

# appointment guarantee

*An Enterprise only feature.*

Use this guide to setup and utilize the Card on File feature to guarantee appointments.

Confirmation - Change Status	No Security
Credit Cards - Add Card on File	Security
Credit Cards - Override Card on File	Security
Credit Cards - Prior Authorization	Security
Credit Cards - Returns	Security
Credit Cards - Settle Batch	Security
Credit Cards - Update Tip	Security
Credit Cards - Use Card on File	Security
Credit Cards - View Batch	Security
Credit Cards - Void Transaction	Security
Customer File - Change Balance	Security
Customer File - Custom Info	No Security
Customer File - Delete	Security
Customer File - Edit Special Pricing	No Security
Customer File - Enter	No Security

## Security

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Security button.
3. Identify the Credit Card areas you wish to secure:
  - Credit Cards – Add Card on File
  - Credit Cards – Override Card on file
  - Credit Cards – Use Card on File
4. Double click in the security column next to the location that you wish to enable security. Or click once in the security column next to the location, and then click the Security button.
5. Notice that the field has changed from “No Security” to “Security”. A location is secure when “Security” is displayed.

## Require Card on File

1. From Blueprints, click on the Staff & Book button.
2. Click the Set Default Settings button.
3. Answer the question: Credit card required to book appointment?
4. Click the Save Answer button.

## Payment Type

1. From Blueprints, click on the Payment Types button.
2. Click the Add button, type in the name of your new payment type and then click the OK button.
3. Type 'Card on File' in the Display Name field.
4. Type 'cof' in the Pay Code field.
5. Type in a quick key code. If all quick key codes are being utilized you may leave this field blank.
6. Since you are adding a new payment type, place a check in the Enable Payment box.
7. Leave the Non-Revenue box unchecked.
8. Check the Automatic verification box.
9. If you would like this payment type to open the cash line drawer upon processing a ticket, place a check in the Opens Cash Drawer box.
10. Uncheck the Print Duplicate Receipts box.
11. Uncheck the Signature Line box.
12. If you would like to have this payment type appear on the ticket screen with an icon, click the Load Icon button and choose an icon.
13. Determine the order of your payment type in the list by clicking and dragging the name in the Payments in order of Appearance box.
14. Click the Update button.



**Customer Information**

First: Jennifer  
 Last: Jones  
 Call: (206)444-5555

Search For Cust  
 Add New  
 Cust App  
 Cust History  
 View Info

**Card on File**

**Appointment Service(s)**

Booked on 11/10/2010 at 9:40 AM  
 Status: Not Confirmed  
 Appt Note

Service	Staff	Start	Length	Res.	Req
HAIRCUT	HEIDI	1:00 PM	0:45		RR

**Card on File**

Customer Card on File

Primary Account: 54\*\*\*\*\*5454 MC [Edit]  
 Alternate Account: [Add]

[Exit]

## Appointments

1. After you have selected a customer, when creating a new appointment, the system will search for an existing card on file for the customer.
2. The Card on File button will appear in Red if there is no card saved and Green if there is a one.
3. Once all services are added to the appointment, clicking the Done button will prompt you when a credit card is required to reserve the appointment and there is none on file.
  - Click the Yes button if you would like to override the requirement.
  - Click the No button to return to the appointment to add a card.
4. To add a Card on File from the Appointment, click the Card on File button.
5. Click the Add button to add a card to either the primary or alternate field.
6. Enter the card information and click the Authorize button.
  - ❖ To verify the validity of the card, Verifone will authorize the card for \$0.01 and store it in their system.
7. Once approved, you will receive an approval message. Click the Ok button to continue reserving the appointment.
8. You can also access the cards on file to edit any existing cards. To edit cards saved, click the Edit button next to either the primary or secondary card you wish to edit.

**Jennifer Jones**

Address & Information | Personal Info | Services | Formulas | Pictures | Custom Info

Primary Location: THE SPA

Beverage: Green Tea

Robe Size: M

Slipper Size: 7

Special Requests: extra time in relaxation room

**Card on File**

## Customer File

1. From the Customer Information file.
2. Click on the Custom Info tab.
3. Click the Card on File button to add or edit a card on file.

First: Jennifer | Last: Jones | Balance: 0.00

Customer Details

Qty	Item	Item Price	Disc	Disc Type	Discount	Ext Price
1	HAI	75.00				75.00

**Card on File**

Account: [Card on File Select] [Edit]  
 Account: Customer Card on File  
 Account Number: [\*\*\*\*\*5454] MC

SubTotal: 75.00  
 Discount: 0.00  
 Tax: 0.00  
 Gratuity: 0.00  
 Total: 75.00  
 Payments: 0.00

Process Ticket | Void Ticket | New Ticket | Print Ticket

## Tickets

1. To use the card on file to process a ticket, select the Card on File payment type. This will prompt the Credit Card Authorizer screen.
2. Click the Card on File button.
3. Select either the Primary or Alternate card (if applicable).
4. Then, click the Use Card button and continue to process the ticket as usual.
  - ❖ Using a card on file is not required to process a ticket; the customer may choose to use an alternate payment type.

