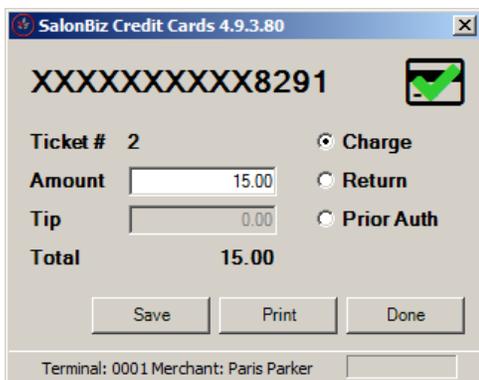
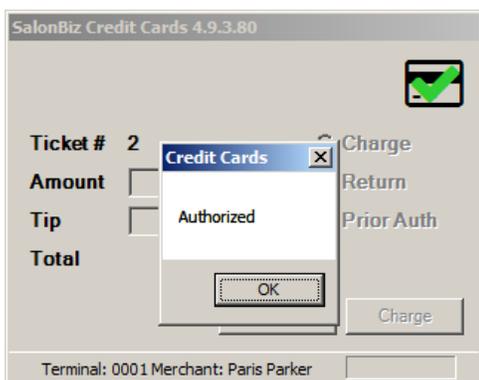
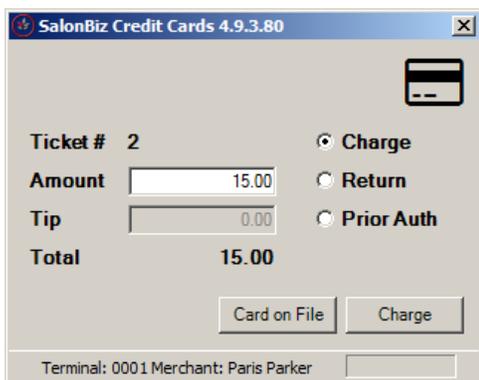
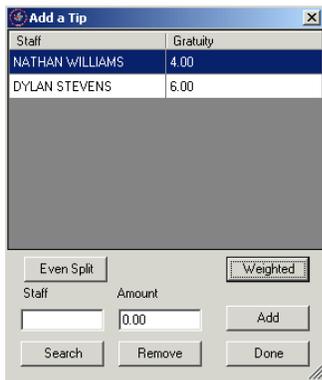
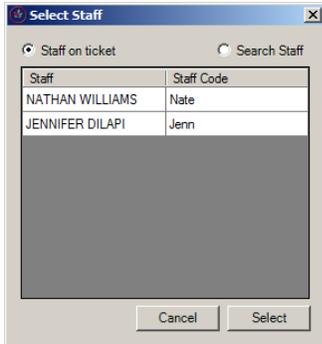
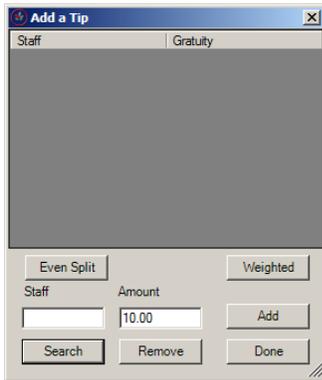


Use this guide as a reference for authorizing a credit card sale from a SalonBiz ticket, managing stored customer cards on file, and managing your credit card batch using our Chip Card Integration.

Authorizing a Credit Card Sale

1. Create a ticket for the customer as usual; select the appropriate credit card payment type to open the Credit Card Authorizer.
2. Verify that the Amount is correct and click the Charge button.
3. This will wake up the pin pad and prompt the user to swipe, insert, or tap their card. The Authorizer will display "Waiting for input..."
 - Manual card entry can be done on the pin pad by having the customer press the Enter Card button underneath the pin pad screen. Have the customer follow the prompts on the pin pad screen to complete the sale. They will be prompted to enter their card number, expiration date, and security code from the back of their card.
4. If you accept tips, the pin pad will prompt the customer to enter a tip before the transaction is complete.
5. When the customer has completed the sale on the pin pad, the transaction will be submitted for authorization.
6. A message will prompt you indicating the transaction has been approved, and the credit card icon on the authorizer will receive a green check. Click the OK button, verify the amount, and then click Done to be returned to the SalonBiz ticket.
 - If the customer chose to enter a tip during the transaction, the Add Tip window will appear before returning to the SalonBiz ticket. See the Adding a Tip section below for guidelines.
 - If you wish to save the customer's card as a Card on File, click the Save button. Refer to the Card on File user guide on how to proceed.
7. If configured, both a merchant and a customer receipt will print out.
 - By default, a signature is not required for transactions under \$25. This amount can be changed by contacting the credit card processor.
8. Click the Process Ticket button to continue to process the ticket as usual.
 - If you need to void a ticket, you can choose to also void the credit card transaction at the same time.





Adding a Tip

1. If the customer chose to add a tip from the pin pad during the transaction, the Add Tip window will appear before returning to the SalonBiz ticket.
 2. Verify that the tip amount matches the amount that the customer chose during the transaction.
 - If there is only one staff member on the ticket, they will be automatically filled in under the Staff box.
 - If there are multiple service staff on a ticket, the Staff box will not be filled in. You can click the Even Split button to evenly split the tip amount amongst all service staff on the ticket, or you can click the Weighted button to assign weighted amounts to all service staff on the ticket based on the service price.
 3. You can search for staff:
 - You can type the staff member's Staff Code in the staff box and click the Add button to immediately add the tip amount to the chosen staff.
 - You can click the Search button to bring up the Staff Search window.
 - You can choose to display only staff on the current ticket, or Search Staff to show a list of all staff.
 4. Once you have assigned the entire tip amount to your desired staff, click the Done button to return to the Authorizer, then click the Done button to return to the SalonBiz ticket.
 5. The total charge and tip amount will be placed on the SalonBiz ticket. If you assigned the tip to specific staff, the SalonBiz ticket will reflect this. Any changes can be made from the Add Gratuity button after the sale is complete.
 6. Should you wish to simply return to the SalonBiz ticket without assigning the tip to any staff, click the Done button on the Add a Tip screen, then click the Done button on the authorizer. The tip amount will be placed on the SalonBiz ticket as change owed, and can be assigned to staff at a later time through the Add Gratuity button.
- ★ Adding, changing, or removing a tip to the actual credit card after the sale has been completed will require that the customer present their credit card again. You may only reassign the existing tip amount to other staff after the sale has been completed.

Credit Card Returns

1. Create a return ticket for the customer as usual; select the appropriate credit card payment type to open the Credit Card Authorizer.
2. Verify that the Return radio button is pre-selected and that the return amount is correct on the authorizer.
3. Click the Return button.
4. This will wake up the pin pad and prompt the customer to swipe, tap, or insert their card. Have the customer follow the prompts on the pin pad to complete the return.
5. A message will prompt you indicating the transaction has been approved. Click the OK button.
6. Both a customer and a merchant receipt will print out.
7. Click the Done button to be returned to the SalonBiz ticket; continue to process the ticket as usual.

SalonBiz Credit Cards 4.9.3.80

Ticket # 3

Amount 5.00

Tip 0.00

Total 5.00

Charge

Return

Prior Auth

444444

Card on File Charge

Terminal: 0001 Merchant: Paris Parker

Prior Authorization

1. Create a ticket for the customer as usual; select the appropriate credit card payment type to open the Credit Card Authorizer.
2. Click on the Prior Auth radio button. A text entry box will appear.
3. Enter the approval code received by phone in the text entry box.
4. Click the Charge button.
5. After a brief pause, a message will appear indicating that the transaction has been approved. Click the Ok button.
6. Click the Done button to return to the SalonBiz ticket and process the ticket as usual.

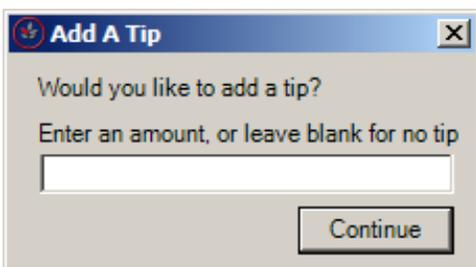
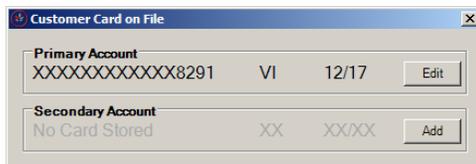
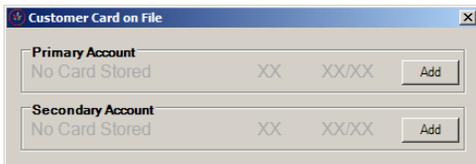
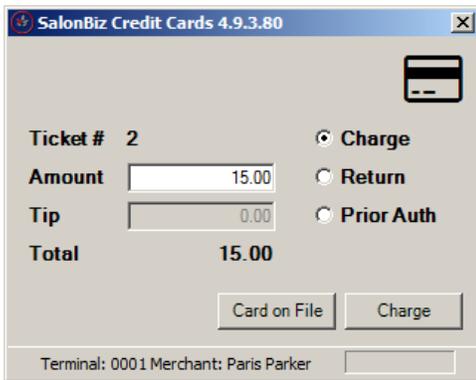
Debit / Debit Returns

1. Create a ticket for the customer as usual; select the appropriate credit card payment type to open the Credit Card Authorizer.
2. Verify the amount is correct and click the Charge button.
3. This will wake up the pin pad and prompt the user to swipe, insert, or tap their card. The Authorizer will display "Waiting for input..."
4. Have the customer follow the on-screen prompts, and choose the Debit option when asked.
5. Have the customer continue to follow the on-screen prompts, entering their PIN when asked.
6. If the PIN is accepted, the transaction will be processed.
7. After a brief pause, a message will appear indicating that the transaction has been approved. Click the Ok button.
8. Click the Done button to return to the SalonBiz ticket and process the ticket as usual.

- ★ This version of credit cards does not require a separate debit payment type in SalonBiz, but it can be used if desired. Debit cards will return the correct card type (VI, MC, etc.) to the SalonBiz ticket in the payment grid once the sale is complete.

Card on File Operations

Use these steps as a reference for the Card on File feature. The SalonBiz Card on File feature complies with all current credit card security requirements. No actual card data is stored in any SalonBiz system.



Saving a Card to File

Saving a Card on File will authorize a small amount on the card. This ensures the validity of the card. Customers may store up to two cards at a time.

1. From the Credit Card Authorizer, click the Card on File button. Once the Customer Card on File window opens click the Add button. The window will expand with a new section labeled Edit Primary Account. From the newly expanded Customer Card on File window click the Add New button.
 - You can also save a customer Card on File from the customer file drawer under the Custom Info tab.
2. This action will prompt the PIN pad for the customer to swipe their card. After the customer swipes their card, there will be a brief pause while the card is validated, and a window will pop up indicating whether or not the card was saved.

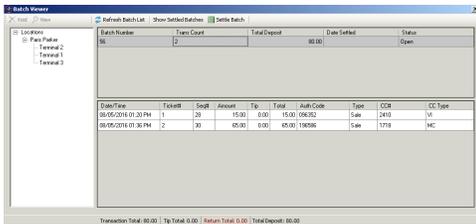
Using a Card on File

1. Create a ticket for the customer as usual. Select any credit card payment type to open the Credit Card Authorizer.
2. Click the Card on File button.
3. The Customer Card on File popup will appear and list all stored cards for the customer.
4. Verify which card the customer would like to use, and then click the Use button.
5. If you wish to enter a tip at this point, enter the tip amount into the Add Tip popup and click Continue. If you do not wish to enter a tip, simply click the Continue button.
6. After a brief pause while the customer's card authorizes, a popup will appear indicating that the charge was complete.
7. Click the Done button to close out of the Credit Card Authorizer screen and return to the SalonBiz ticket to complete the sale.
 - If you chose to add a tip, the tip amount will be placed on the SalonBiz ticket as change due; this can then be assigned to a staff member using the Add Gratuity button from the ticket screen.



Editing or Removing a Card on File

1. From the customer file drawer, search for the customer you wish to change Card on File information for.
2. Double click the customer's name to enter their customer file.
3. Click the Custom info tab.
4. Click the Card on File button toward the bottom of the screen.
 - If a customer has a stored card on file, this button will be green. If the customer does not have a stored card, this button will be red.
5. The Customer Card on File popup will appear.
6. To edit or remove a stored card, click on the Edit button next to the card you wish to update.
7. The popup will expand and provide two additional options.
 - To edit or update an existing card, click the Change button. The pinpad will now allow the customer to swipe their new card, and it will be stored after it successfully authorizes.
 - To remove a card from the customer's file, click the Delete button. You will be notified that the card was deleted, and all stored card information for that card will be removed.



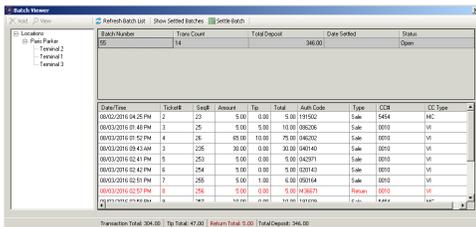
Closing the Shift

Transactions that are processed using the Card on File feature are treated the same way as a regular credit card swipe. A separate Ecommerce account is not required to use Card on File.

- You can see your Card on File transactions with the rest of your retail transactions using the Batch Transactions by Date report. They will also be listed as regular credit card sales in the Batch Viewer screen.

Batch Settlement

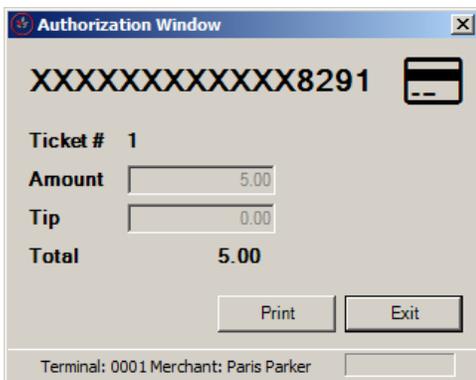
Use these steps as a reference for managing your credit card batches when you close your shift or day.



Batch Viewer

Credit Card Central has been renamed to Batch Viewer.

1. From the SalonBiz menu bar, click on the Operations icon.
2. Click the Close Shift button (if you have open tickets click the Continue to Close Shift button).
3. In the Close Shift screen, click the Credit Trans tab. The Batch Viewer will appear on screen.
4. Double click on the Credit Card Location field, located in the upper left hand frame.
5. Double click on your location name.
6. If you have multiple credit card terminals, they will be listed here. Double click on the terminal you wish to view transaction data for.
7. The open batch will list in the batch field, located in the upper portion of the screen.
8. Single click on the open batch to display the individual transactions for that batch in the bottom portion of the screen.



View and Print a Specific Transaction

1. Follow the procedure to open the Batch Viewer.
2. Highlight the transaction located in the bottom half of the screen that you wish to view.
3. Click the View button, located in the upper toolbar, or double click the transaction.
4. The transaction will then be displayed. Click the Print button to reprint a duplicate receipt, and click the Exit button when you are done.

Voiding a Transaction

1. Follow the procedure to open the Batch Viewer.
2. Highlight the transaction you wish to void in the bottom half of the screen.
3. Click the Void button on the toolbar.
4. After a brief pause while the transaction is voided on the processor side, the transaction status will change to Void.

Settling the Batch

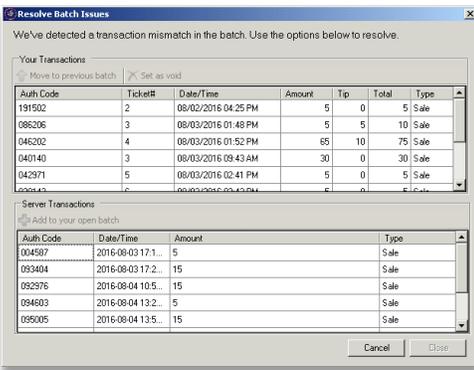
1. Follow the procedure to open the Batch Viewer.
2. Double click on the batch you would like to be settled, and then click the Settle Batch button on the upper toolbar.
3. After a brief pause, a message will appear indicating whether or not the batch was settled.
 - Settling the batch actually charges the card, therefore you will want to settle the batch every night.



Resolving Batch Mismatch Challenges

Occasionally, you may encounter a message stating that a batch mismatch was detected while attempting to settle. Follow these steps to resolve this challenge in the Batch Viewer.

1. Click OK on the message that informs you that a batch mismatch was detected to launch the Resolve Batch Issues screen.
2. You will be presented a list of transactions.
 - Transactions that are in your local batch but could not be found on the processor's side will be listed in the top half of the screen.
 - Click each transaction, or select multiple transactions by CTRL+clicking, to highlight them.
 - Click on the Move to Previous Batch button to move these transactions to your most recently settled batch. You can also void any erroneous transactions at this point.
 - Transactions that are found on the processor's side but do not exist in your local batch will be listed in the bottom half of the screen.
 - Click each transaction, or select multiple transactions by CTRL+clicking, to highlight them.
 - Click on the Add to Open Batch button to add these transactions to your current open batch.
4. When all transactions have been removed from either list, click on the Done button to return to the Batch Viewer.
5. Your current batch in the Batch Viewer will automatically refresh and reflect the changes that you selected in the Resolve Batch Issues screen.
6. Click the Settle Batch button again to settle your batch.
 - ★ If the batch does not settle, contact the SalonBiz support team.



Viewing a Settled Batch

1. Follow the procedure to open the Batch Viewer.
2. Click on the Show Settled Batches button. It will turn light blue.
3. Double click on the batch you wish to view.

Running the Batch Report

1. From the SalonBiz menu bar, click on the Reports icon.
2. Double click on the Batch Transactions by Date from the report list side bar. You will find it under the Credit Card category.
3. Enter a starting and ending date range.
4. Your batch report will be generated with all settled transactions.