



US User Guide -

Payments



FlexPoint V6.00.029+

Non-Integrated Clerk

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Pivotal Product Management Press

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Revision Information

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Sale - Credit

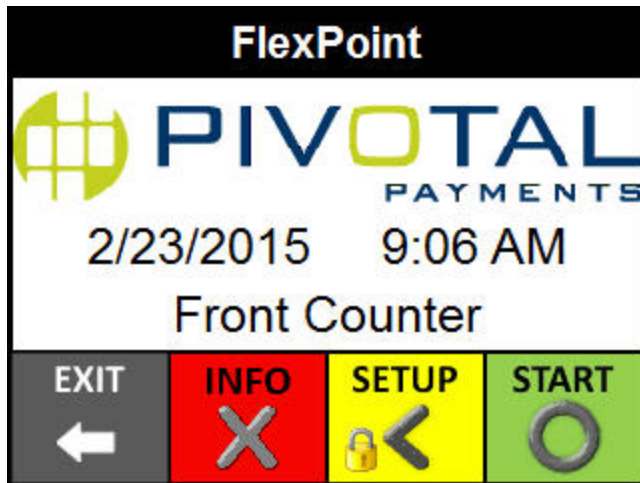


Figure 1-1 Main Screen

To process a transaction press the "Start" button

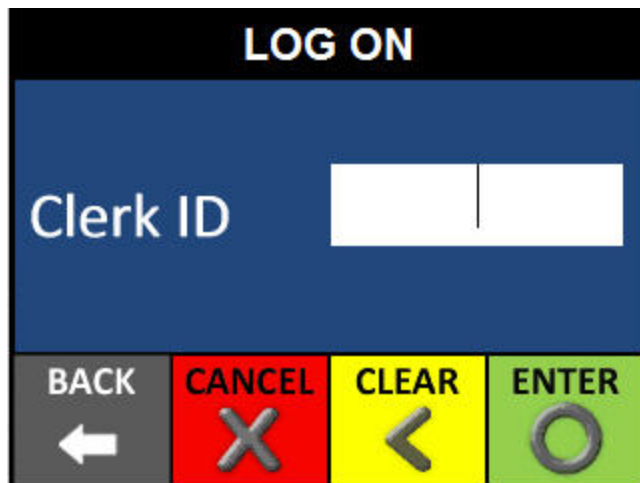


Figure 1-2 Clerk Log On Screen

Enter the Clerk ID and Press "Enter".



Note: The above screen will prompt to Enter "Server, Clerk, or Driver" depending upon the "Employee Title" configuration value.



Figure 1-3 Select Function Screen

Select the type of function such as "Sale".

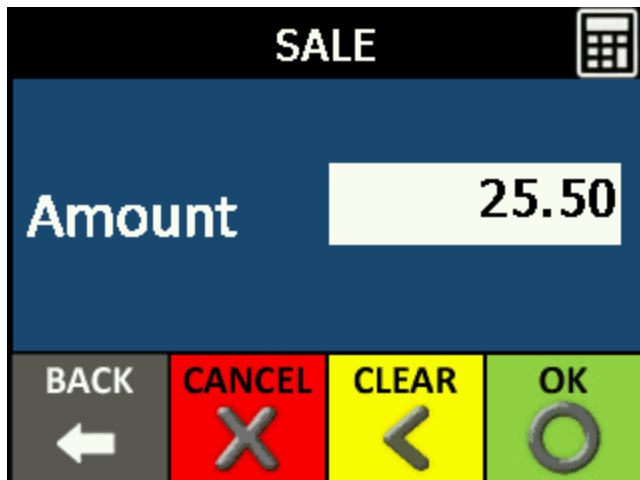


Figure 1-4 Enter Amount Screen

Enter the amount and press the "OK" button.

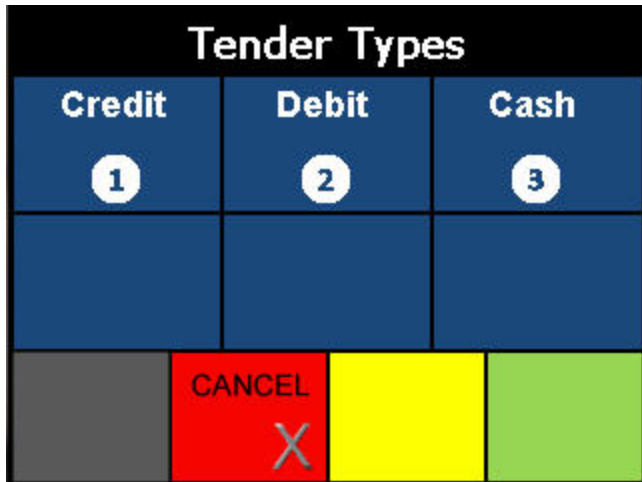


Figure 1-5 Tender Types Screen

Select the Tender Types such as "Credit".

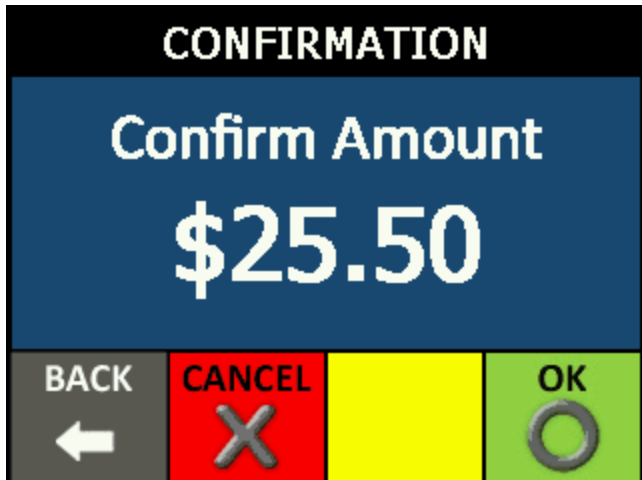


Figure 1-6 Confirm Amount Screen (Optional)

Confirm the amount by pressing "OK".

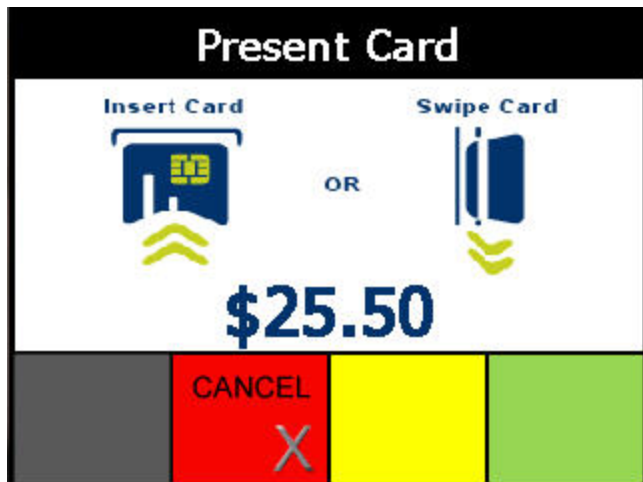


Figure 1-7 Insert or Swipe the card

Insert or swipe the card to proceed.

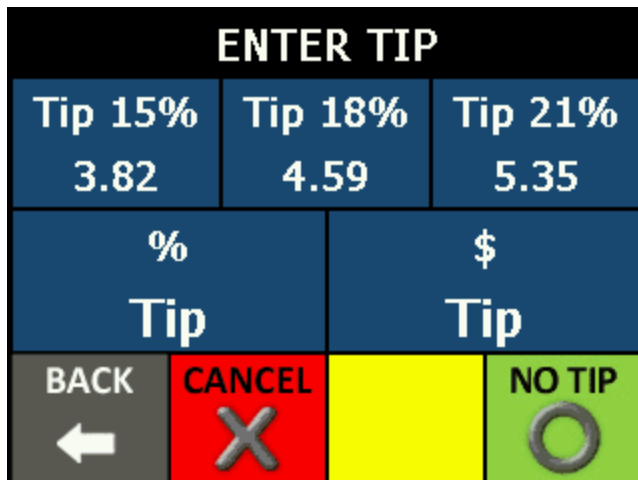


Figure 1-8 Enter Tip Screen

Enter the Tip amount if applicable.



Note: This feature can be turned off for businesses that don't accept Tips such as a Retail merchant such as a Shoe store.

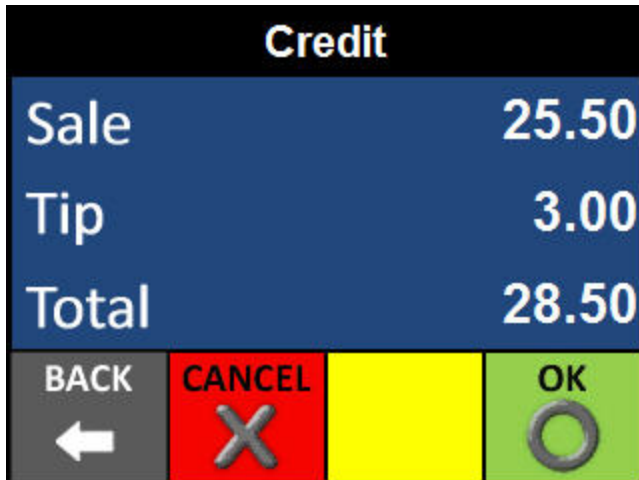


Figure 1-9 Confirm Total Screen

To confirm the transaction total, (including any Tips, Cashback, or fees if applicable) press "OK".



Figure 1-10 Processing Screen

The Terminal is communicating to the processing to get an approval of the transaction.

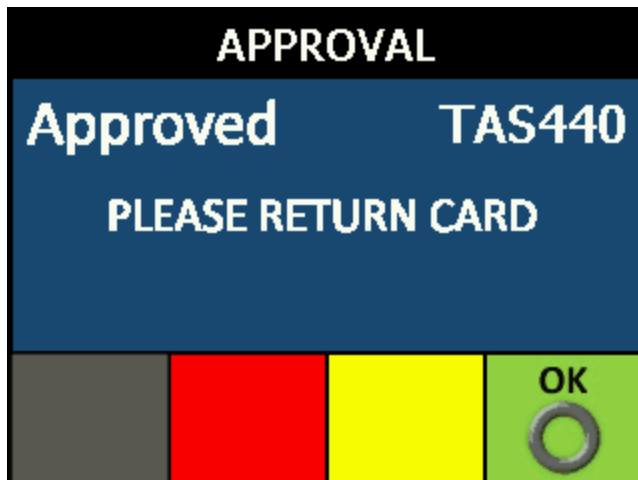


Figure 1-11 Transaction Approved Screen

The transaction has been approved by the processor.

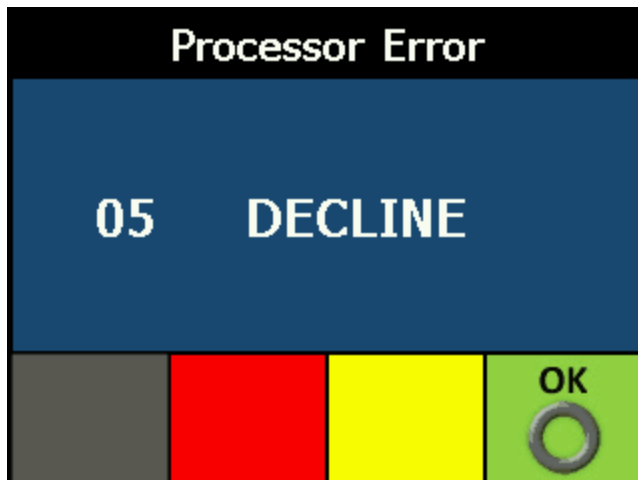


Figure 1-12 Transaction Declined Screen

The transaction has been Declined by the processor.

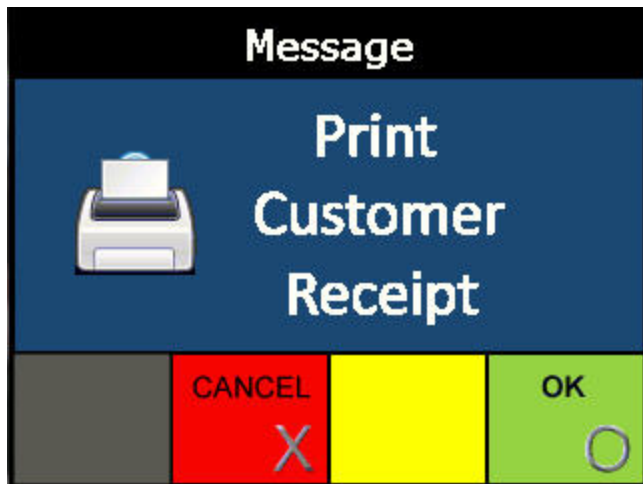


Figure 1-13 *Print Merchant Receipt Screen*

The customer copy will print and then prompt for the Merchant copy to be printed.

Sale - Debit

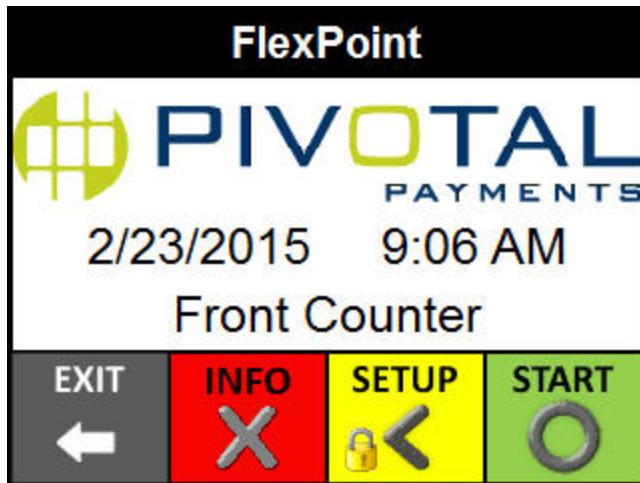


Figure 2-1 Main Screen

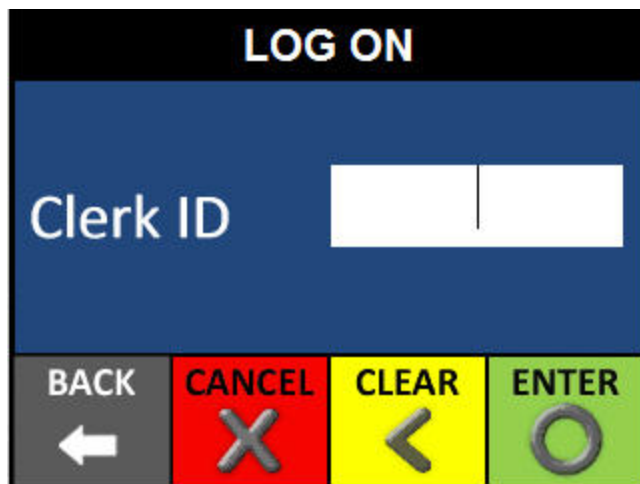


Figure 2-2 Clerk Log On Screen

Enter the Clerk ID and Press "Enter".



Note: The above screen will prompt to Enter "Server, Clerk, or Driver" depending upon the "Employee Title" configuration value.

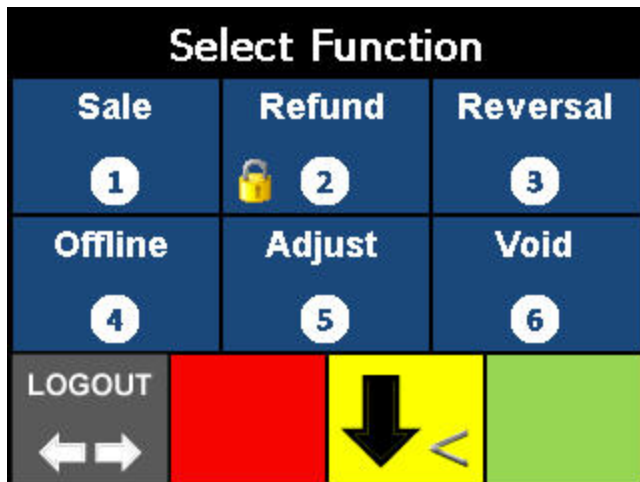


Figure 2-3 Select Function Screen

Select the type of function such as "Sale".

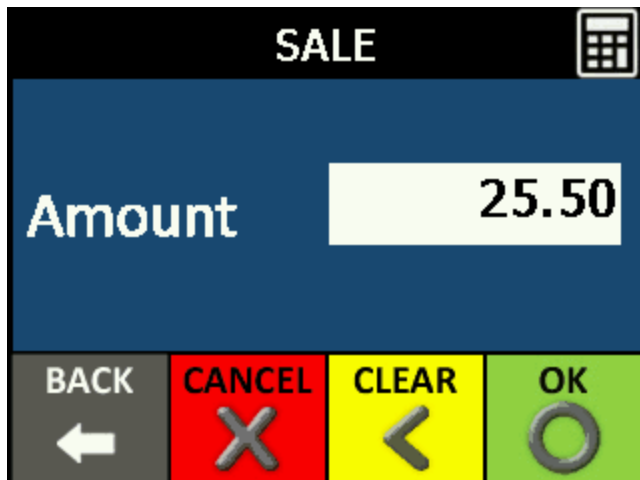


Figure 2-4 Enter Amount Screen

Enter the amount and press the "OK" button.

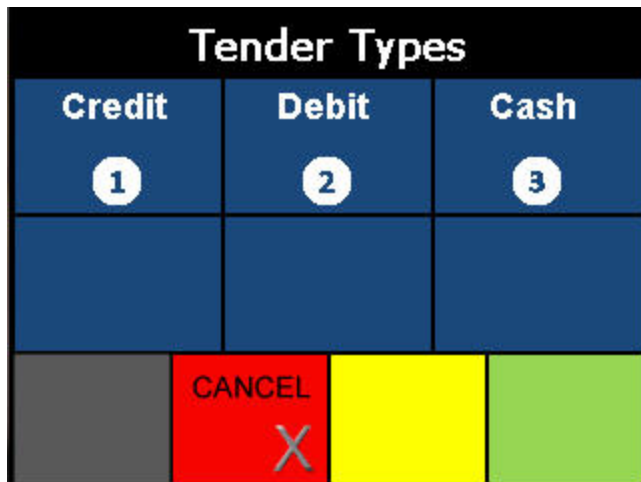


Figure 2-5 Tender Types Screen

Select the Tender Types such as "Credit".

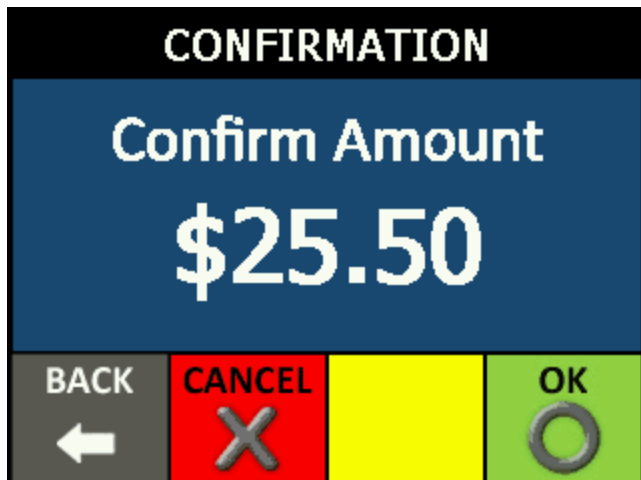


Figure 2-6 Confirm Amount Screen (Optional)

Confirm the amount by pressing "OK".



Figure 2-7 Swipe Card Screen

Insert or swipe the card to proceed.

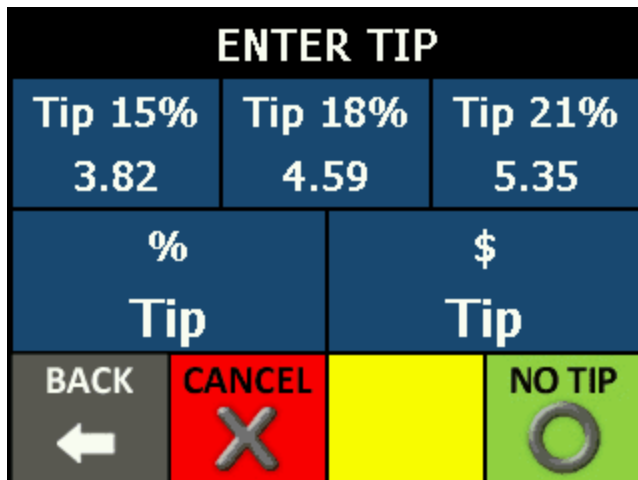


Figure 2-8 Enter Tip Screen

Enter the tip amount if applicable.

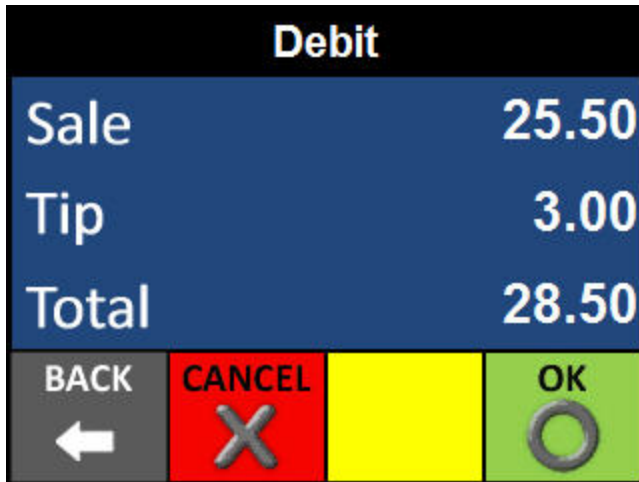


Figure 2-9 Confirm Total Screen

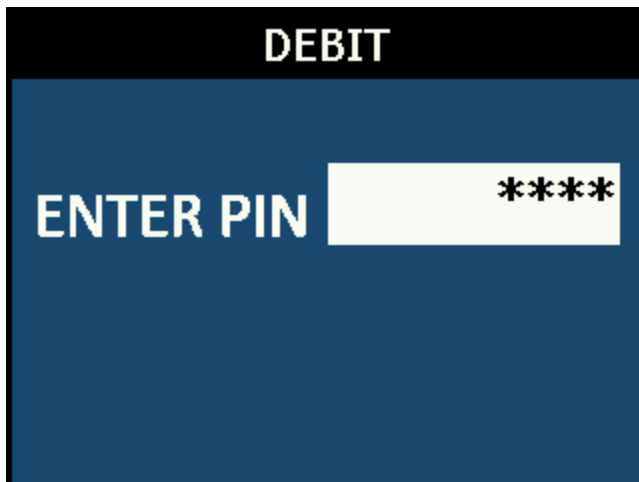


Figure 2-10 Enter PIN Screen



Figure 2-11 Processing Screen

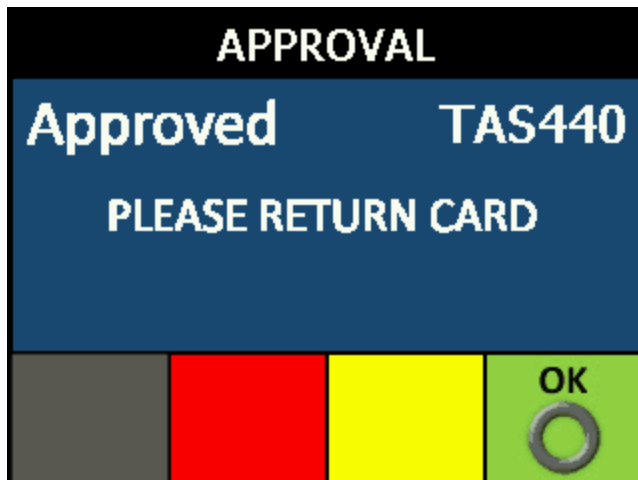


Figure 2-12 Transaction Approved Screen

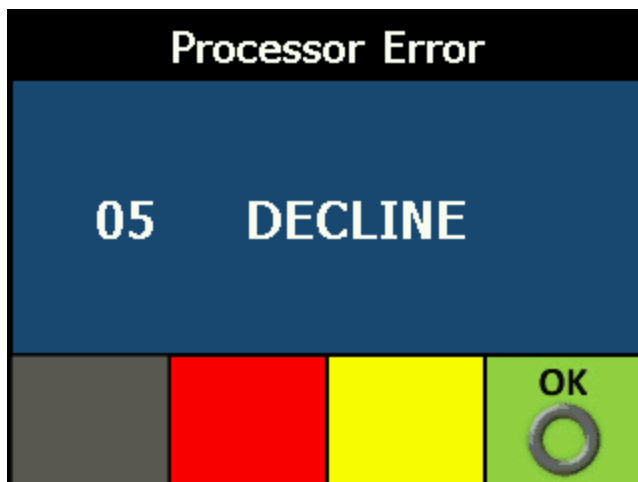


Figure 2-13 Transaction Declined Screen

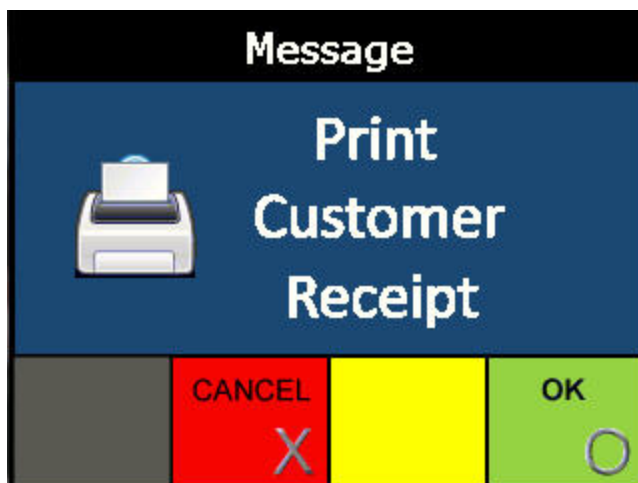


Figure 2-14 Print Customer Receipt Screen

Reversal - Credit

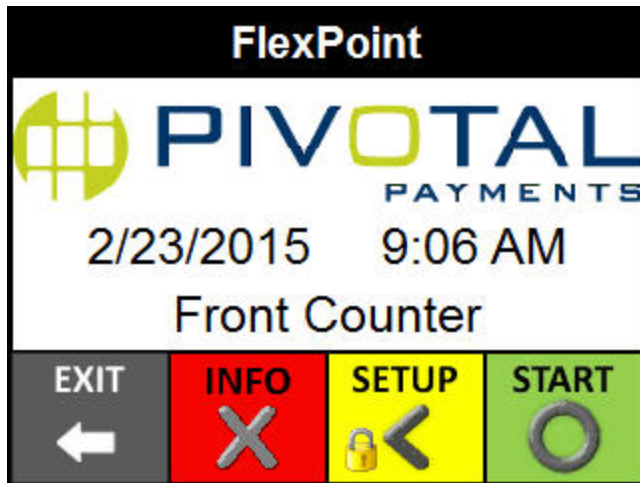


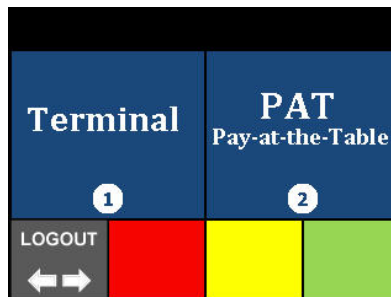
Figure 3-1 Main Screen

From the main screen select the "Start" button. With Integrated (Retail/QSR or Pay-at-the-Table) solutions you will see one of the two screens below.



Retail/QSR

Skip to the "Do a Reversal?" Screen for the continuation of the Retail/QSR flow.



Pay-at-the-Table

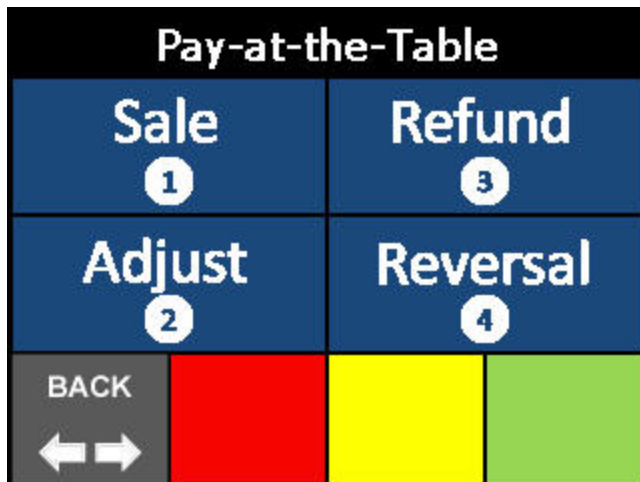


Figure 3-2 Pay-at-the-Table Transaction Type Screen



Warning: It is very important that only authorized users have access to Payment Terminals as this affects the cash flow of your business.

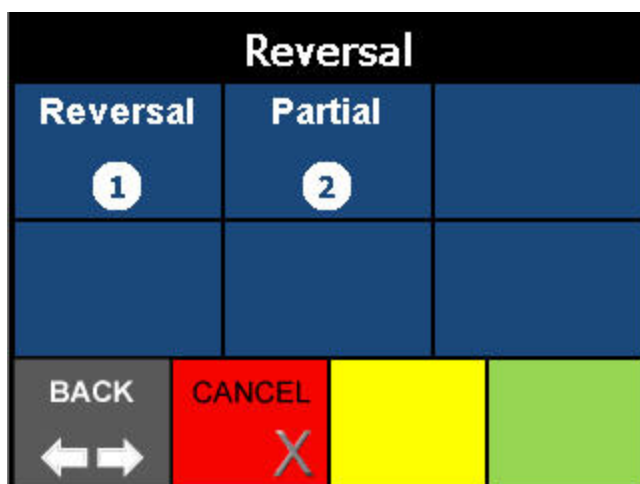


Figure 3-3 Reversal or Partial

From the screen shown above users can select either the Reversal (full) or Partial.

A partial reversal will reverse only a part of the transaction value.

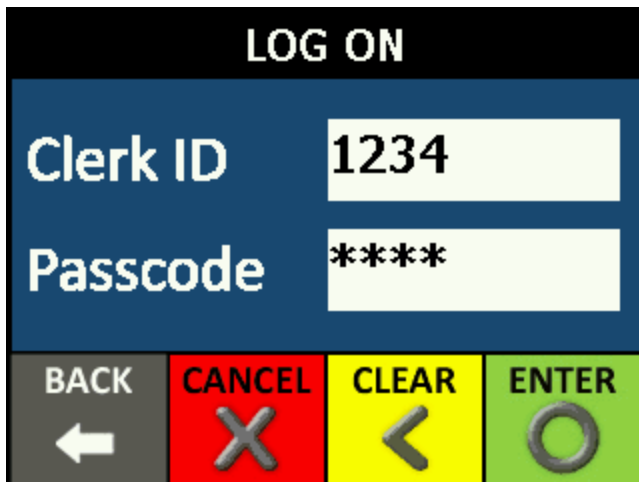


Figure 3-4 Enter User ID & Password



Note: When processing a “Reversal” users may need to enter a valid User ID and Password that has access to the “Reversal” functionality if security is configured for a password. This is noted by the “lock” symbol on the reversal button.

If a user does have the required access to perform a Refund or a Reversal but enters an incorrect User ID or Password they would see the below "Invalid Clerk ID" message.

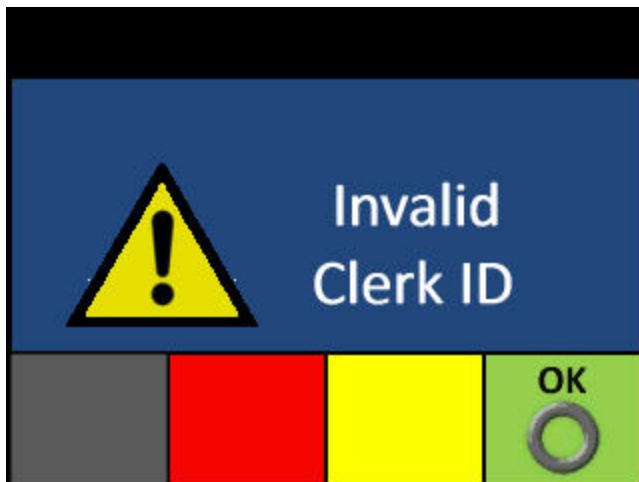


Figure 3-5 Access Denied, Invalid Clerk ID

The screenshot shows a screen titled "REVERSAL" with a dark blue header. Below the header, there are two input fields: "Ref #" and "Auth #", both with empty white text boxes. At the bottom of the screen, there are four colored buttons: a grey "BACK" button with a left arrow, a red "CANCEL" button with a white 'X', a yellow "CLEAR" button with a left arrow, and a green "ENTER" button with a white circle.

Figure 3-6 Ref # or Auth # Screen

Reversals can only be performed on transactions that are part of the current “Open Batch”. To verify that the transaction is in the open batch the user will enter the Auth # (Authorization #) or the Ref # (Reference #) to search for the transaction.



SALE

Pivotal Cafe
25 Demo Street

☎Phone 310-777-777-777

Terminal	Front Counter
Merchant Id	888000001691
	Pivotal Cafe
	TSYS PIVOTAL
Clerk	Admin
Terminal Id	1515
Store #	5999
Batch Number	5
Date	11/11/2014
Time	15:55:27
Auth Code	TA5440
Ref	504400155528
Transaction	Debit
Card Type	Visa
Entry Mode	Swiped
Card	*****1933
Invoice	5519

SALE	25.50
CASH OUT	20.00
CASH OUT FEE	0.50
TIP	3.00

TOTAL 49.00

THANK YOU FOR SHOPPING

Customer Copy
7 Day Return Policy

Figure 3-7 Sale Receipt Sample

Receipt sample shows the Auth# & Ref# that a user would use to retrieve a sale and perform a "Reversal".

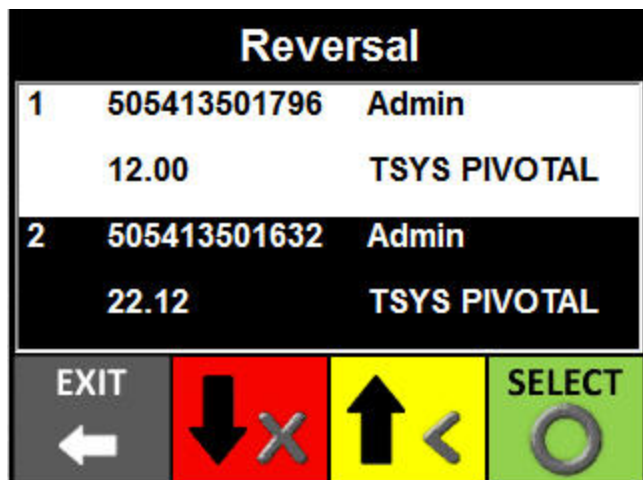


Figure 3-8 Transaction List Screen

If the user is unsure of the Auth or Ref #'s pressing the Enter button and a list of transactions will show on the screen. Scroll to the transaction you wish to Reverse and press the "Select" button.

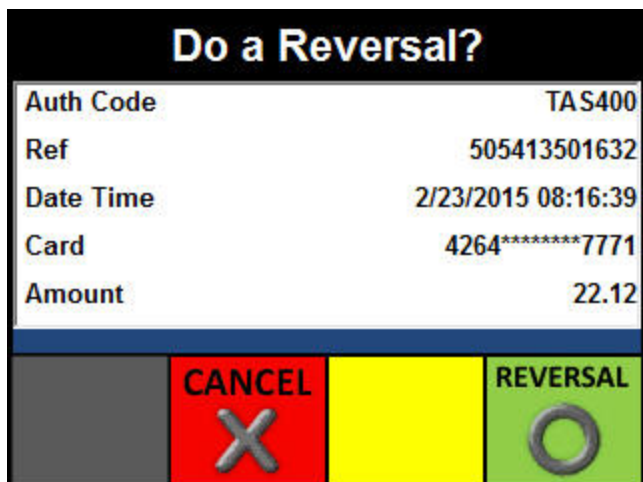


Figure 3-9 Do a Reversal Screen

If a match is found the user must confirm they wish to reverse the transaction by pressing "OK" otherwise they can exit the transaction by pressing "Cancel".



Figure 3-10 Processing Screen

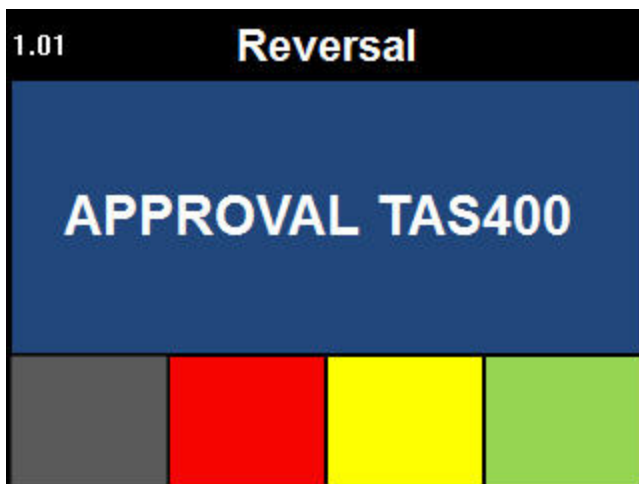


Figure 3-11 Reversal Approved Screen

When entering a Auth or Ref# if the transaction is not found in the Open Batch then the user will receive the below message.

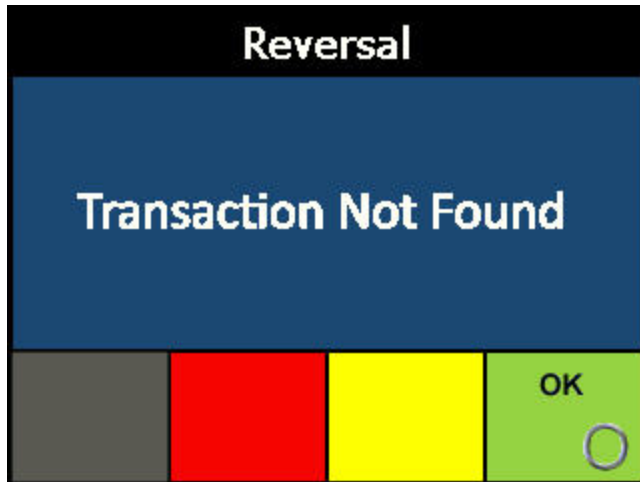


Figure 3-12 *Transaction Not Found*

If a match is NOT found a reversal cannot be completed and the user should perform a "Refund" to return the funds to the customer.

Refund - Credit

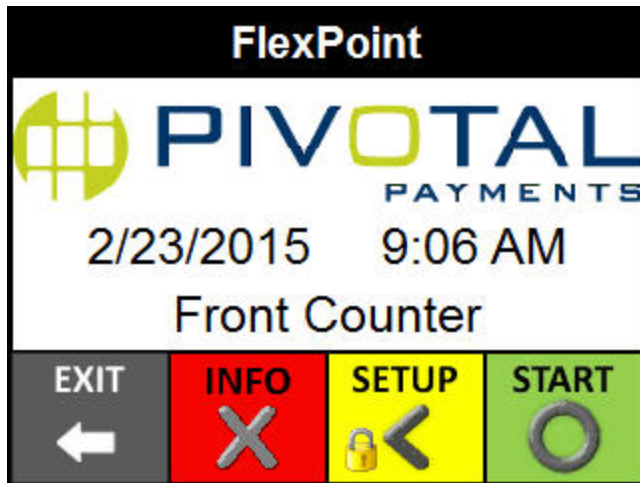


Figure 4-1 Main Screen

From the Main Screen select the “Start” button to process a Refund transaction.



Figure 4-2 Select Function Screen

From the Select Function Screen select the “Refund” button to process a Refund transaction



Warning: It is very important that only authorized users have access to Payment Terminals as this affects the cash flow of your business.

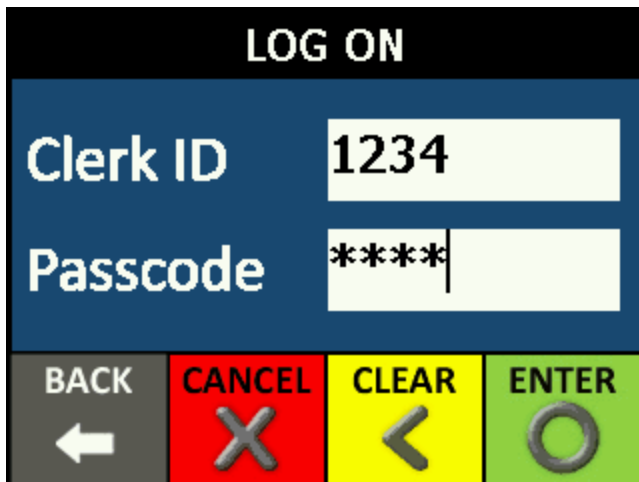


Figure 4-3 Enter User ID & Password



Note: When processing a "Refund" users may need to enter a valid User ID and Password that has access to the "Refund" functionality if security is configured for a password. This is noted by the "lock" symbol on the reversal button.

If a user does have the required access to perform a Refund or a Reversal but enters an incorrect User ID or Password they would see the below "Invalid Clerk ID" message.

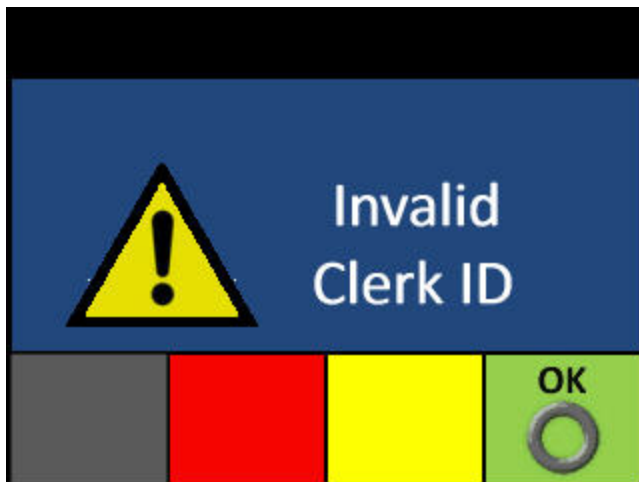


Figure 4-4 Access Denied, Invalid Clerk ID

If a user does not have access to the "Locked" Refund function they will see the "Invalid Clerk ID" (could also display Server ID or Driver ID depending upon the Employee Title setup) Screen.

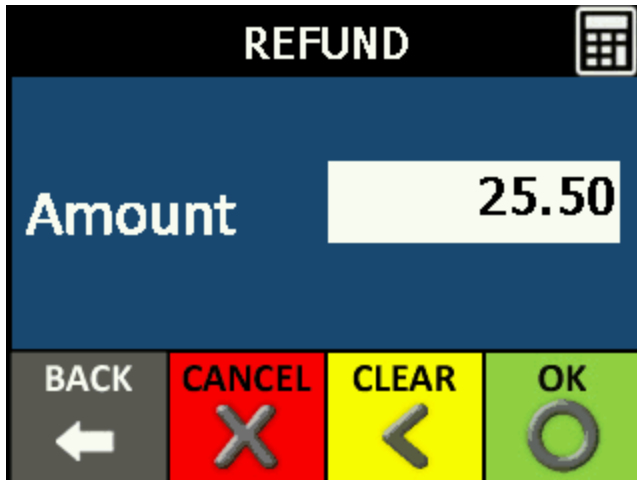


Figure 4-5 Enter Amount

The user would enter the refund amount and press “OK” to proceed. To cancel the refund and return to the main menu press the “CANCEL” button.

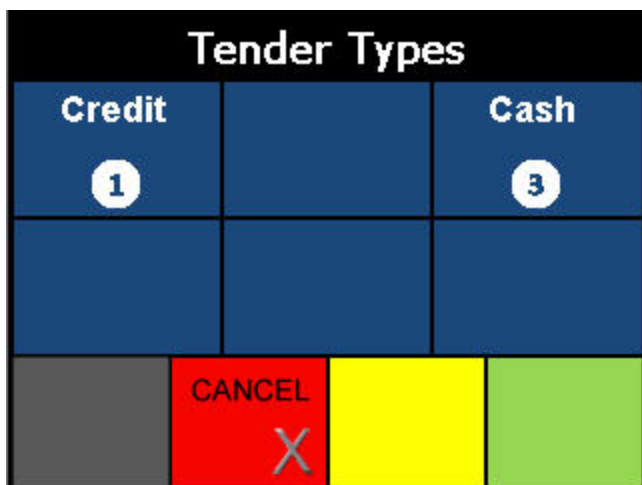


Figure 4-6 Refund Tender Type Screen

The user would select the tender type to refund such as Credit.



Figure 4-7 Insert or Swipe the Card

Users will be able to Insert, Swipe or key in the card number.

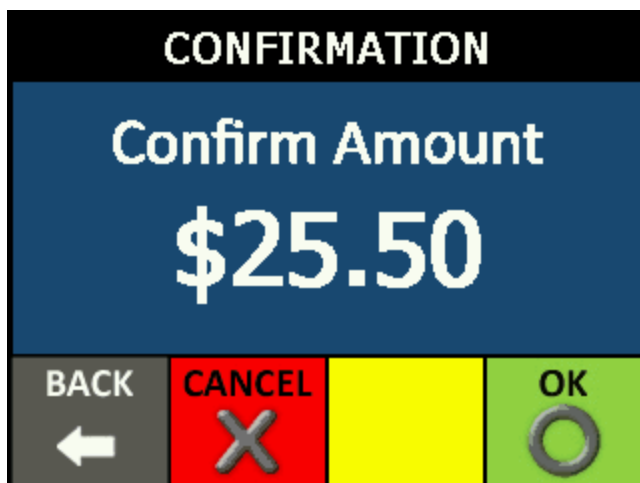


Figure 4-8 Confirm Purchase Amount (Optional)

If a Cardholder inserts or swipes their credit card, the above screen will display prompting the cardholder to confirm the refund amount by pressing the "OK" button.



Figure 4-9 Processing

When the amount is confirmed the payment terminal will communicate with the processor and send information about the transaction seeking an approval of the transaction.

During the communication process the screen showing “Please Wait Processing...” will display letting the clerk knows that the terminal is working on obtaining an authorization.



Figure 4-10 Print Customer Receipt

Once the terminal is done processing the transaction it will automatically print out the merchant copy of the receipt. The terminal then then prompt the user if they wish to "Print Customer Receipt", press "OK" to print or press "Cancel" to skip printing.

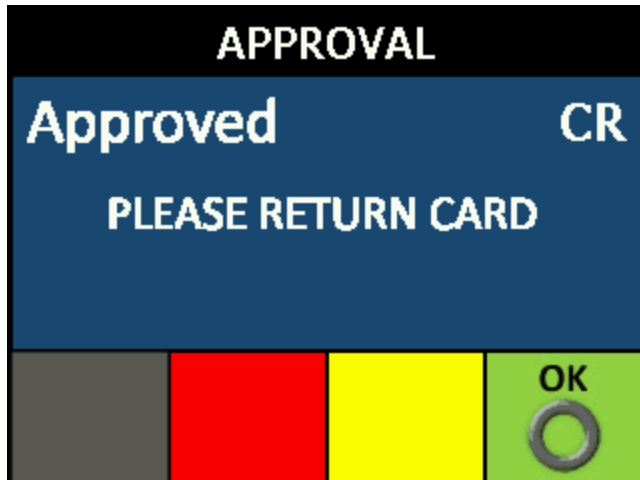


Figure 4-11 Transaction Approved

When a transaction has been successfully completed, the Transaction Approved screen will display “Approved, Please return card”. The approval code is also displayed.