



## **Credit Card Terminal Guide**

### **General Information:**

1. To check out the credit card terminal, contact the Cashier Office 1 week prior to the event for availability. Please provide the following information:
  - Index /FOAP
  - Department Name
  - Terminal pick up date
  - Terminal return date
  - Purpose (Event Title)
  - Contact Information
2. Settlement of the credit card terminal must be performed at the close of each business day.
3. The credit card terminal may be checked out for a maximum of 5 days.
4. Ensure that the credit card terminal is fully charged upon pick up and before scheduled events.
5. If the credit card terminal is lost or damaged, the department's Index will be charged for the full cost of repair or replacement.

### **Recording a Sale (Swiping Card):**

1. Press and hold the power button, the red x on the bottom left hand side of the key pad.
2. Take the credit card with the bar facing toward the keypad and swipe.
3. Verify that the last four digits of the card match what is displayed on the terminal.
4. If the card number matches the terminal, hit 'Yes.' If the card number does not match select 'No' and restart the transaction.
5. Enter the amount for the sale.
6. Select the green 'Enter' button located on the bottom right of the keypad.
7. A receipt will print.
8. Have the customer sign the receipt. If they would like a copy select 'Yes' on the menu.

### **Recording a Sale (Keypad Entry):**

1. Select 'Credit' located on the touch screen.
2. Select the 'Sale' located on the touch screen.
3. Input the credit card number with the keypad and select 'Enter' on the keypad when finished.
4. Input the expiration date using the keypad and select 'Enter' on the keypad when finished.
5. Enter the card code on the keypad and select 'Enter' on the keypad when finished.
6. Enter the amount of the sale using the keypad and select 'Enter' on the keypad when finished.
7. Press 'Enter' twice on the keypad to get through the 'Address' and 'Zip Code' entry screens.
8. A receipt for CSM will print requiring a signature from the customer.
9. If the customer would like a receipt select 'Yes' on the touch screen.

### **Settlement of the credit card terminal:**

\*\*\*Perform at the close of each business day.

1. Select 'Credit' located on the touch screen.
2. Select 'More' located on the touch screen.
3. Select 'Print Reports' located on the touch screen.
4. Select 'Card Details' located on the touch screen.
5. Navigate back to main menu and select 'Credit' located on the touch screen again.
6. Select 'Close' located on the touch screen.
7. Verify that your total credit card receipts match the total located on the screen.
8. If the totals match, select the 'Yes' button.
9. The 'Credit Card Totals' report will print.
10. The 'Credit Card Type Totals' report will print.
11. Ensure that at the bottom of the receipt reads 'Settlement Successful.'
12. Take the reports to the Cashier along with a deposit form printed out from CASHNet.
13. For instructions on how to submit deposits please refer to the [CASHNet Training Manual](#).

### **Voiding a Transaction:**

1. Select the 'Credit' button located on the touch screen.
2. Select the 'Void Trans' button located on the touch screen.
3. Swipe the credit card with the bar facing the keypad.
4. On the keypad, enter the Invoice Number located on the sale receipt.
5. Select the green 'Enter' button located on the bottom right hand corner of the keypad.
6. Select the 'Void' button located on the touch screen.
7. Select the green 'Yes' button located on the touch screen.
8. A receipt will print for the void.
9. If the customer requests a receipt select 'Yes' on the touch screen.

\*If you have any questions please contact the Cashier Office 303-273-3298.