



# CE Payments - Card Present - Mobile POS

2019 - Summer Edition

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# Overview

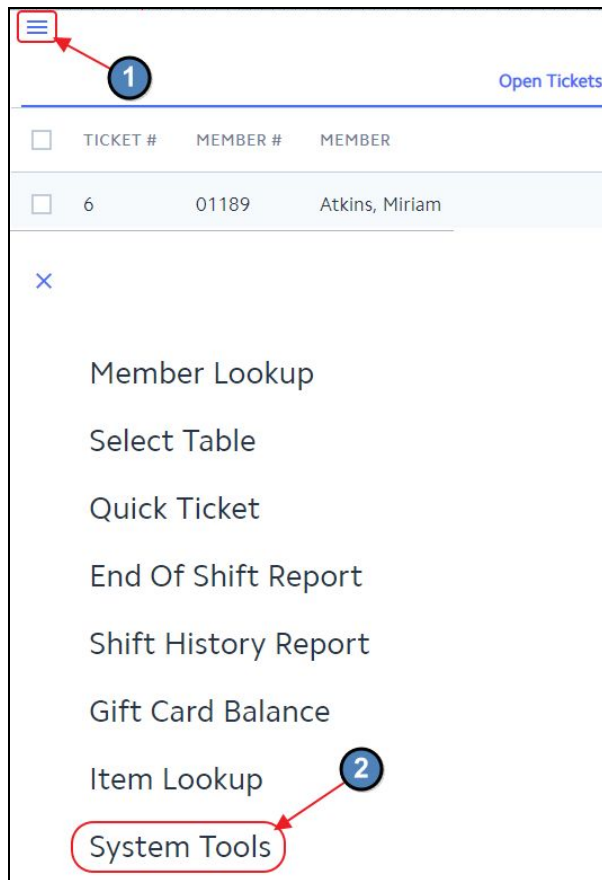
The following guide reviews how Users can set up their Mobile POS system to be able to charge Tickets in Mobile POS when the Member has a physical Credit Card present. This guide has been broken down to include instructions for both a **Set Device** and a **Roaming Tablet**.

## Set Device

After Readers are configured with CE Payments, POS Devices that will work as a **Set Device** and not roam throughout the Club will need to be configured to work with one specific reader (Often the iPP320 Reader). Please follow the instructions below:

## System Tools

Users will log in to the POS and select **System tools** from the Flyout Menu on the top left of the Main Ticket Screen.



Then a CE Payments Device selection screen will populate. For POS Devices that will only be using a single reader, use the **Lookup** feature to find the corresponding **Reader** for the Device.



Once the device is selected, click **Close** and this will save your settings.

**Please Note:** *Once a reader is selected, this will be the only reader that can be used on the device in which you just set up.*

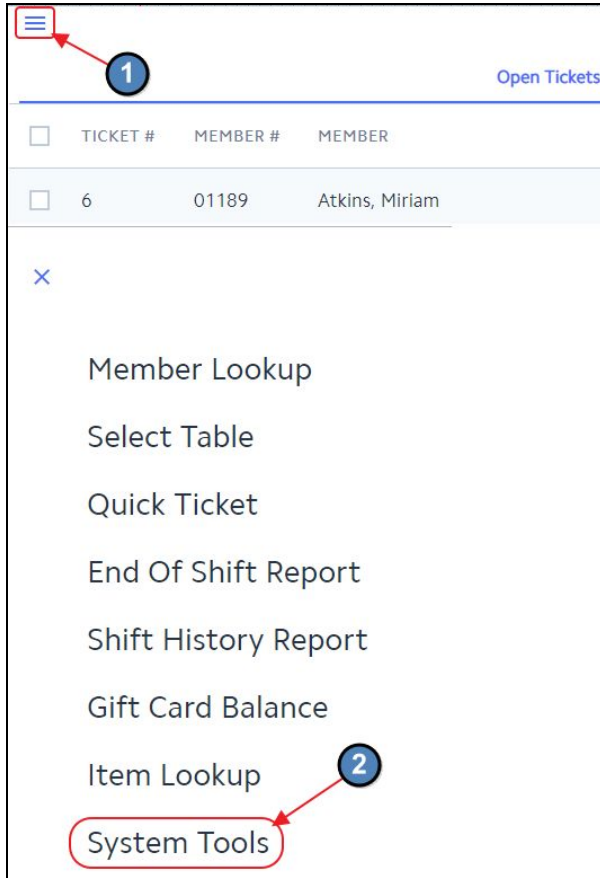
## Roaming Tablet

After Readers are configured with CE Payments, POS Devices that will work as a Roaming Tablet throughout the Club will need to be configured to prompt the user to select the Credit Card Reader closest to their proximity (Often an iSMP4 Reader). Please follow the instructions below:

**Please Note:** *It is extremely important for the club's Local IT to physically label the readers so users can easily distinguish between readers when prompted.*

## System Tools

Users will log in to the POS and select **System tools** from the Flyout Menu on the top left of the Main Ticket Screen.



Then a CE Payments Device selection screen will populate. For POS Devices that will work as a Roaming Tablet, select **Prompt for CE Payments Device**.



When enabled, this setting will prompt the user to select a credit card reader when settling a ticket.

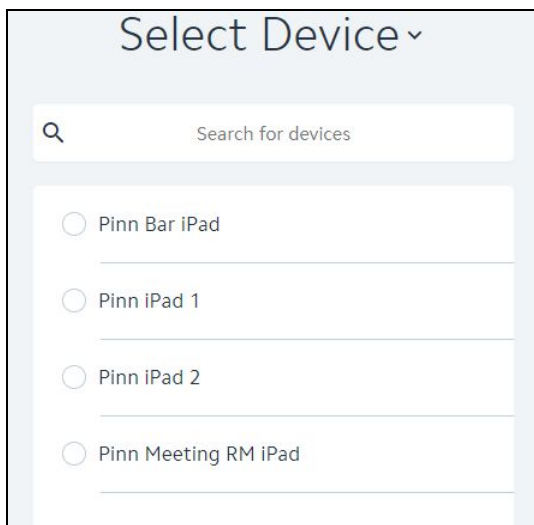
# Test Credit Card Transaction

Next step is to test a Credit Card Transaction. Please follow the instructions below.

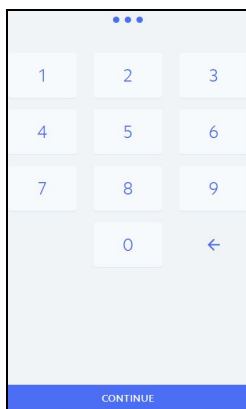
Select the Mobile POS Application to launch the Mobile POS.



Select the applicable POS Device. (Eg. Pinn Bar iPad)



Enter 100 as the Pin Code and select Continue

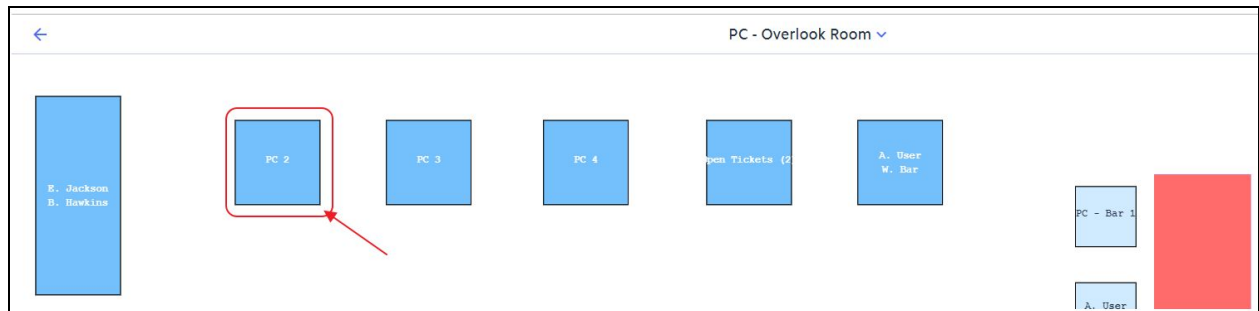


Choose **Select Table**

Open Tickets					
<input type="checkbox"/>	TICKET #	MEMBER #	MEMBER	ARFA	SERV
<input type="checkbox"/>	6	01189	Alkins, Miriam	PC - Overlook Room	A. Us
<input type="checkbox"/>	13	01779	Bennett, James	PC - Overlook Room	A. Us
<input type="checkbox"/>	14	01046	Alexander, Linda	PC - Overlook Room	A. Us
<input type="checkbox"/>	25	01426	Darfield, III, William	PC - Overlook Room	A. Us
<input type="checkbox"/>	28	01417	Darfield Jr., William	PC - Overlook Room	A. Us
<input type="checkbox"/>	40	001	ACCOUNT, GUEST	PC - Overlook Room	A. Us

SELECT TABLE
QUICK TICKET

Choose any random table.



Choose **Guest Member** to start a guest ticket.

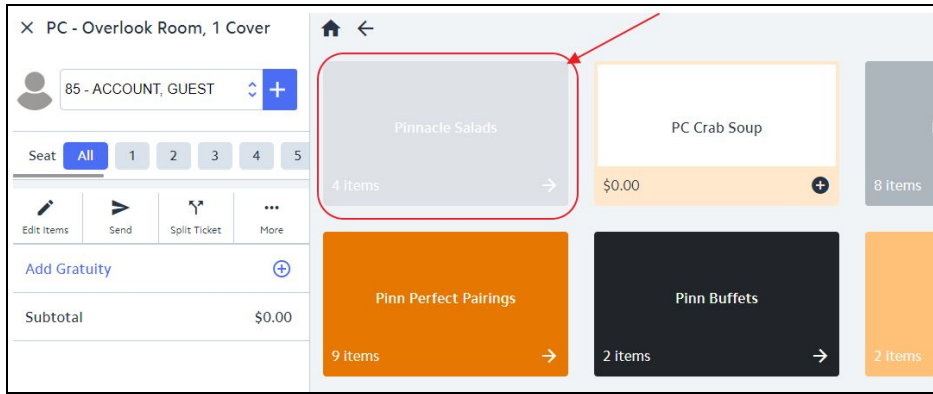
Select a Member

Guest Member

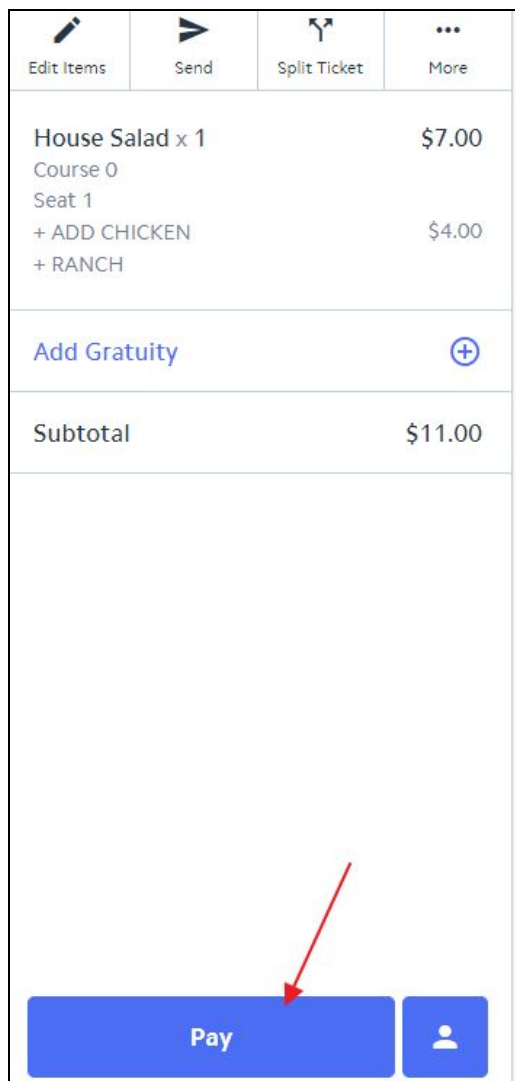
Search for a member

MEMBER NAME	MEMBER #	TYPE
Dott III, W. Franklin	01022	Resident

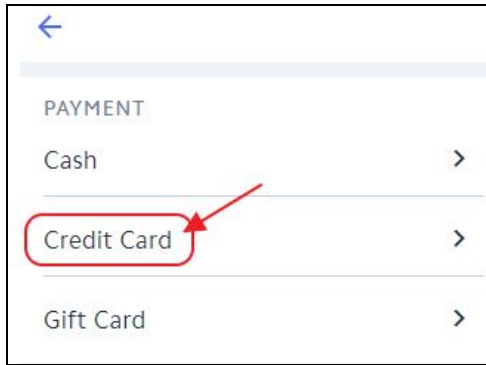
Add any random item the ticket.



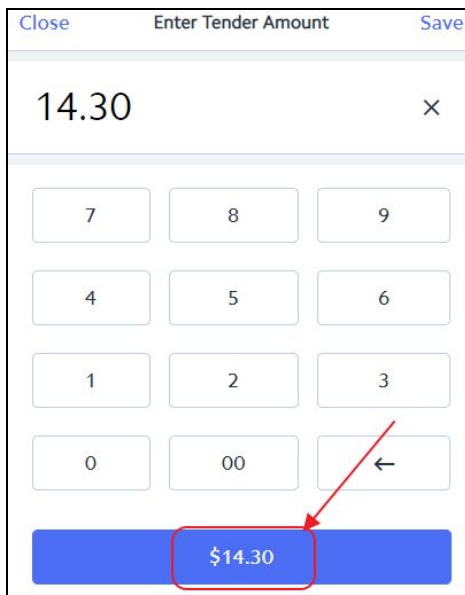
In the POS ordering screen, select **Pay**.



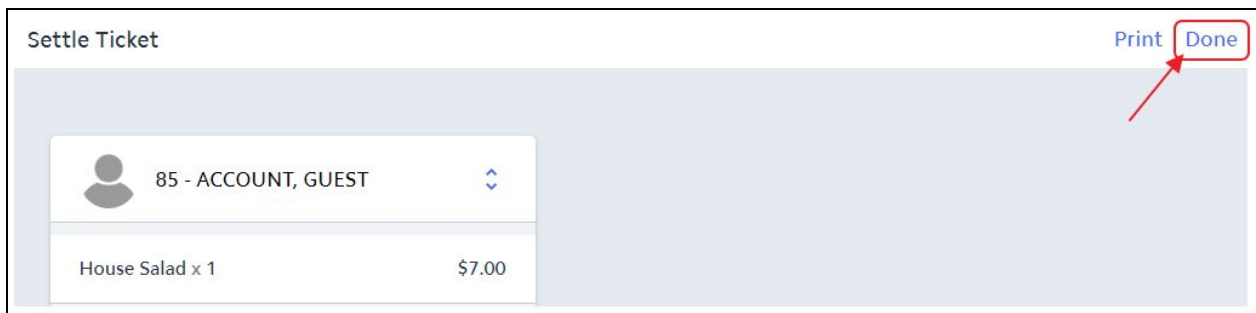
Select the **Credit Card** Settlement Type.



Choose the full amount of the Ticket.

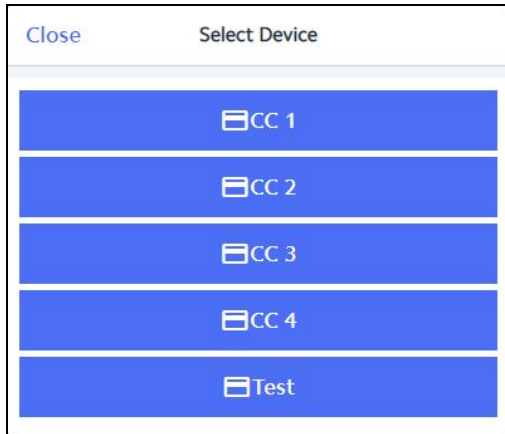


Select **Done**



If this is a **Set Device** configured to work with only one reader, you will move straight to inserting the Card. If this is a **Roaming Tablet**, select the Reader that is closest to you and then insert the card.





**Insert the Card.**



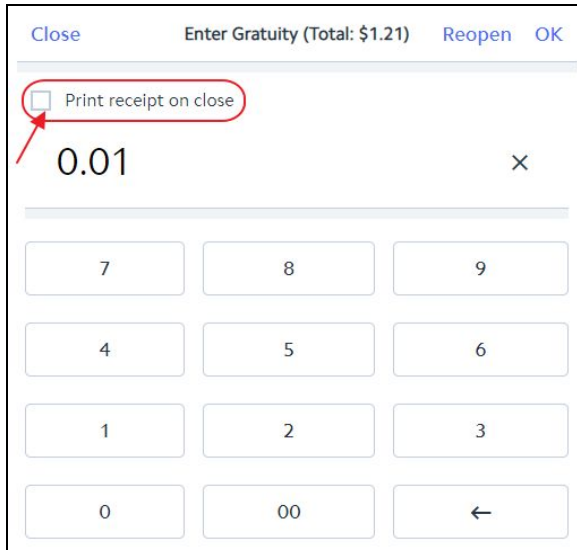
## Additional Gratuity Prompt

This is the 2<sup>nd</sup> 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

After the card is processed the ticket is sent back to the main **Open Tickets** Tab highlighted in yellow.



To print a receipt showing the added tip, select **Print receipt on close**.



The screenshot shows a mobile application interface for entering a gratuity. At the top, there are buttons for 'Close', 'Enter Gratuity (Total: \$1.21)', 'Reopen', and 'OK'. Below the title bar, there is a checkbox labeled 'Print receipt on close' which is highlighted with a red circle and a red arrow. The current tip amount is '0.01' with a close button 'x' to its right. Below the input field is a numeric keypad with buttons for digits 0-9, '00', and a back arrow.

If there is no tip to add, simply select **OK** to specify a \$0 tip.



This screenshot shows the same 'Enter Gratuity' screen as above, but with the 'OK' button at the top right highlighted with a red circle and a red arrow pointing to it. The 'Print receipt on close' checkbox is visible but not highlighted.

The ticket can also be reopened from this screen if necessary.



This screenshot shows the 'Enter Gratuity' screen with the 'Reopen' button at the top highlighted with a red circle and a red arrow pointing to it. The 'Print receipt on close' checkbox is visible but not highlighted.

**Notes:**

There should be no tickets listed in the main Tickets tab (Yellow or not) before printing End of Shift report.

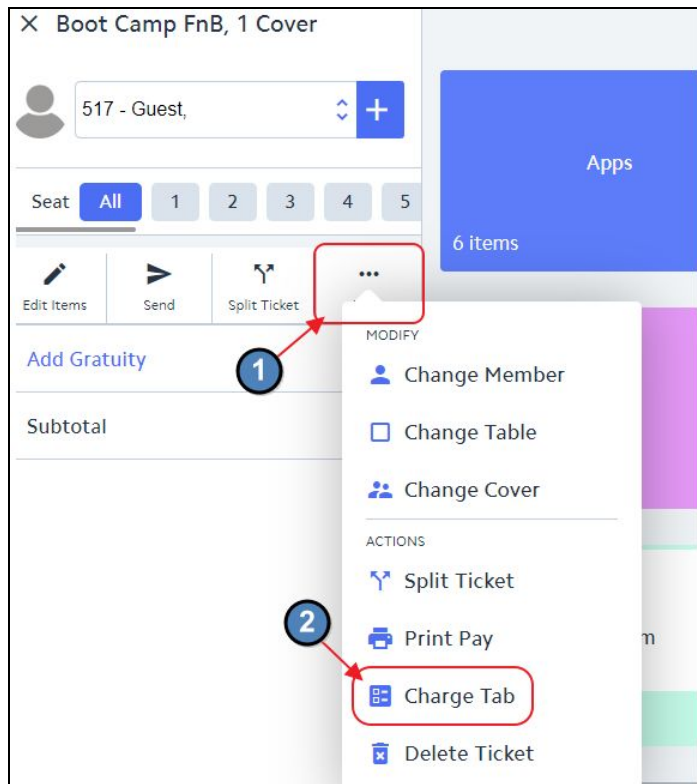
# Starting a Tab

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

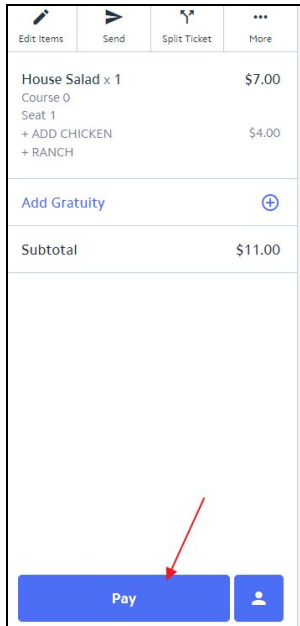
If the user wants to capture the Credit Card before the sale, it must be done **before any items have been entered**.

Select **More**, **Charge Tab**, and then **Insert the card**.

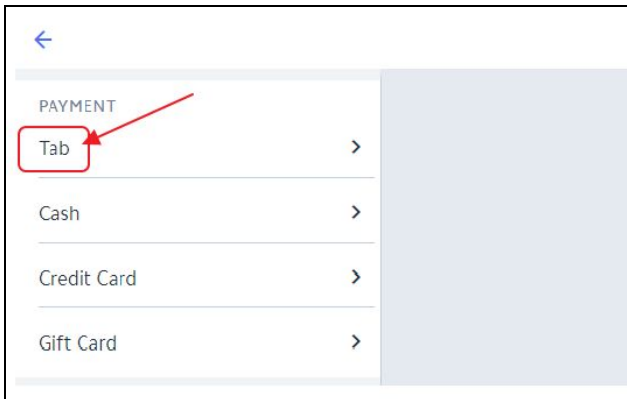
**Note:** If this is a **Set Device** configured to work with only one reader, you will move straight to inserting the card. If this is a **Roaming Tablet**, select the Reader that is closest to you and then insert the card.



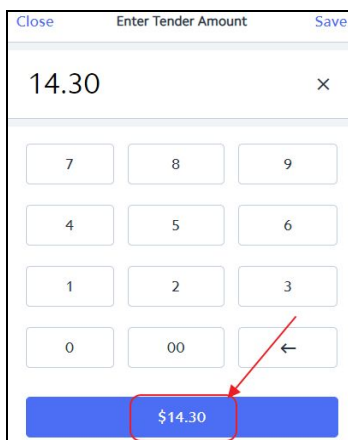
Proceed to enter the order as normal. When finished, select **Pay**.



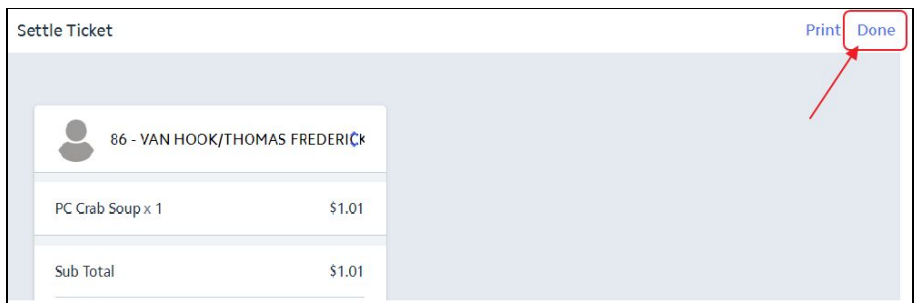
Select the **Tab** Button. The Credit Card information is stored on the ticket so you do not need to insert the card again.



Choose the full amount of the Ticket.



Click **Done**.



**Please Note:** If you have not inserted the card the **Tab** button will not appear.

## Delete/Refund Credit Card Tickets

The most important thing to remember when attempting to refund a Credit Card ticket is that the ticket must be **completely closed first** (both settled and 2<sup>nd</sup> step) before it can be refunded through the POS. **This is the only way the deleted transaction will communicate back to the CE Payments**

Navigate to the **Closed Tickets** tab.

Open Tickets			Mobile Orders			Closed Tickets
TICKET #	MEMBER #	MEMBER	AREA	SERVER	DATE CLOSED	
<input type="checkbox"/>	513	27112071	Adrian, Matt	Boot Camp FnB	A. User	7/31/19 9:20 AM
<input type="checkbox"/>	501	27666175	Abolt, David	Golf	A. User	7/25/19 5:42 PM
<input type="checkbox"/>	499	720	Beckett, Renaldo	Allsons FandB	A. User	7/25/19 5:25 PM

Select the ticket and choose **Delete**. This will communicate back to CE Payments and Refund the Ticket.

Open Tickets			Mobile Orders			Closed Tickets
TICKET #	MEMBER #	MEMBER	AREA	SERVER	DATE CLOSED	
<input checked="" type="checkbox"/>	513	27112071	Adrian, Matt	Boot Camp FnB	A. User	7/31/19 9:20 AM

# 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.

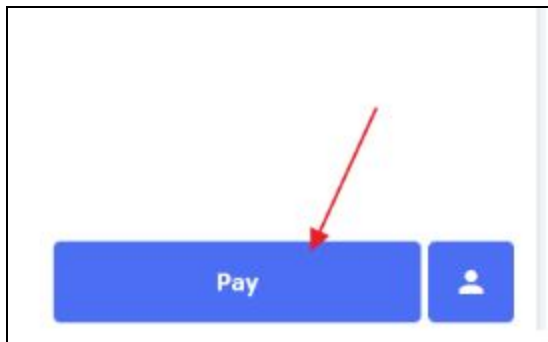
Navigate to the **Closed Tickets** tab.

Open Tickets				Mobile Orders		
TICKET #	MEMBER #	MEMBER	AREA	SERVER	DATE CLOSED	
<input type="checkbox"/>	513	27112071	Adrian, Matt	Boot Camp FnB	A. User	7/31/19 9:20 AM
<input type="checkbox"/>	501	27666175	Abolt, David	Golf	A. User	7/25/19 5:42 PM
<input type="checkbox"/>	499	720	Beckett, Renaldo	Alisons FandB	A. User	7/25/19 5:25 PM

Select the ticket and Choose **Re-Open**.

Open Tickets				Mobile Orders	
TICKET #	MEMBER #	MEMBER	AREA	SERVER	
<input checked="" type="checkbox"/>	516	27761485	Abbott, Richard	Boot Camp FnB	A. Us
<input type="checkbox"/>	501	27666175	Abolt, David	Golf	A. Us

Navigate back to the main POS screen, select the reopened ticket, and make the necessary corrections. When finished, select **Pay**.



**On the settlement screen, you will see the Credit Card Settlement Type Automatically selected.** The Credit Card information is stored on the ticket so the user does not need the Credit Card to reclose the ticket. Click **Done** to reclose the ticket.

Settle Ticket Print Done

85 - ACCOUNT, GUEST	
House Salad x 1	\$7.00
Sub Total	\$11.00
Tax	\$0.88
SC	\$2.42
Total	\$14.30
<input type="checkbox"/> Credit Card	-\$14.30
Due	\$0.00

Annotations: A red circle with the number '1' points to the 'Credit Card' row. A red circle with the number '2' points to the 'Done' button.