industry-leading solutions, and build your merchant base on your terms. Don't get left behind. Take control today and secure your future as an ISV.

Additional Resources * FAQ's

At CSI Works, we are committed to empowering independent sales agents, ISOs, and merchants with the tools, knowledge, and support they need to succeed. Whether you're looking for product training, sales resources, merchant support, or partnership opportunities, we provide a wide range of solutions designed to help you maximize efficiency, streamline operations, and grow your business.

Our resources include dedicated support lines, educational platforms, and partnership programs to ensure that agents and merchants can access expert guidance, training materials, and business opportunities whenever they need them.

📞 Phone Numbers

- Sales: 619-246-8236 (Call or text)
- Merchant Support: 760-542-2178 (Call or text)

✉️ Email Address

- General Inquiries: info@csiworks.net

📚 Informational Resources

Stay informed and up to date with our comprehensive knowledge base, training materials, and video tutorials:

- **ISOTalk.net** – Industry insights, agent strategies, and ISO-specific information.
- **PointOfInteraction.net** – Video demos and training for CSI Works products.
- **CSI.Works** – Written product FAQs, guides, and troubleshooting resources.
- **CSIWorks.net** – Official corporate website for CSI Works solutions and updates.
- **Fincore.dev** - Become ISV. outsource the development to Fintech experts.

🤝 Partnership Resources

We offer multiple ways to collaborate, earn, and grow through our referral, reseller, and ownership programs**:**

- **Refer a Merchant** – Earn rewards by referring merchants to CSI Works.
- **Resell CSI Works Solutions** – Purchase wholesale seats and deploy solutions to merchants.
- **Own & Brand Your Own POS System** – Take control of your own branded POS software.
- **AgentStack.net** – A dedicated platform for agents, providing access to essential tools and resources.