

System Credit Card Support

When your district signs up for credit card processing services, the USAePay credit card processing vendor provides the required account information and the information needed for FOH configuration. Your district will be able to access their credit card gateway account information at the USAePay website. Pertinent information will include the API Key and API PIN which are both required for the FOH credit card feature configuration.

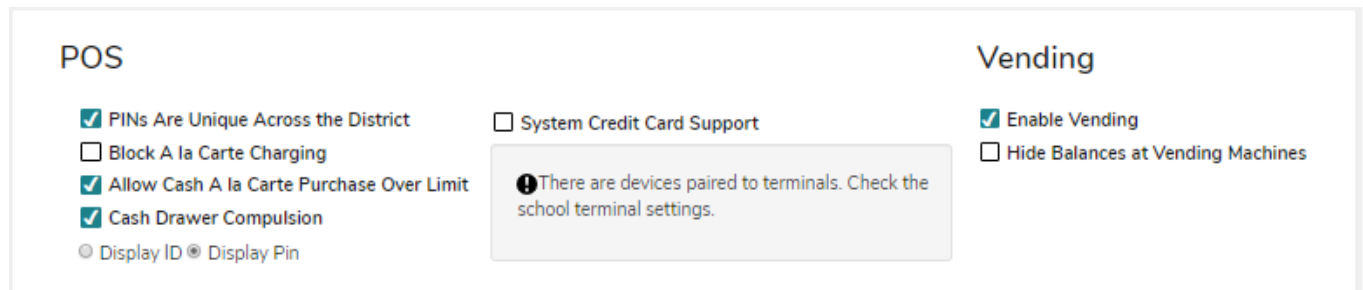
Activate System Credit Card Support

System Credit Card Support is activated in **System Options**. The feature is deactivated by default.

Note: Set the **System Credit Card Support** option at the school level.

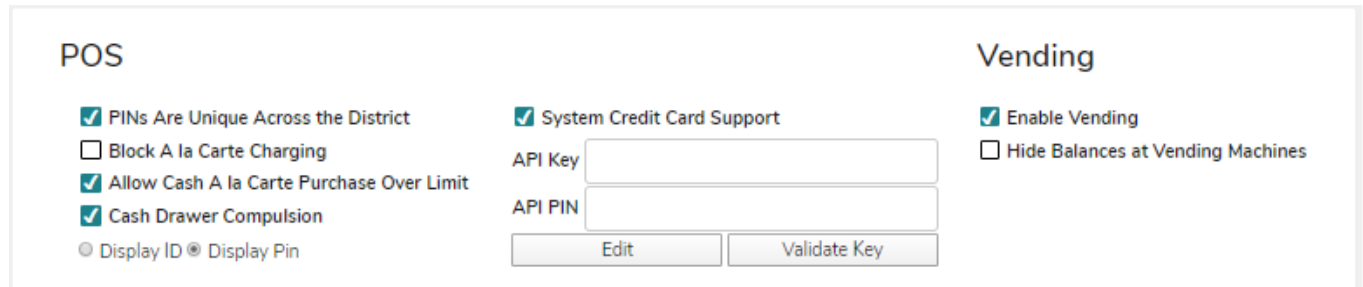
1. Log in to FOH and select a school from the **School** drop-down list.
2. Go to **Admin > Definitions/Setup > Global > System Options**. The **System Credit Card Support** check box is located in the **POS** section of the **System Options** screen.

The check box is cleared (unchecked) by default. If the check box is checked, when you clear the check box to disable the setting, the following system message appears if there are devices paired to terminals:
There are devices paired to terminals. Check the Schools terminal settings.



The screenshot shows the 'System Options' configuration screen. On the left, under the 'POS' section, several checkboxes are checked: 'PINs Are Unique Across the District', 'Allow Cash A la Carte Purchase Over Limit', and 'Cash Drawer Compulsion'. The 'System Credit Card Support' checkbox is unchecked. A grey message box with an information icon is displayed, containing the text: 'There are devices paired to terminals. Check the school terminal settings.' On the right, under the 'Vending' section, the 'Enable Vending' checkbox is checked, and 'Hide Balances at Vending Machines' is unchecked.

3. Check the **System Credit Card Support** check box to enable Credit Card functionality. The **API Key** and **API PIN** fields appear, along with an **Edit** and a **Validate Key** button. (The API Key and API PIN are provided by the USAePay credit card processing vendor.)



This screenshot shows the 'System Options' screen after the 'System Credit Card Support' checkbox has been checked. The 'API Key' and 'API PIN' input fields are now visible and empty. Below these fields are 'Edit' and 'Validate Key' buttons. The 'POS' and 'Vending' sections remain the same as in the previous screenshot.

4. Enter a valid credit card vendor API key and API PIN in the fields provided and click **Validate Key**. The system validates the key and PIN.

Note: Click **Edit** to change existing **API Key** and **API PIN** field entries.

5. After successful validation, the **Key Validated** button replaces the **Validate Key** button.
6. Click **Save**.

POS

- PINs Are Unique Across the District
- Block A la Carte Charging
- Allow Cash A la Carte Purchase Over Limit
- Cash Drawer Compulsion
- Display ID Display Pin

Vending

- System Credit Card Support
- Enable Vending

API Key

API PIN

Edit
Key Validated

Credit Card Device

If the **System Credit Card Support** option is enabled in **System Options**, a **Credit Card Status** and a **Credit Card Edit** column appear in the **Terminals** grid on the **POS** tab accessed from the **Schools** screen (**Admin > Schools**). Use the Credit Card Device feature to pair a POS terminal with a device for credit card use, allowing cashiers to process credit, debit, and Apple® Pay® transactions.

Terminal Number	Machine Name	Client Version	Credit Card Device Status	Credit Card Device Edit	Auto Sale	Active
1	FNMXL0311L1D	2017.2.0.54	None	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	O7040-J7C9CH2_high	2019.3.2.1	None	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	L7490-8SB9XT2	2020.2.2.4	Paired	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	L7490-8SB9XT2_765	2020.2.2.4	Unpaired	Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 4 of 4 items

When you click the **Edit** button in the **Credit Card Device Edit** column, the following dialog appears.

Credit Card Device Edit
✕

Terminal Credit Card Support

Save & Close

The following statuses may appear in the **Credit Card Device Status** column:

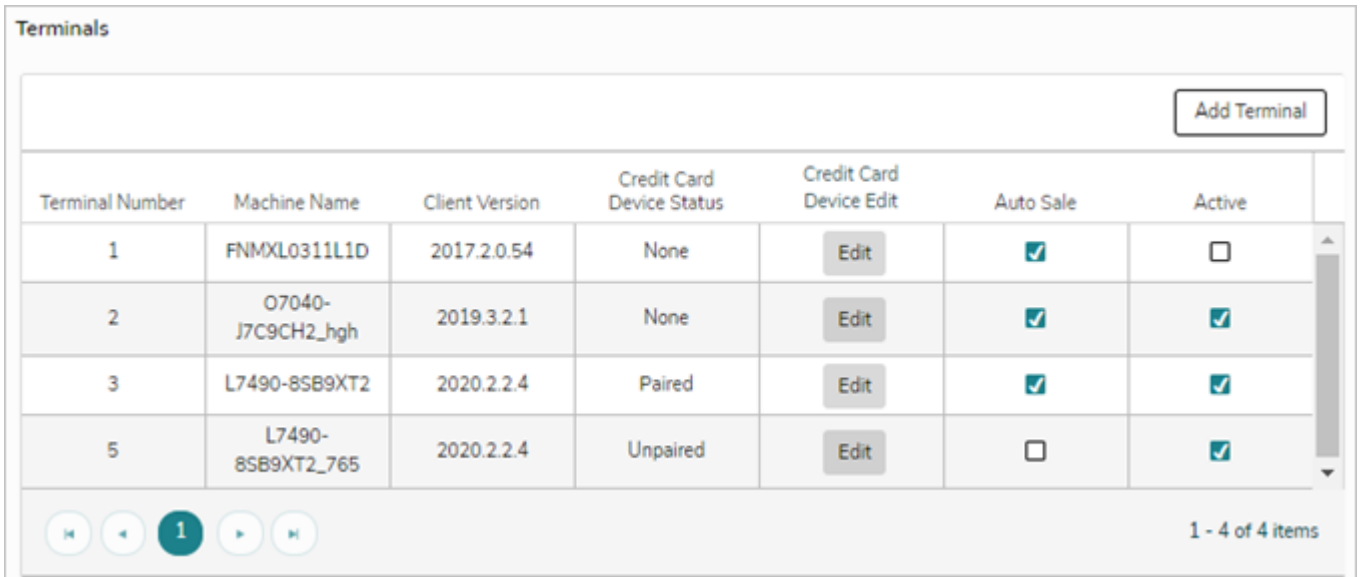
- **None:** The **Terminal Credit Card Support** check box is unchecked; the terminal is not paired with a device.
- **Paired:** The **Terminal Credit Card Support** check box is checked; the terminal is paired with a device.
- **Unpaired:** The **Terminal Credit Card Support** check box is checked; the terminal is not paired with a device or there is a connection issue.

Pair a POS Terminal with a Device

Use the following procedure to pair a POS terminal with a credit card device:

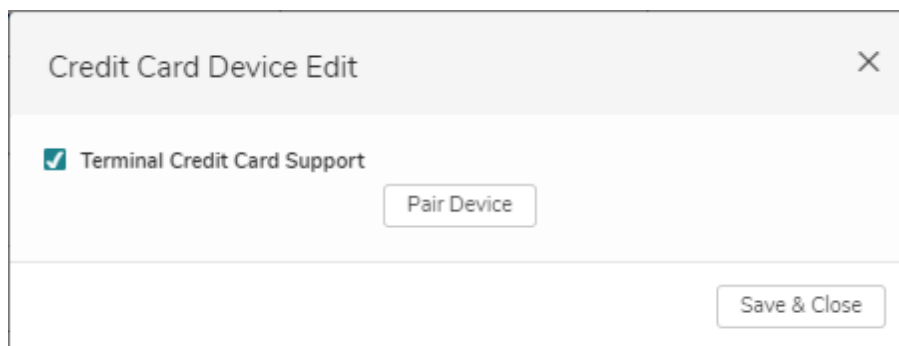
Note: If you attempt to pair a device that is already paired to a terminal, an error message will appear indicating which terminal the device is paired to: *The device is already paired to terminal number: 1, machine name: CHS7-CAFE2.* After a device is paired, the **Pair Device** button on the **Credit Card Device Edit** dialog toggles to **Unpair Device**.

1. Go to **Admin > Schools**, click **More Details** next to the appropriate school, and access the **POS** tab.

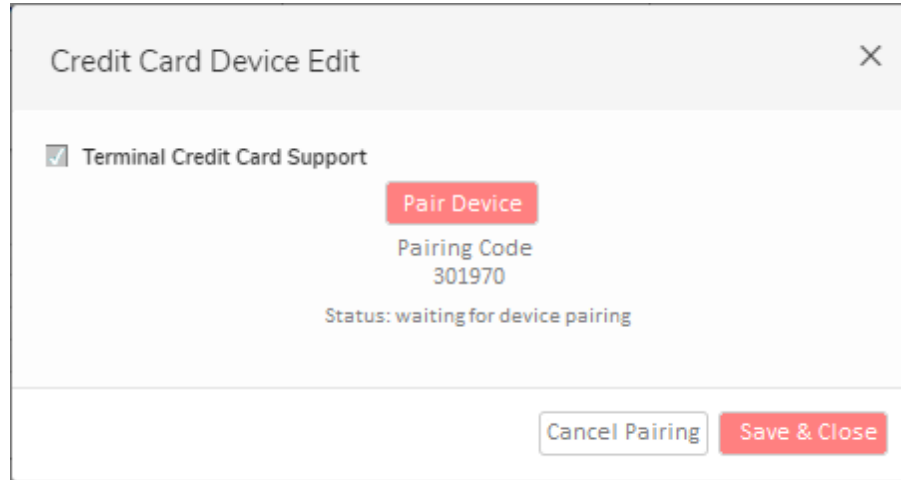


Terminal Number	Machine Name	Client Version	Credit Card Device Status	Credit Card Device Edit	Auto Sale	Active
1	FNMXL0311L1D	2017.2.0.54	None	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	O7040-J7C9CH2_hgh	2019.3.2.1	None	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	L7490-8SB9XT2	2020.2.2.4	Paired	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	L7490-8SB9XT2_765	2020.2.2.4	Unpaired	Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. In the **Terminals** section, click the **Edit** button in the **Credit Card Device Edit** column next to the POS terminal you want to pair with a credit card device. The **Credit Card Device Edit** dialog appears.
3. Check the **Terminal Credit Card Support** check box and click **Pair Device**.



A **Pairing Code** number and status message appear, along with a **Cancel Pairing** button. The **Pair Device** and **Save & Close** buttons are disabled until the device is paired or you click **Cancel Pairing**.



If you click **Cancel Pairing**, the **Unpaired** status is assigned and the pairing code will time out.

4. Enter the pairing code on the device to connect to the server. The *Status: Connected* message appears and the records are saved to the HST database. The **Pair Device** button is replaced with the **Unpair Device** button.
5. Click **Save & Closed**. A **Paired** status appears next to the terminal in the **Credit Card Device Status** column.

Unpair a POS Terminal from a Device

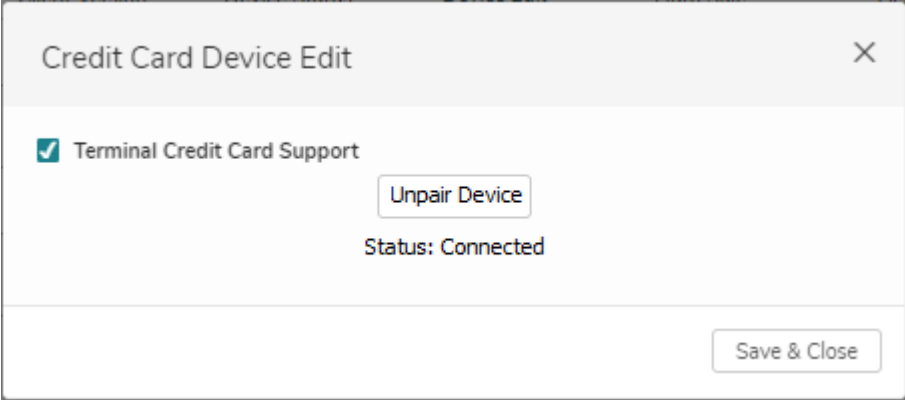
Use the following procedure to unpair a POS terminal from a credit card device:

1. Go to **Admin > Schools** and click **More Details** next to the appropriate school.
2. Access the **POS** tab.

Terminals							Add Terminal
Terminal Number	Machine Name	Client Version	Credit Card Device Status	Credit Card Device Edit	Auto Sale	Active	
1	FNMXL0311L1D	2017.2.0.54	None	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2	O7040-J7C9CH2_hgh	2019.3.2.1	None	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3	L7490-8SB9XT2	2020.2.2.4	Paired	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
5	L7490-8SB9XT2_765	2020.2.2.4	Unpaired	Edit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

1 - 4 of 4 items

3. In the **Terminals** section, click the **Edit** button in the **Credit Card Device Edit** column next to the paired POS terminal you want to unpair from a credit card device. The **Credit Card Device Edit** dialog appears.



4. Click **Unpair Device**. After the successful unpairing of the device, the records are deleted in the HST database. The **Unpair Device** button is replaced with the **Pair Device** button.
5. Click **Save & Closed**. An **Unpaired** status appears next to the terminal in the **Credit Card Device Status** column.

POS Credit/Debit Card Acceptance

Cashiers can accept credit and debit cards as payment from the POS terminal.

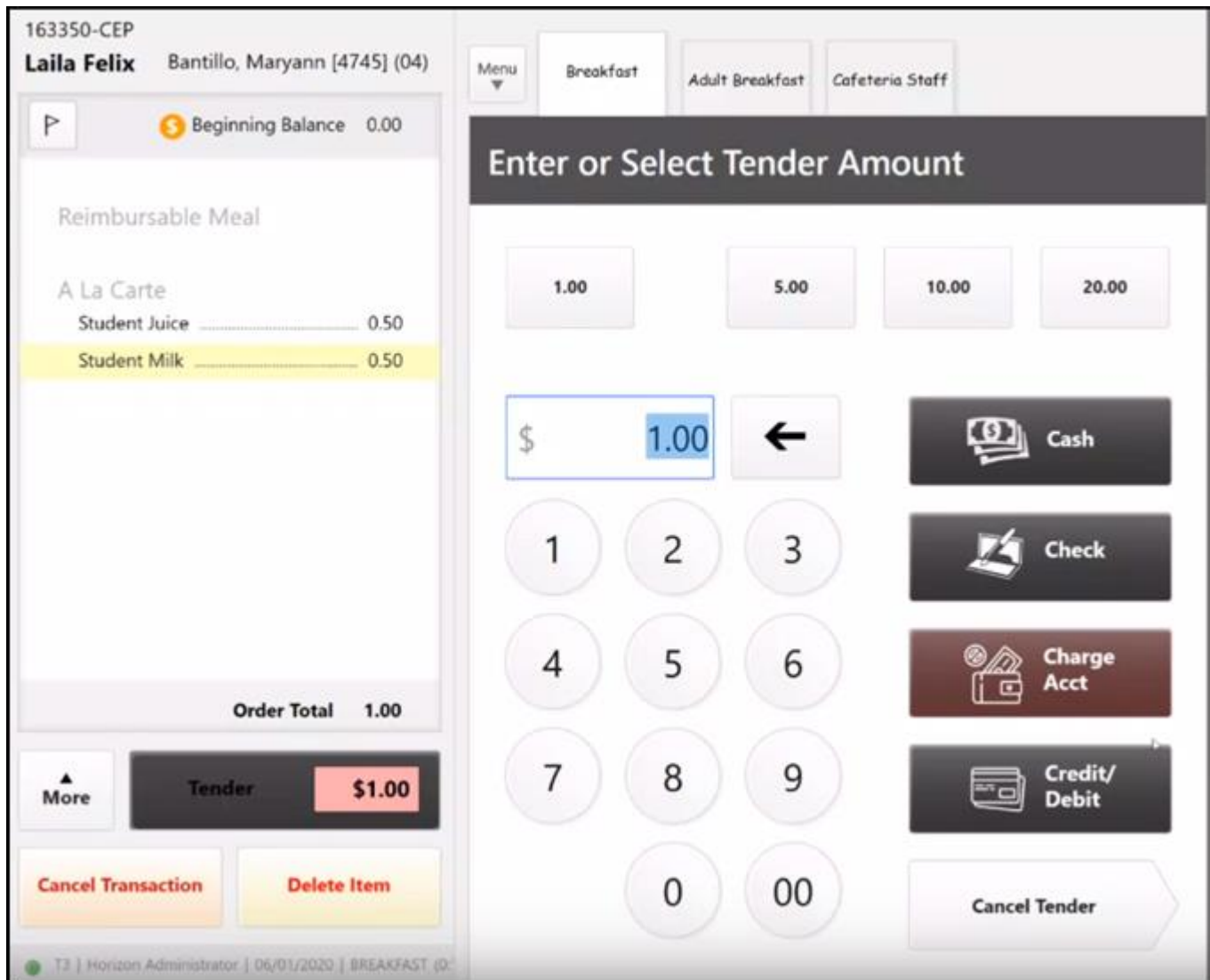
Note the following:

- The **System Credit Card Support** option must be enabled in **System Options**, and the **Terminal Credit Card Support** check box must be checked on the **Credit Card Device Edit** dialog accessed from the **Terminals** grid on the **POS** tab (**Admin > Schools**).
- Credit card and debit card transactions are handled using the Credit/Debit transaction type.
- Refunds are handled from USAePay and go directly to the student credit card when a transaction is voided.
- Full voids are allowed and do not require the card to be run again.
- In the case of an over tender, the remaining money will be applied to the student account.
- If a credit card transaction has been committed/processed, you can perform a void to undo the transaction.
- Transactions that contain a credit/debit cannot be edited; the transaction should be voided.
- Credit/debit transactions cannot be restored.
- Credit/debit transactions appear on the **Transaction History** report.

Process a Credit/Debit Card Sale

Use the following procedure to process a credit/debit card payment:

1. Log in to the terminal.
2. Enter the student's order and click **Tender**. If the **System Credit Card Support** option is enabled in **System Options**, the **Credit/Debit** button on the **Enter or Select Tender Amount** screen will be enabled.



3. Click **Credit/Debit**. A *Credit/Debit Card Processing* status message appears.

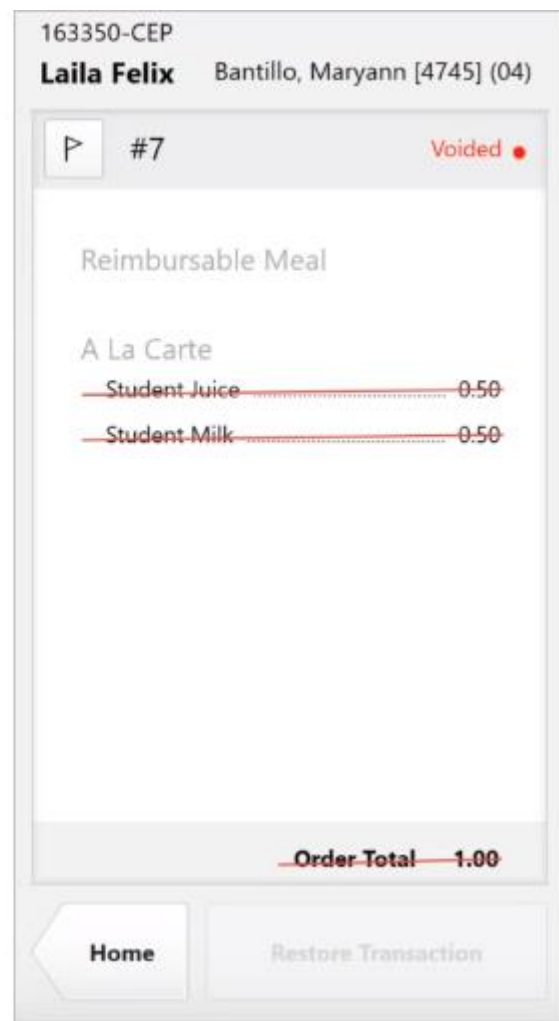
4. Swipe a credit/debit card on the device.

If processing fails (for example, if there is an issue with the device or the device times out after 30 seconds), the following message appears: *Failed. Please check device.* Click **OK**.

If the cashier clicks **Cancel** on the card reader, the *Cancelled* message appears. Click **OK**.

5. After successful processing of the credit/debit transaction, a *Successful* message appears. Click **OK**. The **Tendered Credit/Debit** amount appears on the ticket.

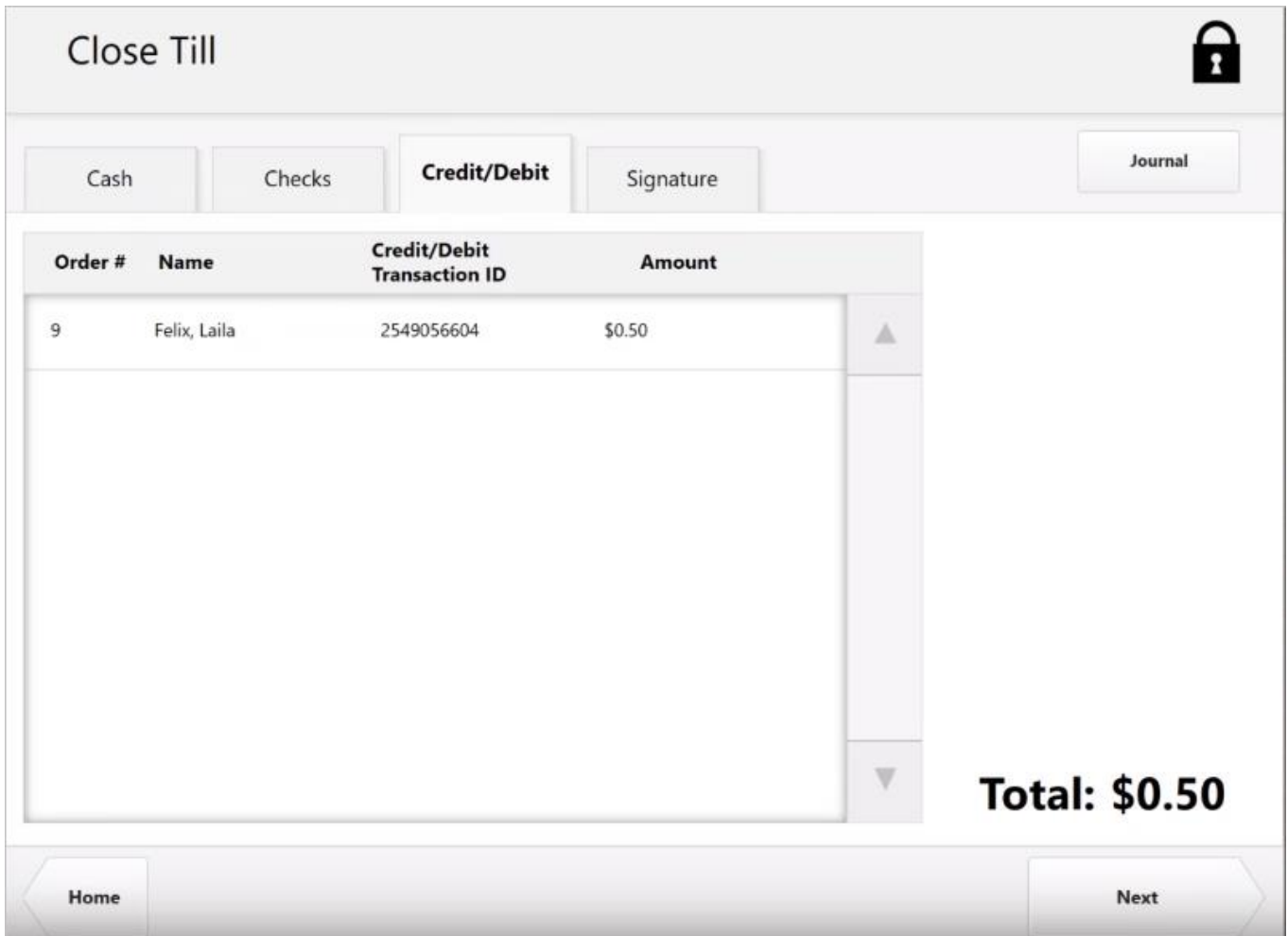
Note: If you click **Modify Transaction**, the following **Void Confirmation** message appears: *This transaction contains a Credit Card payment. Do you want to void the ticket?* If you click **OK** to void the transaction, it is voided immediately—the **Modifying** screen will not appear. You cannot modify or restore the transaction.



Verify Credit/Debit Card Transactions

Review credit/debit card transactions on the **Credit/Debit** tab on the **Close Till** screen to verify that totals are correct before closing your till.

1. On the **Home** screen, click **Close Till**.
2. Access the **Credit/Debit** tab.



The screenshot shows the 'Close Till' interface. At the top, there is a title 'Close Till' and a lock icon. Below the title are four tabs: 'Cash', 'Checks', 'Credit/Debit', and 'Signature'. A 'Journal' button is located to the right of these tabs. The main area contains a table with the following data:

Order #	Name	Credit/Debit Transaction ID	Amount
9	Felix, Laila	2549056604	\$0.50

Below the table, the total amount is displayed as **Total: \$0.50**. At the bottom of the screen, there are 'Home' and 'Next' navigation buttons.

3. Review the transaction information on the **Credit/Debit** tab:
 - **Order #:** Transaction order number for the terminal.
 - **Name:** Student name.
 - **Credit/Debit Transaction ID:** Unique ID for the credit/debit card transaction.
 - **Amount:** Amount of the credit/debit transaction.

4. Access the **Signature** tab to view and sign off on the till totals before closing the till. **Credit/Debit Card Transactions** counts and a **Credit/Debit Card Summary** section with **Transaction Totals** are included.

Cash	Checks
Transaction Summary	
Double Meals	0
Flagged Transactions	0
Modified Transactions	0
Voided Transactions	0
Price Overrides	0
Charged Meals	0
Refunds	0
Credit/Debit Card Transactions	0
Drawer Summary	
Counted Cash	\$0.00
Counted Checks	\$0.00
Counted Total	\$0.00
Expected Total	\$0.00
Credit/Debit Card Summary	
Transaction Totals	\$0.00

The **Credit/Debit Card Summary** amount will not be reflected in the **Expected Total** and **Over/Short** totals; these transactions are not part of the physical drawer count.

Journal

A **Tendered Credit/Debit** button has been added to the Journal screen.

