Integrated Credit Cards
SMP/7900

This document is to help new and existing stores with the Integrated Credit Card process. When processing credit cards, make sure a valid receipt is printing and that batches have settled, otherwise the credit card(s) may not actually be going through to the processor. This can result in lost revenue for the store.

Receipt Information

```
**COLD STONE CREAMERY**
123 FOURTH ST.
PHONE (555) 555-1212
          OWNER NAME

TR TYPE           AUTH SALE
MERCHNT#          123456789123
ORDER#            0264
REF#              02000286
PAYMENT           VISA
CARD#             ***************1234
EXP.DATE          **/**
AUTH#      01234A

    TOTAL         12.76

    T[I]P      _____
    TOTAL         12.76

I AGREE TO PAY THE TOTAL AMOUNT
ACCORDING TO THE CARD ISSUE
AGREEMENT

SIGN _____
CASHIER
    0084 15:48  #17 JUL. 10 '07 REG0002
```
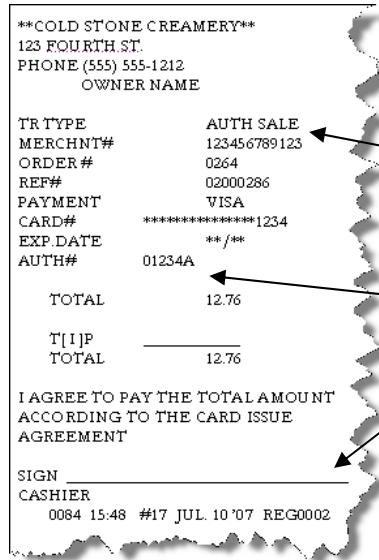
Although receipts can vary, verify the following items are displayed on the receipt:
1. TR TYPE should be AUTH SALE (Authorized Sale)
2. MERCHANT#
3. CARD# should only have the last 4 digits displayed
4. EXP.DATE should be blanked out
5. There should be an authorization number
6. ⬛ Make sure a signature line prints

Call the Kahala Help Desk if the receipt is missing any of the above; 877-811-3811

To verify batches have been settled

Integrated credit card batches are processed automatically (settled) each night for the majority of SMP stores. As with any automated process, integrated credit card batch settlement must be monitored regularly. Unsent batches can result in loss of revenue. In order to ensure that your integrated credit card batches are sent to your processor in a timely fashion, please follow the steps below **at least once per week. It is also critical to monitor your bank accounts to ensure credit card deposits match your records in the store.**

Stores currently processing batches manually may also refer to this document.

1 Open **SMP**

2 Open **System Manager**

3 Open **CAT Batches**

4 Select each batch that has a **red octagon** in front of the business date.

This means the batch failed and will need to be resubmitted.
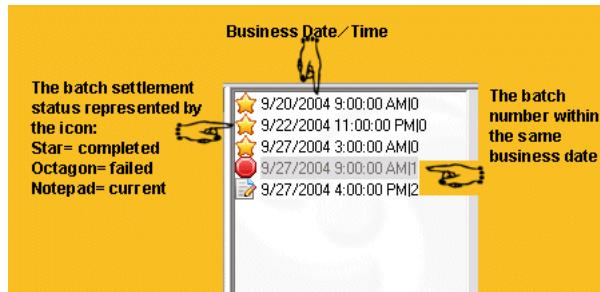
5 After selecting the batch you can view the information for that batch, submit a batch for settlement, or resubmit a failed batch.

⚠️ **Please note the date of the batch before you submit – most processors will charge a significant processing fee for settling older batches. Please contact your processor for their policy.**

6 To resubmit a **failed batch**, click on **Submit.** When the batch has completed, a star will appear next to the business date. The submission process will take 2 – 5 minutes depending on the size of the batch. If a star does not appear, call the Kahala Help Desk; 877-811-3811.

7 Select another batch or click **OK** to exit.

8 In some isolated situations, you may see batches from previous days that look like this:

This "pencil and paper" icon means that the batch did not make an attempt to send. To settle, select the batch and click on **Submit.** Note that this should not be done with batches from the current day, only those from previous days.

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At the Register

Exact Tender
1. Logon as Cashier
2. Ring Items
3. Swipe credit card through the reader and wait for approval
4. A "CAT Processing" message briefly displays on the register screen. If the credit card is approved, your receipts print in about 5 – 15 seconds.
5. Have customer sign the merchant receipt copy. Retain the merchant copy and present the other receipt to the customer.
   Merchant copies may have the complete credit card number and expiration date. The customer copies do not.

```
         PANASONIC
       1707 N. Randall Rd.
       Elgin IL. 60123-7847
          (847)123-4567


       CYNTHIA SMITH

TR TYPE     AUTHSALE
MERCHNT#    999999999911
ORDER#      0351
REF#        03000008
PAYMENT     AMER EXP
CARD#       XXXXXXXX12345
EXP.DATE    XX/XX
AUTH#       123456

TOTAL                 5.26

Sign:_____
I agree to pay the total amount
according to the card issue
agreement.

1stcopy=Merchnt 2ndcopy=Customer
DEBBIE S
0041  09:35  #01 JUN 11'01 REG0001
```

If the credit card is denied, a "DENIED" message prints

If the reader cannot read the card information, follow the Manual Entry Procedures

Split Tender
1. Logon as Cashier
2. Ring Items
3. Touch PAY SCREEN
4. Enter amount to be applied to first credit card
5. Swipe credit card through the reader and wait for approval
6. A "CAT Processing" message briefly displays on the register screen.
7. Enter amount being applied to second card
8. Swipe second card through the reader and wait for approval
9. If the credit cards are approved, your receipts print in about 5 – 15 seconds.
10. Have both customers sign the merchant copies of receipts. Retain the merchant copies and present the other receipts to the customers.
    Merchant copies may have the complete credit card number and expiration date. The customer copies do not.

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Manual Entry

If you have a worn or demagnetized card, the system may not be able to read the card number or its expiration date. Use the following procedure to manually enter the card information.

1. Logon as Cashier
2. Ring Items
3. Touch PAY SCREEN
4. Touch VISA/MASTERCARD/AMEX/DISCOVER key – dependent on type of card used
   The type of card keys will be listed in the MANUAL CREDIT column
5. At the login screen, You will be prompted to enter the credit card number, use number keys to enter credit card number
6. Touch ENTER
7. At the login screen, You will be prompted to enter expiration date, use number keys to enter expiration date
8. Touch ENTER
9. A "CAT Processing" message briefly displays on the register screen. If the credit card is approved, your receipts print in about 5 – 15 seconds.
10. Have customer sign the merchant receipt copy. Retain the merchant copy and present the other receipt to the customer.
    Merchant copies may have the complete credit card number and expiration date. The customer copies do not.

Manual Authorization

You may have to call the processing company directly for credit card approval. Use the following procedure after you call to receive authorization for the customer's charge.

1. Logon as Cashier
2. Ring Items
3. Touch PAY SCREEN
4. Touch MANUAL AUTH
5. Swipe the credit card. If card does not swipe,
   a. Enter card number
   b. Touch MANUAL ENTER
   c. Enter expiration date
   d. Touch MANUAL ENTER
6. You will be prompted for the authorization number, enter the authorization number received over the telephone
7. Touch MANUAL ENTER
8. Touch CASH
9. A "CAT Processing" message briefly displays on the register screen. If the credit card is approved, your receipts print in about 5 – 15 seconds.
10. Have customer sign the merchant receipt copy. Retain the merchant copy and present the other receipt to the customer.
    Merchant copies have the complete credit card number and expiration date. The customer copies do not.

Return Credit Transaction
1. Logon as Cashier
2. Logon as Manager
3. Touch PAY SCREEN
4. Touch CLEAR
5. Touch DELETE
6. Touch ORDER MENU
7. Ring all items in original order
8. Touch PAY SCREEN
9. Touch REFUND CREDIT
10. Swipe credit card through the reader and wait for approval
11. Enter the 8 digit reference number from the original receipt (authorization for Merchant Link)
12. Touch CASH
13. When transaction is accepted, a Return Credit CAT receipt prints. Have customer sign this receipt.

Tip Edit
This is required if a transaction was finalized with the incorrect tip amount. This adjustment must be made before the End of Day.
1. Logon as Cashier
2. Logon as Manager
3. Touch PAY SCREEN
4. Touch CLEAR
5. Touch PAY SCREEN
6. Touch TIP EDIT
7. Use the number keys to enter the reference number (located on original receipt)
8. A "Processing" message appears on register display
9. Use the number keys to enter the new tip amount
10. Touch MANUAL ENTER
11. Touch MANUAL ENTER again to finalize
12. A tip receipt will print

Error Messages

Denied Authorization

If a card is denied, a "Denied" prints without a signature line.

```
                PANASONIC
             1707 N. Randall Rd.
             Elgin IL. 60123-7847
               (847)123-4567



              CYNTHIA SMITH

   TR TYPE         AUTHSALE
   MERCHNT#        999999999911
   ORDER#          0351
   REF#            03000008
   PAYMENT         AMER EXP
   CARD#           XXXXXXXXXX12345
   EXP.DATE        XX/XX
   AUTH#           ****

   DENIED

   1stcopy=Merchnt   2ndcopy=Customer
   DEBBIE S
   0041  09:35  #01 JUN 11'01 REG0001
```

Communication Error

If communication error occurs, the message "CAT receipt OFFLINE" prints at the bottom of the receipt. The AUTH# field is left blank. Call the Kahala Help Desk; 877-811-3811.

```
                PANASONIC
             1707 N. Randall Rd.
             Elgin IL. 60123-7847
               (847)123-4567


              MARIA JOHNSON

   TR TYPE         AUTHSALE
   MERCHNT#        999999999911
   ORDER#          0351
   REF#            03000008
   PAYMENT         AMEX
   CARD#           XXXXXXXX 12345
   EXP.DATE        XX/XX
   AUTH#

   SUBTOTAL                  25.18


   Sign:_____

   I agree to pay the total amount
   According to the card issuer
   agreement


   1STCOPY=MERCHNT
   2NDCOPY=CUSTOMER
   CAT OFFLINE
   DEBBIE S
   0041  09:35  #01 JUN 11'01 REG0001
```