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Processing Customer Orders using credit cards

Credit card sales in Customer Order differ from those being made via the Cash Register screen. It is generally assumed that Cash Register sales result from customers browsing your store, selecting items to purchase and checking out at a point-of-sale (POS) station. Customer Orders differ in the sense that at the time the order is placed, some items may not be in stock and will require a backorder to fill. As a general rule, merchants will not bill credit cards until the item(s) ship. There are two options to accommodate this issue.

- Option one is to simply hold the credit card information until all items are received and ready to ship. Once all items are either available or canceled, process the Customer Order as usual.

- Option two is ship those items that are available and ready to ship. As other items arrive simply bill the card a second time and ship.

Selecting "ship quantity extensions" on the Customer Order header tab will prevent the customer's credit card from being billed for the items not being shipped.

> **Special Note**: When taking tenders you are only allowed one credit card tender per transaction. The exception to this rule is when you are processing multiple shipments since each shipment is treated as a different transaction.

In the following example, we will not discuss the entire process of creating a Customer Order. Instead we will concentrate on taking a credit card as the tender for our sale.

1. Once all items have been placed on the order and are represented accurately (e.g. all items marked as ship are on-hand), we will need to receive payment.

2. Click the *F3 - Take Tenders* button at the bottom of the Customer Order screen.

3. Choose "VISA" from the payment method screen.
   - If you have the "Require Entry of Card Info" set to *Yes* in the Tenders screen, two additional fields will display on the screen.

1. **Credit Card Number:** used to enter the CC number.
2. **Expire Date:** used to enter the expiration date of the card.

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    If your Visual Anthology system has been setup to do credit card processing, this information will be sent to your processor for approval. Pressing *Enter* to accept the amount due causes the approval process to begin.

4. The **Amount** field is automatically populated with the amount of the current sale. Generally for credit card sales you will not allow change to be given (e.g. Amount due = $10 and customer want to charge $25 in order to receive $15 in cash change). If this is the case, simply press *Enter* while on the **Amount** field.