

Credit card on file using PAX (Heartland Portico)

The screenshot displays the 'Customer Maintenance' window. At the top, there are navigation links: 'This Customer', 'All Customers', and 'Print Customer Labels'. Below this is a yellow header for 'Information for: Valued Customer' with buttons for 'Scan License' and 'Keyboard'. The main form contains several sections: 'General Info' with fields for Customer # (114890014855), First Name (Valued), Last Name (Customer), and E-mail Address; 'Credit Card Info' with an 'Add / Edit Credit Card' button, a Credit Card Number field (**4460), and a dropdown for Credit Card Type (None, Mastercard, Visa, American Express); 'Personal Info' with fields for Drivers License ID, Exp Date, Mobile Phone, and Fax; 'Event' with fields for Event Date and Event Description; and 'Referral Source', 'Tax ID', and 'Tax Rate' (0 - DEFAULT - 0.000%). At the bottom, there is a search field, a 'Select for current invoice' checkbox, and navigation buttons: 'Previous', 'Look up', 'Next', 'Add', 'Delete', 'Update', and 'Exit'. A status indicator shows 'Last Search Returned 136 Customers'.

Note: This feature is offered through the **PAX pinpads only**.

Feature is available for **CRE Version 12.9006** and higher

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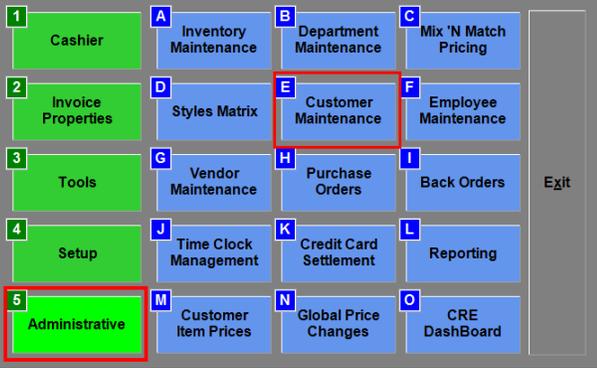
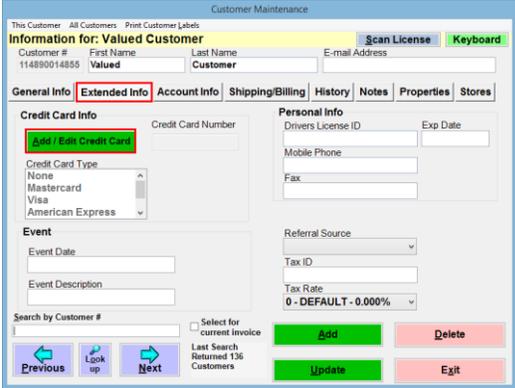
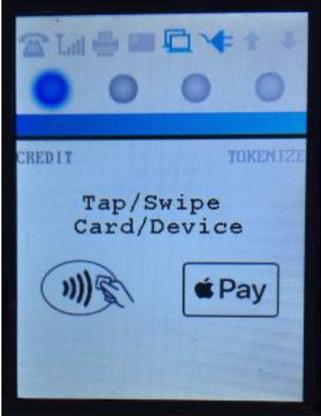
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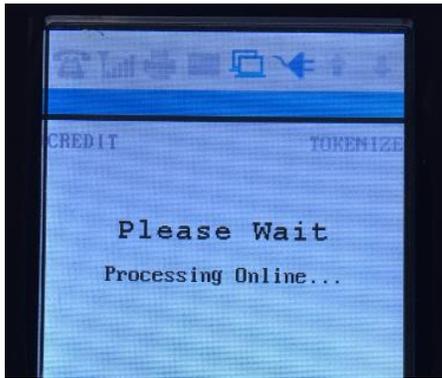
Revision History

Document Version	Date	Author	Description of Changes
1.0	October 14, 2018	JC	1st Release

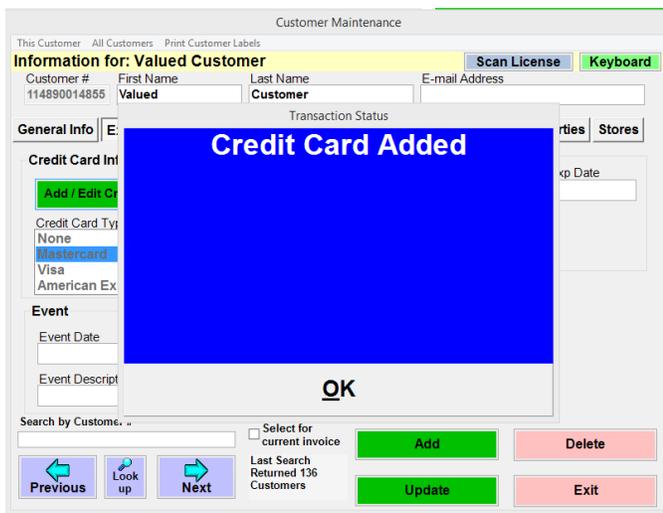
Adding Credit Card to Customer

Note: PAX device must be configured to the station used during this process.

 <p style="font-size: 24px; font-weight: bold; color: black;">Manager</p> <p style="font-size: 24px; font-weight: bold; color: white; background-color: blue; padding: 10px; border-radius: 5px;">Options</p>	<ol style="list-style-type: none"> 1. With CRE open select the Manager or Options button. Enter the Administrative ID & password.
 <p>The image shows a grid of menu options. Step 1 points to 'Cashier', Step 2 to 'Invoice Properties', Step 3 to 'Tools', Step 4 to 'Setup', and Step 5 to 'Administrative'. Within the 'Administrative' section, 'Customer Maintenance' is highlighted with a red box and labeled 'E'.</p>	<ol style="list-style-type: none"> 2. Select Administrative (5) 3. Select Customer Maintenance(E)
 <p>The screenshot shows the 'Customer Maintenance' window. The 'Extended Info' tab is selected and highlighted with a red box. The 'Add / Edit Credit Card' button is also highlighted with a red box.</p>	<ol style="list-style-type: none"> 4. Select the customer you want to associate the Credit Information with. 5. Select Extended Info Tab 6. Select Add /Edit Credit Card button.
 <p>The image shows a PAX device screen with the text 'Tap/Swipe Card/Device' and icons for NFC and Apple Pay.</p>	<p>Pax Device will prompt to Tap or swipe card.</p> <ol style="list-style-type: none"> 7. Swipe or Tap card . <p>Note: All Cards are required to swipe or tap card only.</p>



8. Wait for card to process.



Once processed the encrypted credit card info. is added to the customer.

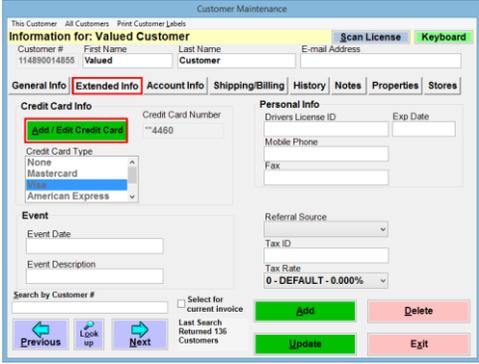
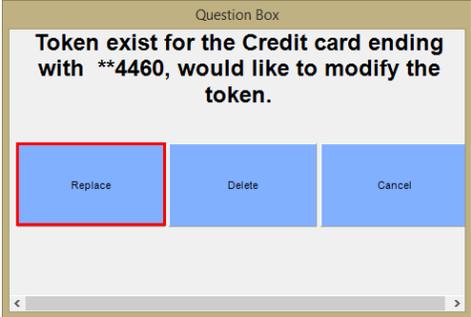
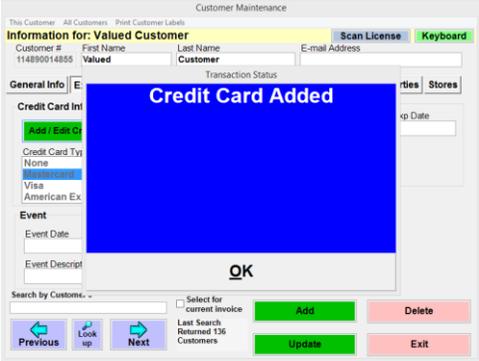
9. Select **OK**

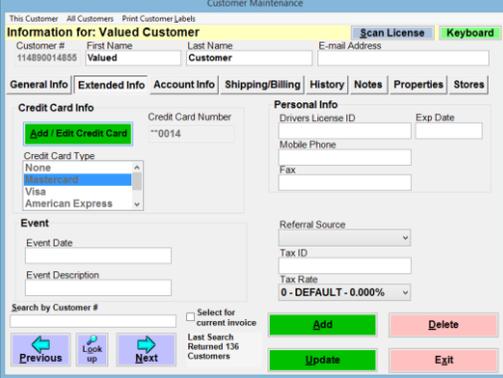


When a card is associated with a customer, the masked number and card type is shown.

Replace Credit Card information

Note: PAX device must be configured to the station used during this process.

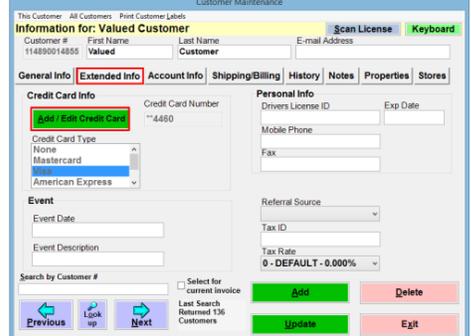
 <p>A yellow button labeled "Manager" is positioned above a blue button labeled "Options".</p>	<ol style="list-style-type: none">1. With CRE open select the Manager or Options button. Enter the Administrative ID & password.
 <p>The screenshot shows the "Customer Maintenance" interface for a "Valued Customer". The "Extended Info" tab is selected. In the "Credit Card Info" section, the "Add / Edit Credit Card" button is highlighted with a red box. Other fields include Credit Card Number (**4460), Credit Card Type (Visa), and Personal Info fields.</p>	<p>Select the customer you want to replace or remove the Credit Information with.</p> <ol style="list-style-type: none">2. Select Extended Info Tab3. Select Add /Edit Credit Card button.
 <p>A "Question Box" dialog is displayed with the text: "Token exist for the Credit card ending with **4460, would like to modify the token." Below the text are three buttons: "Replace" (highlighted with a red box), "Delete", and "Cancel".</p>	<ol style="list-style-type: none">4. Select Replace <p>This will trigger device to prompt to swipe for new credit card information. Previous section Step 7.</p>
 <p>The screenshot shows the same "Customer Maintenance" interface as before, but with a blue dialog box overlaid that says "Credit Card Added" and "OK".</p>	<p>Once Approved through the device</p> <ol style="list-style-type: none">5. Select OK.

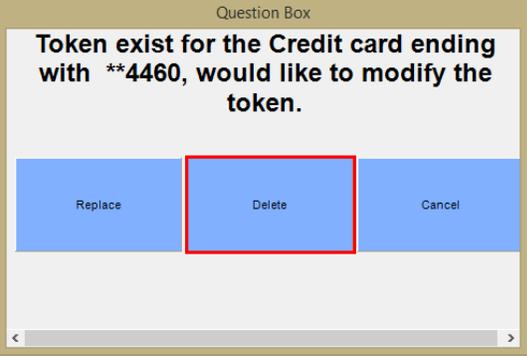
	<p>6. Now new card info. is shown.</p>
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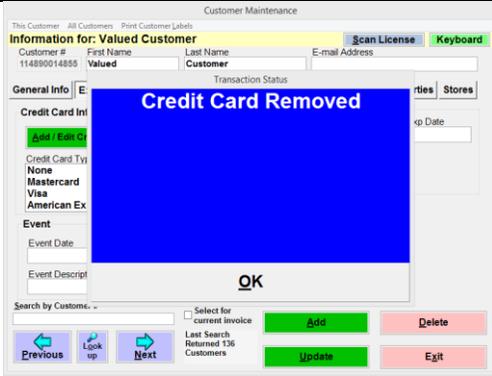
Remove Credit Card Information

Note: PAX device must be configured to the station used during this process.

	<ol style="list-style-type: none"> 1. With CRE open select the Manager or Options button. Enter the Administrative ID & password.
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	<p>Select the customer you want to replace or remove the Credit Information with.</p> <ol style="list-style-type: none"> 2. Select Extended Info Tab 3. Select Add /Edit Credit Card button.
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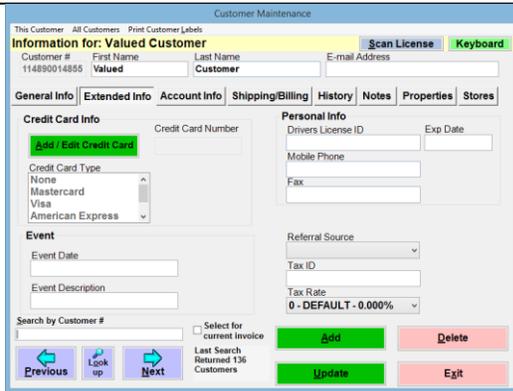
	<ol style="list-style-type: none"> 4. Select Delete
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PAX Device will remove the token and when done.

Msgbox will prompt.

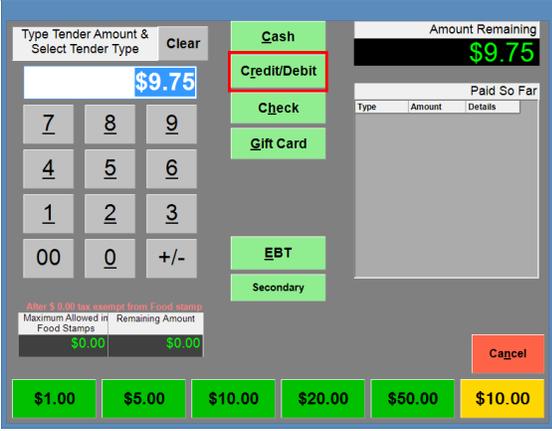
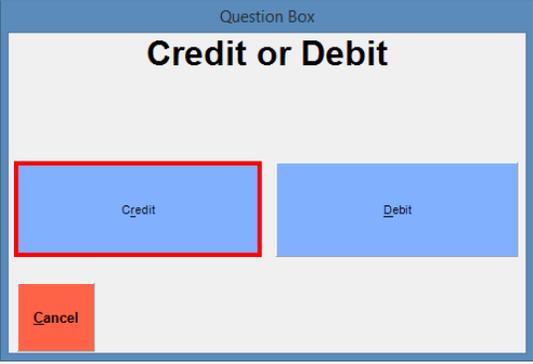
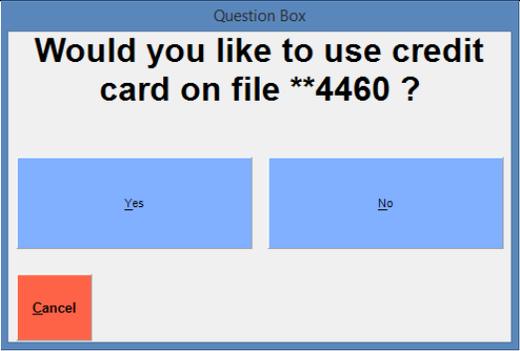
5. Select **OK**



Credit Card information is now removed.

Using associated card

Customer with Card must be associated with invoice.

	<ol style="list-style-type: none">1. Ring up a sale in CRE then hit the PAY button. From the amount tendered screen, select Credit/Debit..
	<ol style="list-style-type: none">2. Select Credit.
	<p>When Customer associated with Card and invoice. You will be prompted. (Shown on the left)</p> <p>Select Yes. Use the card associated with customer.</p> <p>Select No. To use a different credit card. Device will prompt for new credit card. Card is only used for current invoice. It will not replace card on file.</p>