Using Execu/Touch POS with the Credit Card Interface Module

**NOTE:** This document contains procedures for using Execu/Touch Software in conjunction with our optional credit card processing interface. This document assumes you are familiar with the general procedures for using Execu/Touch software and is intended only as a supplement to our main Execu/Touch documentation and help files.

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**A. How to close a sale to one or more credit cards.**

1. Generate an open sale just as you would with any other payment type. Please consult your Execu/Touch documentation for general procedures on ringing up items to generate an open check.

2. Select “total” to bring up the payment screen. **Note:** If you are closing the check to more than one payment type (Cash and credit card for example) then you must enter the payment/s for all other payment types before entering the credit card payment/s. **Credit card payments should be entered last.**

3. The “total” screen will display your available payment types, if you have the Execu/Touch credit card interface installed then a new option will be displayed called “swipe card.” This is the option you will select if you wish to pay the check with one or more credit cards. The other credit card icons such as visa, master card, etc. should not be used if you have the credit card interface installed. Select “swipe card.”

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**A. How to close a sale to one or more credit cards. (Continued)**

4. After you have selected “swipe card” a box will appear with a message at the top that says “PLEASE SWIPE CARD.”


If you have the customer’s card in hand you should run the card through your magnetic swipe reader at this time. If the card is read successfully then the “PLEASE SWIPE CARD” box will
If the card is not read successfully then an error message will be displayed. If this occurs simply select "ok" and try to swipe the card again.

If you are unable to get a successful swipe then you may choose “Manual entry” and enter the card number, expiration date, and card holder’s name using the keyboard or key pad provided.

5. After you have successfully swiped the credit card and/or entered the card information manually you will be prompted with “Amount To Pay.” If you wish to pay the full check amount with this credit card then simply choose “ok.” If you wish to pay an amount less than the full check amount with this card then enter that amount and then select “ok.”

6. If you are running Execu/Touch in “Retail” or “Fast Food” mode then skip to step # 7. If you are running in “Fine Dining” mode then continue here.

   After you have selected the “Amount To Pay” you will be prompted with a box with the following options: 1. Pre-authorize, 2. Close sale, 3. Exit.

   If you want to print a receipt for the customer to sign and add their tip, choose “Pre-Authorize.”

   If you do not need to present a check to the customer for them to add a tip to their card, choose “Close sale.”

7. At this point a box should appear on the screen that says “waiting for answer…”

   If the credit card authorization is declined you will receive a message at this time giving the reason for the decline. After the decline message you may be prompted to swipe the card again or returned back to the payment screen to start over.

A. How to close a sale to one or more credit cards. (Continued)

8. If you are running Execu/Touch in “Retail” or “Fast Food” mode skip to step # 9. If you are running in “Fine Dining” mode and you chose “Close sale” in step # 6 then skip to step # 9. If you are running in “Fine Dining” mode and you chose “Pre-Authorize” in step # 6 then continue here.

   If you chose “Pre-Authorize” in step # 6 and your credit card was approved then the software will print a receipt for the customer to sign and add a tip amount to be charged to their card.

   After the “Pre-Authorize” receipt has printed the software will leave the check open for this sale. To complete this sale and close the check follow these steps:

   a. With the customer receipt containing their tip amount written on the receipt in hand go back into the check payment screen.

   b. You will now notice that the option that was labeled “swipe card” has now changed to “tip entry.” Choose “tip entry.”

   c. After you have chosen “tip entry” you will be prompted to enter a tip amount. Enter the tip amount to be charged to the credit card, or just select “ok” if the tip amount is $0.
d. A box will appear confirming your tip amount, if it is correct then select “yes.”

e. At this point a box should appear on the screen that says “waiting for answer…”

9. After the card is charged the software will print the final receipt and close the check.

B. How to correct a sale closed to a credit card for the wrong amount.

1. Reopen the closed check. When you reopen a check that has been closed to a credit card the software will automatically issue a void to remove the charge made to the card when the check was originally closed.

2. Once the check has been reopened the check can be closed again to any payment type. To close the check again simply follow the steps in this document for A. How to close a sale to one or more credit cards.

C. How to void a sale closed to a credit card.

1. Reopen the closed check. When you reopen a check that has been closed to a credit card the software will automatically issue a void to remove the charge made to the card when the check was originally closed.

2. Once the check has been reopened you can void the check by selecting “void” in the payment screen for this check.

D. How to credit a sale closed to a credit card on a prior days business.

1. Generate a credit sale by either entering individual items as credit items or entering a single “open food” item for the entire amount you wish to credit. Please refer to the instructions in the main Execu/Touch documentation for the procedures necessary to ring up items on a ticket as “credits.”

2. Once the check reflects the total amount you wish to credit (credit amounts show as -) then you must close the credit sale to the customer’s credit card in order to send a credit to his card. To close the credit sale simply follow the steps in this document for A. How to close a sale to one or more credit cards.