Use this guide process credit cards with SalonBiz and PaySimple.
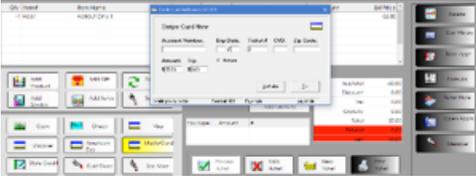
Authorizing a Credit Card Sale

1. From a ticket, select the credit card type. The Authorizer will appear:
   - the ticket number will be automatically entered
   - the sale amount will be automatically entered
   - the authorization field will be automatically checked
2. Swipe the credit card.
   - ✻ If you manually type the card number, include the expiration date and CVD number.
3. Click the Authorize button. You will see the transaction progress at the bottom of the screen.
   - ✻ If you have selected the incorrect credit card type, you will receive an error message. Click the Ok button and select the correct card type from the ticket and swipe the card again.
4. A message will appear indicating the transaction has been approved with the authorization code. Click the Ok button.
5. Both a Customer and Merchant receipt will print.
   - ✻ If the customer adds a gratuity on the receipt, enter the amount in the Tip field and then click the Update Tip button. Use the Add Gratuity button on your SalonBiz ticket to assign the tip amount to the appropriate staff member(s).
6. Click the Exit button to close out of the Credit Card Authorizer.
7. Click the Process Ticket button.
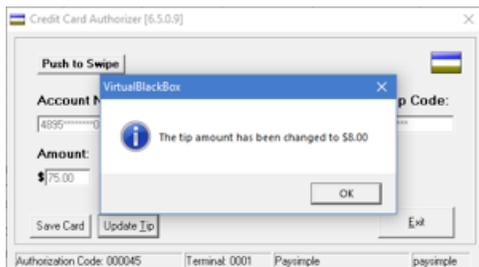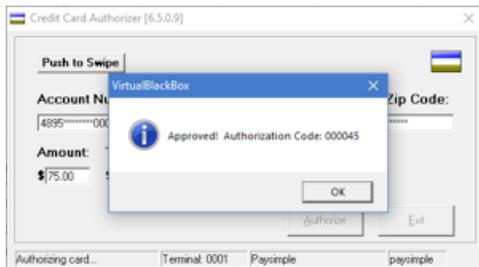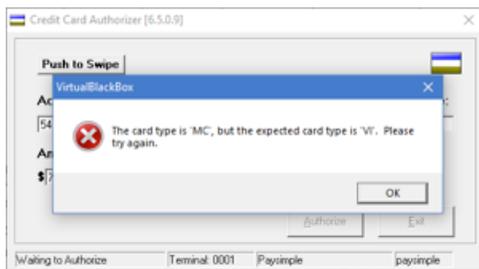
## Adding a Gratuity from a Ticket

1. From the ticket, double click on any part of the complete payment line in the Pay Type Amount field to engage the Credit Card Authorizer.
2. Enter a tip amount, and then click the Update Tip button.
3. Click the Exit button.
4. A message will prompt you indicating that the tip has been updated. Click the OK button, and then click the Exit buttonTemplate.

Credit Card Return

1. Create a return ticket and select the credit card type. The Authorizer will appear:
    - the ticket number will be automatically entered
    - the return amount will be automatically entered
    - the return field will be automatically checked
2. Swipe the credit card.
    * If you manually type the card number, include the expiration date and CVD number.
3. Click the Authorize button. You will see the transaction progress at the bottom of the screen.
4. A message will prompt you indicating the transaction has been approved. Click the Ok button.
5. Both a Customer and Merchant receipt will print.
6. Click the Exit button to close the Authorization screen, continue to process the ticket as usual.


Drawer Entry
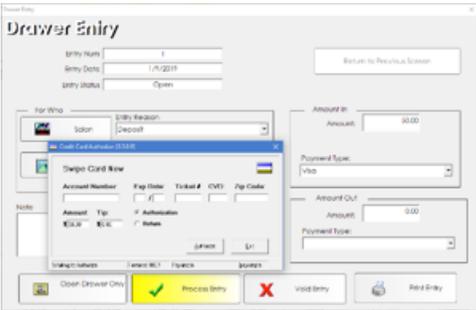
1. From the Ticket screen, click the Drawer Entry button.
2. Complete the appropriate fields for the drawer entry.
3. Enter the amount of payment in the Amount In field.
4. Select a credit card type from the Payment Type drop down menu.
5. Click the Process Entry button.
6. The credit card authorizer will appear allowing you to process the credit card as you normally would on a ticket.
7. A message will prompt you indicating the transaction has been approved. Click the Ok button.
8. Click the Exit button to close the authorizer and drawer entry window.
    * If you need to void a Drawer Entry, you can choose to also void the credit card transaction at the same time.
    * You cannot add a gratuity to a Drawer Entry transaction.

View and Print a Specific Transaction

1. From the main menu bar, click on the Ticket icon.
2. Locate the ticket that you wish to view and/or print and double click the credit card transaction.
3. This Credit Card Authorizer has a "Print" button, allowing you to print a customer copy of the transaction to the assigned receipt printer.
    * You are only able to update tip information.
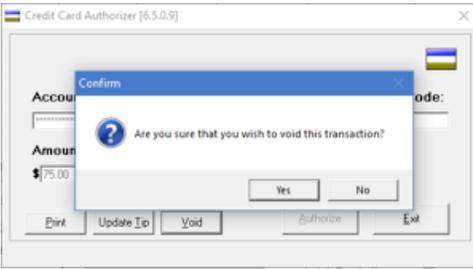
Voiding a Transaction

1. From the Ticket screen, locate the ticket you wish void.
2. Double click the credit card transaction on the ticket.
3. Click the "Void" button on the Credit Card Authorizer.
4. Answer "Yes" to void the transaction and remove it from the ticket.

Settling the Batch

Batches are automatically settled at 3:00 AM MST

## Running the Transactions Report

1. From the main menu bar, click on the Reports icon
2. Double click on Credit Card Transactions Report from the report list side navigation. You will find it under the Credit Card category.
3. Enter a starting and ending date range.
4. Your transactions will be listed between the date range.

Card on File

Saving a Card on File

Cards can only be saved after they have been used to successfully process a transaction to ensure the validity of the card number.

1. After successfully processing a credit card, click the Save Card button on the authorizer screen.
2. The Card on File window will appear. The account number will be listed in the Account Number field in the Current Card section. Click the Save Card button.
   * If the customer already has a card saved, you can choose to save the current card to replace the existing card on file. Click the Exit button when you are finished.
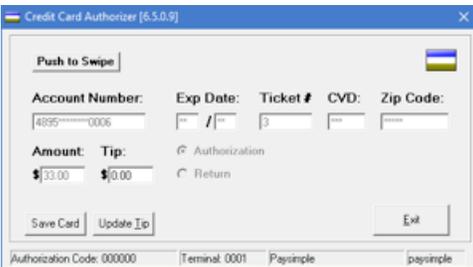
Using a Card on File

1. From a ticket, select the Card on File payment type to open the Credit Card Authorizer.
2. Click the Card on File button.
3. Verify that the card displayed is the correct card to be used, click the Use Card button.
4. The Account Number and Expiration Date fields will automatically populate for you based on the card information stored.
5. Click the Authorize button.
6. A message will prompt you indicating the transaction has been approved.
7. Click the Exit button to close out of Credit Card Authorizer
8. Continue to process ticket as usual.

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