



# CE Payments - Card Present - Classic POS

2019 - Summer Edition

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# Overview

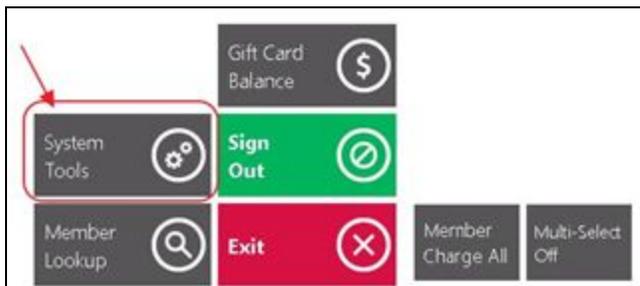
The following guide reviews how Users can set up their Classic POS system to be able to charge Tickets in Classic POS when the Member has a physical Credit Card present. This guide has been broken down to include instructions for both a **Set Device** and a **Roaming Tablet**.

## 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

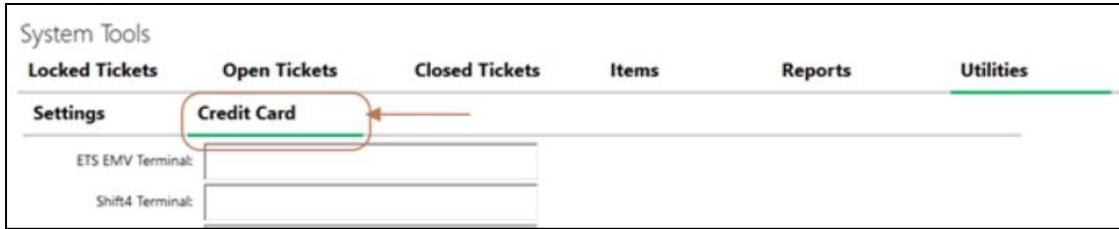
Users will log in to the POS and select **System tools** on the bottom left corner of the main POS screen.



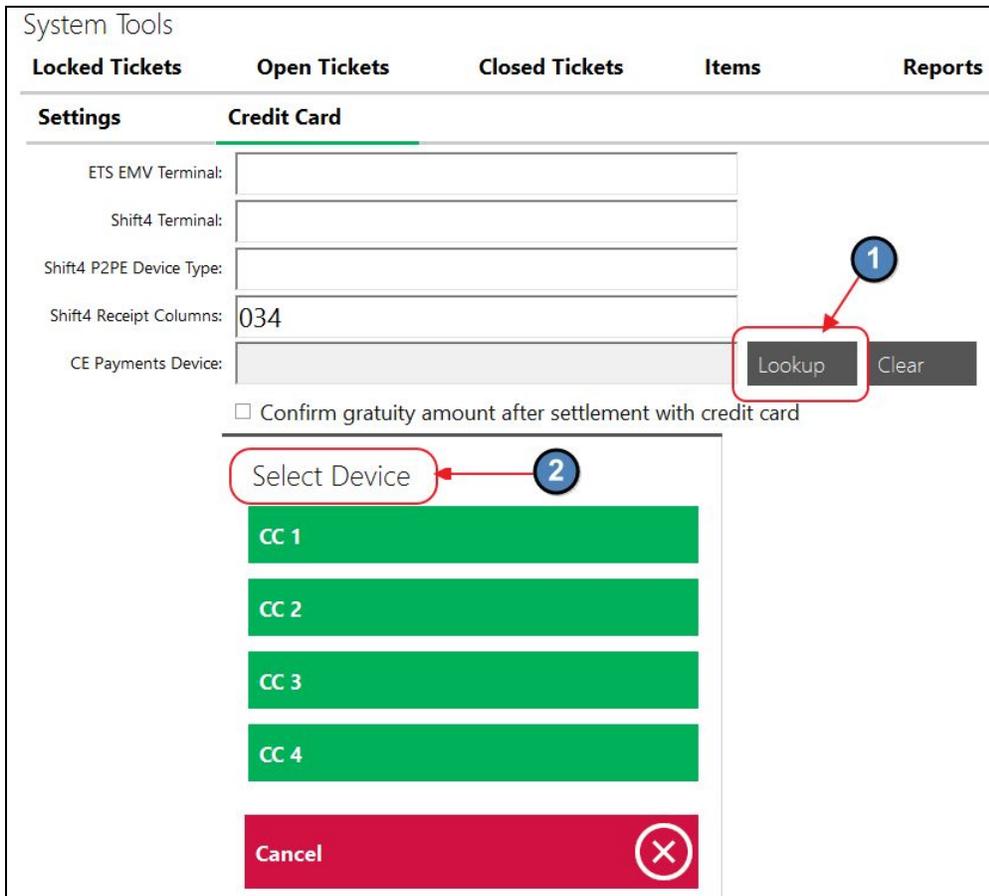
Select the **Utilities** tab.



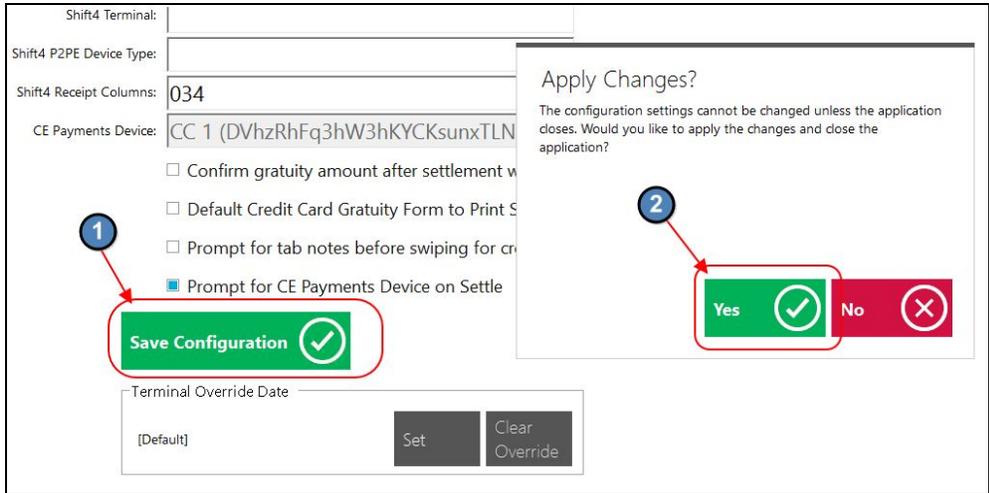
Select **Credit Card**.



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.



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



**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.

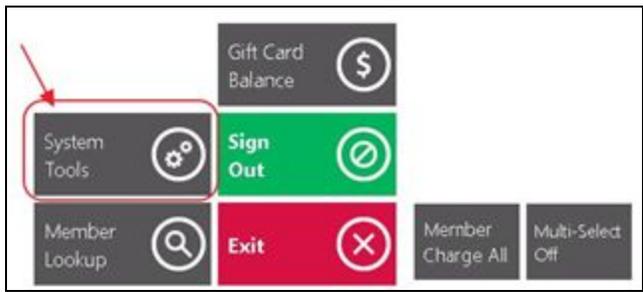
## Roaming Tablet

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

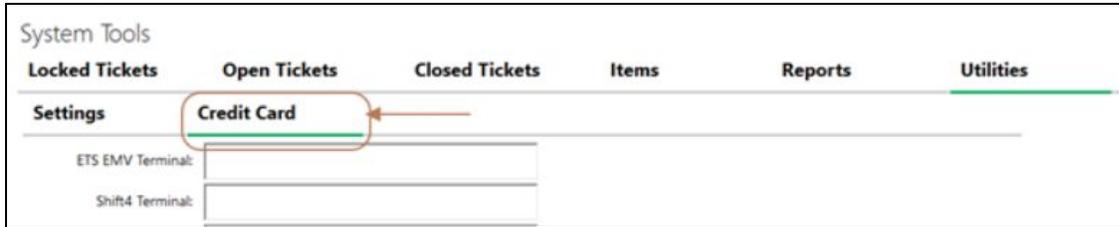
Users will log in to the POS and select **System tools** on the bottom left corner of the main POS screen.



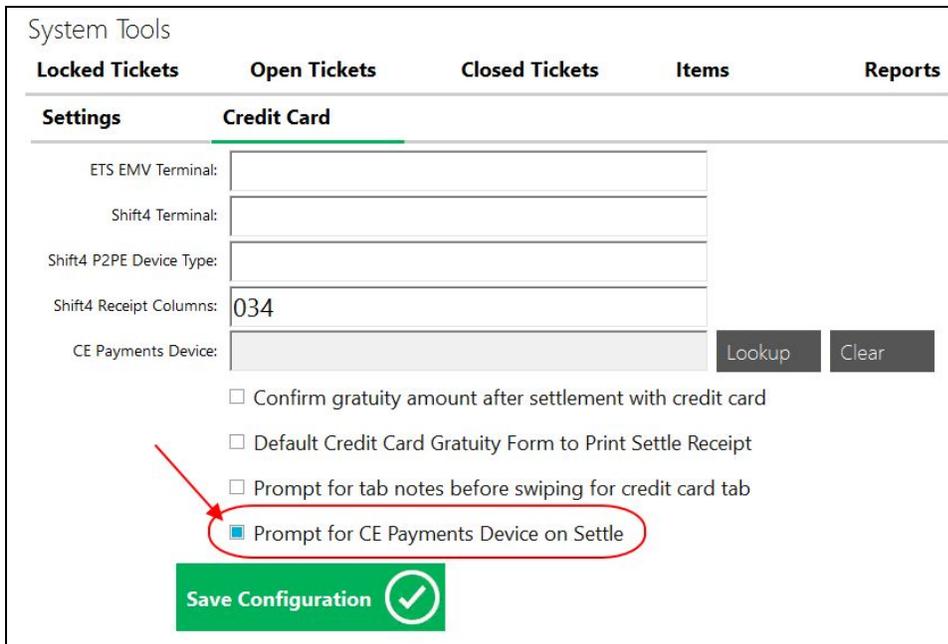
Select the **Utilities** tab.



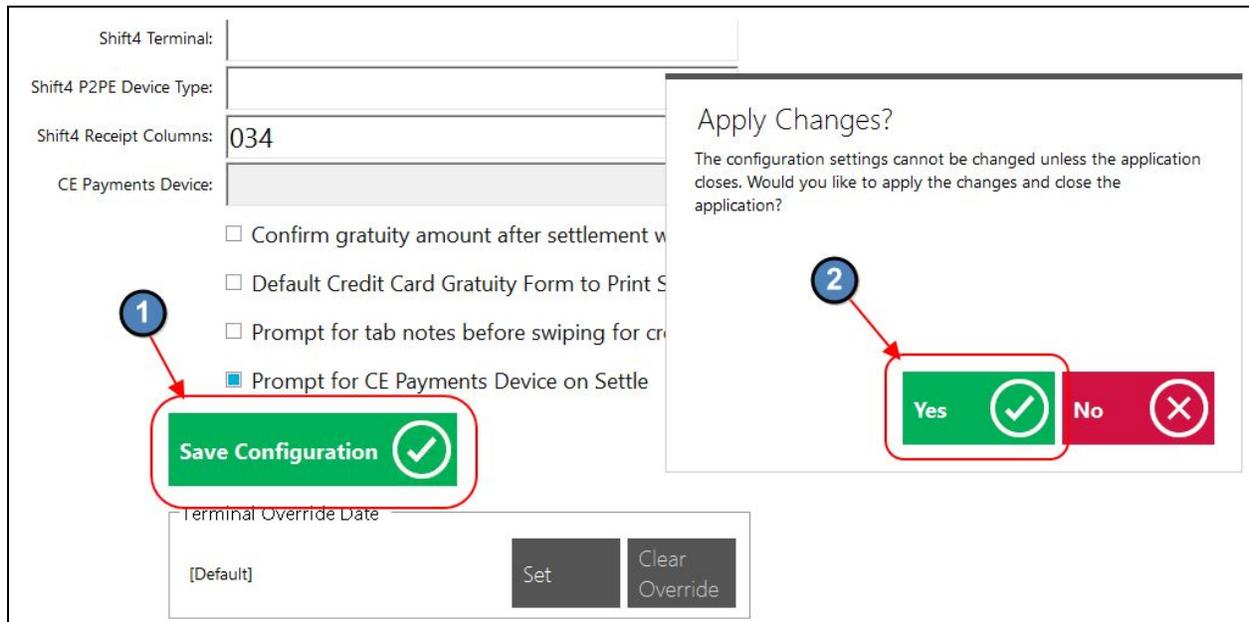
Select **Credit Card**.



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



Click **Save Configuration** and select **Yes** to the confirmation prompt.



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.



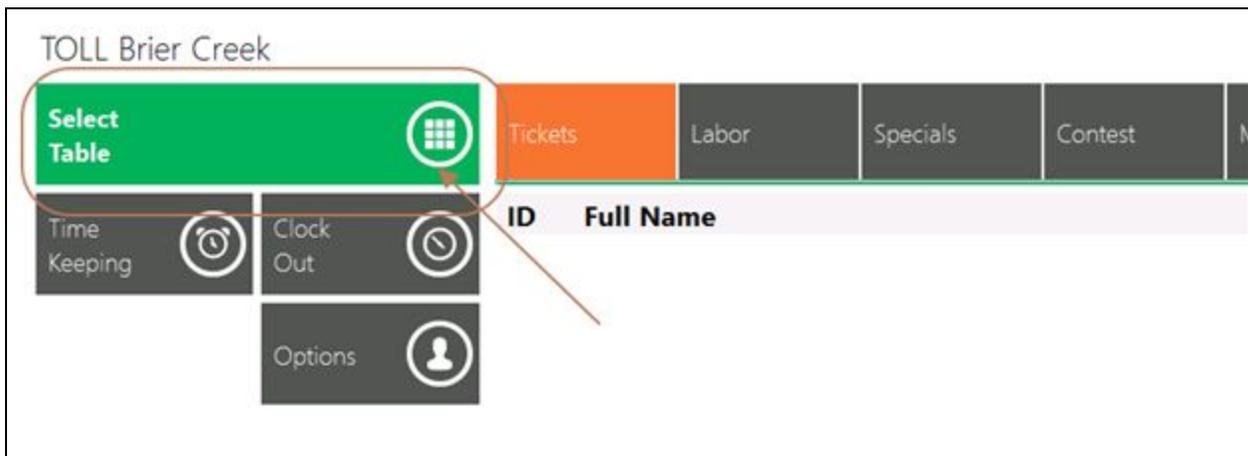
Select the applicable POS Device. (Eg. Gov Bar POS)



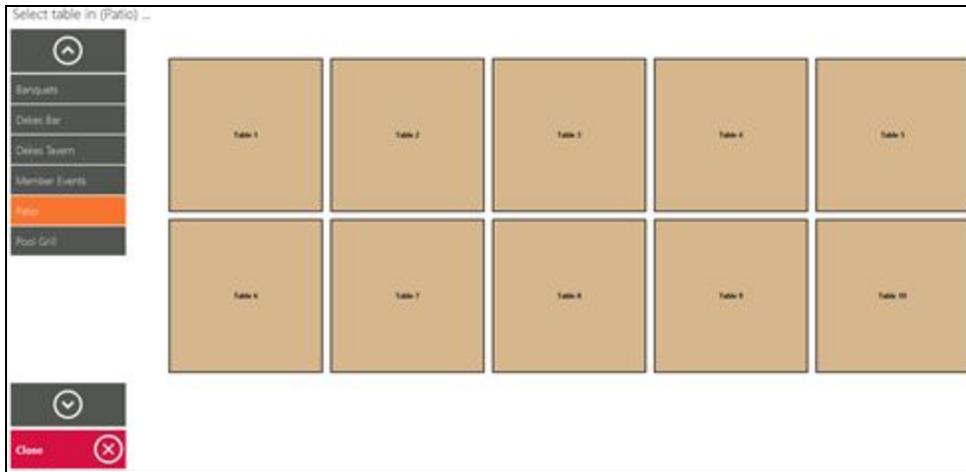
Enter your **POS Pin Code** (Consult Club Admin if you do not know your code).



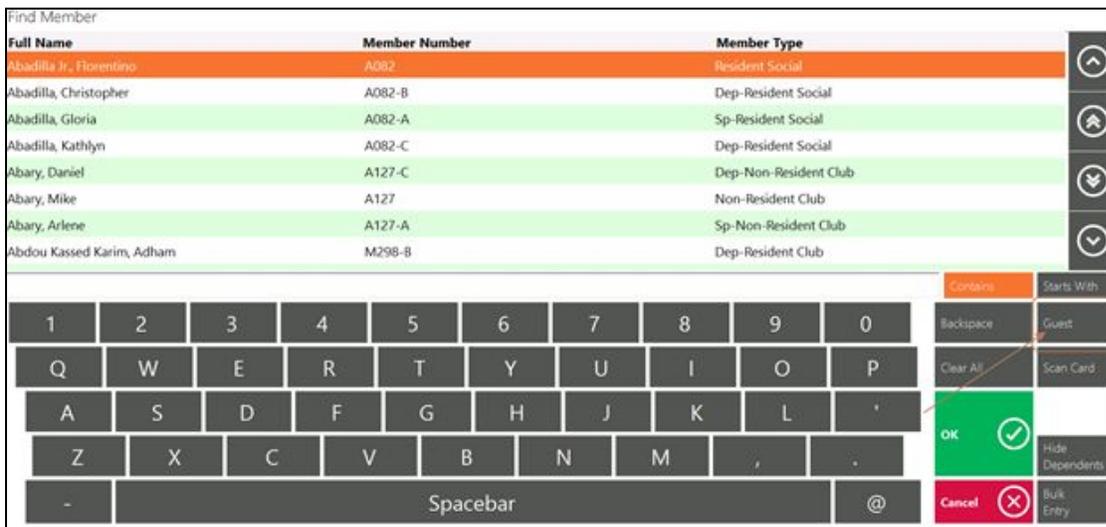
Depending on the nature of the POS Station, choose **Select Table/New Transaction** to start a new ticket.



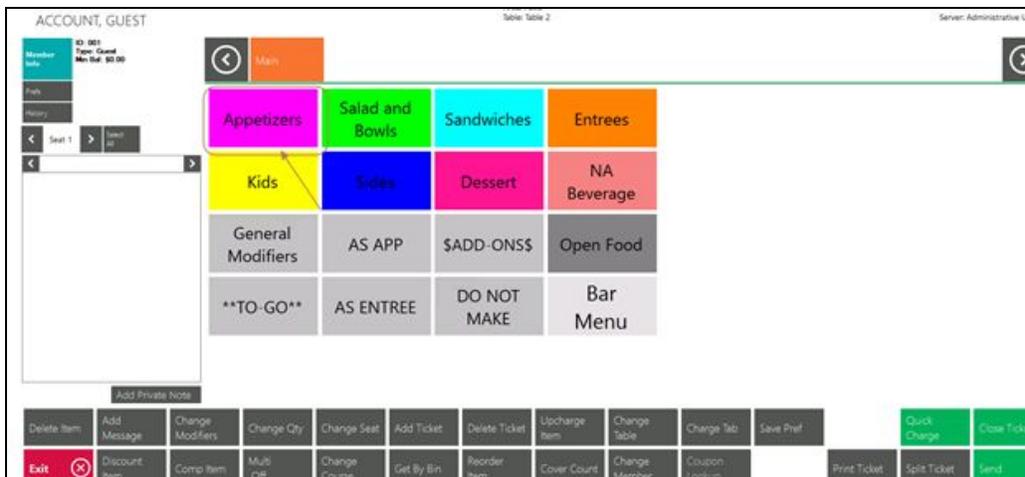
If the POS is an F&B Environment choose any table. If Retail, skip this step.



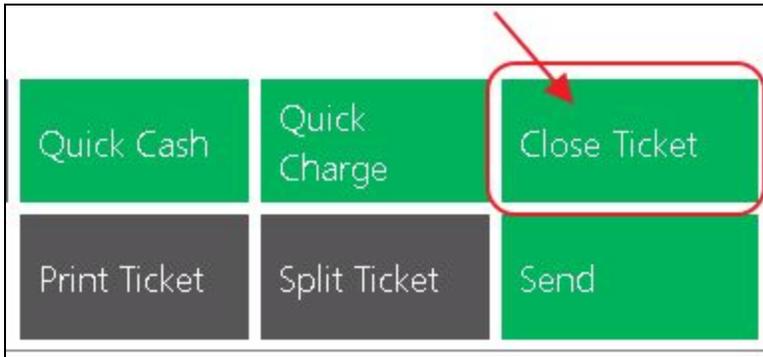
Choose **Guest** to start a guest ticket.



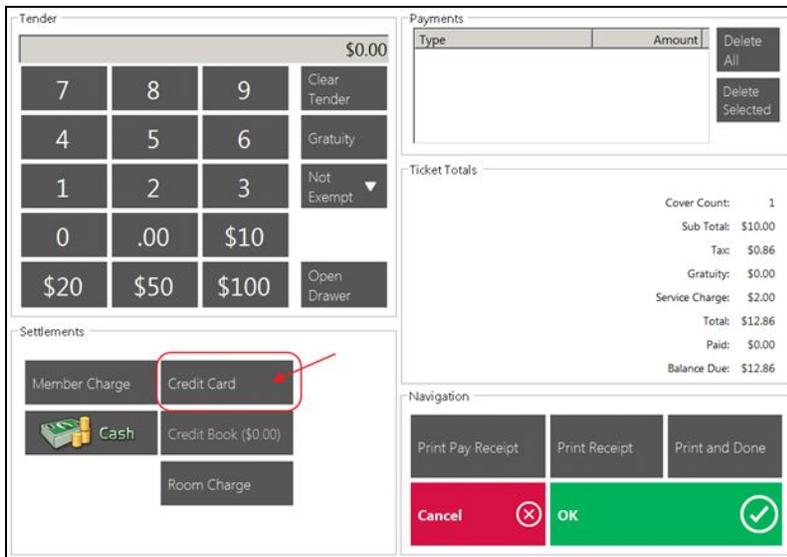
Add any random item the ticket.



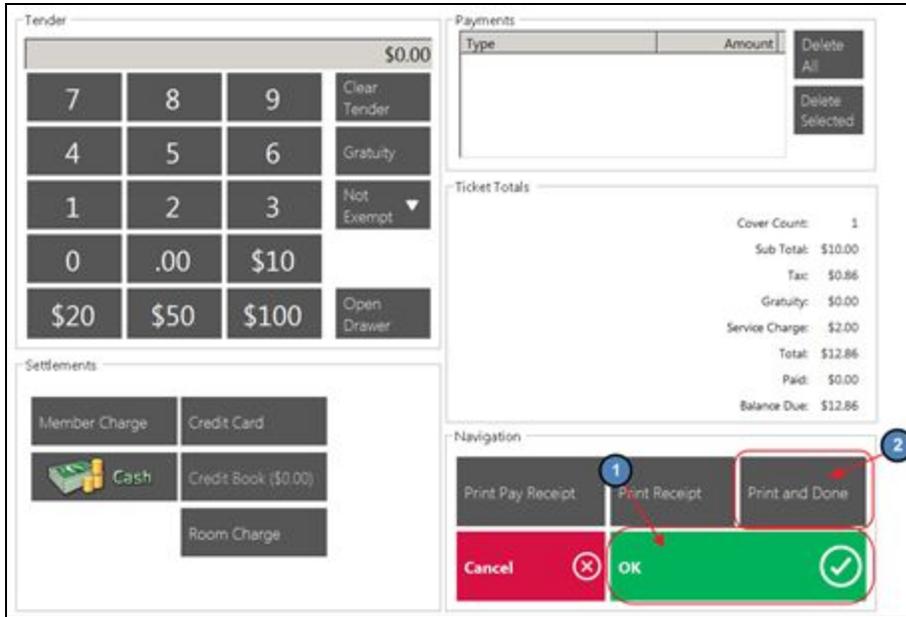
In the POS ordering screen, select **Close Ticket**.



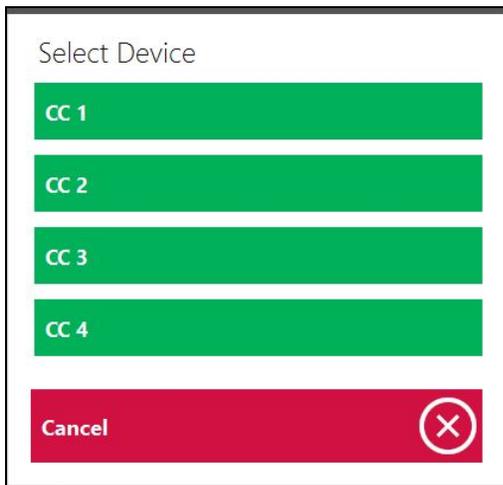
Select the **Credit Card** Settlement Type.



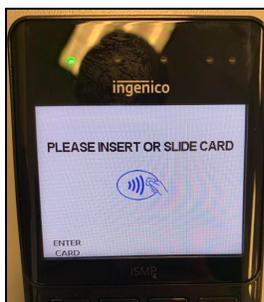
Select **OK** (or **Print and Done**).



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.

<span style="background-color: #f4a460;">Tickets</span> <span>Labor</span> <span>Specials</span> <span>Contest</span> <span>Messages</span> <span>Events</span>						
ID	Full Name	Area	Table	Ticket #	Server Name	
001	OHI/GIRL SCOUTS OF	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 ticket gratuity (Total: \$0.01)

Re-Open Ticket Gratuity

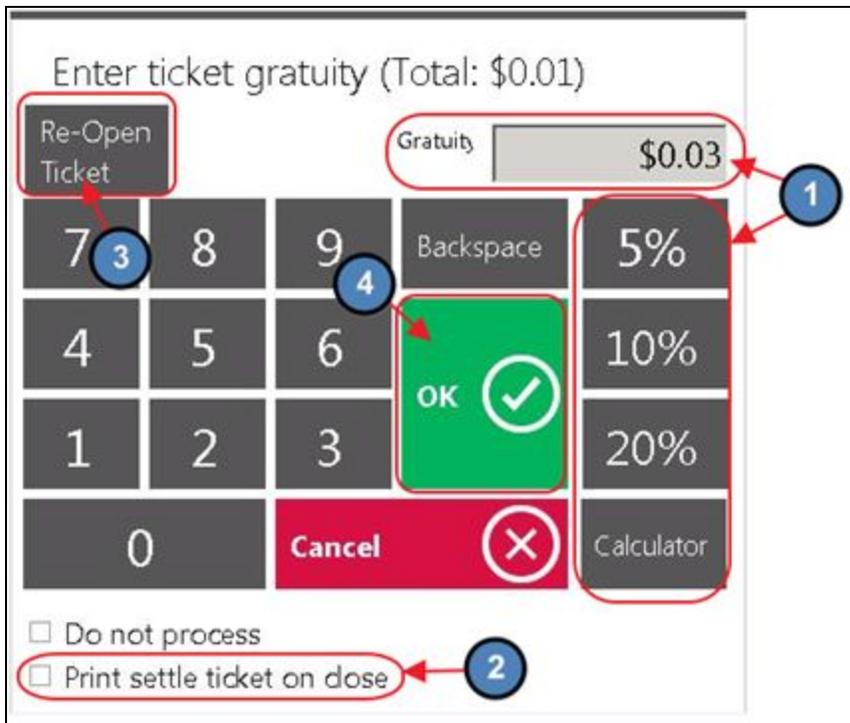
7	8	9	Backspace	5%
4	5	6	OK 	10%
1	2	3		20%
0	Cancel 		Calculator	

Do not process  
 Print settle ticket on dose

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

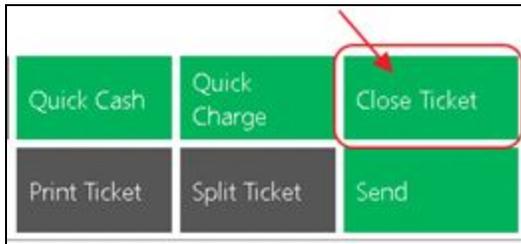
**Charge Tab** is used to store the Credit Card on the ticket at the time the ticket is open as opposed to using the card at the end when closing. Mainly used by clubs who allow non-member visits; this allows them to capture the Credit Card information before the sale.

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

**Please 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.



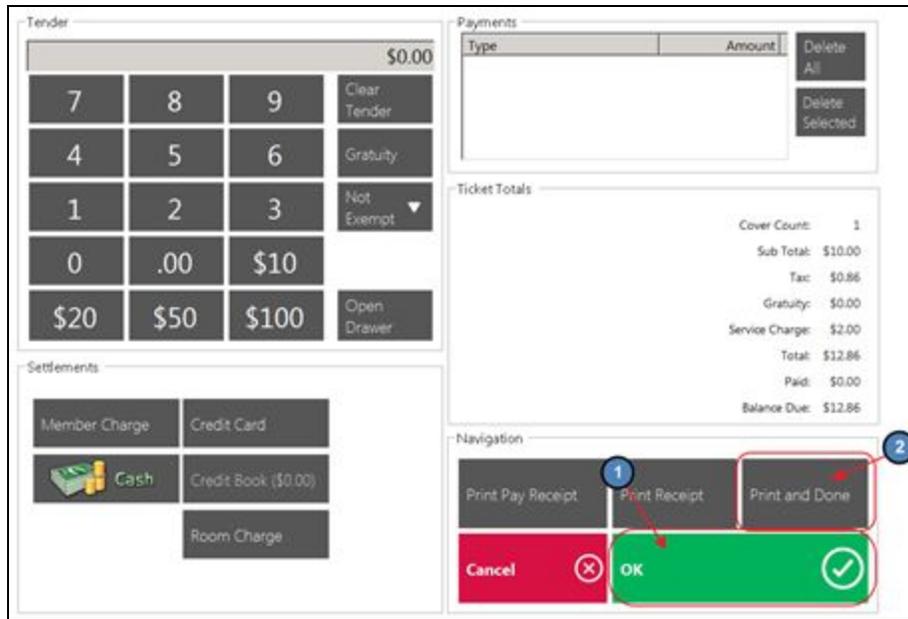
Proceed to enter the order as normal. When finished, select **Close Ticket**.



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**).

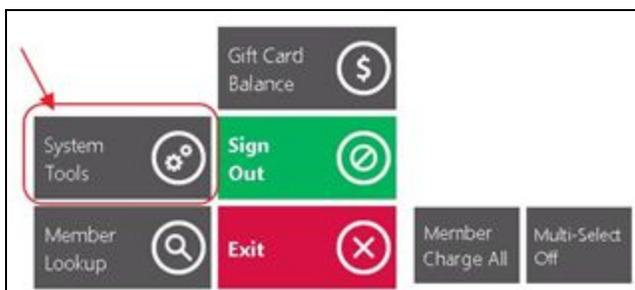


**Please Note:** If you have not inserted the card the **Tab** button will not appear.

## 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**

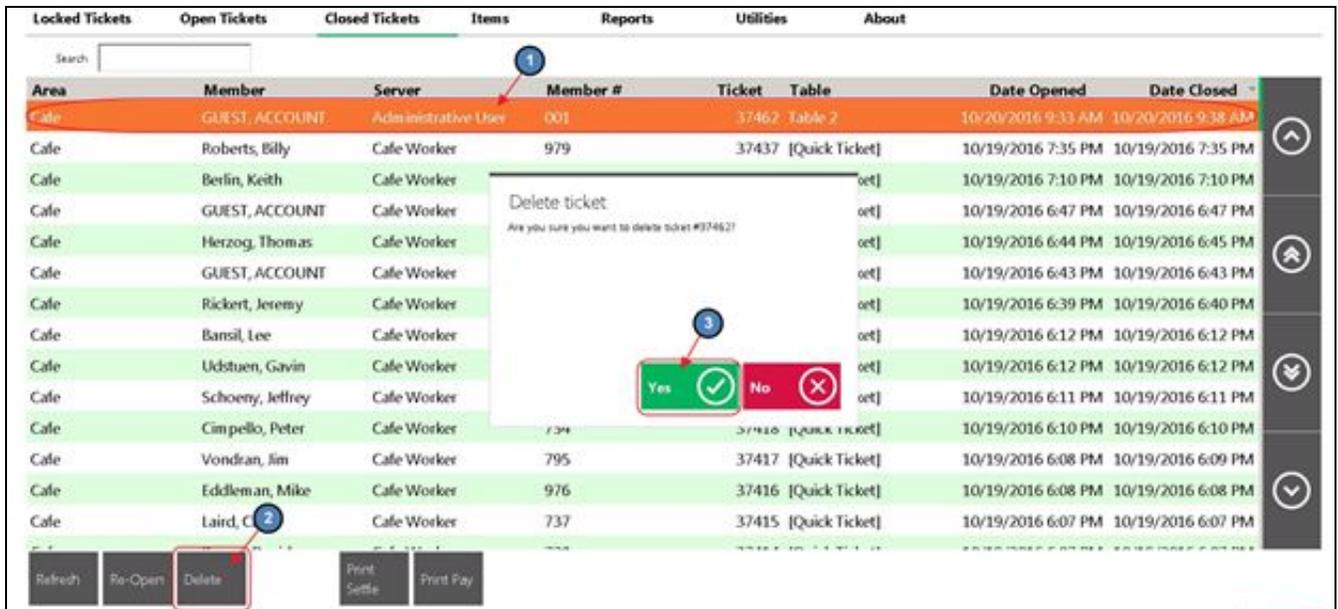
Select **System Tools** on the bottom left corner of the main POS screen.



Navigate to the **Closed Tickets** tab.



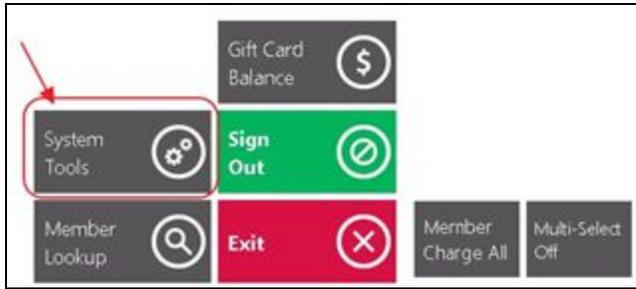
Highlight the ticket and select **Delete**. The user will be prompted, **Are you sure you want to delete ticket #XXXXX?** Click **Yes**. This will communicate back to CE Payments and Refund the Ticket.



## 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.

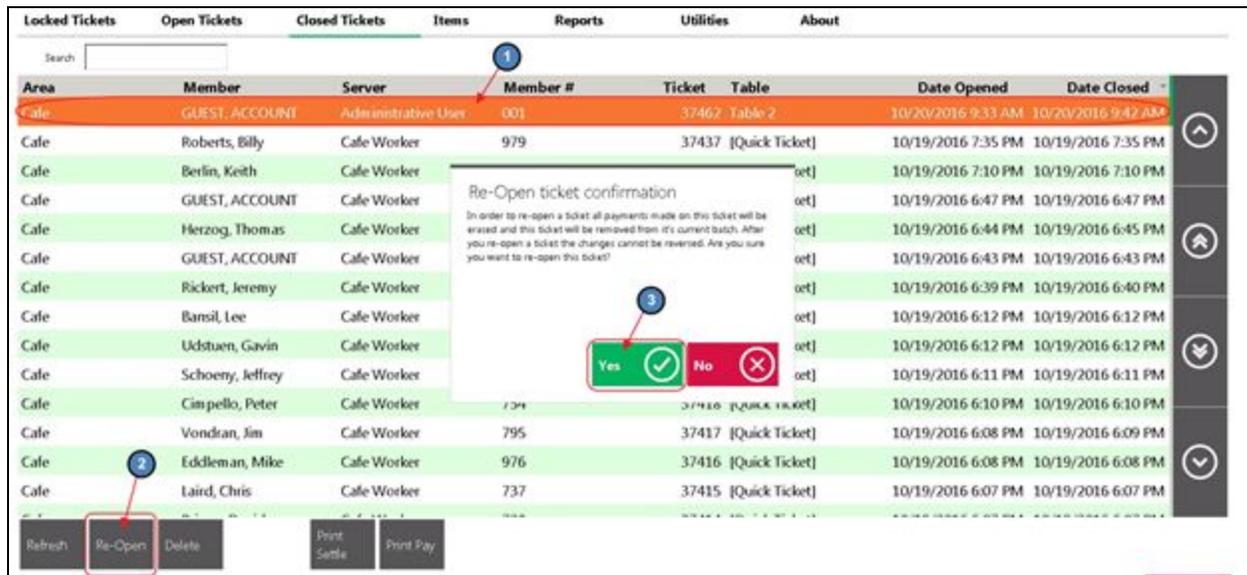
Select **System Tools** on the bottom left corner of the main POS screen.



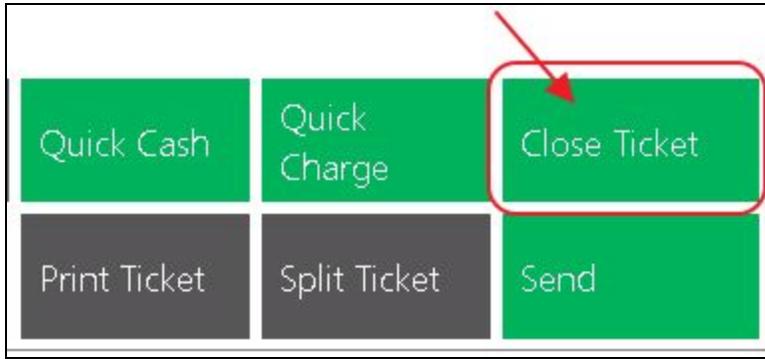
Navigate to the **Closed Tickets** tab.



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



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.

