

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, Shift4. This document assumes you received training on the general procedures for using Execu/Touch software and is intended only as a supplement to our main Execu/Touch documentation and help files.

This document contains information about the following procedures:

- A. How to close a sale to one or more credit cards.**
- B. How to correct a sale closed to a credit card for the wrong amount.**
- C. How to void a sale closed to a credit card.**
- D. How to credit a sale closed to a credit card on a prior day's business.**

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

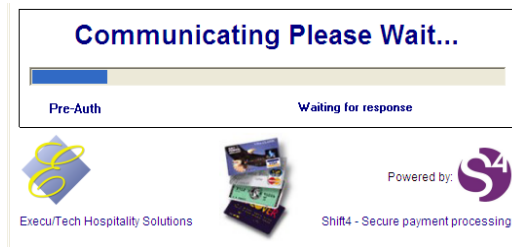
1. Generate an open sale just as you would with any other payment type. Please consult your Execu/Touch documentation for general procedures on ringing up items to generate an open check.
2. Select "Total" to bring up the payment screen. **Note:** If you are closing the check to more than one payment type (cash and credit card for example), 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 displays the available payment types. If you have the Shift4 interface installed an option called "Swipe Card" is displayed. Select this option to pay the check with one or more credit cards.
4. After "Swipe Card" has been selected, a box appears with a message at the top that says "**PLEASE SWIPE CARD.**" The following processing methods are available:
 1. Swipe the credit card
 2. Manual entry
 3. Cancel/Exit.

If you have the customer's card in hand, swipe it through the magnetic card reader at this time. If the card is read successfully, the "**PLEASE SWIPE CARD**" box disappears. If the card is not read successfully then an error message will be displayed. If this occurs simply select click **OK** and try to swipe the card again. If you are unable to get a successful swipe, 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, or entered the card information manually, the software prompts for the "Amount to Pay" (it appears as a green keypad screen). To pay the full check amount with this credit card, press **OK**. To pay an amount less than the full check amount with this card, enter the dollar amount and then press **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 the "Amount To Pay" has been entered, choose one of the following options:
 1. Pre-authorize
 2. Close sale
 3. Exit

To print a receipt for the customer to sign and add their tip, choose "Pre-Authorize." If the customer does not need to add a tip, choose "Close sale."

7. The Shift4 Communication Box and Blue Progress Bar displays on the screen (this is shown on the following page).



The communication process should take approximately 5 - 10 seconds. This process can be slower if the network connection between the server and terminal is unstable or if the internet connection at the terminal is slow.

If the card is pre-authorized or charged successfully, a receipt is printed. If the credit card authorization is declined, a message appears, 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.

The other response from the processor is 'Voice Authorization Required.' If this message is displayed, call the number listed on the screen and obtain the authorization number.

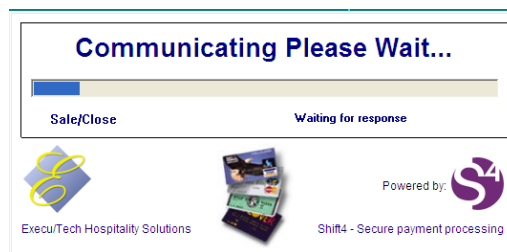
If you receive a communication error message, contact Shift4 Support for more information on the error. You need to provide the full error message.

NOTE: If the communication process seems slow, be patient. **DO NOT** close the program or reboot the terminal. This will call the Execu/Touch program and the Shift4 Processor to become out of sync and can lead to unbalanced batches at the end of day.

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 proceed as follows. When the Pre-Authorization was processed, a receipt with a line for the tip amount and customer signature should have printed. 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. Notice that the payment option that was labeled "Swipe Card" is now labeled "Tip Entry." Click on this option.
- c. The software prompts for a tip amount to be entered. Enter the dollar amount to be added as the tip. If the tip amount is \$0, click **OK**.
- d. A box appears that confirms the tip amount. If it is correct, answer **Yes**.
- e. The Shift4 Communication Box and Blue Progress Bar displays on the screen (see example below).



The communication process should take approximately 5 - 10 seconds. This process can be slower if the network connection between the server and terminal is unstable or if the internet connection at the terminal is slow.

If the card is charged successfully, a final receipt is printed. If the credit card authorization is declined, a message appears, 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.

The other response from the processor is 'Voice Authorization Required.' If this message is displayed, call the number listed on the screen and obtain the authorization number.

If you receive a communication error message, contact Shift4 Support for more information on the error. You need to provide the full error message.

NOTE: If the communication process seems slow, be patient. **DO NOT** close the program or reboot the terminal. This will call the Execu/Touch program and the Shift4 Processor to become out of sync and can lead to unbalanced batches at the end of day.

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.

NOTE: If End of Day has been completed, you cannot go back to make changes to the check. Please see section **D. How to credit a sale closed to a credit card on a prior days business** for information on how to handle this situation.

1. Reopen the closed check. When you reopen a check that has been closed to a credit card the software automatically issues 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, follow the steps in section **A. How to close a sale to one or more credit cards.**

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

NOTE: If End of Day has been completed, you cannot go back to make changes to the check. Please see section **D. How to credit a sale closed to a credit card on a prior days business** for information on how to handle this situation.

1. Reopen the closed check. When you reopen a check that has been closed to a credit card the software automatically issues 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.**