CE Payments - Card Present - Classic POS

2019 - Summer Edition

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Overview

The following guide reviews how Users can set up their Classic POS system to be able to charge Tickets in Classic 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** on the bottom left corner of the main POS screen.



Select the **Utilities** tab.

System Tools Locked Tickets	Open Tickets	Closed Tickets	Items	Reports	Utilities	About	t
Area		Member		Server	/	Ticket	Table

Select Credit Card.

System Tools Locked Tickets	Open Tickets	Closed Tickets	Items	Reports	Utilities
Settings	Credit Card				
ETS EMV Termina Shift4 Termina	at at				

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

ocked Tickets	Open Tickets	Closed Tickets	Items	Reports
Settings	Credit Card			
ETS EMV Terminal	:			
Shift4 Terminal	:			~
Shift4 P2PE Device Type	s -			
Shift4 Receipt Columns	034		,	4
CE Payments Device	s -		Lookup	Clear
	Confirm gratuity a	mount after settlement v	with credit card	
	Select Device	- 2		
	CC 1			
	CC 2			
	CC 3			
	CC 4			

Once the device is selected, click **Save Configuration** and **Yes** to the confirmation prompt.

Shift4 Terminal:		
Shift4 P2PE Device Type:		
Shift4 Receipt Columns:	034	Apply Changes?
CE Payments Device:	CC 1 (DVhzRhFq3hW3hKYCKsunxTLN	closes. Would you like to apply the changes and close the application?
	$\hfill\square$ Confirm gratuity amount after settlement w	approximit
0	Default Credit Card Gratuity Form to Print S	2
	$\hfill\square$ Prompt for tab notes before swiping for cr	
Sav	Prompt for CE Payments Device on Settle	Yes No 🚫
Tern	ninal Override Date	
[Def	fault] Set Clea Ove	r rride

<u>Please Note:</u> 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:

<u>Please Note:</u> 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** on the bottom left corner of the main POS screen.



Select the **Utilities** tab.

ocked Tickets	Open Tickets	Closed Tickets	Items	Reports	Utilities	About	
lrea		Member		Server	1	Ticket	Table

Select Credit Card.

System Tools	Open Tickets	Closed Tickets	Items	Reports	Utilities
Settings	Credit Card				
ETS EMV Termin Shift4 Termin	4				

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

Locked Tickets	Open Tickets	Closed Tickets	Items	Report
Settings	Credit Card			
ETS EMV Terminal:				
Shift4 Terminal:	-			
Shift4 P2PE Device Type:				
Shift4 Receipt Columns:	034			
CE Payments Device:			Lookup	Clear
	Confirm gratuity a	mount after settlement v	with credit card	
X	Default Credit Car	d Gratuity Form to Print	Settle Receipt	
	Prompt for tab no	tes before swiping for c	redit card tab	
(Prompt for CE Pay	ments Device on Settle)	
Sav	e Configuration	\mathbf{O}		

Click Save Configuration and select Yes to the confirmation prompt.

Shift4 Terminal:		
Shift4 P2PE Device Type:		
Shift4 Receipt Columns:	034	Apply Changes?
CE Payments Device:		closes. Would you like to apply the changes and close the application application?
	□ Confirm gratuity amount after settlement w	oppication
	□ Default Credit Card Gratuity Form to Print S	2
	\Box Prompt for tab notes before swiping for cr	
	Prompt for CE Payments Device on Settle	
Save	e Configuration	Yes No X
Term	ninal Override Date	
[Def	Set Clea Ove	ar erride

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.

Double click the POS Application to launch the Point of Sale.



Select the applicable POS Device. (Eg. Gov Bar POS)



Enter your **POS Pin Code** (Consult Club Admin if you do not know your code).



Depending on the nature of the POS Station, choose **Select Table/New Transaction** to start a new ticket.



If the POS is an F&B Environment choose any table. If Retail, skip this step.

Select table in (Patio) Sangusti Celes Bar Celes Saren Maniber Events Adm	-	-	-	hant	-
Peer Gnil	-	un I	lant	Tan 1	Tan II
⊙ ∞					

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

Find Member											
Full Name			м	ember Numbe	NF			Member Type			
Abadilla Ir., Flore	ntino		A	082				Resident Social			\odot
Abadilla, Christop	sher		A	082-B				Dep-Resident Soci	al		
Abadilla, Gloria			A	082-A				Sp-Resident Social	Ú.		
Abadilla, Kathlyn			A	082-C				Dep-Resident Soci	al		<u> </u>
Abary, Daniel			A	127-C				Dep-Non-Resident	Club		
Abary, Mike			A	127				Non-Resident Club			U
Abary, Arlene			A	127-A				Sp-Non-Resident (Jub		\cap
Abdou Kassed Ka	irim, Adham		N	1298-8				Dep-Resident Club	12		\odot
										Contains	Starts With
1	2	3	4	5	6	7	8	9	0	Backspace	Guest
Q	w	E	R	Т	Y	U	L	0	Р	Cear Al	Scan Card
А	S	D	F	G	н	J	к	L			
Z	X	С	V		в	N	М			°* (V	Hide Dependents
-				Spa	cebar				@	Cancel 🗙	Bulk Entry

Add any random item the ticket.







Select the Credit Card Settlement Type.

Tender				Payments			
			\$0.00	Туре		Amount D	elete II
7	8	9	Clear Tender			Di	elete elected
4	5	6	Gratuity				
1	2	3	Not Exempt	Ticket Totals		Cover Count:	1
0	.00	\$10				Sub Total: Tax:	\$10.00 \$0.86
\$20	\$50	\$100	Open			Gratuity:	\$0.00
Ψ 2 0	\$50	\$100	Drawer			Service Charge:	\$2.00
Settlements —						Paid:	\$0.00
Member Che	arge Credi ash Credi Room	t Card 🔹 🔹 t Book (\$0.00) n Charge	ſ	-Navigation Print Pay Receipt Cancel 🛞	Print Receipt	Balance Due: Print and	\$12.86 Done

Select OK (or Print and Done).

Tender				Payments		
			\$0.00	Туре	Amount	oloto
7	8	9	Clear Tender		P	elete Vected
4	5	6	Gratuity			
1	2	3	Not Exempt	Ticket Totals	Cover Counts	1
0	00	\$10	10 C		Sub Total:	\$10.00
· ·	.00	310			Tax:	\$0.86
\$20	\$50	\$100	Open		Grabultyc	\$0.00
920	\$30	\$100	Drawer		Service Charge:	\$2.00
Settlements					Total:	\$12.86
-	_		2		Paid:	\$0.00
Member Cha	arge Cred	t Card		National	beance use.	\$12.00
				Navigation		-
- 🦋 o	lash Cred	t Book (\$0.00)		Print Pay Receipt	int Receipt Print and	Done
	Roon	n Charge				
			•	Cancel 🛞 O	ĸ	\bigcirc
						\sim

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.

Select Device	
cc 1	
CC 2	
CC 3	
CC 4	
Cancel	\otimes

Insert the Card.



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

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

	Labor	Specials	Contest	Messages	Events		
ID	Full Name			Area	Table	Ticket #	Server Name
001	OHI/GIRL SCOUTS O	F		Cafe	[Quick Ticket]	26615	Administrative User
001	GUEST, ACCOUNT			Lounge	[Quick Ticket]	27904	Administrative User
001	GUEST, ACCOUNT			Lounge	[Quick Ticket]	27905	Administrative User
157-3	Ackermann, Angus			Lounge	[Quick Ticket]	32279	Administrative User
707-2	Takas, Abby			Lounge	[Quick Ticket]	32280	Administrative User
157-3	Ackermann, Angus			Lounge	[Quick Ticket]	32597	Administrative User
157-3	Ackermann, Angus			Lounge	[Quick Ticket]	32598	Administrative User
001	GUEST, ACCOUNT			Lounge	[Quick Ticket]	32806	Administrative User
001	Michael Christensen			Cafe	Table 2 - 1	37462	Administrative User

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



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**.
 - If there is no tip to add, simply select **OK** to specify a \$0 tip.
- The ticket can also be **Reopened** from this screen if necessary.

Click **OK** to complete the transaction.



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.

Select Charge Tab, and then Insert the card.

<u>Please Note:</u> 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.

I	Delote bern	Add Message	Change Modifiers	Change Qty	Change Seat	Add Ticket	Delete Ticket	Upcharge Bem	Change Table	Charge Tab	Save Pref	Quels Cath	Quid Charge	Cose Toket
	Exit 🛞	Discount Birm	Comp Item	Multi Off	Change Course	Get By Bin	Reorder Stem	Cover Count	Change Member	Coupon Lookup		Print Ticket	Spir Ticket	Send

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 insert the card again. Click **OK** to complete the transaction.



Select OK (or Print and Done).

S0.00 Type 7 8 9 Clear Tender 4 5 6 Gratuity 1 2 3 Not Exempt Ticket Totals 0 .00 \$10 Ticket Totals	Amount Cover Courts	Delete Vil Delete elected
7 8 9 Clear Tender 4 5 6 Gratuity 1 2 3 Not Exempt ▼ 0 .00 \$10	Cover Counts	Delete elected
4 5 6 Gratuity. 1 2 3 Not Exempt ▼ 0 .00 \$10	Cover Count	1
1 2 3 Not Exempt ▼ Ticket Totals 0 .00 \$10	Cover Counts	
0 .00 \$10	Cover Count:	1
0 .00 \$10		-
016 00.	Sub Total:	\$10.00
And and a second s	Tax	\$0.86
\$20 \$50 \$100 ^{Open}	Gratuity:	\$0.00
\$20 \$30 STOO Drawer	Service Charge:	\$2.00
Settlements	Total	\$12.86
	Paid:	\$0.00
Member Charge Credit Card	beandy use.	312.00
Navigation	-	
Cash Credit Book (\$0.00) Print Pay Receipt	Print and	Done
Room Charge		
		0
Cancel (X) OK		\odot

<u>Please Note</u>: 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 2nd step) before it can be refunded through the POS. This is the only way the deleted transaction will communicate back to the CE **Payments**

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



Navigate to the **Closed Tickets** tab.



Highlight the ticket and select **Delete**. The user will be prompted, **Are you sure you want to delete ticket #XXXXX?** Click **Yes**. This will communicate back to CE Payments and Refund the Ticket.

Locked Tickets	Open Tickets	Closed Tickets	Items	Reports	Utilitie	5	About			
Search	-									
Area	Member	Server	Me	mber#	Ticket	Table		Date Opened	Date Closed	
Catle	GUEST, ACCOUNT		ve User 001						10/20/2016 9:38 AM	0
Cafe	Roberts, Billy	Cafe Worker	979	83.	37437	[Quick Tic	ket]	10/19/2016 7:35 PM	10/19/2016 7:35 PM	C
Cafe	Berlin, Keith	Cafe Worker					oet)	10/19/2016 7:10 PM	10/19/2016 7:10 PM	
Cafe	GUEST, ACCOUNT	Cafe Worker	Delete t	icket	10.000		oet]	10/19/2016 6:47 PM	10/19/2016 6:47 PM	
Cafe	Herzog, Thomas	Cafe Worker	Are you sure	You want to deade this	x1#974621		cet]	10/19/2016 6:44 PM	10/19/2016 6:45 PM	6
Cafe	GUEST, ACCOUNT	Cafe Worker					cet]	10/19/2016 6:43 PM	10/19/2016 6:43 PM	6
Cafe	Rickert, Jeremy	Cafe Worker			0		ort]	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				0	cet]	10/19/2016 6:12 PM	10/19/2016 6:12 PM	8
Cafe	Schoeny, Jeffrey	Cafe Worker		Yes	⊘ №	\otimes	ort]	10/19/2016 6:11 PM	10/19/2016 6:11 PM	0
Cafe	Cimpello, Peter	Cafe Worker	134		3/410	IQUICK TR	ket]	10/19/2016 6:10 PM	10/19/2016 6:10 PM	
Cafe	Vondran, Jim	Cafe Worker	795	8	37417	[Quick Tic	ket]	10/19/2016 6:08 PM	10/19/2016 6:09 PM	
Cafe	Eddleman, Mike	Cafe Worker	976		37416	[Quick Tic	(ket)	10/19/2016 6:08 PM	10/19/2016 6:08 PM	\odot
Cafe	Laird, C	Cafe Worker	737		37415	[Quick Tic	(ket)	10/19/2016 6:07 PM	10/19/2016 6:07 PM	\sim

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.

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



Navigate to the **Closed Tickets** tab.

System Tools	Open Tickets	Closed Tickets	Items	Reports	Utilities	About
Search Area	Member	Server	N	1ember #	Ticket	Table
Cafe	GUEST, ACCOUN	T Cafe Worker	0	01	37400	[Quick Ticket]

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	Items Reg	ports Utilitie	5	About			
Search			()						
Area	Member	Server	Member #	Ticket	Table		Date Opened	Date Closed	
Cate	GUEST, ACCOUNT	Administrativ	e User 001	37462	Table 2	8	10/20/2016 9:33 AM	10/20/2016 9:42 AM	1
Cafe	Roberts, Billy	Cafe Worker	979	37437	[Quick T	icket]	10/19/2016 7:35 PM	10/19/2016 7:35 PM	19
Tafe	Berlin, Keith	Cafe Worker				oet]	10/19/2016 7:10 PM	10/19/2016 7:10 PM	
lafe	GUEST, ACCOUNT	Cafe Worker	Re-Open ticket	t confirmation		oet]	10/19/2016 6:47 PM	10/19/2016 6:47 PM	
Cafe	Herzog, Thomas	Cafe Worker	In order to re-open a 50 erased and this 5drat wi	set all payments made on this to il be removed from it's current bu	set will be sch. After	oet]	10/19/2016 6:44 PM	10/19/2016 6:45 PM	6
Cafe	GUEST, ACCOUNT	Cafe Worker	you re-open a totat the you want to re-open this	changes cannot be revensed. An a 5d/e57	you sure	oet]	10/19/2016 6:43 PM	10/19/2016 6:43 PM	4
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			0	ort]	10/19/2016 6:12 PM	10/19/2016 6:12 PM	6
Cafe	Schoeny, Jeffrey	Cafe Worker		Yes 🕜 No	\otimes	ort]	10/19/2016 6:11 PM	10/19/2016 6:11 PM	
Cafe	Cimpello, Peter	Cafe Worker	124	3/410	PULLER I	n.oet]	10/19/2016 6:10 PM	10/19/2016 6:10 PM	
Cafe	Vondran, Jim	Cafe Worker	795	37417	(Quick T	icket]	10/19/2016 6:08 PM	10/19/2016 6:09 PM	
Cafe (2 Eddleman, Mike	Cafe Worker	976	37416	(Quick T	icket]	10/19/2016 6:08 PM	10/19/2016 6:08 PM	6
Cafe /	Laird, Chris	Cafe Worker	737	37415	[Quick T	icket]	10/19/2016 6:07 PM	10/19/2016 6:07 PM	

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



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 reclose the ticket.

