

BASYS IQ

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Processing a Transaction

1. Select the **Sale** option at the top of the virtual terminal screen.
2. If you do not have a swiper, input all required information (Card Number, Holder Name, and Expiration Date). Address, ZIP Code, Customer #, Invoice #, and PO # are default information that can be overwritten but are required for best pricing.
3. Additional information may be entered in the **Transaction Note** field prior to clicking **Process**. This field will appear on the receipt.
4. After entering the customer's information, input the **Total Amount** for the transaction. Enter the entire amount to charge the cardholder, including shipping, tax, tip, etc. Click **Process** to complete the transaction.
5. Use the same method to process a refund or an authorization. Simply change the transaction type from **Sale** to **Refund** or **Auth** using the blue bar at the top of the screen.
6. When the transaction is approved, three receipt options are listed on the right of the **Receipt** header in the light blue box on the right-hand side of the screen.

Entering a Customer into the Rolodex

1. To add a new client to the rolodex, click on the **Rolodex** tab on the upper portion of the screen. Click **Records**. Click the **Add** button on the far right of the screen.
2. Enter client data in the fields provided. The only required field is the **Business Name** field. Please add all fields required for your clients.
3. After the record has been saved, click **Add Credit Card** in the bottom right corner to add the customer's credit card information.

Alternate Save Option:

1. When a transaction is processed in the Virtual Terminal, click **Save As: Rolodex** in the bottom left corner. This option is also available from the **Settlement Queue** or the **Transaction History**.
2. This save option automatically populates the information from the **Transaction** to the **Rolodex**.
3. Review information and make any final changes before saving the record.

Processing a Transaction from the Rolodex

1. Select the desired customer in the **Rolodex** by clicking the arrow to the left of the customer record.
2. Verify all contact and credit card information before proceeding with the transaction.
3. Click **Create -Transaction** in the lower right. This will move the rolodex record into the main **Transaction Screen**.
4. Input the total amount and click **Process** to complete the transaction.

Processing from the Rolodex on the Virtual Terminal

1. Search by **Business name**.
2. Select **Customer**.
3. Information will automatically populate.

Using the Settlement Queue

1. Under the **Credit Cards** tab, select **Settlement Queue**.
2. In the **Settlement Queue**, all of today's pending transactions are available. BASYS IQ will automatically settle these transactions at 1:00 a.m. CT.
3. To manually settle the transactions in this queue, click the **Manual Settle** button on the left side of the screen. This settles all transactions in the **Settlement Queue**. It is not possible to only settle selected transactions.
4. To void a transaction, highlight it and select **Void**. Voiding a transaction prevents a cardholder from being charged.

- Voiding a transaction is preferable to refunding a transaction. Refunding a transaction charges the cardholder before returning the funds.
5. To search for a specific transaction, use the search fields below the column headers.

Accessing Reports

1. Click on the **Reports** tab on the top of the screen.
2. Once the drop down is opened, select the desired report.
3. All **Transaction and Settlement Reports** require a date range to be entered.
4. All Reports found in BASYS IQ can be printed or exported as a .pdf or .xls file.
5. The **Rolodex Reports** include all clients currently listed in the **Rolodex**.
 - The **Rolodex Expired Credit Cards** report provides client names based upon the expiration date selected by the user. This report is useful for determining which customers' cards will expire soon.

Recurring Billing

Creating Monthly Batch Groups

1. Select **Credit Cards**, then select **Batch**.
2. Next, select **Transactions**.
3. In the upper left corner, select the **Add** option.
4. Enter the name of the **Group** in the text box and click **Save**.

If the customer is already saved to your Rolodex, use the following instructions to add the customer to a group. Please see "Entering a Customer into the Rolodex" for further instructions.

1. Locate the customer record in the **Rolodex**.
2. Click the **arrow** to the left of the record to expand the customer record.
3. To the right of the encrypted credit card information, click the **Batch** link.
4. After the **Edit Batch Transaction** screen appears, select the appropriate **Batch Group** to add the customer.
5. Verify all customer information and add the recurring amount.

6. In the upper right corner select **Save** next to Batch Transaction.

Processing a Recurring Billing Batch

1. Select **Credit Cards**, then select **Batch**.
2. Next, select **Transactions**.
3. Select the group to process by clicking the **arrow** next to the **Group**.
4. Review the list and confirm all dollar amounts. Any changes made will be effective for this and all future transactions in this Batch Group.
5. Click **Send Group for Processing** to send the batch to the **Transaction Batch Queue**.
6. In the **Transaction Batch Queue**, make any additional adjustments to transaction amounts. These changes will only be applied to this batch.
7. Click **Process** to process all unprocessed transactions in batch.
8. A box will appear that says “All unprocessed transactions in your batch queue will be processed. The email address on file for your BASYS IQ account will receive an email when the batch is completed. Processing times may vary based on batch size or system activity.” Click **OK**.
9. After the confirmation email is received, the **Batch Queue** will display the authorization status of each transaction. This process may take up to one hour, depending on batch size.
10. Click **Clear Approved** to display only transactions which were declined or returned an error message. Print this screen for reference to obtain an alternative form of payment from these customers.
11. Click **Clear All**.
12. Your transactions will now be listed in the **Settlement Queue**. To get to the **Settlement Queue**, select **Credit Cards** and select **Settlement Queue**.

Adding a User

1. Click on the **Account** tab on the left of the screen.
2. Click the **Account Manager** button. Click the **Users** tab.
3. Click the **Add User** button located on the right of the top half of the screen.
4. Enter the user’s information (first name, last name, email).

5. Assign a username.
6. Pick a temporary password for the new user. The new user will be prompted to change the password when they log in to BASYS IQ.
7. Next to **Account Status**, check the **Admin User** box only if you'd like to give the user access to change settings for other users.
8. Set the **User Permissions**. Any or all of these may be selected. These may be changed at any time by an admin user.