Point of sale reference sheet for using Hosted Payments

Contents

To accept a credit card payment using Hosted Payments using the swiper

1) Add your line item(s) to the sale as you normally do.
2) Select a credit card tender.

The focus will move to the Amount Tendered field, pre-filled with the Total Due. You can edit this to a smaller amount if you plan to take another tender, but usually you will just press <Enter>.

The Hosted Payments window will come up:

3) Swipe the card. The number and expiration date fields will fill in and you can press <Tab> twice and then <Enter> to process the transaction, or just click on the Process Transaction button.

You should get a display like this one:
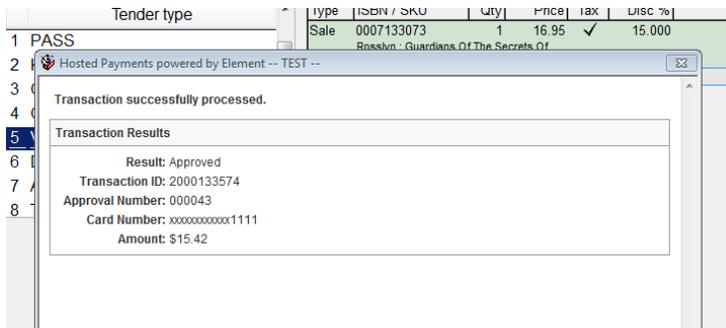
4) Press <Esc> to close the results window or click on the **X** in the upper right of the window.   If the amount authorized was sufficient to cover the Total Due, a credit card signature slip will print, followed by the customer receipt.

If the authorization is rejected, the results window will indicate the reason. When you close the window, the focus will return to the list of tenders so you can try another card or another tender. See below for more detail on dealing with declined cards.

Keyed transactions

Sometimes the credit card cannot be read (for instance, if the magnetic strip is damaged, or if you are taking an order over the phone). In such a case:

1) Choose the "Keyed credit card' tender you created earlier.
2) A window will pop up, asking for your customer's ZIP code. Enter the ZIP and press <Enter>.
3) The standard Hosted Payments window will appear. Key in the card number and expiration date. Tab to Process Transaction and press <Enter>, or simply click on the Process Transaction button.

How to handle a declined charge

When you try to authorize a credit card sale through Element Hosted Payments and the card is declined, you will see something like this:
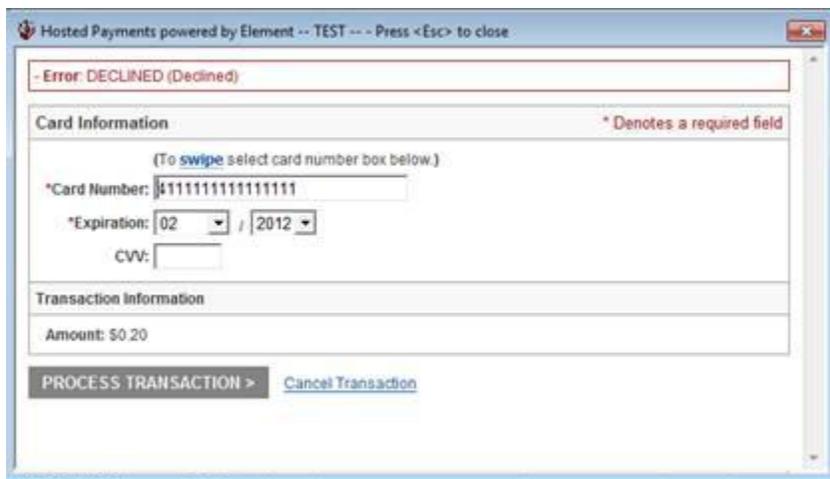
When you see a display like this, take the following steps:
1) Click on the Cancel Transaction link at the bottom of the window.
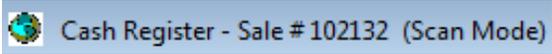2) A window will appear confirming that the transaction was cancelled. Click on the X on the upper corner of the Transaction Information window.
3) You now will be returned to the Tenders list. If the customer wants to give another tender—another credit card, or a check, etc.—choose the option you want from the Tenders list and proceed as you normally would.

Accepting a return

To accept the return of an item paid for through Element Payment Services:

If you intend to accept a return and to issue a credit to the customer's card, *and if the original sale was authorized through Element Hosted Payments*, please take the following steps:

1) If you are in Scan Mode (as indicated on the title bar of the Cash Register window) , use the Actions menu to turn it off.

Cash Register - Sale # 102132 (Scan Mode)

2) Choose Return Manager from the Cash Register Actions menu, or press Alt-F9, or click on the Alt-F9 Return Mgr button.
3) When the Return Manager opens, the focus will be on the 'Transaction number' field.
4) If your customer has a receipt for the item they want to return, and if the receipt was printed in a recent version of Anthology, there will be a barcode at the bottom of the receipt. Scan in the barcode to identify the transaction. If there is no barcode because the receipt was printed with an earlier version of the program, you can key the Sale transaction number in this field.
5) A list of the items sold on the transaction will appear in the grid above.   Select the item you want to accept and choose F12 Select. (You can also search for items or transactions by using the ISBN/SKU, Customer Code, or Customer Last Name fields.)
6) Press <Enter> to add the item you want to the transaction as a return.
7) You can now add other line items to the transaction if you choose.
8) When you want to complete the transaction and want to credit the customer's card, choose Take Tenders and swipe the card that was originally used on the transaction. (Note that, to prevent credit card loading, you cannot issue the credit to a different card from the one originally used.)   If the original purchase was made with that card, the customer will be successfully credited. Have the customer sign the slip and retain it for your records as usual.
9) If you turned Scan Mode off at the beginning of the transaction, turn it back on now using the Actions menu.

To accept the return of an item NOT paid for through Element Payment Services:

Although you should be able to locate it in Return Manager, you will not be able to issue a credit for an item that was not originally charged via Elements Hosted Payments. For such items, you can issue payment in another form such as store credit, gift card, cash, or check. However, if your store's policies require you to issue a credit to the customer's charge account, then you must keep your old merchant account in place for some reasonable amount of time in order to be able to issue credits through that

account. Most Anthology users will have used either PCCharge or IPCharge with their old account, and you must use these tools to issue a credit in such a situation.

To issue a credit on a card for transactions done before Element Payment Services was in place, please take the following steps:

For former PCCharge users:

1) Set up a tender as 'OldCC' and make sure that "Require entry of card info" is not checked on the Details page for the tender.
2) When you want to accept a return, add the item to be returned to the transaction via Return Manager and choose
3) Use the PCCharge PaymentServer program to issue the credit to the customer. Please remember that PCCharge does not support encrypting swipers, so you will have to key in the card number and expiration date.
4) Complete the return in Anthology as usual, using OldCC as the tender type for the payout.

For former IPCharge users:

1) Set up a tender as 'OldCC' and make sure that "Require entry of card info" is not checked on the Details page for the tender.
2) When you want to accept a return, add the item to be returned to the transaction via Return Manager.
3) Use the online IPCharge web portal to issue the credit to the customer.   Please remember that IPCharge does not support encrypting swipers, so you will have to key in the card number and expiration date.
4) Complete the return in Anthology as usual, using OldCC as the tender type for the payout.