C Openedge Credit Card Transactions

2016 - Winter Edition

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Overview

In this guide, we will discuss the proper rules and procedures to follow when settling a ticket to Credit Card and Openedge is the Credit Card Processor.

Use Case(s)

When the Server came back to return the Member's Credit Card to them after settling the ticket, the Member indicated they were so sorry, but had meant to use a different card, and wanted to know if it was possible to change the card that was already swiped. The Server made the change. Also, at a nearby table, a server inadvertently dumped an entire tray of food on a Member that had just paid via credit card and was leaving. The Manager refunded the Member their entire order. At the close of the shift, all Servers reviewed their ticket screens to ensure all tickets had been closed out, and all gratuities were added and/or finalized.

Getting Started: Important Rules to Remember

- Once a card has been swiped, (either at opening or closing of the ticket), the user must follow the proper delete procedures. **Do not** reopen the ticket and try to delete the items and the ticket; this will put the ticket in an **Invalid state**. If the Invalid Ticket message is received, please contact Clubessential Office Support. They will need to fix the ticket and the club accountant will have to contact Openedge to delete the Credit Card charge.
- 2) It is important to close all Credit Card tickets before the end of day. Once the Credit Cards have been processed, users cannot add tips or make changes to the ticket through POS. The user will need to log into the Openedge websites to edit the transaction and go through member charges to correct the member account.
- 3) If the club is setup to allow additional gratuity, there will be a 2nd step to finalize the Credit Card process. It is important to remember that ALL Credit Card tickets must complete the 2nd step even if they do not have any additional gratuity to add to the ticket. Accounting will not be able to post the batch if the 2nd step of closing a ticket to Credit Card was not completed. Please refer to the Closing Ticket to Credit Card section of this manual for more information.

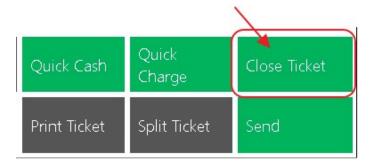
- Credit Card batch close out procedures are communicated by Openedge to the club; if the club does not know what time daily credit cards are processed please contact Openedge.
- 5) Openedge should have given the club a Login (Username & Password) and trained someone at the club to view & edit transactions from the Openedge website. If the club does not know their Username and Password, they will need to contact Openedge.

POS Common Tasks

Closing Ticket to Credit Card

To close a ticket to Credit Card within the POS,

1) In the POS ordering screen, select **Close Ticket**.



2) Select the Credit Card Settlement Type.

Tender				Payments	
		_	\$0.00	Type Amount Del All	lete
7	8	9	Clear Tender	Dek	ete ected
4	5	6	Gratuity		
1	2	3	Not Exempt	- Ticket Totals	1
0	.00	\$10		Sub Total: 1 Tax:	\$10.00 \$0.86
\$20	\$50	\$100	Open Drawer	Gratuity: Service Charge:	\$0.00 \$2.00
Settlements				Total: 5 Paid:	\$12.86
Member Cha	arge Credi	t Card 🛛 🏄	\mathbf{r}	Balance Due: 1	
8		t Book (\$0.00)		Print Pay Receipt Print Receipt Print and D	lone
	Room	n Charge	I	Cancel 🛞 OK	\oslash

3) Select **OK** (or **Print and Done**).

Tender				Payments
			\$0.00	Type Amount Delete All
7	8	9	Clear Tender	Delete Selected
4	5	6	Gratuity	
1	2	3	Not 🚽	Ticket Totals
-	<u> </u>	J	Exempt	Cover Count: 1
0	.00	\$10		Sub Total: \$10.00
•	.00	\$10		Tax: \$0.86
\$20	\$50	\$100	Open	Gratuity: \$0.00
420	\$50	\$100	Drawer	Service Charge: \$2.00
Settlements				Total: \$12.86
				Paid: \$0.00
Member Cha	arge Credi	t Card		Balance Due: \$12.86
				Navigation
🛛 😂 🖌	ash Credi	t Book (\$0.00)		
				Print Pay Receipt Print Receipt Print and Done
	Room	Charge		
			•	Cancel 🛞 OK

4) Swipe the Card or, select Continue to enter the card manually.

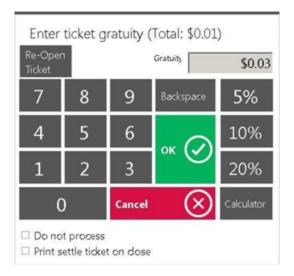
Additional Gratuity Prompt

This is the 2nd step to processing a Credit Card Transaction and where the user enters any additional gratuity. Remember, **ALL** Credit Card tickets must complete this step even if they do not have any additional gratuity to add to the ticket.

1) After the card is swiped or entered manually, the ticket is sent back to the main **Tickets** Tab highlighted in yellow.

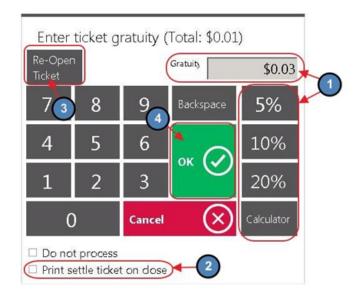
Tickets	La	bor	Specials	Contest	Messages		Events			
ID	Full Nam	e			Area	Table	,	Ticket #		Server Name
001	OHI/GIRL	SCOUTS OF			Cafe	[Quick	(Ticket]	2661	15	Administrative User
001	GUEST, AG	COUNT			Lounge	[Quick	c Ticket]	2790	04	Administrative User
001	GUEST, AG	COUNT			Lounge	[Quick	(Ticket]	2790	05	Administrative User
157-3	Ackerman	n, Angus			Lounge	[Quicl	(Ticket]	3227	79	Administrative User
707-2	Takas, Abl	by			Lounge	[Quick	(Ticket]	3228	30	Administrative User
157-3	Ackerman	n, Angus			Lounge	[Quick	(Ticket]	3259	97	Administrative User
157-3	Ackerman	n, Angus			Lounge	[Quick	(Ticket]	3259	98	Administrative User
001	GUEST, AG	COUNT			Lounge	[Quick	(Ticket]	3280	06	Administrative User
001	Michael C	hristensen	1		Cafe	Table	2 - 1	3746	52	Administrative User

2) Select the ticket in yellow and the Gratuity Prompt will populate.



3) Enter the additional Gratuity amount (the user can either use the percentages or manually key in the amount).

- To print a receipt showing the added tip, select **Print settle ticket on close**.
- The ticket can also be reopened from this screen if necessary.
- Click **OK** to complete the transaction.
- If there is no tip to add, simply select **OK** to specify a \$0 tip.



Notes:

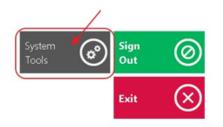
- There should be no tickets listed in the main Tickets tab (Yellow or not) before printing End of Shift report.
- If the 2nd step was not complete and accounting is unable to post the daily batch click <u>here</u> for instructions to fix.

Delete/Refund Credit Card Tickets

The most important thing to remember when attempting to delete a Credit Card ticket is that the ticket must be **completely closed first** (both settled and 2nd step) before it can be deleted through **System Tools** in POS. **This is the only way the deleted transaction will communicate back to Openedge.**

Note: Credit Card tickets that are deleted within 24 hours will be automatically refunded. If Credit Card tickets are deleted after 24 hours, they will need to be refunded through Openedge.

1) Select **System Tools** on the bottom left corner of the main POS screen.



2) Navigate to the **Closed Tickets** tab.

System Tools Locked Tickets Search	Open Tickets	losed Tickets It	ems Reports	Utilities	About
Area	Member	Server	Member #	Ticket Table	e
Cafe	GUEST, ACCOUNT	Cafe Worker	001	37400 [Quic	k Ticket]

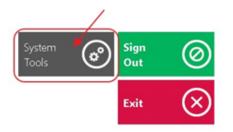
 Highlight the ticket and select Delete. The user will be prompted, Are you sure you want to delete ticket #XXXXX? Click Yes.

Locked Tickets	Open Tickets	Closed Tickets	Items R	eports Utilitie	s Abos	at .		
Search								
Area	Member	Server	Member	# Ticket	Table	Date Opened	Date Closed ~	
Cate			e User 001				10/20/2016 9:38 AM	
Cafe	Roberts, Billy	Cafe Worker	979	37437	[Quick Ticket]	10/19/2016 7:35 PM	10/19/2016 7:35 PM	\odot
Cafe	Berlin, Keith	Cafe Worker			oet]	10/19/2016 7:10 PM	10/19/2016 7:10 PM	
Cafe	GUEST, ACCOUNT	Cafe Worker	Delete ticket		oet]	10/19/2016 6:47 PM	10/19/2016 6:47 PM	
Cafe	Herzog, Thomas	Cafe Worker	Are you sure you wan	t to delete ticket #974621	oet]	10/19/2016 6:44 PM	10/19/2016 6:45 PM	۲
Cafe	GUEST, ACCOUNT	Cafe Worker			oet]	10/19/2016 6:43 PM	10/19/2016 6:43 PM	9
Cafe	Rickert, Jeremy	Cafe Worker		0	oet]	10/19/2016 6:39 PM	10/19/2016 6:40 PM	
Cafe	Bansil, Lee	Cafe Worker		9	oet]	10/19/2016 6:12 PM	10/19/2016 6:12 PM	
Cafe	Udstuen, Gavin	Cafe Worker			oet]	10/19/2016 6:12 PM	10/19/2016 6:12 PM	۲
Cafe	Schoeny, Jeffrey	Cafe Worker		Yes 🚫 No	(X) ort	10/19/2016 6:11 PM	10/19/2016 6:11 PM	0
Cafe	Cimpello, Peter	Cafe Worker	/34	3/416	[QUICK TICKET]	10/19/2016 6:10 PM	10/19/2016 6:10 PM	
Cale	Vondran, Jim	Cafe Worker	795	37417	[Quick Ticket]	10/19/2016 6:08 PM	10/19/2016 6:09 PM	
Cafe	Eddleman, Mike	Cafe Worker	976	37416	[Quick Ticket]	10/19/2016 6:08 PM	10/19/2016 6:08 PM	\odot
Cafe	Laird, C🔽	Cafe Worker	737	37415	[Quick Ticket]	10/19/2016 6:07 PM	10/19/2016 6:07 PM	\sim
Refresh Re-Ope	in Delete	Print Settle Print Pa	y			101000000000000		

Reopen a Credit Card Ticket

If a user needs to reopen a credit card ticket to make corrections, remember the user cannot use the Credit Card Settlement Button again. To reclose a Credit Card ticket you must close to the **Tab** Settlement Type; this will send the adjustment amount to Openedge with the difference between the first close and the second close. It is also important to remember that you can only reopen a ticket on the same day as the transaction.

1) Select **System Tools** on the bottom left corner of the main POS screen.



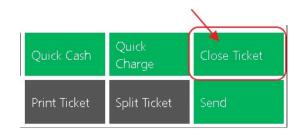
2) Navigate to the **Closed Tickets** tab.

System Tools Locked Tickets	Open Tickets	osed Tickets	Items	Reports	Utilities	About
Area	Member	Server		Member #	Ticket	Table
Cafe	GUEST, ACCOUNT	Cafe Worker		001	37400	[Quick Ticket]

3) Highlight the ticket and select **Re-Open.** The user will be warned that **all Payments made on this ticket will be erased.** Click **Yes**.

Locked Tickets	Open Tickets	Closed Tickets It	ems Reports	Utilities	About		
Search			0				
Area	Member	Server	Member #	Ticket T	able	Date Opened	Date Closed -
Cafe.			lser 001				10/20/2016 9:42 AM
Cafe	Roberts, Billy	Cafe Worker	979	37437 [Quick Ticket]	10/19/2016 7:35 PM	10/19/2016 7:35 PM
Tafe	Berlin, Keith	Cafe Worker			oet]	10/19/2016 7:10 PM	10/19/2016 7:10 PM
Cafe	GUEST, ACCOUNT	Cafe Worker	Re-Open ticket conf		ort]	10/19/2016 6:47 PM	10/19/2016 6:47 PM
Tafe	Herzog, Thomas	Cafe Worker	In order to re-open a Scket all pa erased and this Scket will be rem	oved from it's current batch	After cet]	10/19/2016 6:44 PM	10/19/2016 6:45 PM
Tafe	GUEST, ACCOUNT	Cafe Worker	you re-open a ticket the changes you want to re-open this ticket?	cannot be revenied. Are yo	oet]	10/19/2016 6:43 PM	10/19/2016 6:43 PM
afe	Rickert, Jeremy	Cafe Worker		0	oet]	10/19/2016 6:39 PM	10/19/2016 6:40 PM
Tafe	Bansil, Lee	Cafe Worker			oet]	10/19/2016 6:12 PM	10/19/2016 6:12 PM
afe	Udstuen, Gavin	Cafe Worker			oet]	10/19/2016 6:12 PM	10/19/2016 6:12 PM
Cafe	Schoeny, Jeffrey	Cafe Worker	Ye	No 10	🗵 🗠	10/19/2016 6:11 PM	10/19/2016 6:11 PM
afe	Cimpello, Peter	Cafe Worker	/ 34	0.410 P	Junck (IKROET]	10/19/2016 6:10 PM	10/19/2016 6:10 PM
afe	Vondran, Jim	Cafe Worker	795	37417 (Quick Ticket]	10/19/2016 6:08 PM	10/19/2016 6:09 PM
Cafe 🤇	Eddleman, Mike	Cafe Worker	976	37416 [0	Quick Ticket]	10/19/2016 6:08 PM	10/19/2016 6:08 PM
Cafe 🛛	Laird, Chris	Cafe Worker	737	37415 [0	Quick Ticket]	10/19/2016 6:07 PM	10/19/2016 6:07 PM
Refresh Re-Oper	n Delete	Print Settle Print Pay	744			*********	****

4) Navigate back to the main POS screen, select the reopened ticket, and make the necessary corrections. When finished, select **Close Ticket**.



5) On the settlement screen, select the **Tab** button (located on the keypad under the Exempt button). The Credit Card information is stored on the ticket so the user does not need the Credit Card to reclose the ticket. Click **OK** to re-close the ticket.

		\$0.00
8	9	Clear Tender
5	6	Gratuity
2	3	Not Exempt
.00	\$10	Tab
\$50	\$100	Open Drawer
\$50	\$100	
	5 2 .00 \$50	5 6 2 3 .00 \$10

Notes:

- The **Tab** button will only be visible when the card information is on file for the **Credit Card**, meaning the card has already been swiped.
- If the Tab button is not visible after reopening a Credit Card ticket, the Tab settlement will need to be activated for the Area the ticket was completed.
 Please refer to the <u>Activate the Tab Settlement</u> section of this document.
- **Basic rule of thumb**: if the **Tab** button is displayed then use the **Tab** settlement and not Credit Card settlement. If the Tab button is not displayed use the Credit Card settlement to swipe the card (there is no credit card information on file for the ticket).

Use the "Charge Tab" Function

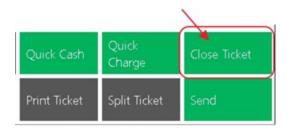
Charge Tab is used to store the Credit Card on the ticket at the time the ticket is open as opposed to swiping the card at the end when closing. Mainly used by clubs who allow nonmember visits; this allows them to capture the Credit Card information before the sale.

If the user wants to capture the Credit Card before the sale, it must be done **before any items** have been entered.

1) Select **Charge Tab**, **Swipe the Card** or select **Continue** to manually enter the card information.

Delete B	tem Add Messar	Cha Mod	nge diters	Change Qty	Change Seat	Add Ticket	Delete Ticket	Upcharge Item	Change Table	Charge Tab	Save Pref	Quick Cash	Quick Charge	Close Ticket
Exit	⊗ Discou 3em	t Com	np Item	Multi Off	Change Course	Get By Bin	Reorder Bern	Cover Count	Change Member	Coupon Lookup		Print Ticket	Split Ticket	Send

2) Proceed to enter the order as normal. When finished, select **Close Ticket**.



 Select the Tab Button (located on the keypad under the Exempt button). The Credit Card information is stored on the ticket so you do not need to swipe the card again. Click OK to complete the transaction.



Notes:

- If you have not swiped the card, the **Tab** button will not appear.
- It is important to remember when using the Charge Tab the settlement cannot be changed once the card has been swiped. If the guest decides to pay with a different method a new ticket will need to be open. The ticket that has been swiped with the Credit Card will need to be deleted following the steps to <u>Delete</u> <u>a Credit Card Ticket</u>.

Common Troubleshooting Tasks

Tab Payment Button Not Visible in POS

The **Tab** payment button must be activated for each Area the club sees fit (Not applicable to Retail Areas) in Office CMA. In most cases, this is already set up during implementation. If the **Tab** button is not visible after reopening a ticket closed to Credit Card, follow the below steps.

1) Navigate to System across the top toolbar and select Areas.



2) Select the Area that needs the Tab Settlement button activated.

Home										
New	Edit Delete	Export	Refresh	Clear Filter	Active	() Help	Search:		 All Words Any Words 	
D 🔺 💌	Name	•	Quick Ticket	Settle T	icket ID 🔄	Active	Layout ID	Screen Group File	- R	POS 🔄
1	Admin					0		Admin		
28	Banquet Membe	er				0				
29	Banquet Non-M	ember				0				
33	Bar 🔺		1		2	9 Din Rr	n Layout	Main FnB with P	ics by	
26	Beverage Cart					3 Dining	Rm Easter	Beverages		
27	Carlie's F&B Are	ea .	1		2	9 Din Rm	Layout	Main FnB with Pics	; by Carlie	
24	Carlie's Retail A	rea				3 BR Pas	ta Buffet	Golf		1
4	Club Functions	Ballroom			2	9 Ballroo	m Easter	Easter Buffet Nev	u	

 On the Area Information section, navigate to the Tab Payment option and select Credit Card.

iome Bar X					
🔒 🔛 🔛 😔	0				
🕫 👘 Area Setup	Area Information				
Area Groups	Name: Bar		POS Type: 0	FnB C Retail	
Meal Periods Settlement Overrides	Description: Bar Area	A	Department:	Food	0
POS Options		~	Area Category:	Food & Bev	0
Buttons Integration Settings	Screen Group: Main FnB with Pics by Carlie		Manager:	(None)	Q. #
v B Member Details	Active Layout: Din Rm Layout		Display Order:	9	
Member Filter	Tab Payment: Credit Card - F68	-	Schedule Override	s(1)	
Quick Ticket	X				

4) Lastly, be sure to select **Save & Close**.



Unprocessed CC Trx Error When Posting

If a batch will not post because of an error stating '**You have invoices with Unprocessed Credit Card Transactions'** (See below screenshot) this means that a ticket has not been fully processed, and is still waiting for the 2nd step of the Credit Card transaction to be completed.

POS Batch Posting Summary					ATC:	~					
Batch Control Number: Previ	ew Only			6	SIL	3					
Activity Date: 8/21/2016				6	35	7					
				PREVIE	W ONL	<i>,</i>					
G/L Posting											
Account								0	Debit	0	redit
gg 1190-00 Operating								\$	47.99	1	00.00
g 1210-00 A/R Members								\$3	62.64		00.00
pp 2370-00 SC Sales Tax P	auable								\$0.00	5	77.05
m 2372-00 SC Liquor Encir	e Tav Pau	ale.							\$0.00	- 1	14.00
g 2373 00 York County He									\$0.00		71.40
g 4400-40 Food Sales A L									08.30		37.20
								5			
#405-40 Beer Saler A La									\$0.00	-	39.20
E 4410-40 Liquor Sales A I									\$0.00		90.00
#41540 Wine Sales A L	a Cate								\$0.00	\$	15.50
#900-40 Gratuity Income	,								\$0.00	5	44.58
Posting Total							_	\$1,3	18.93	\$1,3	18.93
Ticket Details											
Employee	Ref #	Subtotal	Decourt	Svc Do/Te	Tax	Total	Member Charge	Cash	Credit Card	Credit Book	Gilt Ca
E Devido	110.0	100000	111111	0.919	1980	10.00	c.sp	0401		SPRINT:	91.04
B (001) QUEST ACCOU	162113	\$7.00	\$6.00	\$1.40	\$0.73	\$9.13	\$0.00	\$9.13	\$0.00	\$0.00	\$9.0
B [001] GUEST ACCOU		\$9.00	\$6.00	\$1.00	\$0.94	\$11.74	\$0.00	\$11.34	\$0.00	\$0.00	\$0.0
[011] GURSTACCOU		\$2.50	\$6.00	\$0.50	\$0.26	\$3.26	\$0.00	\$3.26	\$0.00	\$0.00	\$0.0
B [001] GURSTACCOU		\$2.00	\$6.00	\$0.40	\$0.21	\$2.61	\$0.00	\$0.00	\$2.61	\$0.00	\$0.0
B [001] DURISTACCOU		\$9.50	\$6.00	\$1.90	\$0.99	\$12.39	\$0.00	\$12.39	\$0.00	\$0.00	\$0.0
B [001] GUESTACCOU		\$2.00	\$6.00	\$0.40	\$0.21	\$2.61	\$0.00	\$2.61	\$0.00	\$0.00	\$0.
B [001] GURSTACCOU		\$1.95	\$6.00	\$0.39	\$0.20	\$2.54	\$0.00	\$0.00	\$2.54	\$0.00	\$0.
	162220	\$2.75	\$6.00	\$0.55	\$0.29	\$1.59	\$0.00 \$0.00	\$3.59	\$0.00	\$0.10	\$0.1
E less Joness vocon			\$6.00	\$1.00	\$0.52	\$6.52		\$6.52	\$0.00	\$0.10	\$0.
C [1010] Jack Bankey	162208	\$4.5	\$6.00	\$0.00	\$0.29	\$4.64	\$4.64	\$0.00	\$0.00	\$0.10	\$0. \$0.
C 12016 1 Robert Brezin	1622118	42.75	\$4.00	\$0.00	\$0.25	\$3.00	\$0.00	\$0.00	\$0.00	\$0.00	30.

How to find the Ticket

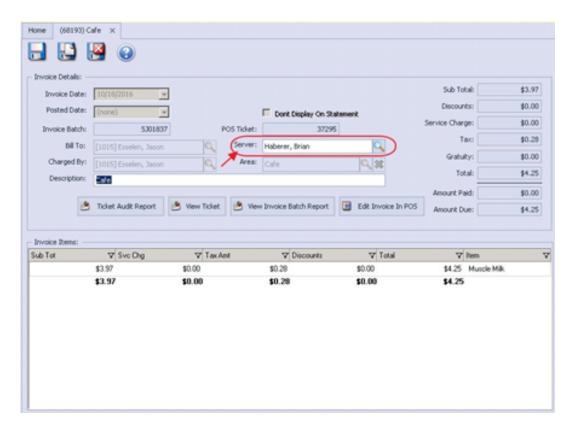
 Go to Membership, Approve Charge Batches, and then expand the batch with the error by selecting the + sign to the left of the batch. All tickets within the batch will be displayed.

9	Approve C	harge Batche	es ×						
Ho	me (68)	140) Lounge	×						
Ne	ew Edk	Delete	Export	Refresh Clear F	Rer Active	Post Batch Edit	Batch Date Refresh GL	Unpost Batch Batch	Report Help Search
Tran	nsaction Dal	te 🔻		Control Number 👻	Amount	Posted (🐑 Posted Date 🛛 👻	Batch Location 🛞 Las	t Modified Date 🛞 Invoice I
		10/20/2	016 530184	ŧ1		(\$0.01)		Food & Bev	10/20/2016
+		10/20/2	016 530184	90	:	693.34		Retail	10/20/2016
Ŧ		10/19/2	016 530183	39	1	117.33		Food & Bev	10/19/2016
Ð	~	10/19/2	016 530183	38	1	622.00		Retail	10/19/2016
Ð		10/18/20	016 \$3018	137	\$	391.36		Food & Bev	10/18/2016
	Total	Open 👻	Posted	Billed Date	Description	Member Number	Settlement Type	Member Name	Restricted ID
	\$3.25			10/18/2016	Cafe	883	Member Charge	Piehowicz, II, John	3
	\$1.40			10/18/2016	Cafe	240	Member Charge	Falter, Tom	3
	\$2.75			10/18/2016	Cafe	942	Member Charge	Santoro, John	3
	\$1.50			10/18/2016	Cafe	790	Member Charge	Kohnen, David	3
	\$1.50			10/18/2016	Cafe	804	Member Charge	Crowther, Charles	3
	\$6.00			10/18/2016	Cafe	794	Member Charge	Thomas, Daniel	3
	\$4.25			10/18/2016	Cafe	1015	Member Charge	Esselen, Jason	3
	\$4.15			10/18/2016	Cafe	754	Member Charge	Cimpello, Peter	3
	\$1.40			10/18/2016	Cafe	592	Member Charge	Hyland, David	3
	\$1.70			10/18/2016	Cafe	198	Member Charge	McClay, John	3

 Look at the Open column. (If the open Column is not there, customize the columns to add it.) Any tickets checked as Open have not been fully processed and are still in the 2nd step of the Credit Card Transaction.

Ho	me	(681	40) Lounge	×						
Ne	-	Edt	Delete	Export	Refresh Clear F	Rer Active	Post Batch Edit	Batch Date Refresh GL	Unpost Batch Batch	h Report Help Seard
Trar	rsacti	ion Dat	e .	🕫 💎 Batch (Control Number 👻	P Anount	Posted (🕐 Posted Date 🛛 👻	Batch Location 💎 La	ist Modified Date 💎 Invoice
Ŧ			10/20/	2016 530184	41		(\$0.01)		Food & Bev	10/20/2016
Ð			10/20/	2016 530184	10	1	693.34		Retail	10/20/2016
ŧ]			10/19/	2016 530183	39	1	117.33		Food & Bev	10/19/2016
Ð			10/19/	2016 530183	18	1	622.00		Retail	10/19/2016
8			10/18/2	2016 53018	37	\$	391.36		Food & Bev	10/18/2016
	Tota	1	Open	 Posted 	Billed Date	Description	Member Number	Settlement Type	Member Name	Restricted ID
	1	\$3.25			10/18/2016	Cafe	883	Member Charge	Piehowicz, II, John	3
	:	\$1.40			10/18/2016	Cafe	240	Member Charge	Falter, Tom	3
	1	\$2.75			10/18/2016	Cafe	942	Member Charge	Santoro, John	3
		\$1.50			10/18/2016	Cafe	790	Member Charge	Kohnen, David	3
	1	\$1.50			10/18/2016	Cafe	804	Member Charge	Crowther, Charles	3
	1	\$6.00		/ -	10/18/2016	Cafe	794	Member Charge	Thomas, Daniel	3
		4.25			10/18/2016	Cafe	1015	Credit Card - F&B	Esselen, Jason	3
	1	\$4.15			10/18/2016	Cafe	754	Member Charge	Cimpello, Peter	3
	1	\$1.40			10/18/2016	Cafe	592	Member Charge	Hyland, David	3
	1	\$1.70			10/18/2016	Cafe	198	Member Charge	McClay, John	3
	1	\$3.80			10/18/2016	Cafe	766	Member Charge	Valento, Jay	3
	- 1	\$1.70			10/18/2016	Cafe	673	Member Charge	Schneider, Michael	3
	1	\$1.75			10/18/2016	Cafe	720	Member Charge	Robinson, Jeff	3
	1	\$2.75			10/18/2016	Cafe	766	Member Charge	Valento, Jay	3
		\$4.20			10/18/2016	Cafe	1019	Member Charge	Elliott, Todd	3
		62.75			10/18/2016	Cale	978	Member Charge	Hesselson Aaron	1

 Double click on the ticket to see what Server has the ticket. (<u>Do Not select Edit</u> <u>Invoice in POS.)</u>



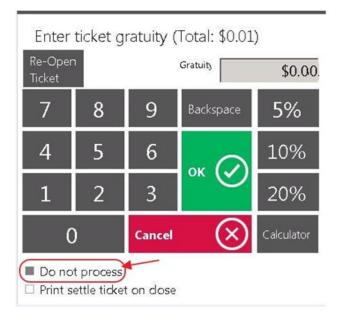
 The Server's Card Swipe ID is needed. If the Card Swipe ID is not known, please navigate to the System tab within the Server's employee profile and make a note of their Card Swipe ID.

Home Haberer, Brian X	0	
	Employee Information First: Email: habererbrian@rgmail.com Phone: (513) 225-5544 Salaried Employee	Last: Haberer
Conter Contents Content Notes	Username: 604 Password: Card Swipe ID: POS PIN: *** Payroll ID: Training Mode Account Is Locked Out	Password Security Password Expired Password Last Changed: Password To Expire: 8/11/2015 1:14 PM Pirst Login: 12/6/2015 1:57 PM Last Login: 10/18/2016 8:38 PM

- 5) Using the Server's Card Swipe ID, sign into the POS.
- 6) The ticket will be displayed in yellow. Click on the ticket to populate the additional Gratuity prompt.

	ι	abor	Specials	Contest	Messages		Events		
ID	Full Nam	ne			Area	Tabl	e	Ticket #	Server Name
001	OHI/GIRL	SCOUTS OF			Cafe	[Quid	k Ticket]	26615	Administrative User
001	GUEST, A	CCOUNT			Lounge	[Quid	k Ticket]	27904	Administrative User
001	GUEST, A	CCOUNT			Lounge	[Quid	k Ticket]	27905	Administrative User
157-3	Ackerman	nn, Angus			Lounge	[Quid	k Ticket]	32279	Administrative User
707-2	Takas, Ab	by			Lounge	[Quid	k Ticket]	32280	Administrative User
157-3	Ackerman	nn, Angus			Lounge	[Quid	k Ticket]	32597	Administrative User
157-3	Ackerman	nn, Angus			Lounge	[Quid	k Ticket]	32598	Administrative User
001	GUEST, A	CCOUNT			Lounge	[Quid	k Ticket]	32806	Administrative User
001	Michael C	hristensen	1		Cafe	Table	2 - 1	37462	Administrative User

7) Select **Do Not Process** and click **OK**. This will complete the transaction and the batch can be posted.



Notes:

• Openedge usually processes the daily credit cards by 5am in the morning; if the user is posting batches for credit card transactions after this time then **Do Not**

Process must be select on the Gratuity prompt. The only thing that will not be processed is the additional tip; the sales were already processed.

- If the ticket did have additional tip that should have been processed, the user will need to contact Openedge to edit the credit card transaction or...
- Openedge should have given the club a Login User & Password and trained someone at the club how to view & edit transactions on the Openedge website; if login credentials are not known, please contact Openedge.

Best Practices

Ensure all gratuities are added, and all tickets are closed out from the Open Tickets Screen before printing an End of Shift Report.

Utilize the Tab feature if edits to the ticket need to be made after a credit card has been swiped. Remember edits can only decrease, not increase amounts to the ticket.

Common Questions and Concerns

What if I need to add an amount to a ticket that has already been closed and credit card processed?

Generate a new ticket to add the item and charge the Member. A ticket may be reopened only to decrease the amount or void an item.

The Tab payment option does not appear after I ran a Credit Card, and need to re-close, how do I enable it?

Enable the **Tab** payment feature in Office CMA by going to **System**, **Areas**. Select the area that needs the Tab feature activated. Then, navigate to the Area Information section, **Tab Payment** option and select the correct **Credit Card** option. Save settings. Exit and re-open the POS to view update.