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2   POS - How to Run a POS Transaction with Partial Approvals

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How to Run a POS Transaction with Partial Approvals	The POS terminal is used to run payments, or transactions. Payments can be made using multiple cards, including prepaid/gift cards and split tender transactions (Agency dependent).

Step 1	Inform the cardholder of the VitalChek fee
Step 2	User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal
	Note - if the Operator ID was entered incorrectly or does not have the authority for the transaction, an error message will be displayed

Step 3   **Select Operation** screen displays

Step 4 Select **Payment** option by pressing corresponding number on the pinpad then press the green enter button

Step 5   **Select Product** screen displays with available product options

Note - agencies with multiple products use the purple key above the number 1 to scroll

Step 6

Select product by pressing the corresponding number on the pin pad then press the green enter button

For agencies with more than 10 product selections, press # for the first 1. Ex 10 = #0, 11 = #1, 12 = #2,

Step 7   **Reference Number** screen displays (if applicable)

Step 8   Enter Reference Number (if applicable) and press the green enter button

Note: Alphabetic characters are obtained by hitting a number field multiple times to scroll through. For example: for the letter "a", press the 2 key twice

Step 9　　**Enter Amount** screen displays

Step 10   Enter the **Payment Amount** using the numeric keypad. **Do not include the VCN Fee.** The VCN Fee will be added automatically. Press the green enter button

Step 11   **Another Product** screen displays

Step 12   Select **Yes** for additional products (return to step 5) or **No** to continue to card swipe

Step 13 **Waiting on Card Swipe** screen displays

Pin pad prompts customer to swipe card

For help with card swiping errors see: **POS Transaction Errors (on-line documentation)**

Step 14   If applicable, the Debit/Credit screen displays on terminal and Pin Pad

Step 15 Select Debit or Credit by pressing the corresponding F1 or F4 button

Note - If **DEBIT** is selected, the cardholder will be prompted to enter their PIN number on the PIN pad with terminal displaying: **"Ask customer to enter PIN. Please Enter PIN"**

Step 16 **Authorizing** message displays on both Terminal and Pin Pad

Step 17 When the card does not have sufficient funds to cover the entire amount, the **PARTIAL PAYMENT** screen displays with 3 options:

1. **Use Additional Card** - Customer pays balance with additional credit/debit/gift/prepaid cards. Select **Use Additional Card** and **Waiting on Card Swipe** screen is displayed (step 13) Customer continues steps 13-16 until payment is made in full.

2. **Accept Split Tender** - Customer is unable to pay using additional card(s) and chooses to pay remainder with cash or check. Select **Accept Split Tender** and continue with steps 18+

3. **Cancel Payment** - Customer chooses to cancel the payment and void the transaction. **** NOTE – THE CUSTOMER'S CARD(S) HAVE ALREADY BEEN CHARGED AT THIS POINT. CUSTOMER MUST FOLLOW THE PROMPTS, SWIPING ALL CARDS TO VOID THE TRANSACTION. A VOID RECEIPT CONFIRMS THE TRANSACTION HAS BEEN VOIDED AND PAYMENT CANCELLED ****
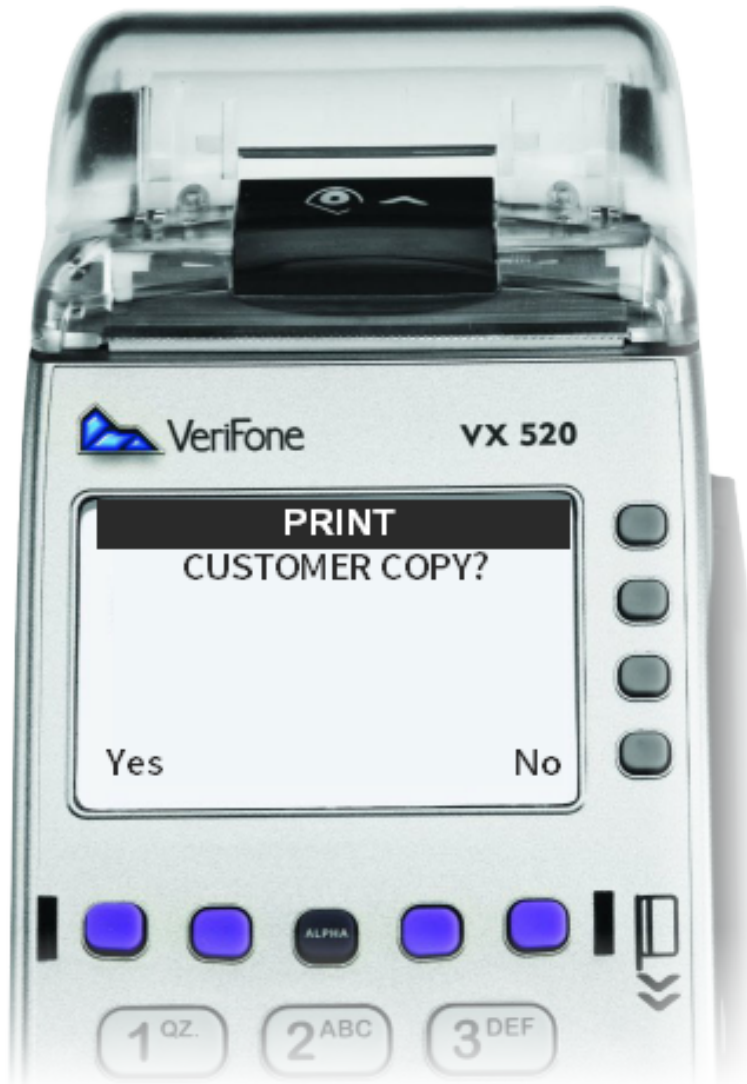
See: **How to Void a POS Transaction with Partial Approvals (Section 3)**, and complete steps 6-10

Note - select corresponding number and press green enter key

Note - If the prepaid card does not have enough funds to cover the cost of the VitalChek fee, the transaction will ***Decline****.*

Step 18

The **Agency Receipt** automatically prints and the **Customer Receipt** screen displays instructing the user to press Enter to print the customer receipt

Note - The receipts contain the payment confirmation number and the agency reference number.

3   How to Void a POS Transaction with Partial Approvals

How to Void a POS Transaction with Partial Approvals

POS transactions that have been paid using a prepaid card may be voided using the POS terminal and selecting the Void option.

Step 1   User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal

Note - if the Operator ID was entered incorrectly of does not have the authority for the transaction, an error message will be displayed

Step 2   **Select Operation** screen displays

Step 3   Select **Void** option and press the green enter key

Step 4   **VOID** screen displays

Step 5 Enter the confirmation number located on the receipt and press the green enter button

Step 6   Void confirmation screen displays

Step 7 Verify the amount on the terminal, press Yes or No and press the green enter key

Step 8   After pressing **Enter** to confirm **Yes**, the terminal displays the card swipe message

Pin Pad prompts the user to swipe the same card that was used for payment

Note - if multiple cards have been used, repeat until all cards have been swiped

Note - if the original transaction was Debit, the terminal will display the message:
*"**Press Enter when ready to enter PIN on the PIN pad...**"*

User presses green enter button to OK and the customer is asked to enter PIN and press the green enter button on the PIN pad.

Note - The void amount displayed is the amount of the transaction plus the VCN fee

Step 9   After pressing **Enter** to confirm **Yes**, the Agency Receipt automatically prints

Agency Name
Agency Address
Agency City, State, Zip

MID:	999999
TID:	9999999999999
Terminal ID:	V9999999
Date / Time:	99/99/99 99:99 AM EDT
Confirmation #:	99999999

Card #:	************9999
Expiration:	##/##
Transaction Type:	Void - $18.00
Transaction Date:	99/99/99 99:99 PM EDT
Payment Type:	Credit
Card Type:	MasterCard
Approval Code:	999999

Card #:	************9991
Expiration:	##/##
Transaction Type:	Void - $4.50
Transaction Date:	99/99/99 99:99 PM EDT
Payment Type:	Credit
Card Type:	MasterCard
Approval Code:	999999

Product Name $20.00
12345

Agency Amount: - $20.00
LexisNexis Service Fee: - $2.50

Total Fee: - $22.50

Cardholder Signature

X _____

Merchant Copy

Step 10   The terminal prints the **Customer Receipt** and returns the user to the **Enter Operator ID** screen

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 9999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:   ************9999
Expiration: ##/##
Transaction Type: Void   - $18.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Card #:   ************9991
Expiration: ##/##
Transaction Type: Void   - $4.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name $20.00
12345

          Agency Amount: - $20.00
LexisNexis Service Fee: - $2.50

              Total Fee: - $22.50

Customer Copy

4   POS Receipt Example with Partial Approvals

POS Receipt Example with Partial Approvals, Balance Due

Agency and Customer receipts are printed after each POS transaction.

Transactions with a balance due will display the "Agency still owed" amount on both receipts (Agency/Customer).

Transactions using multiple payment methods with enough funds to cover the entire transaction will not display the "Agency still owed" line.

Agency Receipt with Balance Due (Partial Approval)

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 9999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:   ************9999
Expiration: ##/##
Transaction Type:
    Payment/Purchase/Sale $100.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Card #:   ************9991
Expiration: ##/##
Transaction Type:
    Payment/Purchase/Sale $10.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name $107.50
12345

            Agency Amount: $107.50

    LexisNexis Service Fee: $2.50

            Total Fee: $110.00

***Agency still owed $25.00 ***

Cardholder Signature

X_____

Merchant Copy

Customer Receipt with Balance Due (Partial Approval)

```
                    Agency Name
                   Agency Address
                Agency City, State, Zip


MID:              999999
TID:              9999999999999
Terminal ID:      V9999999
Date / Time:      99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:           ************9999
Expiration:       ##/##
Transaction Type:
     Payment/Purchase/Sale      $100.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type:     Credit
Card Type:        MasterCard
Approval Code:    999999

Card #:           ************9991
Expiration:       ##/##
Transaction Type:
     Payment/Purchase/Sale      $10.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type:     Credit
Card Type:        MasterCard
Approval Code:    999999


Product Name                    $107.50
12345


          Agency Amount:    $107.50

     LexisNexis Service Fee:    $2.50

           Total Fee:  $110.00

***Agency still owed $25.00 ***

          Customer Copy
```