Tab Wizard Credit Card Integration
Instruction Manual

After all items are added to the sales grid and awaiting payment, simply follow these instructions to process a credit card:

Running a Credit Card Transaction

1. Select "Credit Card"
2. "Swipe" ("Manual" selection is to input card numbers manually)
3. Look at the Pin Pad and verify the amount is correct to be charged and select the appropriate button.
4. Insert the card with the chip facing up and inwards. Press and leave in until indicated
5. The Pin Pad will beep when ready to remove, simply remove the card.
6. Look at the Tab Wizard screen.   Select "Yes" to complete the transaction
7. A duplicate credit card receipt will print and the cash drawer will open.
8. Have the customer sign / tip on the receipt and be sure to get the signed copy from the customer.

Entering a Credit Card Tip:

1. Select Clerk > Enter Credit Card Tips
2. Locate the "Invoice Number" on the printed receipt and verify the number to the "Receipt Number" on the Tab Wizard Credit Card Tip screen.
3. Select the corresponding tip line with invoice/receipt number and select Edit
4. Enter a tip amount > OK (the tip is added to the total charge)
5. Accept and exit the screen

How to Void / Refund a credit card

1. Select item(s) to void/refund and select "VOID" or "REFUND"
2. Repeat steps above "Running a credit card transaction

Clerk Reports (end of shift): Clerks need to enter their tips and print their own tip reports

1. Select Clerk > Enter Credit Card Tips
2. Select Clerk > Tip Report One Clerk
3. Print all other reports as normal > Shift Change

End of Day / Shift

1. Print a Server Tip Report (Report > Daily > Credit Card Server Tip Report) > Print
2. Print a Batch Report (Report > Daily > Credit Card Detail Batch Report) > Accept
3. Finalize the day by doing a Z Report (Report > Daily > Z Report