Using the Credit Card Interface

Setting up the Credit card Interface

Once you have selected the **[Card's/Tender's]** option from the system setup screen, the following screen will appear; (Flashpoint will automatically display the card setup screen for the station you are on. You must setup the charge cards on every station.)
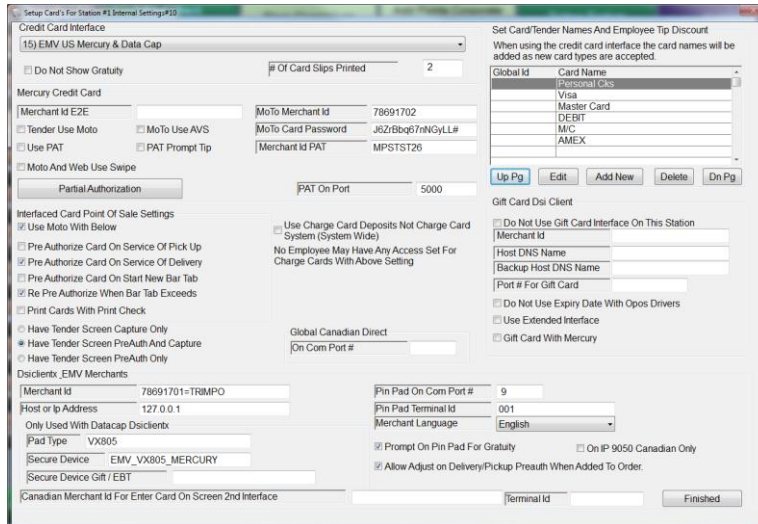
Flashpoint will automatically set the "**Credit Card Interface**" selection for you, depending on your license. If you have purchased a specific card interface and do not see that interface, simply update your license (System Setup-> License -> Update License) then return to this screen. If it is still the wrong interface selected, you will need to call your reseller to have it properly set. If you did not wish to purchase the integrated charge cards and instead just wish to record the charge card information, Flashpoint will select the **"Just Record Charge Cards"** option. The only setups required would be to enter the card/tender types you wish to accept, the employees can just enter all of their charge cards into the system at the end of their shift or during the downtime.

Before turning on credit card, you must ensure that you have the appropriate interface software installed from Datacap (you will have to refer to the Datacap guide for the interface you are installing for more information). Refer to the table below to see which NetEpay components you require for the processor you are using (install in the order listed):

Processor	Datacap Components		Processor	Datacap Components
EMV US (ALL processors)	dsiEMVUS, dsiclientx, NetEpay		EMV Canada (All)	SQL, dsiclientx, DSIEMVClientX, NetEpay
Vantiv (MOTO and web)	dsiclientx, dsiPDCX		Vantiv (Non-EMV)	dsiclientx, dsiPDCX
All other US Non-EMV	Some processors will require SQL database installation, dsiclientx, dsiPDCX, NetEpay			

You will also be requires to enter a secure device and Pad type based on the pin pad you are using. Below is a current list of secure devices and Pad Types (as of 07/05/2016). To get an updated list contact Datacap systems. The secure device and pad type must be entered in Flashpoint the exact way they are shown in the table:

Description	Interface Type	Secure Device	PadType	PadType
Datacap PDC	RS-232 or USB/VCom	PDC	VFI1000	None
Datacap PDC2	RS-232 or USB/VCom	PDC2	VFI1000	None
Verifone Vx810 PIN pad running XPI	RS-232 or USB/VCom	VX810XPI	VX810	
UIC 795 PIN pad	RS-232 or USB/VCom	UIC795	UIC795	
ViVoPay 4500m contactless with MSR	RS-232 or USB/VCom	VIVO4500M	None	
MagTek SureSwipe MSR	RS-232 or USB/VCom	MTSURESWIPEVCOM	None	
MagTek MINI MSR	RS-232 or USB/VCom	MTMINIMSRVCOM	None	
MagTek MINI MSR	RS-232	MTMINIMSR	None	
MagTek SureSwipe MSR	USB/HID	MTSURESWIPEHID	None	
MagTek MINI MSR securedevice	USB/HID	MTMINIMSRHID	None	
IDTech MSR	USB/HID	IDTMSRHID	None	
IDTech MSR no Encrypt	USB/HID	IDTMSRHID	None	
IDTech MSR Encrypted	USB/HID	IDTSECUREMAGHID	None	
MagTek IPAD PIN pad with Mercury E2E Encryption	USB/HID	MTIPADHID	IPAD100	None
Equinox Payments L5300 PIN pad	RS-232	EQUINOXL5300	L5300	None
J2 650 POS Internal MSR	RS-232	J2650MSRVCOM	None	
Firich FEC Gladius Smart AL7385 MSR	USB/HID	FECMSRHID	None	
FEC AER Touch POS Terminal MSR	USB/HID	FECAERMSRHID	None	
IBM SurePOS 500 MSR	RS-232 (19200 baud)	IBMSUREPOSMSR	None	
Micros PCWS 2015 System MSR	Internal Micros PCWS	MICROSPCWSMSR	None	
POSX EVO TP4 All-In-One POS MSR	USB/HID	POSXMSRHID	None	
AnyShop POS MSR	USB/HID	ANYSHOPPOSMSRHID	None	
Elo ETT10A1 Tablet MSR	RS-232 or USB/VCom	ELOTABLETMSR	None	
MSR or Pad on Tran	IP	ONTRAN	None	
Verifone MX915 PinPad	RS-232	VERIFONEMX915	MX915	None
PioneerPOS StealthTouch MSR	USB/HID	PIONEERSTM5MSRHID	None	
HP Retail Jacket	USB/HID	HPRETAILJACKET	None	
IDTech SecuRED Encrypted	USB/HID	IDTSECUREDMSRHID	None	
UIC 795SE PIN pad	RS-232 or USB/VCom	UIC795SE	UIC795SE	
UIC 795 SE PIN pad with TSYS VOLTAGE	RS-232 or USB/VCom	UIC795SE_TSYS_VOLT	UIC795SE	
Verifone Vx805 PIN pad running XPI	RS-232 or USB/VCom	VX805XPI	VX805	
ID Innovations Classic MSR	USB/HID	IDINNOVATIONS_CLASSIC_MSRHID	None	
ID Innovations Value MSR	USB/HID	IDINNOVATIONS_VALUE_MSRHID	None	
Verifone MX850 PinPad	RS-232	VERIFONEMX850	MX850	None
Ingenico iSC250 PinPad	RS-232	INGENICOISC250	ISC250	None
HP RP77800	USB/HID	HP_RP77800	None	
Verifone Vx805 Pinpad running XPI with Mercury E2E Encryption	RS-232 or USB/VCom	VX805XPI_MERCURY_E2E	VX805	
Verifone Vx805 PIN pad running XPI with Contactless	RS-232 or USB/VCom	VX805XPI_CTLS	VX805	
UIC 215E USB/HID MSR with TSYS VOLTAGE	USB/HID	UICMSR215E_TSYS_VOLT	None	
Ingenico iSC250 PinPad with Mercury E2E Encryption	RS-232	INGENICOISC250_MERCURY_E2E	ISC250	None
Ingenico iPP350 PinPad	RS-232	INGENICOIPP350	IPP350	None
VX805 for Mercury (Use VX805 with E2E for gift)	USB	**EMV_VX805_MERCURY**	**VX805**	
None	None	NONE	None	
VX805 for First Data	USB	EMV_VX805_RAPIDCONNECT	VX805	

Depending on the credit card interface you are using, you will have to setup the credit card interface differently. Below are the steps to setup the credit card interface for each interface:

Setting up Mercury Credit Card Interface in the US

If you wish to use the credit card interface in the USA and have selected Mercury Payments as your Processor, you must enter your merchant id in the space provided beside the **"Merchant Id E2E"** (under the **"Mercury Credit Card**" heading). You can ignore all other merchant settings. The merchant ID can be

found on the dealer letter from Mercury next to the "Merchant Number" heading. When setting up your Mercury account be sure to ask for E2E encryption and tokenization setup on the account. <mark>**Note: If using the EMV interface refer to the Setting up Mercury EMV credit card section of the manual.**</mark>

You must also have either a Magtek Ipad (allows manual entry of card data, Debit and EBT) or a Magnesafe Card Swipe (credit card only, card must be swiped) at every station that you wish to accept credit cards. You can obtain the Ipads and Magnesafe card readers from Mercury Payments. If you are using Mercury in the US with the IPad, you will have the option to hand enter card numbers as well as adjusting a gratuity without getting the card number from the customer again.

The MOTO interface is used for accepting credit cards with delivery without the IPad as well as Pay at the Table in the US. If you are using the MOTO card interface, simply enter your Merchant Id in the field beside "**MOTO Merchant Id",** and Password in the field beside **"MOTO Card Password"**. If you are using the MOTO interface for Pay at the Table, select the **"Tender Use MOTO"** option. If using MOTO with the tender screen and have a card swipe that is compatible with the MOTO interface, you can select **"MOTO and Web use Swipe"**, if selected the server will have the option to hand enter or swipe a card. Because you receive better rates if you use address verification, you should turn on **"MOTO use AVS"** if using the MOTO interface to accept credit cards with delivery. The merchant Id will be sent in a dealer letter from Mercury under the heading "Terminal ID". You will be required to generate the password using MercuryView web portal https://portal.mercurypay.com/nonsecure/Login.aspx .

Setting up Mercury EMV Credit Card Interface

If you are using the Mercury credit card interface in Canada, or the EMV interface in the US, you will be required to install and setup a copy of NetEpay for Mercury. Once installed you will also need to copy the shortcut and paste into Windows startup folder. The first time you run NetEpay you will be prompted to enter the Deployment ID. You will then need to enter the Terminal ID and Merchant ID in Flashpoint (beside ID fields under the DSIClientX EMV Merchants heading in Flashpoint. The Terminal ID can be found on the setup sheet sent to you from Mercury. **FOR YOUR MERCHANT ID SIMPLY ENTER THE TERMINAL ID (do not use the merchant number)**

Enter the COM port the pin pad is connected to beside **Pin Pad on Com Port**. Enter the terminal ID beside **Pin Pad Terminal Id**, the terminal Id should have been given to you by your processor. Enter the IP address of the station running the NetEpay software beside **Host or IP Address**. If it is located on the local station, enter 127.0.0.1

If you are using Mercury's Hosted Checkout solution enter your merchant id and password beside the Web merchant Id and Card Password fields when setting up your web store settings (these setups are not on this screen). Do not enter it in any other area.

The MOTO interface is used for accepting credit cards with delivery in Canada. If you are using the MOTO card interface, simply enter your Merchant Id in the field beside "**MOTO Merchant Id",** and Password in the field beside **"MOTO Card Password"**. Because you receive better rates if you use address verification, you should turn on **"MOTO use AVS"** if using the MOTO interface to accept credit cards with delivery. The merchant Id will be sent in a dealer letter from Mercury under the heading "Terminal ID". You will be required to generate the password using MercuryView web portal https://portal.mercurypay.com/nonsecure/Login.aspx .

Setting up the Pay at the Table Interface (Mercury Canada)

If accepting credit cards at the table, you will require the Pay at the Table interface. Once you have received the pin pad and credentials from Mercury, you will need to enter the Merchant Id given to you (under terminal Id heading on dealer letter) beside the Merchant ID PAT field. You will also need to select the port that you have setup the pin pad to connect with beside the "PAT on Port" heading. Be sure that you do not use a port that is currently in use, 5000 is the default port. Once setup, select "Use PAT" in order to turn on the interface, if you wish to accept tips, turn on "PAT Prompt Tip"

Once you have setup Flashpoint for use with the Pay at the Table interface, you will need to setup the pin pad. To setup the pin pad, complete the following steps:

1. **Setup Wi-Fi on the device**
2. Add the MAC Address from the back of the Vx680 to your Wi-Fi network if your Wireless MAC Filter is enabled.
3. Choose CommServer from the VMAC menu
4. Press the button with Gears logo in bottom right corner of screen
5. Press Wi-Fi button in Wi-Fi config.
6. Press Wi-Fi Profile button in Wi-Fi config.
7. Press Add Profile
8. Enter in SSID
9. Choose Encryption Type
10. Enter password
11. Choose Yes to save changes
12. Close of out of CommServer again, Reopen, and press Gear button
13. Choose IP to enter in IP settings
14. Press Cancel until on the CommServer Wi-Fi screen. You should see blue bars if the connection is successful
15. You can choose Troubleshoot to check connections if not and Repair to try and repair the connection if it fails.
16. **Configure the terminal to connect to Flashpoint**
17. From terminal application screen press 2 to open PAT RPOS.
18. Press Setup to enter RPOS setup screen.
19. Press RPOS Config to enter in RPOS Config screen.
20. Press Edit to Edit RPOS IP Address. Enter in the IP Address from the station setup to **"Use PAT"**.
21. Press Next to get to RPOS Port screen. Edit the RPOS Port that is configured in the RPOS test app. You can enter any port that you can use on your computer in the RPOS test app and terminal if default 5000 does not work.
22. Press Exit and press OK to save changes.
23. Press Cancel and then * to get back to the application screen.

You should now be able to connect to Flashpoint and complete a Key Exchange (see Pay at the Table Administrative procedures).

Setting up Global Canada (Direct interface)

If you wish to use integrated credit cards in Canada, and have selected Global Payments as your Processor, you should see **"Credit Cards thru Global Canada"** selected as the Credit Card Interface. You do not have to enter your merchant information if using Global, as the VX810 reader will automatically set the information for you. Contact Global Payments to obtain a Vx810 terminal. The Vx810 will connect to a serial port on the PC. Enter the serial port that you have connected the Vx810 to in the space provided under the Global Canadian Direct heading. If using the Global Canada direct interface, you do not have the option to pre-authorize a card on service. **Note: As of version 19, this interface is no longer available. If using the SRM, you cannot use the Global Credit card interface.**

Setting up Paymentech / Global / Moneris (Using NetEpay)

Due to the nature of EMV in Canada, you will not be able to pre-authorize cards on the pin pad. If you wish to pre-authorize cards, you will be required to run a second copy of NetEpay on the station with a second terminal Id. If you are processing with Global, Chase Paymentech Moneris or Mercury in Canada, you must complete the following setups:

Merchant Id – Enter your Merchant Id exactly as sent to you by the processor.

Pin Pad on Com Port - Enter the COM port the pin pad is connected to.

Pin Pad Terminal Id –Enter the terminal ID here, the terminal Id should have been given to you buy your processor.

Host or IP Address – Enter the IP address of the station running the NetEpay software. If it located on the local station, enter 127.0.0.1

**Merchant Language** – Select your language (English or French)

Pad Type & Secure Device – Only enter this information if instructed to.

Prompt on Pin Pad for Gratuity – If using the pin pad and enter this option, the system will prompt the customer for the gratuity amount on the Pin Pad.

If using the credit card interface in Canada and wish to take credit cards for delivery, you have to run two copies of the NetEpay software (one for use with the pin pad and one that allows you to hand enter cards right on the order entry screen). If this is the case, select **"On IP 9050 Canadian Only"** (one of the copies of the NetEpay software will be set to run on port 9050) and enter the second merchant Id and Terminal Id. *Note: If using Mercury, you do not have the option to run two copies of NetEpay.* Instead, you have the option to use Mercury's Hosted checkout to key in orders. If you are using Mercury's Hosted Checkout solution enter your merchant id and password beside the Web merchant Id and Card Password fields. Do not enter it in any other area.

Besides setting up Flashpoint, you will also have to setup the terminal Id's in the NetEpay software. To setup NetEpay, first shut down Flashpoint and you should see the Net Epay screen. If you do not see the screen, be sure that you run it (it is highly suggested that you add the Net Epay software to the Windows startup menu). NetEpay must be run on the server only. All other stations connect to NetEpay on the server.
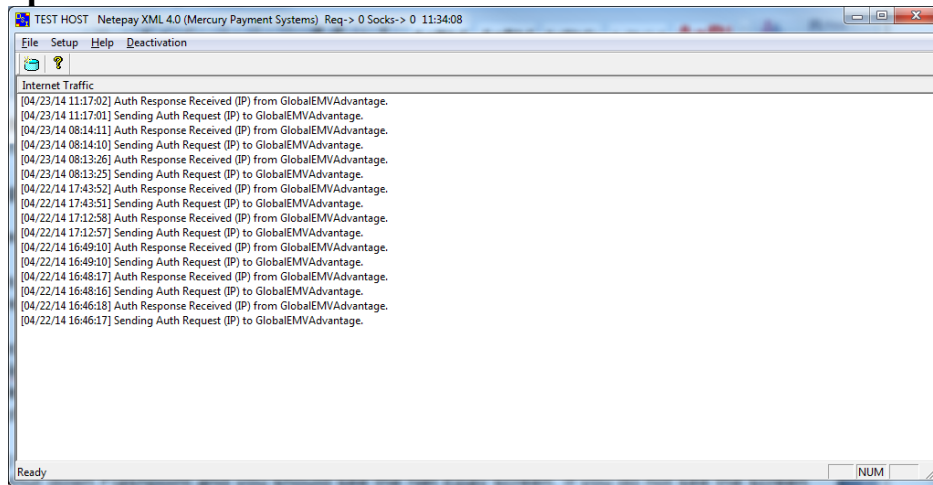
Select the Setup Option, and then from the setup screen select **"Lane Setup"**.
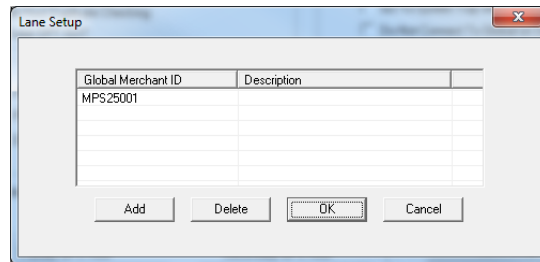
Click "Add" and enter the terminal Id's that you were given from the processor. Click Ok to exit the Lane setup screen, then Ok again to exit the main setup screen.

Setting up Non-EMV Credit Card processing in the US through NetEpay

If you are processing cards in the US using NetEpay, you must setup the following:

Merchant Id – Enter your Merchant Id exactly as sent to you by the processor.

Pin Pad on Com Port – If using a Pin Pad (for taking Debit transactions); enter the COM port the pad is connected to.

Pin Pad Terminal Id – If your processor gave you a terminal Id for the pin pad enter it here, otherwise leave this blank

Host or IP Address – Enter the IP address of the station running the NetEpay software. If it located on the local station, enter 127.0.0.1

Merchant Language – Select your language (English or French)

Pad Type & Secure Device – Only enter this information if instructed to.

Do not void on Delivery/Pickup when added to Order

When you pre-auth on pick-up/deliveries, and you add to an order, the system must finalize the original card, void it then re-issue a new card. If you select this option, the system will simply change the amount on the original card. Not all processors allow this option and you must be on ver. 5.06 of NetEpay.

CAUTION... **Payment services, like Heartland, has said that they don't like the purchase amount to be changed and will not certify for changing the purchase amount, but will also not prevent us from changing the purchase amount. For this reason we do not recommend you use this feature. But, since many merchants asked for it, we added an additional tag for lookup allowing us to find the transaction and allowing the purchase amount to be changed.**

Prior to setting this option, you must contact your payment processing relationship manager and explain that you intend to change the purchase amount from what was originally authorized. Make sure that you are OK with whatever downgrades or transaction costs that this might cost you. Some merchants don't care about any additional cost, they just want things to run smoother and want this functionality.

Prompt on Pin Pad for Gratuity – If using the pin pad and enter this option, the system will prompt the customer for the gratuity amount on the Pin Pad (if available with your merchant).

Prompt on Pin Pad for Gratuity – If using the pin pad and enter this option, the system will prompt the customer for the gratuity amount on the Pin Pad (if available with your merchant).

Other Charge Card Options

Once you have setup your processor info, you can complete the remainder of the non-specific charge card options below:

If you have a fast food or retail environment and do not wish to display a tip line on the receipts, select the **"Do not Show Gratuity"** option. **Note: You may have to set this in two other places. One later in the card setup screen (if using a Pin Pad make sure "Prompt for Gratuity on Pin Pad" is not checked), the second under Closed Service Check Setup -> "Do Not Ask For Gratuity on Tender Screen" (turns off prompting for gratuity on the tender screen even when entering cash).**

If you wish to have the system pre-authorize a credit card when servicing a delivery, select "**Pre-Authorize Card on Service of Delivery**". This will cause the system to prompt the order taker for the method of payment (card or cash) and verify the credit card if need be. If the employee reopens and adds to an order, the card will be re-approved. The driver would then finalize the transaction and add a gratuity upon returning from the delivery. This option is available with Mercury US (requires Magtek Pin Pad), NetEpay US and all NetEpay Canada interfaces except Mercury (requires 2nd copy of NetEpay running).

 "**Pre-Authorize card on Start new Bar Tab**", if checked, will cause the system to pre-authorize the customers charge card for the pre-defined amount set under "**Pre-Authorize Bar Tab for $**" field, when a new tab is started. If the bar tab exceeds the pre-defined amount and the "**Re Pre-authorize when Bar Tab Exceeds**" flag is checked, the system will void the original pre-auth and re authorize the card for an additional amount based on the same setting. Example: If set to $50.00 and the tab reaches $51.00 the system will pre-authorize the card for $100.00. When the order is closed the system will prompt for the payment information and adjust the amount of the card appropriately **Note: These options are not available for all Processors, contact your reseller prior to purchasing the interface to see if this**

option is available for the Processor you wish to use. This option is available with Mercury US (requires Magtek Pin Pad), NetEpay US and all NetEpay Canada interfaces except Mercury (requires 2nd copy of NetEpay running).

Although not recommended, if you are using print check with deliveries and closing the check when the driver returns, you can have Flashpoint print the card slip when printing the check by selecting the **"Print Cards with Print Check"**.

 If using the tender screen to enter charge cards, you must select whether you want to "**Have the Tender Screen Capture only**", "**Have the Tender Screen Pre-Auth and Capture**" or "**Have the Tender Screen Pre-Auth only**". **Note: With some Processors, including all EMV interfaces, only "Have the Tender Screen Capture only" will be your only option (the pin pad will prompt the customer for a tip).**
If you choose to capture only, the system will capture the credit card only and not allow the employee to enter a tip (fast food). If you choose to have the system pre-auth and capture the system will prompt for the tip amount after the employee swipes and captures the card with the total amount including tip (table service/bar with a Cashier). If you choose to have the system pre-auth only, the system will pre-authorize the card leaving it open for the employee top add a tip at a later time (table service/bar with server banking).
 The system will print the number of slips entered under "**Number of Card Slips Printed with Authorization**", every time the employee puts through a card. You should set this option to at least two (one for the customer to keep and one for the customer to sign and return to the server).

If you are not using the credit card interface, add the card names that you accept in the top right of the screen (this will be what the system will prompt the employee with, when selecting a card type). If you are using the credit card interface, the system adds the card names automatically as you accept a credit card type. You may also add additional payment types (check etc.) in the same area.

If you are not using Flashpoint to enter your charge cards, select **"Use Charge Card Deposits not Charge Card System)"**. If selected, the system will use the total of the charge card deposits to subtract cards from the total for the day (entered from the deposits screen). No employees will have access to enter any charge cards into Flashpoint when using this feature.

If you are accepting gift cards through your processor, enter the appropriate information in the space provided (If you are not accepting gift cards on this station select the "Do Not Use Gift Card Interface on This Station" option).

If processing gift cards through Mercury Payment Systems you must swipe the card on the Magtek Ipad and must check off the option "Gift Card with Mercury".

The Use Extended Interface is reserved for custom gift card interfaces.

FLASHPOINT™ P.O.S. Software

Using the Local Credit Card Interface

This section will explain how to use the credit card interface. Although the manual explains how to enter cards through the Credit Card screen, if you are entering credit cards through the tender screen, the only difference is that you select **"Enter Charge Card"** on the tender screen to swipe the card, and you do not have the option to select the seat or check number. You can follow the remainder of the instructions below for any other tasks.

The options available and screen that you see depends on the processor that you are using. Below are examples of what the card screen will look like starting with Canadian credit cards through NetEpay:
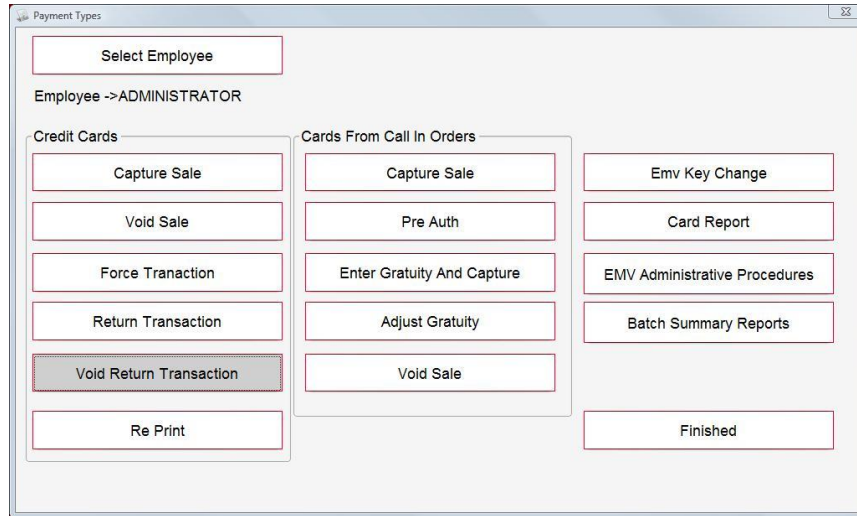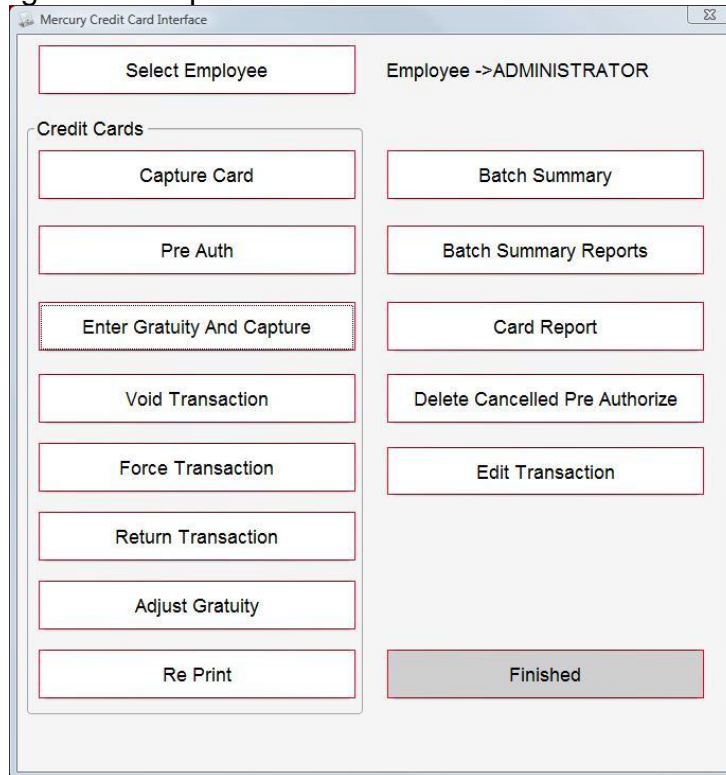

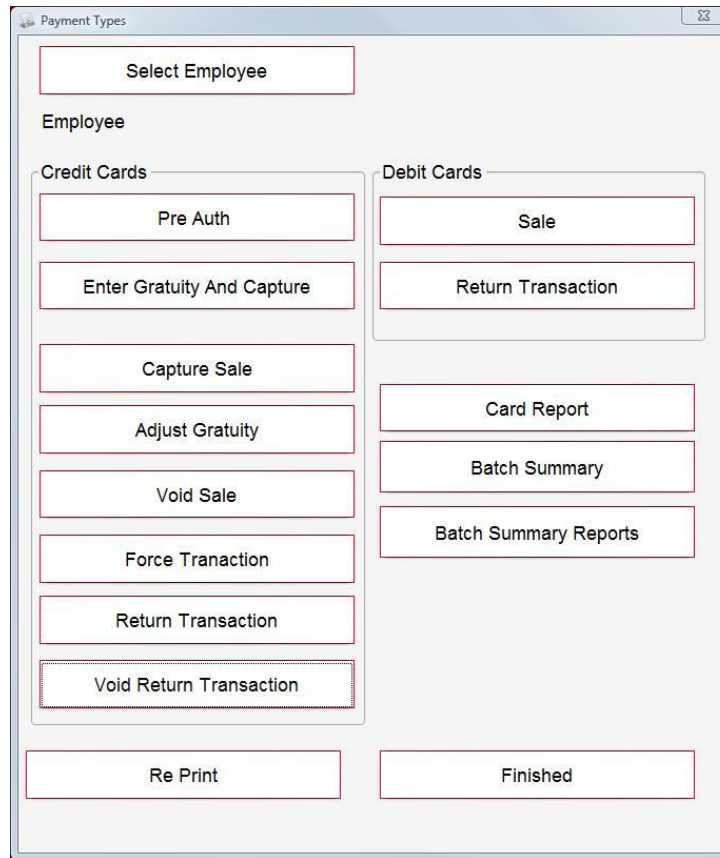Next is Global Canada using the Vx810 terminal:
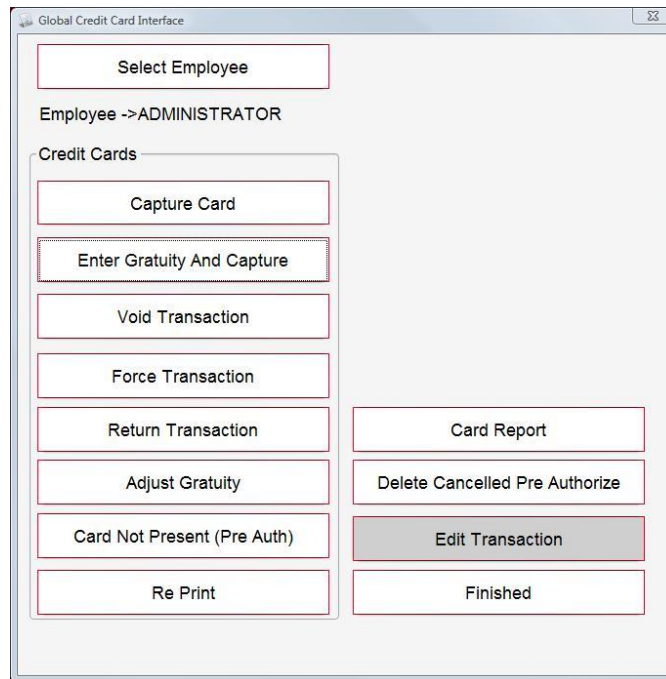
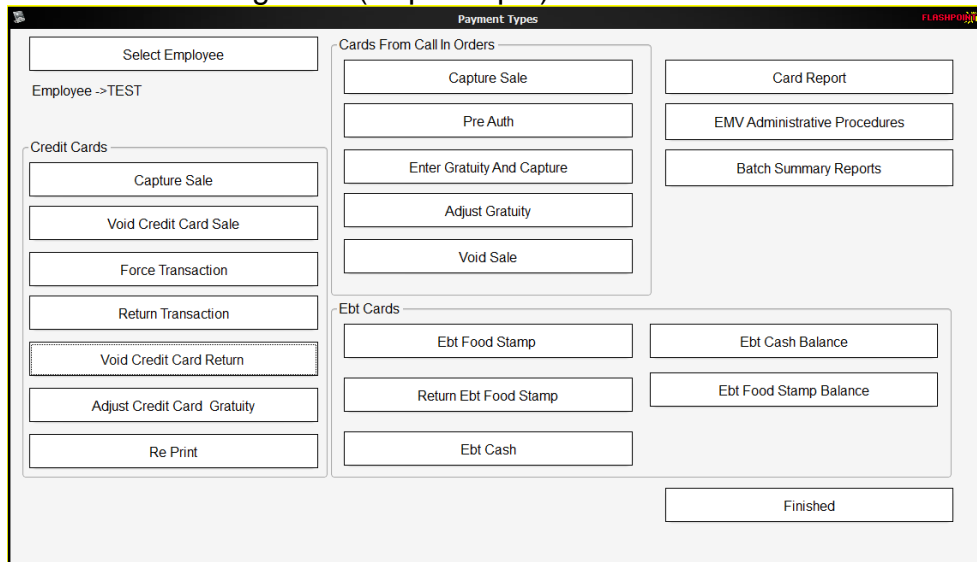Below is Mercury Payments US using the Ipad (notice that Ebt is available only with the Ipad:
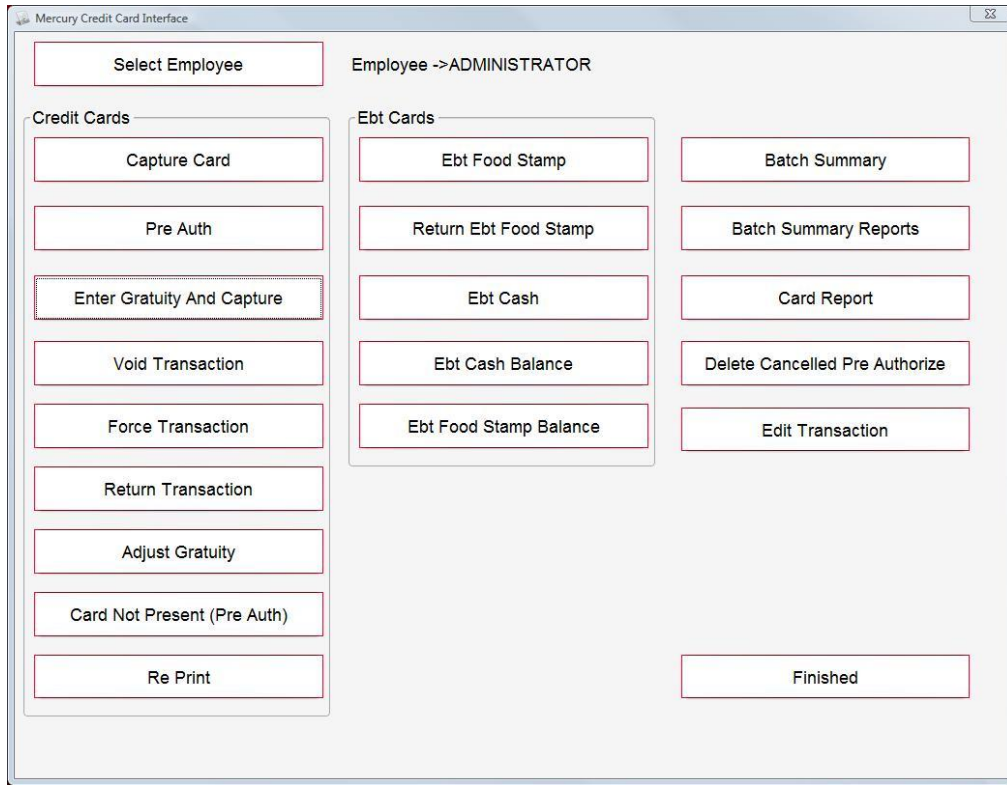
Next is Mercury using the Magnesafe swipe card reader:

Other standard interfaces in the US through NetEpay:

Payment Types

Select Employee

Employee

Credit Cards

Pre Auth

Enter Gratuity And Capture

Capture Sale

Adjust Gratuity

Void Sale

Force Tranaction

Return Transaction

Void Return Transaction

Debit Cards

Sale

Return Transaction

Card Report

Batch Summary

Batch Summary Reports

Re Print		Finished

And finally Credit card in the US using EMV (chip and pin):

Payment Types

Select Employee

Employee ->TEST

Credit Cards

Capture Sale
Void Credit Card Sale
Force Transaction
Return Transaction
Void Credit Card Return
Adjust Credit Card Gratuity
Re Print

Cards From Call In Orders

Capture Sale
Pre Auth
Enter Gratuity And Capture
Adjust Gratuity
Void Sale

Ebt Cards

Ebt Food Stamp	Ebt Cash Balance
Return Ebt Food Stamp	Ebt Food Stamp Balance
Ebt Cash	

Card Report
EMV Administrative Procedures
Batch Summary Reports

Finished

The only difference (besides the available functions) when running cards is you either will be swiping the card through a Pin Pad terminal or through a regular card swipe device.

If you are taking credit cards in Canada using two copies of NetEpay (one for hand entered one for Pin Pads) you will have to enter all cards that will be from the Pin Pad under the "Credit Cards" section and all

the hand entered (on screen) cards from the "Cards from Call in Orders" section. The only main difference is that with The Credit Card section, you will HAVE to enter all cards on the Pin Pads and with the Call In section cards are entered on the screen (Debit transactions cannot be entered in the Call In section).

When entering, editing or voiding a credit card, you must first select the employee that you are entering the transaction for (if you are entering the card for yourself, this step is not necessary, as the system defaults to the person logged in). Once you click the [**Select Employee]** button, you can select the appropriate employee from the following screen. The currently selected employee will always be displayed beside the select employee button.
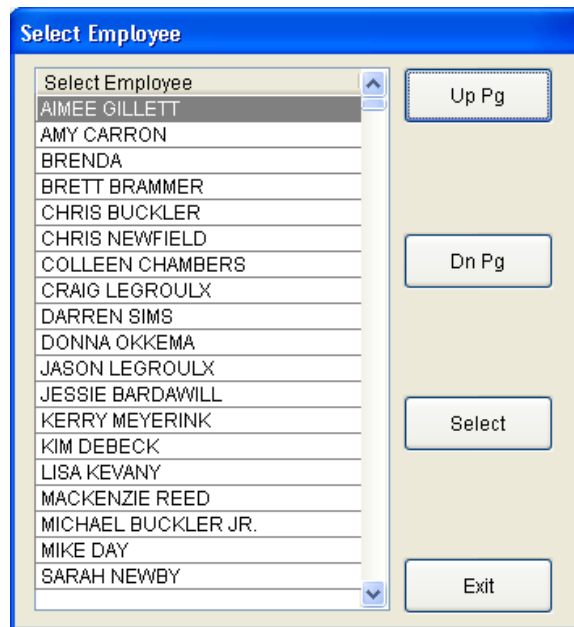
To select the employee, simply use the [**Up Pg]** and [**Dn Pg]** buttons to find the correct employee, touch the employee's name to highlight him/her and touch [**Select]**.

To authorize a credit card, select either capture card or pre-auth. If you choose to capture only, the system will capture the credit card only and, depending on how your credit cards are setup, will prompt for a tip to be entered. If you choose Card Not Present to pre-authorize the card only, the system will prompt for the card information on screen (NetEpay) or on the pin pad (Mercury), then pre-authorize the card leaving it open for the employee top add a tip at a later time (table service/bar with server banking).

Capture Card

If you choose **[Capture Card]** the following screen will appear, prompting for the card information.

Select the reference number of the check that the card is being used for as well as the seat number (if applicable). If the total purchased is not the total being charged, you may change the amount using the "**Total Purchased**" button. You may also add a tip to the card while on this screen using the "**Gratuity**" button (depending on the interface, this may not be available as tips are entered on the Pin Pad) then selecting the "Save" Button. To enter the credit card information simply have the customer swipe or insert the card. Depending on the processor (including all of Canada), the pin pad may ask the customer for a tip.

If you do not physically have the card, select the "Manual Card Entry" checkbox before selecting save and you will be prompted to hand enter the card number on the pin pad.

If when processing a card you receive an **"AP DUPE"** error that means that you have already charged the customer's card the exact same amount on an earlier transaction. If it is a valid transaction, select the capture card option again except check off the **"Force Duplicate"** option to tell the processor that it is a valid transaction. The card will then be approved.

Pre Auth

When you select Pre-Auth, you will see the same screen as above. The only difference between the pre-auth and capture is when doing a pre-auth you will have to run the **"Enter Gratuity and Capture"** function to finalize the card. Due to Chip and Pin technology in Canada, you cannot use the Pre-Auth function, Instead you will need to do a Card not Present (manual card entry) Transaction.

Enter Gratuity and Capture

If you pre-authorize a card and wish to enter a tip, you may do so using the **"Add Gratuity and Capture"** function. Once selected, the following screen will appear displaying all pre-authorized cards that have yet to be finalized.
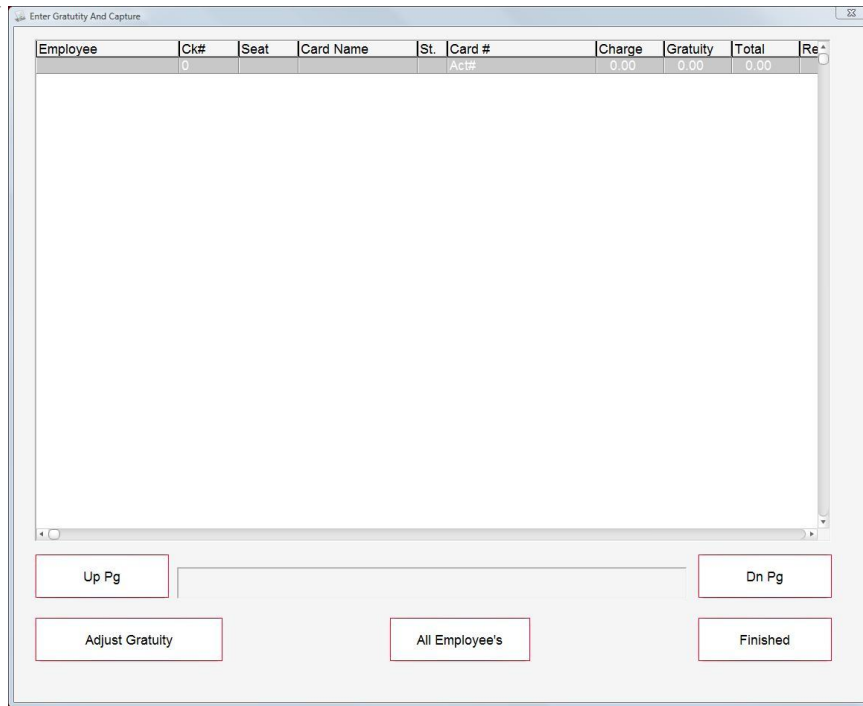
To add gratuity, select the card to add the gratuity to then the "**Select**" button. If the correct card is from another employee, you can select "**All Employees**" to view the cards for everyone. Once the card is selected the following screen will appear, prompting for the gratuity. NOTE: All pre-authorized cards must be finalized in order to close the batch at the end of the day, whether the card has a tip or not. If a pre-authorized card does not have a tip, select the card and touch the save button with no tip.
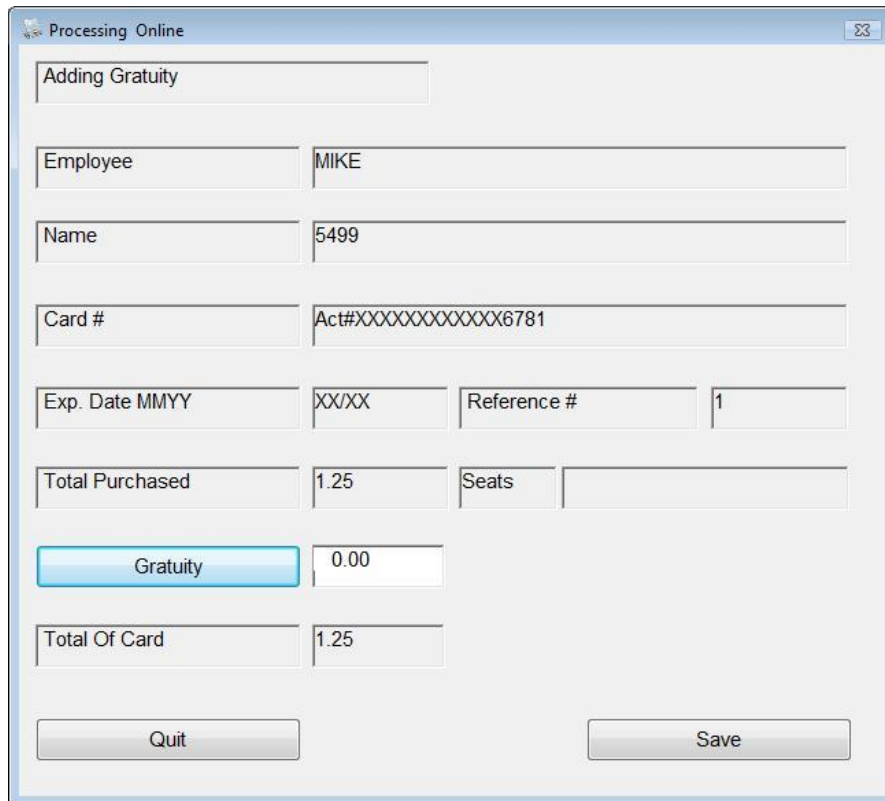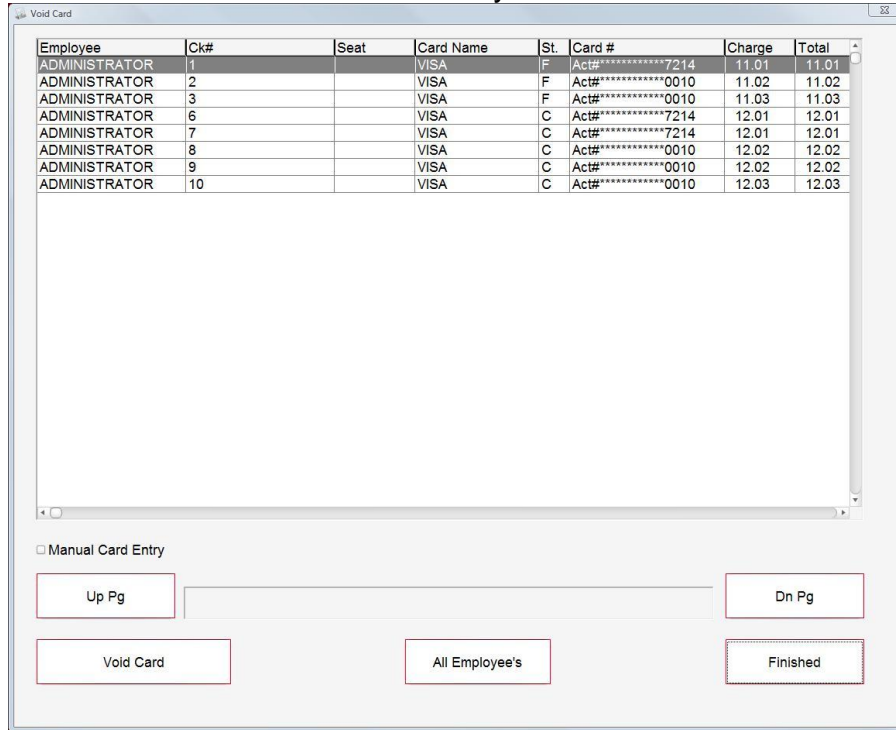
Enter the gratuity amount, select "Process Card". The system will capture the card, and the card will no longer be listed in the add gratuity section.

Void Transaction

If a card was captured in error, or the customer wishes his/her money back, you can void a card using the "**Void Transaction**" button. Once selected the following screen will appear including all the transactions captured for the day. **NOTE**: If a transaction is pre-authorized, this is not necessary; simply select the "**Delete Cancelled Pre-Auth**" button at the end of the day

Employee	Ck#	Seat	Card Name	St.	Card #	Charge	Total
ADMINISTRATOR	1		VISA	F	Act#***********7214	11.01	11.01
ADMINISTRATOR	2		VISA	F	Act#***********0010	11.02	11.02
ADMINISTRATOR	3		VISA	F	Act#***********0010	11.03	11.03
ADMINISTRATOR	6		VISA	C	Act#***********7214	12.01	12.01
ADMINISTRATOR	7		VISA	C	Act#***********7214	12.01	12.01
ADMINISTRATOR	8		VISA	C	Act#***********0010	12.02	12.02
ADMINISTRATOR	9		VISA	C	Act#***********0010	12.02	12.02
ADMINISTRATOR	10		VISA	C	Act#***********0010	12.03	12.03

☐ Manual Card Entry

Up Pg		Dn Pg
Void Card	All Employee's	Finished

Touch the card that you wish to void, then the "**Select**" button. If not using the Canadian interface the following screen will be displayed.

After verifying that the information is correct, touch "**Yes**" to void the transaction. If the information is incorrect, select "**No**" then select the proper transaction from the previous screen.

If using Credit cards in Canada, you will not see the above screen. Instead you will be prompted to swipe the card on the Pin Pad. You may also check off the "Manual Card Entry" option before selecting the void button allowing you to hand enter the card number on the pin pad. Because of EMV technology with E2E encryption, the card must be voided on the pin pad and the card number will have to be entered again.

Return Transaction

If you wish to enter a credit on a customer's credit card, you may do so by selecting the "Return Transaction", swiping the customer's credit card, and then entering the amount that you will be adding to the customer's card.

Void Return

If a return was done incorrectly, you will need to void that return. Voiding a return is done in the same manner as voiding a transaction as described earlier in this document.

Adjust Gratuity

If you entered an incorrect gratuity amount on a charge card, you can change the amount using the **"Adjust Gratuity"** Button. If you are using Mercury Payments, the system will simply adjust the original gratuity amount for you. If you are not using Mercury Payments as a processor the system will void the original transaction and re-enter the new transaction based on the totals you enter. **NOTE: If you are not using Mercury Payments as a processor and use this function the card will be put through with a higher discount rate. This is due to the fact that track two information is being stored or put through the second time. If the customer is still available you should void the original card and re-enter the card by re-swiping the card.**

Force Transaction

If you have authorized any credit cards over the phone instead of through Flashpoint, you may enter the

cards through without re-verifying. To do this, select the "**Force Transaction**" button, enter the customer's credit card information, enter the total purchased and enter the verification number that the processor gave you over the phone.

Debit Transactions (US Only)

Debit Cards may also be put through (if setup) in the same method as credit cards. With EMV Debit is treated the same as a credit card, therefore there is only one button (enter card) for both. In the US, when not using EMV, you will have to select a different button for debit cards (Debit transaction) then when entering a credit card.

Re-Print

If you require a new copy of a card receipt, you can re-print the receipt using this function. Once selected, a list of all of your cards entered for the day will be displayed. To re-print a transaction simply highlight the appropriate transaction and select the print button.

Card Not Present

A card not present transaction is a pre-auth that is hand entered. In Canada, due to Chip and Pin technology, this is the only way you can hand enter a charge card. Once "Card not Present" is selected you will need to enter the card in the same manner as entering a pre-auth, except you need to hand enter the card info. Because a card not present transaction is a pre-auth, you will need to run the enter gratuity and capture function to finalize the card.

EBT Cash

Ebt (Electronic Benefits Transfer) are considered just a debit card. Instead of receiving a monthly check and food stamps, the customer receives a debit card which money is added to every month. The customer can then purchase any items he/she wishes or (because many do not have bank accounts) receive cash back with the card. When running an Ebt transaction, follow the same procedures as running a Debit card. The only main difference is that the customer can ask for cash back from their card or request a balance on their account. Because the Ebt transaction is considered just like cash, there is no need to return a transaction, instead simply return the cash value of the transaction to the customer.

EBT Food Stamps

Ebt food stamps are certificates given to customers to purchase items. Only certain items are available for purchase using the food stamps and some are taxable and some are not. When you select the check number that you are entering the Food Stamp transaction on the system will scan the order and add the totals for all items that have been *flagged* as available with food stamp (set in menu setup) and remove the taxes from the order for items that have been set to food stamp tax exempt. The customer will then be prompted to add the certificate number on the Ipad and the amount will be verified. The customer can also check their balance on the food stamp.

Unlike EBT, if the customer wishes to return an item, you will need to run the "Return Ebt Food Stamp" function to put the value of the transaction back into the customer's account.

Edit Transaction

If a card is changed at the processor for some reason (deleted, voided or finalized), you will need to change the status of the card locally for the batch summary to sync properly with the processor. To do this select the Edit Transaction option and change the status of the card in question.

Credit Card Interface Reports

The **"Batch Summary"** displays all the credit card totals that have been put through for the day. If at any time the Network and Local totals do not match, there is a problem with one or more of the cards. If this happens you should call the credit card processor or run the Web Reports to fix the problem before closing the batch.

Batch Summary

Merchant ID	494901		
Batch No	5923		

	Network	Local	Variance
Batch Item Count	5	0	5
Net Batch Total	12.04	0	12.04
Credit Purchase Count	5	0	5
Credit Purchase Amount	12.04	0	12.04
Credit Return Count	0	0	0
Credit Return Amount	0.00	0	0.00
Debit Purchase Count	0	0	0
Debit Purchase Amount	0.00	0	0.00
Debit Return Count	0	0	0
Debit Return Amount	0.00	0	0.00
Open Pre Authorize Card's			0
Open Offline Card's			0

Finished

At any time, you can run the "**Batch Summary Report**" to display detailed information for all of the batch totals in the system. Once selected, the following report will be displayed.

Batch Summary Reports

Batch For 01/06/06
Merchant Id 494901 Batch No 3784

	Network	Local	Variance
Batch Item Count	17	14	3
Net Batch Total	86.15	80.59	5.56
Credit Purchase Count	13	12	1
Credit Purchase Amount	86.40	80.84	5.56
Credit Return Count	1	1	0
Credit Return Amount	5.00	5.00	0.00
Debit Purchase Count	2	2	0
Debit Purchase Amount	9.75	9.75	0.00
Debit Return Count	1	1	0
Debit Return Amount	5.00	5.00	0.00

Transaction Detail	Amount	Gratuity	Total
Card Type VISA Act# ************6781 Card Name	5.00	0.00	5.00
Check #602 Seat #0 Ref# 0002 Type Credit Employee Name TRIM-P.O.S. TEST			
Date 01/03/06 Time 16:17 Auth Code 000051			
Card Type VISA Act# ************6781 Card Name	5.00	0.00	5.00
Check #602 Seat #0 Ref# 0003 Type Credit Employee Name TRIM-P.O.S. TEST			
Date 01/03/06 Time 16:20 Auth Code 000051			
Card Type M/C Act# ************6781 Card Name	8.50	0.00	8.50
Check #603 Seat #0 Ref# 0004 Type Void Employee Name TRIM-P.O.S. TEST			

UpPg	-Day	+Day	Select Day	Print	Dn Pg

Friday January 6 2006   Finished

The report displays the batch totals along with detailed card information for the batch. To view totals for a different day, use the "**- Day**", "**+ Day**", or "**Select Day**" buttons to display the correct day to view.

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Card Report

The Card report displays all credit cards that have been put through for the day along with the gratuity and tip discount. All credit card data is masked on the report.

Delete Cancelled Pre Authorize

At the end of the day, if there are any pre-authorized cards that were cancelled (customer no longer wanted to charge to credit card) the system will not close. To close out the system all pre-authorized cards must be finalized or deleted. After finalizing all good cards, select "**Delete Cancelled Pre-Auth**" to delete the remainder of the cards that were pre-authorized but not charged to. CAUTION: Be sure that all valid pre-authorized cards have been finalized before selecting this option, as they will also be deleted if not.

EMV Key Change

All EMV transactions are encrypted at the pin pad and only encrypted information is sent back and forth from Flashpoint to the Pin Pad. If you receive an encryption error when processing a card, run this function and the encryption key will re-sync between Flashpoint and the Pin Pad.

EMV Administrative Functions

The EMV administrative functions are used to diagnose problems with the EMV Pin Pad. Only go into this function if instructed to by support personnel. The only two functions available for normal use are Batch summary reports and editing transactions (see earlier instructions for using these features).

Running Batch Report when using Multiple Stations with EMV Cards

The **"Batch Summary"** displays all the credit card totals that have been put through for the day on this station only. The only difference between running the batch summary reports in the US and Canada is due to the Pin Pad Encryption, you must run the batch summary report on every station to receive that stations totals. Once you run the report it will be displayed along with the other stations you ran the report on. When closing the day's sales, Flashpoint will automatically run the batch summary report on every station with a terminal Id before going to the closing sales screen. The station closing the day's sales will display all the stations batch totals and add them up for you allowing you to match the totals from Flashpoint with the totals that come from the processor.

Using the Pay at the Table Card Interface

This section will explain how to use the Pay at the Table interface. When entering a card on the Pay at the Table device, you will be prompted for an Id and a password. The ID will be the same ID used to get into Flashpoint; The Password is a 4 digit password that is setup specifically for the interface under "Employee Setup-> Charge Cards-> Mercury Pay at Table Password". Before entering a card, if the pin pad is displaying "CommServer" and "Anywhere", select "Anywhere". If you are on the correct screen you should see 4 options; Purchase, Split Purchase, List Check and Gift. **NOTE: If using the SRM in Quebec, the PAT device will only display the totals of checks that have been printed not closed. If you add an item to an order and do not re-print, the system will not see the proper total on the PAT device. Once the card is added to the table, you can close the table. Also you will not have the option to combine seats or print one seat only if using the Pay at the Table with the SRM.**

Entering a Credit Card Sale

Putting a card through for an entire Table using the Table Number (Purchase)

To put through a card for an entire table, using the table number, complete the following steps (when using the table number, you do not have the option to put through a card for one seat):

- Once the table is closed, select the **"Purchase"** option,
- Enter your server Id then **"Next"** or **"Ok"**,
- Enter your 4 digit PAT Password then **"Next"** or **"Ok"**,
- Enter the table number that the card is to be applied to, then **"Next"** or **"Ok"**,
- If the correct table is displayed, touch **"slct"**. If the wrong totals are on the screen select the **"Next"** button on the right hand side of the screen until the correct table is displayed, then **"Slct"**,
- The pin pad will display the total of the check, select **"Yes"** to Proceed,
- Press **"OK"** and hand the terminal to the customer,
- The customer will then be prompted to verify a tip amount the total of the check and to insert their card.
- Once the transaction is complete the customer will return the unit to you,
- Press **"Ok"** and the receipt will print and the transaction will be complete.

Putting through a card for a Table/Seat or Bar Tab using the check number (Purchase)

To put through a card for a table or seat, using the check number, complete the following steps (if using the check number you can enter the card for one seat or the entire table):

- Once the table is closed, select the **"Purchase"** option,
- Enter your server Id then **"Next"** or **"Ok"**,
- Enter your 4 digit PAT Password then **"Next"** or **"Ok",**
- Select the **"Check Nmbr"** option,
- Enter the check number that the card is to be applied to, then **"Next"** or **"Ok"**,
- If the correct seat is displayed, touch **"slct"**. If the wrong seat is on the screen select the **"Next"** button on the right hand side of the screen until the correct seat is displayed, then **"Slct"** (Seat 99 is the entire table),
- The pin pad will display the total of the check, select **"Yes"** to Proceed,
- Press **"OK"** and hand the terminal to the customer,

- The customer will then be prompted to verify a tip amount the total of the check and to insert their card.
- Once the transaction is complete the customer will return the unit to you,
- Press **"Ok"** and the receipt will print and the transaction will be complete.

Putting a card through for a portion of the value of the check (Split Purchase)

To put through a card for a portion of the table using the check number, complete the following steps (if using the check number you can enter the card for one seat or the entire table):

- Once the table is closed, select the **"Split Purchase"** option,
- Enter your server Id then **"Next"** or **"Ok"**,
- Enter your 4 digit PAT Password then **"Next"** or **"Ok",**
- Select the **"Check Nmbr"** option,
- Enter the check number that the card is to be applied to, then **"Next"** or **"Ok"**,
- If the correct seat is displayed, touch **"slct"**. If the wrong seat is on the screen select the **"Next"** button on the right hand side of the screen until the correct seat is displayed, then **"Slct"** (Seat 99 is the entire table),
- The pin pad will display the total of the check, select **"Yes"** to Proceed,
- Press **"OK"** and hand the terminal to the customer,
- The customer will then be prompted to verify the amount they want to put on the card, a tip amount the total of the check and to insert their card.
- Once the transaction is complete the customer will return the unit to you,
- Press **"Ok"** and the receipt will print and the pin pad will show the remaining balance. You can then press **"Ok"** on the balance and return the unit to the customer to add another card or cancel to mark the balance as being paid by cash.

Displaying a list of closed tables

At anytime you can view a list of checks that you have closed for a particular table using the "List Check" option. To use the feature, complete the following:

- Select the **"List Check"** option,
- Enter your server Id then **"Next"** or **"Ok"**,
- Enter your 4 digit PAT Password then **"Next"** or **"Ok",**
- Enter the **"Table #"**,
- The pin pad will display a list of checks closed for that table. You can scroll through the checks using the **"Next"** button on the bottom of the screen.
- If you want to add a card to one of the checks listed, select the blue oval beside the Check number/Amount,
- Press **"OK"** and hand the terminal to the customer,
- The customer will then be prompted to verify a tip amount the total of the check and to insert their card.
- Once the transaction is complete the customer will return the unit to you,
- Press **"Ok"** and the receipt will print and the transaction will be complete.

Key Exchange

The first time you use the Pay at the Table device as well as from time to time when the encryption becomes out of sync, you may have to complete a Key Exchange. A key exchange syncs the encryption at the pin pad with the encryption at the POS (Exchanging the encryption key between the two). To complete a key exchange, complete the following:

- Select **"Admin"**
- Enter your Administrative Id then **"Next"** or **"Ok"**,
- Select **"Next"** to get to the second admin screen
- Select **"Key Exchange"**,
- The pin pad will return to the main screen when the key exchange is complete

Completing a Refund or Void

From time to time, you may have to complete a Refund or a Void. A refund is simply a card put through for a negative value. You will have to refund the transaction at the POS before completing the refund on the pin pad. A void reverses a card transaction that occurred on the same day.

To complete a refund, complete the following:

- Select **"Admin"**
- Enter your Administrative Id then **"Next"** or **"Ok"**,
- Select **"Refund"**
- Enter the employee Id that the refund will be for then **"Next"** or **"OK"**,
- Enter the employees 4 digit PAT Password then **"Next"** or **"Ok"**,
- Enter the check number that the card is to be applied to, then **"Next"** or **"Ok"**,
- The pin pad will display the total of the check, select **"Next"** to Proceed,
- Press **"OK"** and hand the terminal to the customer,
- The customer will then be prompted to verify a tip amount the total of the check and to insert their card.
- Once the transaction is complete the customer will return the unit to you,
- Press **"Ok"** and the receipt will print and the transaction will be complete.

To void a transaction, complete the following (any type of transaction can be voided including refunds):
- Select **"Admin"**
- Enter your Administrative Id then **"Next"** or **"Ok"**,
- Select **"Void"**
- If you have the original slip that you are voiding select **"Ref #"** and enter the reference number from the credit card slip.
- If you do not have the slip, select the **"Acct #"** option and enter the last 4 digits of the customer's card.
- Enter the check number that the card is to be applied to, then **"Next"** or **"Ok"**,
- The pin pad will display the total of the check, select **"Next"** to Proceed,
- Press **"OK"** and hand the terminal to the customer,
- The customer will then be prompted with the total of the check and to insert their card.

- Once the transaction is complete the customer will return the unit to you,
- Press **"Ok"** and the receipt will print and the transaction will be complete.

Entering a previously authorized card (over the phone) "Force"

If at some point you had to call and get a phone authorization for a card, you should still enter it into the system. To do so you will need to complete a Force Purchase. To force a card, complete the following:

- Select **"Admin"**
- Enter your Administrative Id then **"Next"** or **"Ok"**,
- Select **"Force Purch"**
- Enter the employee Id that the refund will be for then **"Next"** or **"OK"**,
- Enter the employees 4 digit PAT Password then **"Next"** or **"Ok"**,
- Enter the Table number that the card is to and select the correct check .or. select the **"Check Nmbr"** option and enter the reference number the card is to be applied to, then **"Next"** or **"Ok"**,
- The pin pad will display the total of the check, select **"Next"** to Proceed,
- Press **"OK"** and hand the terminal to the customer,
- The customer will then be prompted to verify a tip amount the total of the check and to insert their card.
- The customer will be prompted to return the device to you. Do not have them remove their card; it must stay in for the next step.
- enter the Approval code given from the phone operator
- Once the transaction is complete remove the card,
- Press **"Ok"** and the receipt will print and the transaction will be complete.

Closing the batch on the Pin Pad

When you have finished closing the day at the POS, you will also be required to close the batch at the Pin Pad. Closing the batch clears out all of the credit card sales from the pin pad and puts them into your bank account. To close the batch, complete the following:

- Select **"Admin"**
- Enter your Administrative Id then **"Next"** or **"Ok"**,
- Select **"Settlement"**
- The Pin Pad will display the total purchases and refunds. Verify the totals are correct and select **"Ok"**
- The batch totals will print and the totals will be cleared

Taking Gift Cards with Pay at the Table (Using Mercury)

If you are using Gift cards with the pay at the table, you can check balances, void, reload and redeem the gift cards right from the Pin Pad.

Issuing a new Gift Card

To issue a new gift card, complete the following steps:

- From the Pin Pad, select **"Gift"**,
- Select **"Issue"**,

- Enter your server Id then **"Next"** or **"Ok"**,
- Enter your 4 digit PAT Password then **"Next"** or **"Ok",**
- Swipe the new gift card
- Select one of the pre-defined amounts or select "Other" and enter an amount
- The system will print a slip with the balance of the card

Checking the Balance of a Gift Card

To check the balance of a gift card for the customer, complete the following steps:

- From the Pin Pad, select **"Gift"**,
- Select **"Balance"**,
- Enter your server Id then **"Next"** or **"Ok"**,
- Enter your 4 digit PAT Password then **"Next"** or **"Ok",**
- Swipe the gift card
- The system will print a slip with the balance of the card

Adding money to a Gift Card (Reload)

To add to a gift card, complete the following steps:

- From the Pin Pad, select **"Gift"**,
- Select **"Reload"**,
- Enter your server Id then **"Next"** or **"Ok"**,
- Enter your 4 digit PAT Password then **"Next"** or **"Ok",**
- Swipe the new gift card
- Select one of the pre-defined amounts or select **"Other"** and enter an amount
- The system will print a slip with the balance of the card

Redeeming a Gift Card

To redeem a gift card, simply treat the gift card as a credit card and follow the procedure explained above. The only difference is the customer will not require a pin. If the card does not have enough for the value of the check

Pay at the Table Functions within Flashpoint

Although most functions for the Pay at the Table interface are completed on the Pin Pad, there are still a few functions that must be completed within Flashpoint. The following are the available functions that can be done from the PAT Credit Card function in Flashpoint (you will be required to add the "PAT Credit Card" option to the system screen or the main menu. See the system setup or menu setup manuals for more information.)

Card Report

The Card report displays all credit cards put through for the day along with the gratuity and tip discount. All credit card data is masked on the report.

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Batch Summary

The **"Batch Summary"** displays totals for all the credit cards put through the Pay at the Table interface for the day. If at any time the Network and Local totals do not match, there is a problem with one or more of the cards. If this happens, you should call the credit card processor.
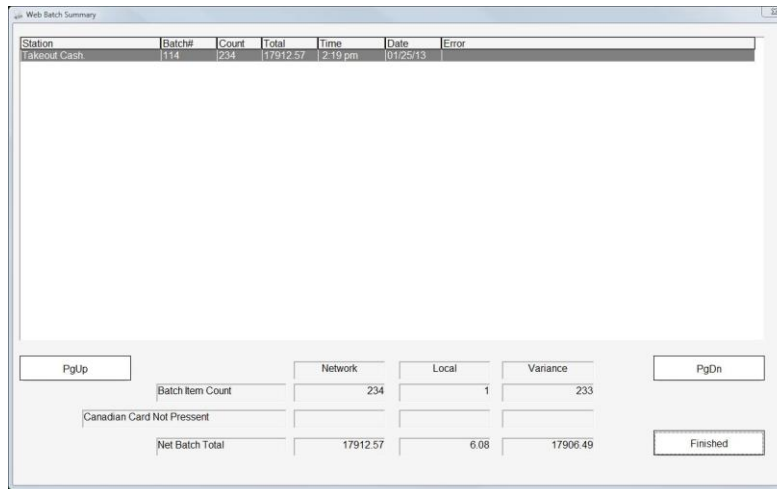
At any time, you can run the "**Batch Summary Report**" to display detailed information for all of the closed batches in the system. Once selected, the following report will display:
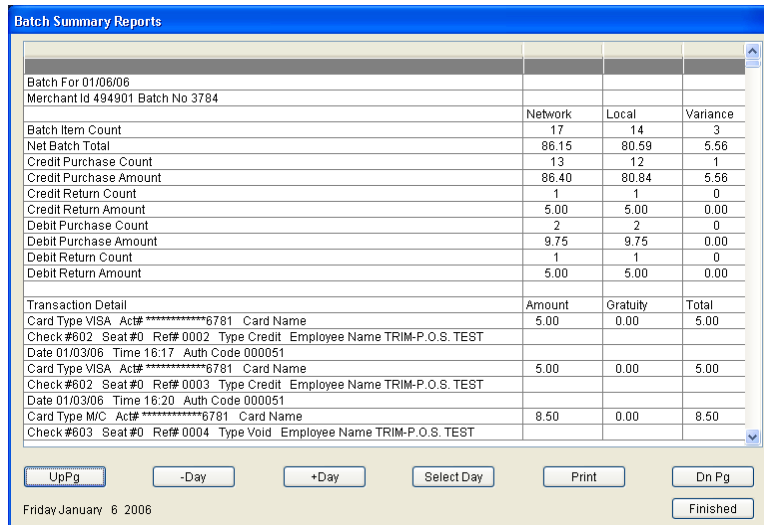
The report displays the batch totals along with detailed card information for the batch. To view totals for a different day, use the "**- Day**", "**+ Day**", or "**Select Day**" buttons to display the correct day to view.

Edit Transaction

If a card is changed at the processor for some reason (deleted, voided or finalized), you will need to change the status of the card locally for the batch summary to sync properly with the processor. To do this select the Edit Transaction option and change the status of the card in question. Note: <mark>DO NOT USE THIS FEATURE UNLESS PROMPTED TO BY A TRIM-P.O.S. LEVEL 3 SUPPORT ENGINEER.</mark>

Using the Credit Card Interface with the Web Interface

If the customer paid using a credit card on the web, when you close the check the system will ask if you wish to apply the card to the order (select yes unless the customer decides to pay by cash when picking up the order). The system will also print two copies of the charge card receipt with the check (one copy for the customer and one for your records). All charge cards come from the web as pre-auths and you must finalize the cards before you close the day's sales.

To finalize the credit card, follow these steps:

First, select the "Web Credit Card button" from the system screen, the main order entry screen or the other functions screen. The following screen will display:

If you are entering a charge card for a check closed by another employee, select the **"Select Employee"** button and pick the employee from the on screen list. Once you have selected the employee or if you are entering the card for you, select the **"Enter Gratuity and Capture"** button to display the following:

The screen will include all non-captured cards for the employee selected, if the card you are entering the gratuity for is not listed, you can select the **"All Employees"** button and all cards will be displayed. If the card is still not displayed, it may have been captured already. To finalize the card, highlight the appropriate card from the list and select the **"Adjust Gratuity"** button. **Note: You must select this option for all cards prior to closing the day's sales no matter if a gratuity is added or not.**

Select the **"Gratuity"** button and enter the gratuity using the on screen keypad. Once entered, or if the employee did not receive a gratuity, select the **"Save"** button and the system will finalize (capture) the card. Once saved, the transaction will be complete and you will return to the web credit card main screen.

If at any time you enter an incorrect gratuity amount, you can change the gratuity by selecting the **"Adjust Gratuity"** button and following the above procedures. Only cards that have been finalized (captured) will display in the adjust gratuity window.

Voiding/Reversing a Credit Card Transaction

If you have captured a card in error, or the customer wishes his/her money back, you can void a card using the "**Void Sale**" or the **"Reverse Transaction"** button. The difference between a void and a reversal is that a void will put the money back on the customer's card when the batch is closed. A reverse will completely reverse the transaction, returning the money immediately. You also cannot void a pre-auth, you will need to capture the card and then void it.

Although we suggest that you reverse a transaction as much as possible, some acquiring banks do not allow reversals. You should always try doing a reversal first and if you receive an error, void the card. Once you select void or reverse transaction, the following screen will appear including all the transactions captured for the day (as mentioned before, if you use reverse all cards captured or pre-auths will display, with void only cards captured will display):

Touch the card that you wish to void, then the "**Reverse/Void**" button.

After verifying that the information is correct, touch "**Save**" to void the transaction. If the information is incorrect, select "**Quit**" then select the proper transaction from the previous screen.

Pre-Auth a Credit Card

If you require to pre-auth a card using the web card interface, you may do so using this function. You would normally use this if there was a problem with a card entered through the web (which you reversed/voided) and now need to re-enter it. Once you select the **"Pre Auth"** button, the system will display the following:

Select the reference number of the check that the card is being used for, as well as the seat number (if applicable). If the total purchased is not the total being charged, you may change the amount using the "**Total Purchased**" button. Once you enter the information, select the **"Save"** button to display the following:

If you have the card on hand, simply swipe the card to enter the card information. If you do not physically have the card, select **"Manually Enter Card Number"** and hand enter the card number in the space provided. Once the card number is entered press submit and the card will be authorized. Remember that all pre-auths must be captured before closing the day's sales.

Re-Print a Credit Card Receipt

If you require a new copy of a card receipt, you can re-print the receipt using this function. Once selected, a list of all of your cards entered for the day (using the web) will be displayed. To re-print a transaction simply highlight the appropriate transaction and select the print button.

Card Report

The Card report displays all credit cards put through for the day along with the gratuity and tip discount. All credit card data is masked on the report.

The **"Batch Summary"** displays totals for all the credit cards put through the web for the day (will not include cards from the local credit card interface). If at any time the Network and Local totals do not match, there is a problem with one or more of the cards. If this happens, you should call the credit card processor or run the Web Reports to fix the problem before closing the batch.

At any time, you can run the "**Batch Summary Report**" to display detailed information for all of the closed batches in the system. Once selected, the following report will display:

The report displays the batch totals along with detailed card information for the batch. To view totals for a different day, use the "**- Day**", "**+ Day**", or "**Select Day**" buttons to display the correct day to view.

Using the Credit Card Interface with the MOTO Interface (Call in Orders)

The Moto interface can be used to pre-authorize call in / bar orders as well as a Pay at the Table option in the US. If pre-authorizing a card on service, the system will prompt for the method of payment when you service an order. If the customer wishes to pay with cash, the order will be serviced and you will be done. If the customer wishes to pay by card the system will prompt you for the relevant information. If approved the system will inform you and will return you to the server is screen. If declined, you will be allowed to re-select the method of payment or cancel the order. The credit card slip will not print until the customers check is closed, at which time the employee that closed the check will need to verify the card numbers have the customer sign the slip and finalize the card. **Note: If you do not finalize a card, it will not be added to your batch and you will not receive your money. Ensure that all cards have been finalized before closing out the days sales.**

To finalize the credit card, follow these steps:

First, select the "Moto Card button" from the system screen, the main order entry screen or the other functions screen. The following screen will display:

If you are entering a charge card for a check closed by another employee, select the **"Select Employee"** button and pick the employee from the on screen list. Once you have selected the employee or if you are entering the card for you, select the **"Enter Gratuity and Capture"** button to display the following:

The screen will include all non-captured cards for the employee selected, if the card you are entering the gratuity for is not listed, you can select the **"All Employees"** button and all cards will be displayed. If the card is still not displayed, it may have been captured already. To finalize the card, highlight the appropriate card from the list and select the **"Adjust Gratuity"** button. **Note: You must select this option for all cards prior to closing the day's sales no matter if a gratuity is added or not.**

Select the **"Gratuity"** button and enter the gratuity using the on screen keypad. Once entered, or if the employee did not receive a gratuity, select the **"Save"** button and the system will finalize (capture) the card. Once saved, the transaction will be complete and you will return to the Moto credit card main screen.

If at any time you enter an incorrect gratuity amount, you can change the gratuity by selecting the **"Adjust Gratuity"** button and following the above procedures. Only cards that have been finalized (captured) will display in the adjust gratuity window.
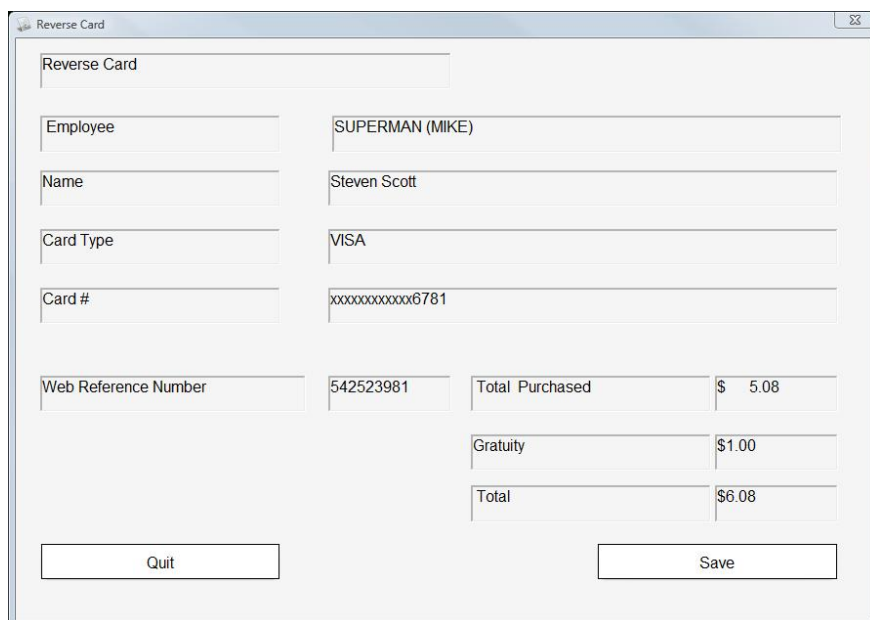
Voiding/Reversing a Credit Card Transaction

If you have captured a card in error, or the customer wishes his/her money back, you can void a card using the "**Void Sale**" or the **"Reverse Transaction"** button. The difference between a void and a reversal is that a void will put the money back on the customer's card when the batch is closed. A reverse will completely reverse the transaction, returning the money immediately. You also cannot void a pre-auth, you will need to capture the card and then void it.

Although we suggest that you reverse a transaction as much as possible, some acquiring banks do not allow reversals. You should always try doing a reversal first and if you receive an error, void the card. Once you select void or reverse transaction, the following screen will appear including all the transactions captured for the day (as mentioned before, if you use reverse all cards captured or pre-auths will display, with void only cards captured will display):

Touch the card that you wish to void, then the "**Reverse/Void**" button.

After verifying that the information is correct, touch "**Save**" to void the transaction. If the information is incorrect, select "**Quit**" then select the proper transaction from the previous screen.

Pre-Auth a Credit Card

If you require to pre-auth a card using the Moto card interface, you may do so using this function. Once you select the **"Pre Auth"** button, the system will display the following:

Select the reference number of the check that the card is being used for, as well as the seat number (if applicable). If the total purchased is not the total being charged, you may change the amount using the "**Total Purchased**" button.   Once you enter the information, select the **"Save"** button to display the following:

If you have the card on hand, simply swipe the card to enter the card information. If you do not physically have the card, select **"Manually Enter Card Number"** and hand enter the card number in the space provided. Once the card number is entered press submit and the card will be authorized. **Remember that all pre-auths must be captured before closing the day's sales**.

Re-Print a Credit Card Receipt

If you require a new copy of a card receipt, you can re-print the receipt using this function. Once selected, a list of all of your cards entered for the day (using the web) will be displayed. To re-print a transaction simply highlight the appropriate transaction and select the print button.

Card Report

The Card report displays all credit cards put through for the day along with the gratuity and tip discount. All credit card data is masked on the report.

Credit Card Interface Reports

The **"Batch Summary"** displays totals for all the credit cards put through the web for the day (will not include cards from the local credit card interface). If at any time the Network and Local totals do not match, there is a problem with one or more of the cards. If this happens, you should call the credit card processor or run the Web Reports to fix the problem before closing the batch.

At any time, you can run the "**Batch Summary Report**" to display detailed information for all of the closed batches in the system. Once selected, the following report will display:

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The report displays the batch totals along with detailed card information for the batch. To view totals for a different day, use the "**- Day**", "**+ Day**", or "**Select Day**" buttons to display the correct day to view.