

Batching Credit Cards

1. Sign in to **Manage System**
2. Select the **Credit Card** module

Modules					
POS Module	Retail Module	Employee Module	Customer Module	Gift Cards	Credit Cards
Inventory Module	Tax Module	Ticket Audit	Messaging Module	Activity Logging	Setup
Business Reports	Online Ordering Module	Historical Archive	E-Mail Reports	Training Mode	Docs
Business Performance Report	Kiosk Module	K2			

4. Click **Settle and Close Batch** This button will be yellow if there are credit card transactions in the batch that need to be settled and closed. We are assuming that all tips have been entered in at this point.

Reports			
Credit Report	Daily Activity	Mini Reports	Untipped Transaction Report
View Batch History			
Heartland (Internet) Reports			
Activity	Batch History	Open Authorizations	
Management			
Adjust Payments	Apply Credit Refund	Offline Sale	Voice Authorize
Settle And Close Batch	Void Credit Txn	Test Communication	Reset Encryption Password

5. Select **Fast Settle**. This will move through the transactions more quickly if you choose single settle it will move one transaction at a time

Processing Credit Card Batch

Cancel

1 transaction(s) left to process.
Are you sure you want to process the batch?

Continue (Single Settle) Continue (Fast Settle)

Single settle: Process one card at a time.
Fast Settle: Process for 30 seconds at a time.

6. Click on **Close Batch**. Wait for the **Batch Closed Successfully** message to appear at the top of the screen.

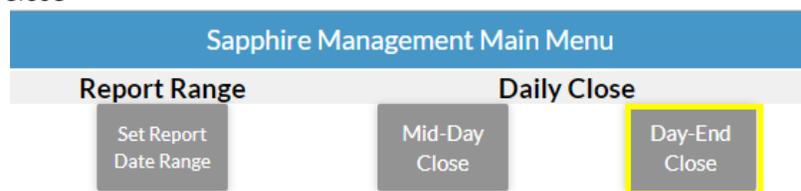
Manually Close Current Batch	
<div style="border: 2px solid yellow; padding: 5px; display: inline-block;">Close Batch</div>	
Last Batch Summary	
Batch Number	533486
Batch Count	5
Batch Total	\$48.32
Current Batch Summary (Sapphire Info)	
Batch Items	1
Net Batch Total	\$15.22
Credit Count	1
Credit Total	\$15.22

***Note:** If you process credit cards on an external credit card reader machine like the PAX S300 or a Bolt device you will need to click close external batch on this screen. If you are using both the card swiper on the terminal and also a side terminal for credit cards then it is always best practice to click **Close Both Batches**.

Day End Close

A Day End Close Needs to be run at the end of each day, this confirms the proper steps were taken to ensure a proper close.

1. Sign into Manage System
2. Select Day End Close



In order to run the day end close, the following need to be completed:

- Hourly employees have clocked out
- Tickets are closed
- Credit Cards have been batched

If Sapphire finds any of these issues they will need to be resolved before the system will let you move forward with the Day End Close Process. Other prompts it may require would be for you to download a backup, or activity log. Follow the steps Sapphire displays on the screen to complete the Day End Close.