

Pre-Authorisation

Quick Reference Guide

Please find below instructions on how to use the Pre-Authorisation function on your terminal.


You must retain the merchant copy of the Pre-Authorisation transaction receipt (original receipt) as the Pre-Authorisation cannot be completed without the acquirer Id (ACQ ID) and transaction reference number (TRX REF). These numbers are located on both the merchant and cardholder copies of the receipt.

For detailed information for specific cards and additional Pre-Authorisation options, refer to the Merchant Operating Guide.

HOW TO PERFORM A PRE-AUTHORISATION

The Pre-Authorisation transaction allows the merchant to place a hold on a cardholder's funds to the value of a future sale (Pre-Authorisation Completion) transaction.


Note: Always obtain the cardholder's consent prior to charging any amounts.

- 1 Press **<MENU>** 
- 2 Select **Transaction**
- 3 Select **Pre-Authorisation**
- 4 Enter amount and press ENTER / OK
- 5 The customer must tap, insert, swipe their card or mobile wallet when "PRESENT CARD" is visible on screen – For Swipe or Insert card processing allow the customer to select account type If prompted, have the customer enter their PIN and press <OK>
- 6 The terminal will display a 'Transaction OK' OR 'Transaction DECLINED' message. If the transaction has been declined please notify the customer, advise them to contact their card Issuer and seek an alternative form of payment.
- 7 Transaction is approved and merchant receipt is printed. Note: No funds have been debited at this stage.
- 8 Press 1 to print the customer copy or 2 to return to the start screen. Hand the customer their copy of the Transaction Record and their card.

HOW TO COMPLETE A PRE-AUTHORISATION TRANSACTION.

The Pre-Authorisation Completion transaction looks up the original Pre-Authorisation record, confirms the transaction value and puts the Pre-Authorisation payment through as a transaction.


Note: Always obtain the cardholder's consent prior to charging any amounts.

- 1 Press **<MENU>** 
 - 2 Select **Transaction**
 - 3 Select **Pre-Authorisation Completion**
 - 4 Enter amount and press ENTER / OK
 - 5 Enter Acq Id from original receipt and press ENTER / OK
 - 6 Enter TRX-REF Nr from original receipt and press ENTER / OK.
The terminal will display a 'Transaction OK' OR 'Transaction DECLINED' message. If the transaction has been declined please notify the customer, advise them to contact their card Issuer and seek an alternative form of payment
 - 7 Transaction is approved and merchant receipt is printed.
 - 8 Press 1 to print the customer copy or 2 to return to the start screen. Hand the customer their copy of the Transaction Record and their card
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HOW TO AMEND A PRE-AUTHORISATION TRANSACTION.


Pre-Authorisation Adjustment allows the merchant to increase the 'Pre-Authorisation' amount to the final value prior to completion.

Note: Always obtain the cardholder's consent prior to charging any amounts.

- 1 Press **<MENU>** 
 - 2 Select **Transaction**
 - 3 Select **Other Transactions**
 - 4 Select **Pre-Authorisation Adjustment**
 - 5 Enter extra amount and press ENTER / OK
Note: Be sure to add the extra amount only, not the full amount.
 - 6 Enter Acq Id from original receipt and press ENTER / OK
 - 7 Enter TRX-REF Nr from original receipt and press ENTER / OK
 - 8 The terminal will display a 'Transaction OK' or 'Transaction DECLINED' message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and seek an alternative form of payment.
 - 9 Transaction is approved and merchant receipt is printed
 - 10 Press 1 to print the customer copy or 2 to return to the start screen. Hand the customer their copy of the Transaction Record and their card
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HOW TO CANCEL A PRE-AUTHORISATION

Pre-Authorisation reduces available funds on a cardholder's credit card account. If a customer does not proceed with a sale after approval has been obtained, you must cancel the Pre-Authorisation as soon as possible.

- 1 Press **<MENU>** 
 - 2 Select **Transaction**
 - 3 Select **Other Transactions**
 - 4 Select **Pre-Authorisation Cancel**
 - 5 Enter Acq Id from original receipt and press ENTER / OK
 - 6 Enter TRX-REF Nr from original receipt and press ENTER / OK
 - 7 The terminal will display a 'Reversal OK' or 'Transaction DECLINED' message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and seek an alternative form of payment.
 - 8 Transaction is approved and merchant receipt is printed
 - 9 Press 1 to print the customer copy or 2 to return to the start screen. Hand the customer their copy of the Transaction Record and their card
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