

# Integrity Payment Systems & Envision Credit Card Processing Helpful Hints

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## 1. Processing "Tips"

- Use the "Print Ticket" button in the Point of Sale of Envision to print out a pre-receipt for the transaction.
- Provide this receipt to the customer to fill in tip amount, total and signature.
- Ensure the tip has been entered **before** swiping the card. Swiping the card is the last step. *If the tip amount is entered after the card is processed, it will appear in Envision as if the tip was paid, but on the batch report the tip amount will not be included in the transaction total and will not be included in your batch deposit.*

## 2. Voiding/Refunding a Ticket

- Once a transaction has been processed and an authorization/approval code has been provided, you can not simply **void** the transaction. The card must be swiped or manually entered (hand keyed) again to process a void/refund of the transaction. The customer will see both a positive transaction and a refund on their credit card statement.
- When looking at their Credit Card Statement online, authorizations post immediately and refunds usually take 3 - 5 business days to post. When processing a refund, the Envision software will provide an "Approved" message but there will be no approval code.

## 3. Question if a transaction went through? (Reporting)

If a transaction is swiped/processed but you are not sure if it went through or not, rather than simply swiping the card a second time, go to the Accounting menu in Envision, select "Print Credit Card Batch Report" and enter the current date. You may view all transactions in real time to see if the transaction has been approved. This will avoid transactions being processed twice.

## 4. Customers Would Like to Purchase Additional Products

In a scenario where a person pays for a service and the transaction has already been completed (approval code received), then decides to purchase some additional products, there are a few options available. To avoid any issues, the easiest option is to simply create an entirely new ticket and process as normal.

## 5. Credit Card Processing Information and Documents

It is very important to ensure that anyone that is processing credit card transactions in Envision has access to the Envision Credit Card Processing Guide. This guide provides step by step instructions with screenshots of how to process transactions correctly. Also, please share these helpful hints with anyone processing credit card transactions.

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