# SalonBiz®

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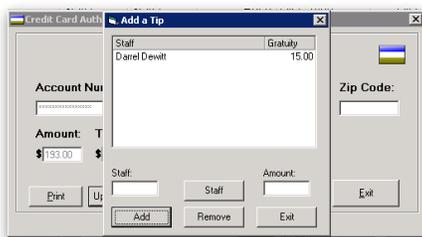
Authorizing a Credit Card Sale

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 card
   * If you manually type the card number, include the expiration date, CVD and billing zip code.
3. Enter a tip amount
   * If a tip is added to the ticket prior to authorization the tip will show on the authorizer automatically.
4. Select Authorize
   * If the incorrect card type was selected and error message with pop-up, select OK. Either swipe the correct card or close the authorizer and select the correct card type.
5. An approval message with Authorization code will appear, select OK
6. Both a Client and Merchant receipt will print.
7. If the client included gratuity on the signed receipt, enter the amount in the Tip field and click Update Tip.
   * If a tip is updated on the Authorizer the staff will use the add gratuity button on the ticket in SalonBiz to assign the tip to the appropriate staff before proccessing the ticket.
8. Click the Exit button to close out of the Credit Card Authorizer.
9. Click the Process Ticket button.
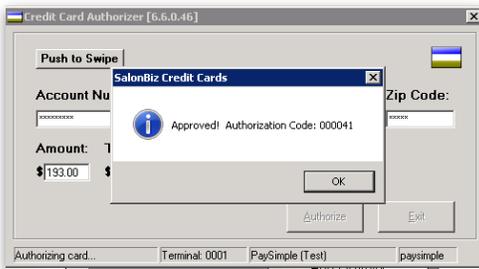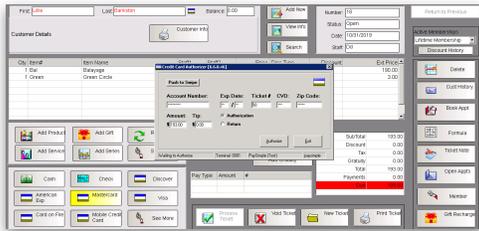
Adding a Tip from a Processed Ticket

**Only tickets for the current day and shift the ticket was processed can have a tip updated.**

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. Click Update Tip.
3. Select the staff you want to assign the tip and enter the amount of the tip. Click Add
4. Click the Exit button.
5. A message will prompt you indicating that the tip has been updated. Click the OK button, and then click the Exit button.
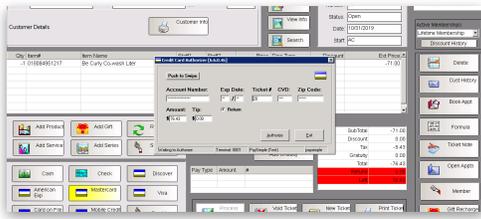
Credit Card Return

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 card.
   - ✷ If you manually type the card number, include the expiration date CVD and billing zip code.
3. Select Authorize
4. A message will prompt you indicating the transaction has been approved. Click the Ok button.
5. Both a Client and Merchant receipt will print.
6. Click the Exit button to close the Authorization screen, continue to process the ticket as usual.
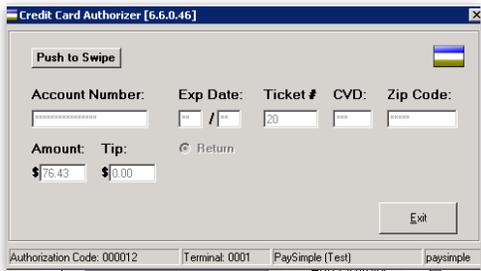
Duplicate Transaction Check

If a payment fails to write to a ticket and a staff runs a credit card a second time, the system will perform an automatic duplication check.

1. From a ticket, select the credit card type. The Authorizer will appear:
2. Click the charge button
3. When a duplicate transaction is detected the staff will get the prompt 'This card was previously charged for $XX.XX for this ticket, but the payment was not properly applied. The previous charge will now be applied to the ticket. The charge you just attempted was not processed. Return to the ticket to view the payments.'
4. Click Ok
5. The payment will now show on the ticket and the staff can process.
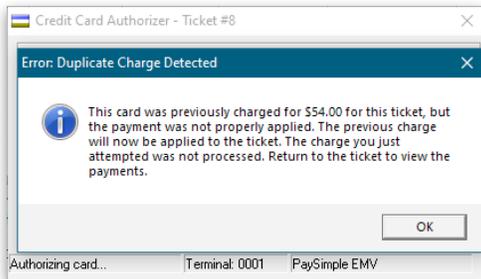
Drawer Entry

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 tip to a Drawer Entry transaction.
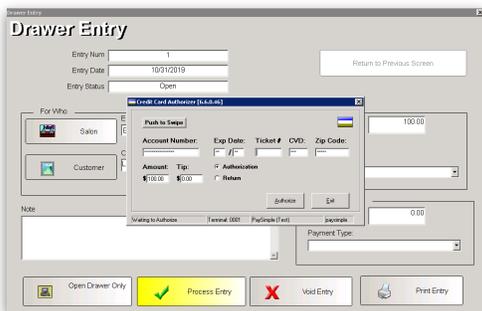
View and Print a Specific Transaction

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
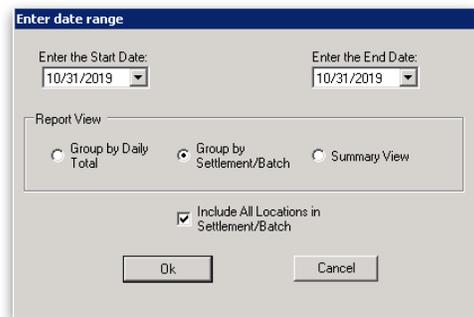
Running the Transactions Report

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. Select how you want to view the listings.
5. If Multi-Location select if you want to include all locations in Settlement/Batch
6. Your transactions will be listed between the date range.

Card on File
### Saving a Card on File from a Ticket or Drawer Entry

1. After authorizing a credit card, click the Save Card button on the authorizer screen.
2. In the Card on File screen the account number will be listed in the Account Number field in the Current Card section. Click the Save as Primary if no card is on file or if you want to replace the current primary card on file. Click Save as Alternate if you have a primary card saved on file and you want to save this card also.
3. Exit button when you are finished.

Saving a Card on File from Client file
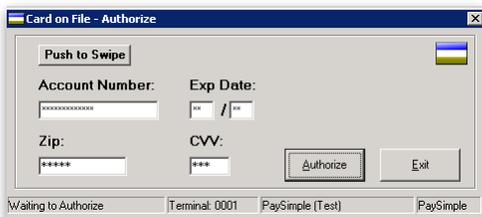
1. From the client file select the Custom Info tab.
2. Click the Card on File button.
3. Click + next to primary or alternate, if you want to save a second card.
4. Swipe the card
5. Click Authorize from the authorization screen.
   * This does not charge the client card, it simply verifies the account information.
6. Click Ok to the account created pop-up.
7. Click Exit

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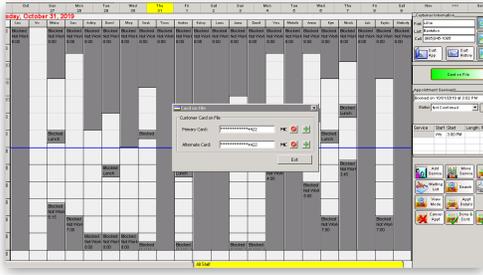
Saving a Card on File from Appointment Book

1. From the clients appointment click the Card on File button.
2. Click + next to primary or alternate, if you want to save a second card.
3. Swipe the card
4. Click Authorize from the authorization screen.
   * This does not charge the client card, it simply verifies the account information.
5. Click Ok to the account created pop-up.
6. Click Exit
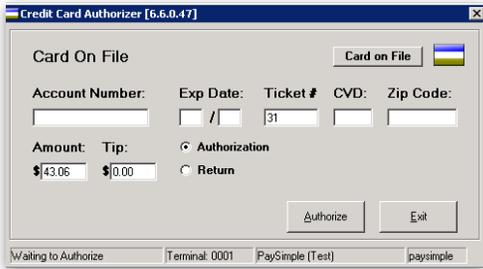
Using a Card on File

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(s) displayed are correct, click the Use Primary or Use Alternate button.
4. The Account Number and Expiration Date fields will automatically populate for you based on the card information stored.
5. Enter a tip amount
6. Click the Authorize button.
7. A message will prompt you indicating the transaction has been approved.
8. Click the Exit button to close out of Credit Card Authorizer
9. Continue to process ticket as usual.

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