

## Using the Credit Card Interface

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## Setting up the Credit card Interface

If you are using the credit card interface you must first setup the station to use the interface (System Setup -> Cards. You must complete this on all stations that will accept credit cards. **Note: If using the SRM, you cannot use the Global Credit card interface.**

Once you have selected the [**Card's/Tender's**] option from the system setup screen, the following screen will appear; (Flashpoint will automatically display the card setup screen for the station you are on. You must setup the charge cards on every station.)

Flashpoint will automatically set the “**Credit Card Interface**” selection for you, depending on your license. If you have purchased a specific card interface and do not see that interface, simply update your license (System Setup-> License -> Update License) then return to this screen. If it is still the wrong interface selected, you will need to call your reseller to have it properly set. If you did not wish to purchase the integrated charge cards and instead just wish to record the charge card information, Flashpoint will select the “Just Record Charge Cards” option. The only setups required would be to enter the card/tender types you wish to accept, the employees can just enter all of their charge cards into the system at the end of their shift or during the downtime.

If you have a fast food or retail environment and do not wish to display a tip line on the receipts, select the “**Do not Show Gratuity**” option. **Note: You may have to set this in two other places. One later in the card setup screen (if using a Pin Pad make sure “Prompt for Gratuity on Pin Pad” is not checked), the second under Closed Service Check Setup -> “Do Not Ask For Gratuity on Tender Screen” (turns off prompting for gratuity on the tender screen even when entering cash).**

If you wish to use the credit card interface in the USA and have selected Mercury Payments as your Processor, you must enter your merchant id in the space provided under the “Mercury Credit Card” heading. You must also have either a Magtek Ipad (allows manual entry of card data, Debit and EBT) or a Magnesafe Card Swipe (credit card only, card must be swiped) at every station that you wish to accept credit cards. You

can obtain the Ipad and Magnesafe card readers from Mercury Payments.

If you wish to use integrated credit cards in Canada, and have selected Global Payments as your Processor, you should see “**Credit Cards thru Global Canada**” selected as the Credit Card Interface. You do not have to enter your merchant information if using Global, as the VX810 reader will automatically set the information for you. Contact Global Payments to obtain a Vx810 terminal. The Vx810 will connect to a serial port on the PC. Enter the serial port that you have connected the Vx810 to in the space provided under the Global Canadian Direct heading.

If you wish to have the system pre-authorized a credit card when servicing a delivery, select “**Pre-Authorize Card on Service of Delivery**”. This will cause the system to prompt the order taker for the method of payment (card or cash) and verify the credit card if need be. If the employee reopens and adds to an order, the card will be re-approved. The driver would then finalize the transaction and add a gratuity upon returning from the delivery.

“**Pre-Authorize card on Start new Bar Tab**”, if checked, will cause the system to pre-authorize the customers charge card for the pre-defined amount set under “**Pre-Authorize Bar Tab for \$**” field, when a new tab is started. If the bar tab exceeds the pre-defined amount and the “**Re Pre-authorize when Bar Tab Exceeds**” flag is checked, the system will void the original pre-auth and re authorize the card for an additional amount based on the same setting. Example: If set to \$50.00 and the tab reaches \$51.00 the system will pre-authorize the card for \$100.00. When the order is closed the system will prompt for the payment information and adjust the amount of the card appropriately **Note: These options are not available for all Processors, contact your reseller prior to purchasing the interface to see if this option is available for the Processor you wish to use.**

If using the tender screen to enter charge cards, you must select whether you want to “**Have the Tender Screen Capture only**”, “**Have the Tender Screen Pre-Auth and Capture**” or “**Have the Tender Screen Pre-Auth only**”. **Note: With some Processors, including all Canadian Processors, only “Have the Tender Screen Capture only” will be your only option (the pin pad will prompt the customer for a tip).** If you choose to capture only, the system will capture the credit card only and not allow the employee to enter a tip (fast food). If you choose to have the system pre-auth and capture the system will prompt for the tip amount after the employee swipes and captures the card with the total amount including tip (table service/bar with a Cashier). If you choose to have the system pre-auth only, the system will pre-authorize the card leaving it open for the employee to add a tip at a later time (table service/bar with server banking).

The system will print the number of slips entered under “**Number of Card Slips Printed with Authorization**”, every time the employee puts through a card. You should set this option to at least two (one for the customer to keep and one for the customer to sign and return to the server).

If you are using a processor other than Mercury (USA) or Chase Paymentech (Canada), you will need to purchase and install a copy of NetEpay (contact your local distributor). You will also need to fill in the following fields:

**Merchant Id** – Enter your Merchant Id exactly as sent to you by the processor.

**Pin Pad on Com Port** – If using a Pin Pad (for taking Debit transactions), enter the COM port the pad is connected to.

**Pin Pad Terminal Id** – If your processor gave you a terminal Id for the pin pad enter it here, otherwise leave this blank

**Host or IP Address** – Enter the IP address of the station running the NetEpay software. If it located on the local station, enter 127.0.0.1

**Merchant Language** – Select your language (English or French)

**Pad Type & Secure Device** – Only enter this information if instructed to.

**Prompt on Pin Pad for Gratuity** – If using the pin pad and enter this option, the system will prompt the customer for the gratuity amount on the Pin Pad (if available with your merchant).

If using the credit card interface in Canada and wish to take credit cards for delivery, you may have to run two copies of the NetEpay software (one for use with the pin pad and one that allows you to hand enter cards right on the order entry screen). If this is the case, select **“On IP 9050 Canadian Only”** (one of the copies of the NetEpay software will be set to run on port 9050) and enter the second merchant Id and Terminal Id. Although you will end up with multiple accounts, you will save money by not having to purchase a pin pad for every station.

If you are not using the credit card interface, add the card names that you accept in the top right of the screen (this will be what the system will prompt the employee with, when selecting a card type). If you are using the credit card interface, the system adds the card names automatically as you accept a credit card type. You may also add additional payment types (check etc.) in the same area.

If you are accepting gift cards through your processor, enter the appropriate information in the space provided (If you are not accepting gift cards on this station select the “Do Not Use Gift Card Interface On This Station” option).

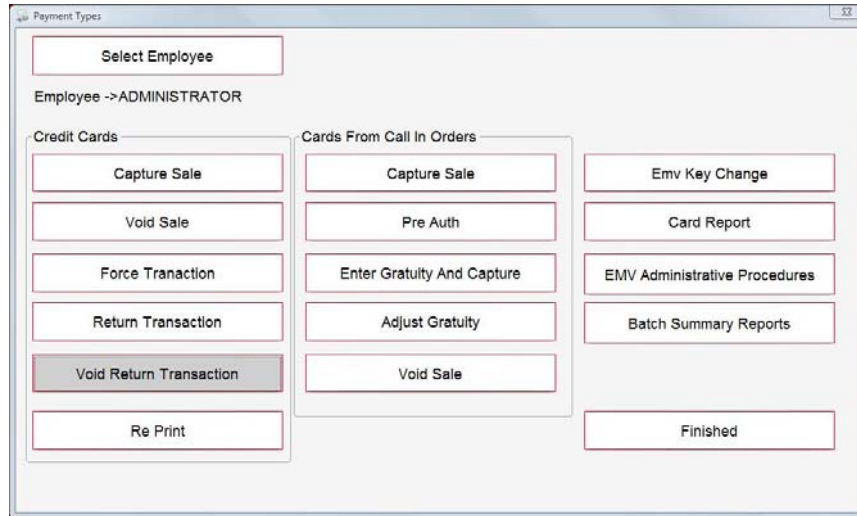
If processing gift cards through Mercury Payment Systems you must swipe the card on the Magtek Ipad and must check off the option “Gift Card with Mercury”.

The Use Extended Interface is reserved for custom gift card interfaces.

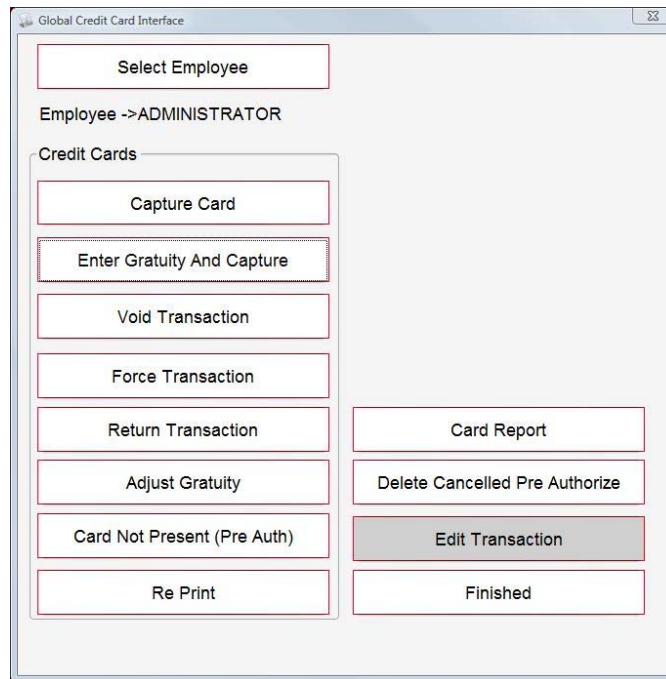
**Using the Credit Card Interface**

This section will explain how to use the credit card interface. Although the manual explains how to enter cards through the Credit Card screen, if you are entering credit cards through the tender screen, the only difference is that you select **“Enter Charge Card”** on the tender screen to swipe the card, and you do not have the option to select the seat or check number. You can follow the remainder of the instructions below for any other tasks.

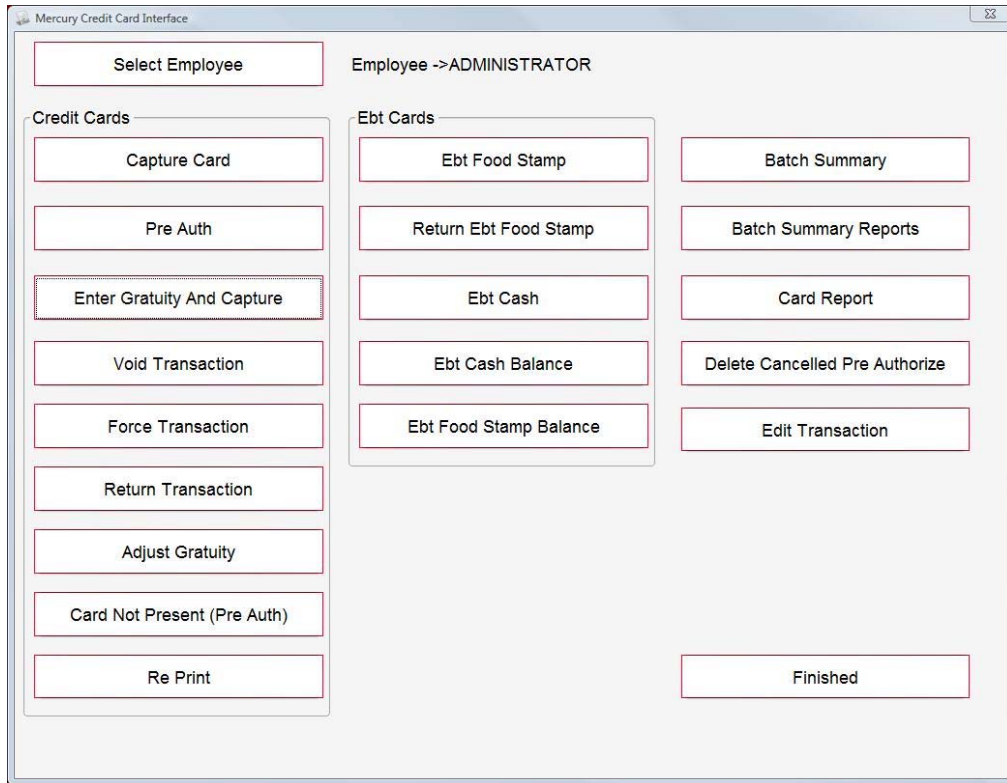
The options available and screen that you see depends on the processor that you are using. Below are examples of what the card screen will look like starting with Canadian credit cards through NetEpay:



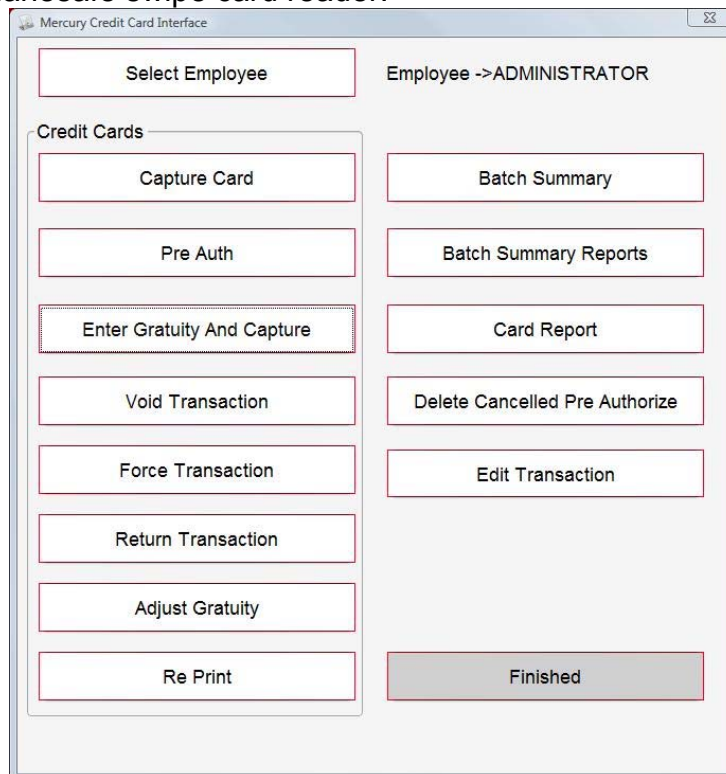
Next is Global Canada using the Vx810 terminal:



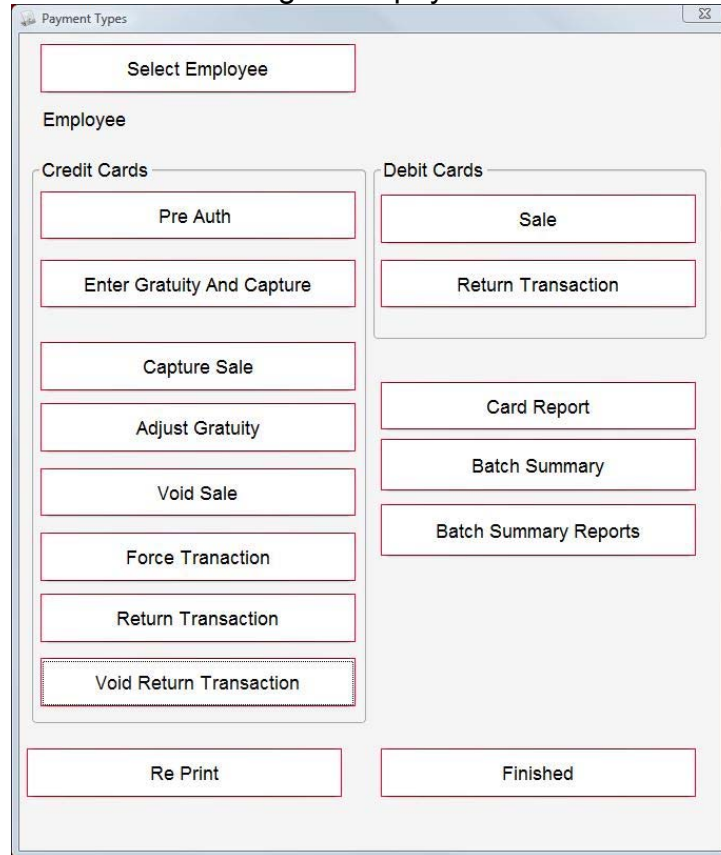
Below is Mercury Payments US using the Ipad (notice that Ebt is available only with the Ipad):



Next is Mercury using the Manesafe swipe card reader:



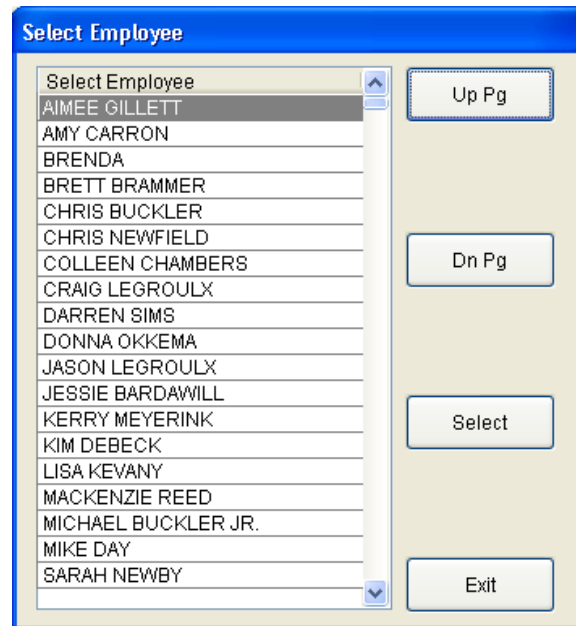
And finally is all other interfaces in the US through NetEpay:



The only difference (besides the available functions) when running cards is you either will be swiping the card through a Pin Pad terminal or through a regular card swipe device.

If you are taking credit cards in Canada using two copies of NetEpay (one for hand entered one for Pin Pads) you will have to enter all cards that will be from the Pin Pad under the "Credit Cards" section and all the hand entered (on screen) cards from the "Cards from Call In Orders" section. The only main difference is that with The Credit Card section, you will HAVE to enter all cards on the Pin Pads and with the Call In section cards are entered on the screen (Debit transactions cannot be entered in the Call In section).

When entering, editing or voiding a credit card, you must first select the employee that you are entering the transaction for (if you are entering the card for yourself, this step is not necessary, as the system defaults to the person logged in). Once you click the **[Select Employee]** button, you can select the appropriate employee from the following screen. The currently selected employee will always be displayed beside the select employee button.



To select the employee, simply use the **[Up Pg]** and **[Dn Pg]** buttons to find the correct employee, touch the employee's name to highlight him/her and touch **[Select]**.

To authorize a credit card, select either capture card or pre-auth. If you choose to capture only, the system will capture the credit card only and, depending on how your credit cards are setup, will prompt for a tip to be entered. If you choose Card Not Present to pre-authorize the card only, the system will prompt for the card information on screen (NetEpay) or on the pin pad (Mercury), then pre-authorize the card leaving it open for the employee to add a tip at a later time (table service/bar with server banking).

### Capture Card

If you choose **[Capture Card]** the following screen will appear, prompting for the card information.

Select the reference number of the check that the card is being used for as well as the seat number (if applicable). If the total purchased is not the total being charged, you may change the amount using the **"Total Purchased"** button. You may also add a tip to the card while on this screen using the **"Gratuity"** button (depending on the interface, this may not be available as tips are entered on the Pin Pad) then



selecting the “Save” Button. To enter the credit card information simply have the customer swipe or insert the card. Depending on the processor (including all of Canada), the pin pad may ask the customer for a tip.

If you do not physically have the card, select the “Manual Card Entry” checkbox before selecting save and you will be prompted to hand enter the card number on the pin pad.

If when processing a card you receive an “**AP DUPE**” error that means that you have already charged the customers card the exact same amount on an earlier transaction. If it is a valid transaction, select the capture card option again except check off the “**Force Duplicate**” option to tell the processor that it is a valid transaction. The card will then be approved.

### Pre Auth

When you select Pre-Auth, you will see the same screen as above. The only difference between the pre-auth and capture is when doing a pre-auth you will have to run the “**Enter Gratuity and Capture**” function to finalize the card. Due to Chip and Pin technology in Canada, you cannot use the Pre-Auth function, Instead you will need to do a Card not Present (manual card entry) Transaction.

### Enter Gratuity and Capture

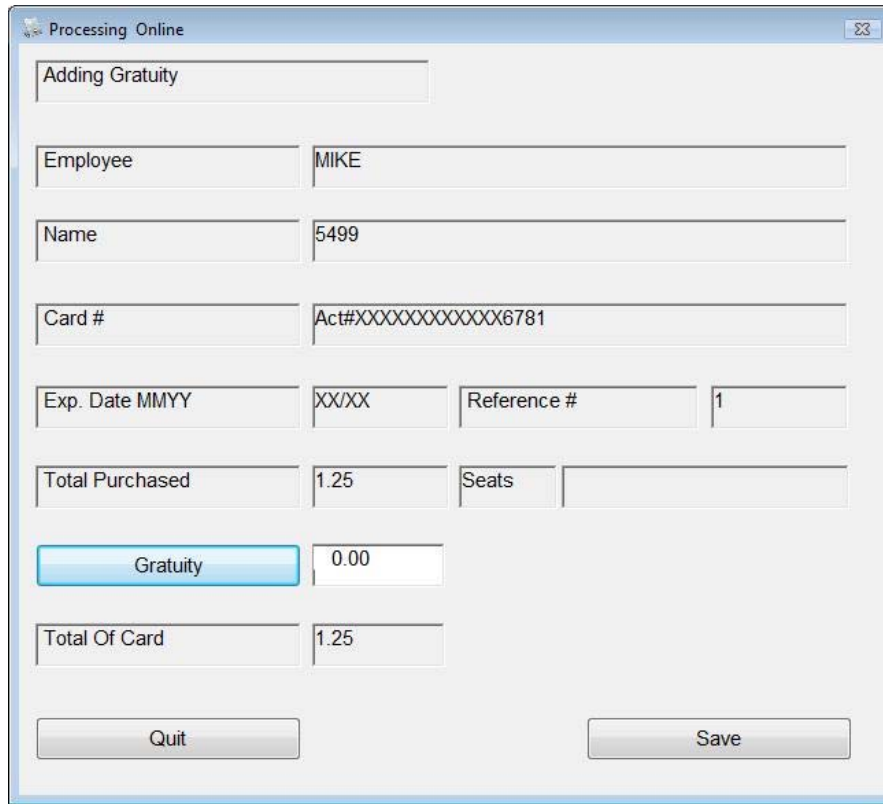
If you pre-authorize a card and wish to enter a tip, you may do so using the “**Add Gratuity and Capture**” function. Once selected, the following screen will appear displaying all pre-authorized cards that have yet to be finalized.

Employee	Ck#	Seat	Card Name	St.	Card #	Charge	Gratuity	Total	Re-
					ACM	0.00	0.00	0.00	

Up Pg      Dn Pg

Adjust Gratuity      All Employee's      Finished

To add gratuity, select the card to add the gratuity to then the “**Select**” button. If the correct card is from another employee, you can select “**All Employees**” to view the cards for everyone. Once the card is selected the following screen will appear, prompting for the gratuity. NOTE: All pre-authorized cards must be finalized in order to close the batch at the end of the day, whether the card has a tip or not. If a pre-authorized card does not have a tip, select the card and touch the save button with no tip.



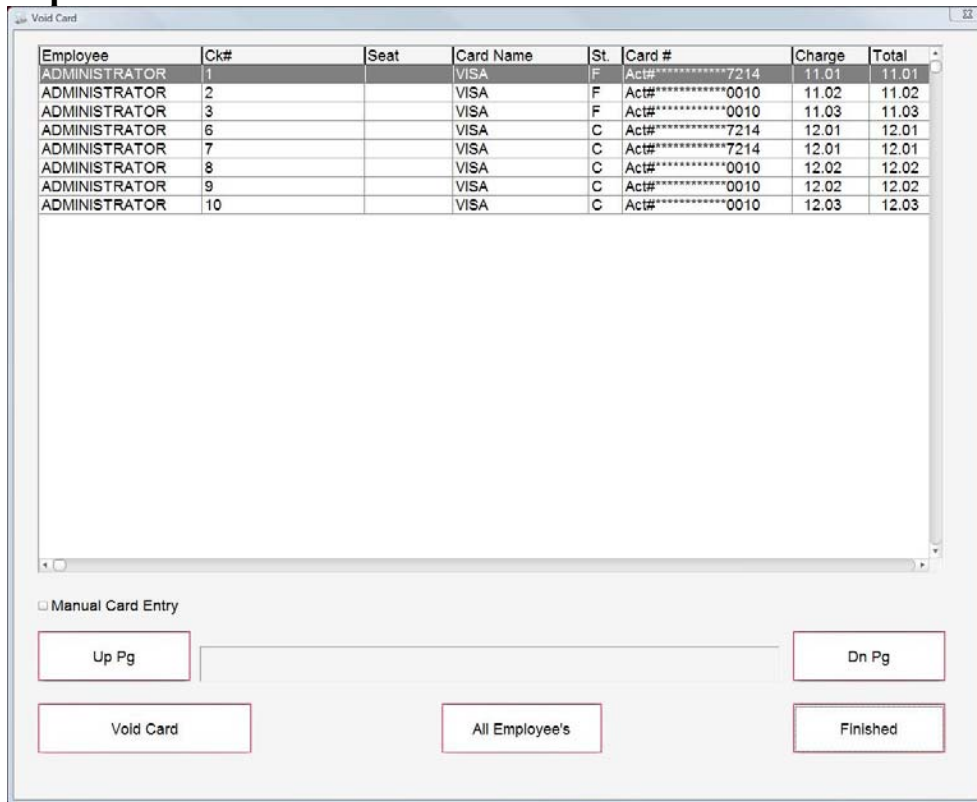
The screenshot shows a software window titled "Processing Online" with a close button in the top right corner. The window contains a form for "Adding Gratuity". The form fields are as follows:

Adding Gratuity			
Employee	MIKE		
Name	5499		
Card #	Act#XXXXXXXXXXXX6781		
Exp. Date MMY	XX/XX	Reference #	1
Total Purchased	1.25	Seats	
<b>Gratuity</b>	0.00		
Total Of Card	1.25		
Quit		Save	

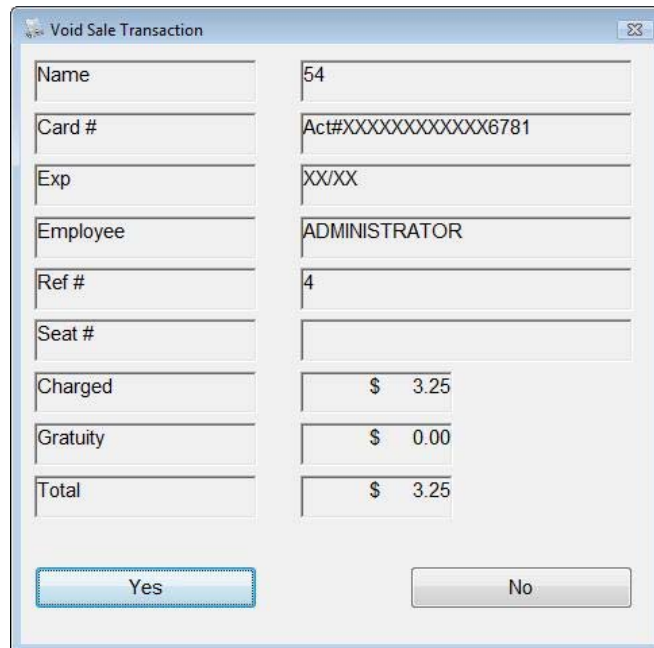
Enter the gratuity amount, select "Process Card". The system will capture the card, and the card will no longer be listed in the add gratuity section.

### Void Transaction

If a card was captured in error, or the customer wishes his/her money back, you can void a card using the "Void Transaction" button. Once selected the following screen will appear including all the transactions captured for the day. **NOTE:** If a transaction is pre-authorized, this is not necessary; simply select the "Delete Cancelled Pre-Auth" button at the end of the day



Touch the card that you wish to void, then the **"Select"** button. If not using the Canadian interface the following screen will be displayed.



After verifying that the information is correct, touch **"Yes"** to void the transaction. If the information is incorrect, select **"No"** then select the proper transaction from the previous screen.

If using Credit cards in Canada, you will not see the above screen. Instead you will be prompted to swipe the

card on the Pin Pad. You may also check off the “Manual Card Entry” option before selecting the void button allowing you to hand enter the card number on the pin pad. Because of EMV technology with E2E encryption, the card must be voided on the pin pad and the card number will have to be entered again.

### **Return Transaction**

If you wish to enter a credit on a customer’s credit card, you may do so by selecting the “Return Transaction”, swiping the customer’s credit card, and then entering the amount that you will be adding to the customer’s card.

### **Void Return**

If a return was done incorrectly, you will need to void that return. Voiding a return is done in the same manner as voiding a transaction as described earlier in this document.

### **Adjust Gratuity**

If you entered an incorrect gratuity amount on a charge card, you can change the amount using the “**Adjust Gratuity**” Button. If you are using Mercury Payments, the system will simply adjust the original gratuity amount for you. If you are not using Mercury Payments as a processor the system will void the original transaction and re-enter the new transaction based on the totals you enter. **NOTE: If you are not using Mercury Payments as a processor and use this function the card will be put through with a higher discount rate. This is due to the fact that track two information is being stored or put through the second time. If the customer is still available you should void the original card and re-enter the card by re-swiping the card.**

### **Force Transaction**

If you have authorized any credit cards over the phone instead of through Flashpoint, you may enter the cards through without re-verifying. To do this, select the “**Force Transaction**” button, enter the customer’s credit card information, enter the total purchased and enter the verification number that the processor gave you over the phone.

### **Debit Transactions (US Only)**

Debit Cards may also be put through (if setup) in the same method as credit cards. In Canada Debit is treated the same as a credit card, therefore there is only one button (enter card) for both. In the US, if debit is available, you will have to select a different button for debit cards (Debit transaction) then when entering a credit card.

### **Re-Print**

If you require a new copy of a card receipt, you can re-print the receipt using this function. Once selected, a list of all of your cards entered for the day will be displayed. To re-print a transaction simply highlight the appropriate transaction and select the print button.

### **Card Not Present**

A card not present transaction is a pre-auth that is hand entered. In Canada, due to Chip and Pin technology, this is the only way you can hand enter a charge card. Once selected, you would enter the card in the same manner as entering a pre-auth except you would hand enter the card info. Because a card not present transaction is a pre-auth, you will need to run the enter gratuity and capture function to finalize the card.

**EBT Cash**

Ebt (Electronic Benefits Transfer) are considered just a debit card. Instead of receiving a monthly check and food stamps, the customer receives a debit card which money is added to every month. The customer can then purchase any items he/she wishes or (because many do not have bank accounts) receive cash back with the card. When running an Ebt transaction, follow the same procedures as running a Debit card. The only main difference is that the customer can ask for cash back from their card or request a balance on their account. The only processor that Ebt is currently available for is Mercury Payments. Because the Ebt transaction is considered just like cash, there is no need to return a transaction, instead simply return the cash value of the transaction to the customer.

**EBT Food Stamps**

Ebt food stamps are certificates given to customers to purchase items. Only certain items are available for purchase using the food stamps and some are taxable and some are not. When you select the check number that you are entering the Food Stamp transaction on. The system will scan the order and add the totals for all items that have been flagged as available with food stamp (set in menu setup) and remove the taxes from the order for items that have been set to food stamp tax exempt. The customer will then be prompted to add the certificate number on the Ipad and the amount will be verified. The customer can also check their balance on the food stamp.

Unlike EBT, if the customer wishes to return an item, you will need to run the “Return Ebt Food Stamp” function to put the value of the transaction back into the customers account.

**Edit Transaction**

If a card is changed at the processor for some reason (deleted, voided or finalized), you will need to change the status of the card locally for the batch summary to sync properly with the processor. To do this select the Edit Transaction option and change the status of the card in question.

**Credit Card Interface Reports**

The “**Batch Summary**” displays all the credit card totals that have been put through for the day. If at any time the Network and Local totals do not match, there is a problem with one or more of the cards. If this happens you should call the credit card processor or run the Web Reports to fix the problem before closing the batch.

**Batch Summary**

Merchant ID	494901		
Batch No	5923		
	Network	Local	Variance
Batch Item Count	5	0	5
Net Batch Total	12.04	0	12.04
Credit Purchase Count	5	0	5
Credit Purchase Amount	12.04	0	12.04
Credit Return Count	0	0	0
Credit Return Amount	0.00	0	0.00
Debit Purchase Count	0	0	0
Debit Purchase Amount	0.00	0	0.00
Debit Return Count	0	0	0
Debit Return Amount	0.00	0	0.00
Open Pre Authorize Card's			0
Open Offline Card's			0

At any time, you can run the **“Batch Summary Report”** to display detailed information for all of the batch totals in the system. Once selected, the following report will be displayed.

**Batch Summary Reports**

Batch For 01/06/06			
Merchant Id 494901 Batch No 3784			
	Network	Local	Variance
Batch Item Count	17	14	3
Net Batch Total	86.15	80.59	5.56
Credit Purchase Count	13	12	1
Credit Purchase Amount	86.40	80.84	5.56
Credit Return Count	1	1	0
Credit Return Amount	5.00	5.00	0.00
Debit Purchase Count	2	2	0
Debit Purchase Amount	9.75	9.75	0.00
Debit Return Count	1	1	0
Debit Return Amount	5.00	5.00	0.00
Transaction Detail			
Card Type VISA Act# *****6781 Card Name	Amount	Gratuity	Total
Check #602 Seat #0 Ref# 0002 Type Credit Employee Name TRIM-P.O.S. TEST	5.00	0.00	5.00
Date 01/03/06 Time 16:17 Auth Code 000051			
Card Type VISA Act# *****6781 Card Name	5.00	0.00	5.00
Check #602 Seat #0 Ref# 0003 Type Credit Employee Name TRIM-P.O.S. TEST			
Date 01/03/06 Time 16:20 Auth Code 000051			
Card Type M/C Act# *****6781 Card Name	8.50	0.00	8.50
Check #603 Seat #0 Ref# 0004 Type Void Employee Name TRIM-P.O.S. TEST			

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The report displays the batch totals along with detailed card information for the batch. To view totals for a different day, use the **“- Day”**, **+ Day”**, or **“Select Day”** buttons to display the correct day to view.

**Card Report**

The Card report displays all credit cards that have been put through for the day along with the gratuity and tip discount. All credit card data is masked on the report.

**Delete Cancelled Pre Authorize**

At the end of the day, if there are any pre-authorized cards that were cancelled (customer no longer wanted to charge to credit card) the system will not close. To close out the system all pre-authorized cards must be finalized or deleted. After finalizing all good cards, select **“Delete Cancelled Pre-Auth”** to delete the remainder of the cards that were pre-authorized but not charged to. CAUTION: Be sure that all valid pre-authorized cards have been finalized before selecting this option, as they will also be deleted if not.

**EMV Key Change**

All EMV transactions are encrypted at the pin pad and only encrypted information is sent back and forth from Flashpoint to the Pin Pad. If you receive an encryption error when processing a card, run this function and the encryption key will re-sync between Flashpoint and the Pin Pad.

**EMV Administrative Functions**

The EMV administrative functions are used to diagnose problems with the EMV Pin Pad. Only go into this function if instructed to by support personnel. The only two functions available for normal use are Batch summary reports and editing transactions (see earlier instructions for using these features).

**Running Batch Report when using Multiple Stations with Canadian Credit Cards**

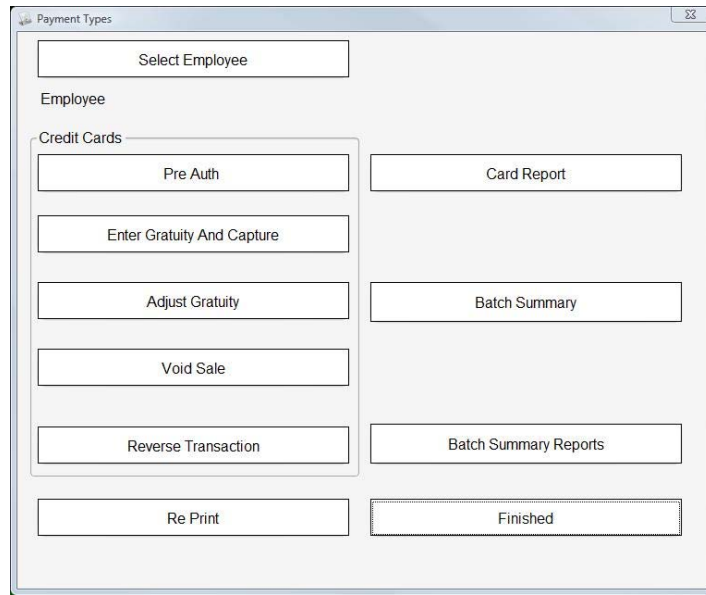
The **“Batch Summary”** displays all the credit card totals that have been put through for the day on this station only. The only difference between running the batch summary reports in the US and Canada is due to the Pin Pad Encryption, you must run the batch summary report on every station to receive that stations totals. Once you run the report it will be displayed along with the other stations you ran the report on. When closing the days sales, Flashpoint will automatically run the batch summary report on every station with a terminal Id before going to the closing sales screen. The station closing the days sales will display all the stations batch totals and add them up for you allowing you to match the totals from Flashpoint with the totals that come from the processor.

**Using the Credit Card Interface with the Web Interface**

If the customer paid using a credit card on the web, the system will ask if you wish to apply the card to the order (select yes unless the customer decides to pay by cash when picking up the order) when you close the check. The system will also print two copies of the charge card receipt with the check (one copy for the customer and one for your records). All charge cards come from the web as pre-auths and you must finalize the cards before you close the days sales.

To finalize the credit card, follow these steps:

First, select the **“Web Credit Card button”** from the system screen, the main order entry screen or the other functions screen. The following screen will display:



If you are entering a charge card for a check closed by another employee, select the **“Select Employee”** button and pick the employee from the on screen list. Once you have selected the employee or if you are entering the card for you, select the **“Enter Gratuity and Capture”** button to display the following:



The screen will include all non-captured cards for the employee selected, if the card you are entering the gratuity for is not listed, you can select the **“All Employees”** button and all cards will be displayed. If the card is still not displayed, it may have been captured already. To finalize the card, highlight the appropriate card from the list and select the **“Adjust Gratuity”** button. **Note: You must select this option for all cards prior to closing the days sales no matter if a gratuity is added or not.**



The screenshot shows a 'Pre Auth Capture' window with the following fields and values:

Employee	SUPERMAN (MIKE)
Name	Steven Scott
Card Type	VISA
Card #	xxxxxxxxxxxx5781
Reference Number	6000027
Total Purchased	\$ 5.08
Gratuity	\$ 0.00
Total	\$ 5.08

Buttons: Quit, Save

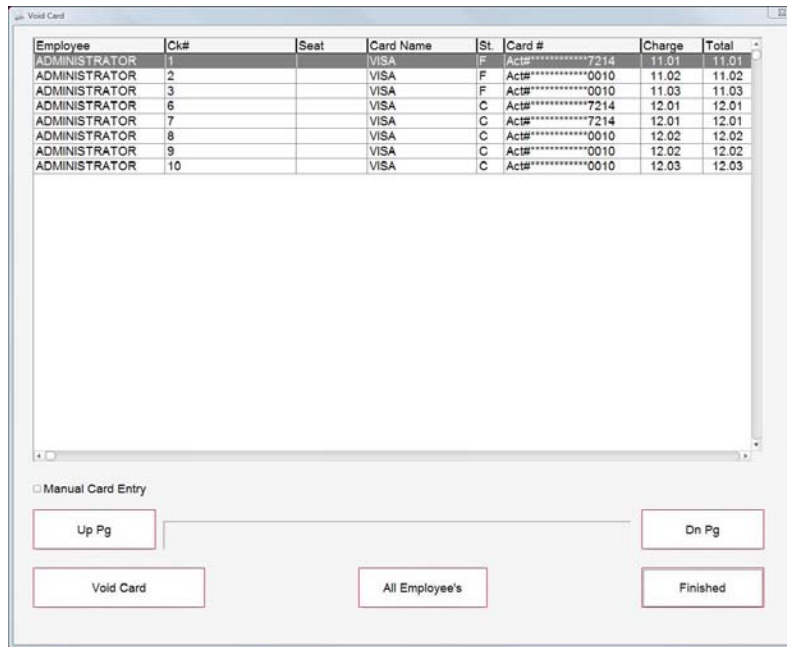
Select the **“Gratuity”** button and enter the gratuity using the on screen keypad. Once entered, or if the employee did not receive a gratuity, select the **“Save”** button and the system will finalize (capture) the card. Once saved, the transaction will be complete and you will return to the web credit card main screen.

If at any time you enter an incorrect gratuity amount, you can change the gratuity by selecting the **“Adjust Gratuity”** button and following the above procedures. Only cards that have been finalized (captured) will display in the adjust gratuity window.

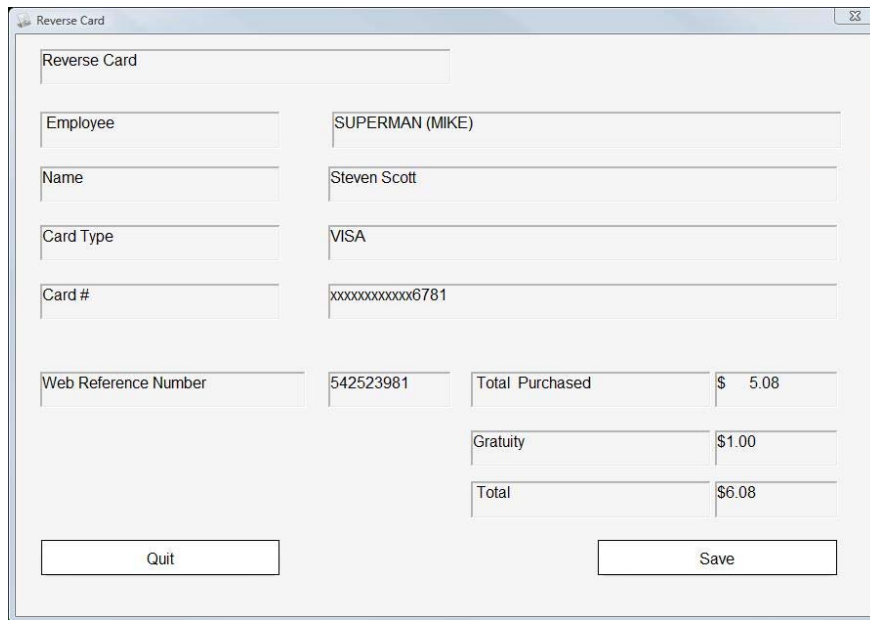
### Voiding/Reversing a Credit Card Transaction

If you have captured a card in error, or the customer wishes his/her money back, you can void a card using the **“Void Sale”** or the **“Reverse Transaction”** button. The difference between a void and a reversal is that a void will put the money back on the customers card when the batch is closed. A reverse will completely reverse the transaction, returning the money immediately. You also cannot void a pre-auth, you will need to capture the card and then void it.

Although we suggest that you reverse a transaction as much as possible, some acquiring banks do not allow reversals. You should always try doing a reversal first and if you receive an error, void the card. Once you select void or reverse transaction, the following screen will appear including all the transactions captured for the day (as mentioned before, if you use reverse all cards captured or pre-auths will display, with void only cards captured will display):



Touch the card that you wish to void, then the **“Reverse/Void”** button.



After verifying that the information is correct, touch **“Save”** to void the transaction. If the information is incorrect, select **“Quit”** then select the proper transaction from the previous screen.

**Pre-Auth a Credit Card**

If you require to pre-auth a card using the web card interface, you may do so using this function. You would normally use this if there was a problem with a card entered through the web (which you reversed/voided) and now need to re-enter it. Once you select the **“Pre Auth”** button, the system will display the following:

Select the reference number of the check that the card is being used for, as well as the seat number (if applicable). If the total purchased is not the total being charged, you may change the amount using the **“Total Purchased”** button. Once you enter the information, select the **“Save”** button to display the following:

If you have the card on hand, simply swipe the card to enter the card information. If you do not physically have the card, select **“Manually Enter Card Number”** and hand enter the card number in the space provided. Once the card number is entered press submit and the card will be authorized. Remember that all pre-auths must be captured before closing the days sales.

### Re-Print a Credit Card Receipt

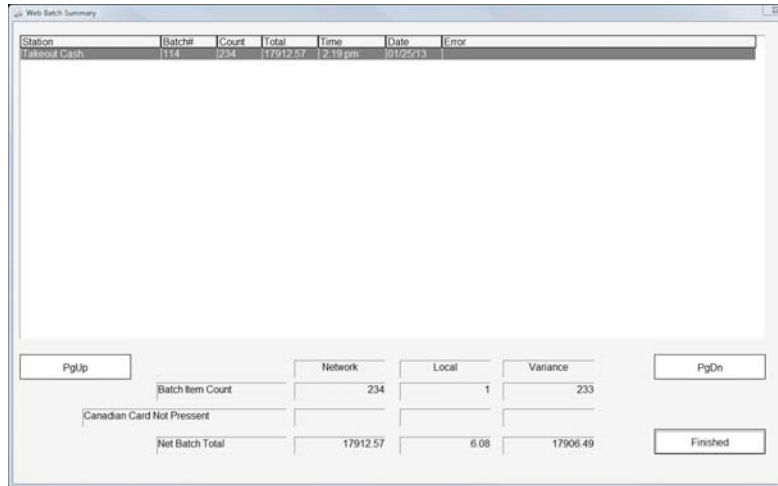
If you require a new copy of a card receipt, you can re-print the receipt using this function. Once selected, a list of all of your cards entered for the day (using the web) will be displayed. To re-print a transaction simply highlight the appropriate transaction and select the print button.

### Card Report

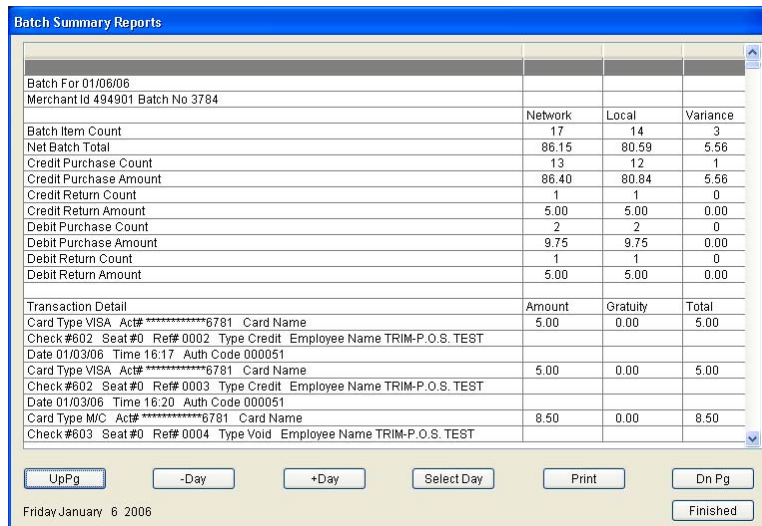
The Card report displays all credit cards put through for the day along with the gratuity and tip discount. All credit card data is masked on the report.

**Credit Card Interface Reports**

The “**Batch Summary**” displays totals for all the credit cards put through the web for the day (will not include cards from the local credit card interface). If at any time the Network and Local totals do not match, there is a problem with one or more of the cards. If this happens, you should call the credit card processor or run the Web Reports to fix the problem before closing the batch.



At any time, you can run the “**Batch Summary Report**” to display detailed information for all of the closed batches in the system. Once selected, the following report will display:



The report displays the batch totals along with detailed card information for the batch. To view totals for a different day, use the “**- Day**”, “**+ Day**”, or “**Select Day**” buttons to display the correct day to view.