

## Recurring Billing

### Creating Monthly Batch Groups

1. Select Credit Cards, then select Batch. Next, select Transactions.
2. In the upper left corner, select the Add option.
3. 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. Next, select Transactions.
2. Select the group to process by clicking the arrow next to the Group.
3. Review the list and confirm all of the dollar amounts. Any changes made will be effective for this and all future transactions in this batch group. Click Send Group for Processing to send the batch to the Transaction Batch Queue.
4. In the Transaction Batch Queue, make any additional adjustments to transaction amounts. These changes will only be applied to this particular batch. Click Process all unprocessed transactions in batch.
5. A box will appear on your screen 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."
6. After confirmation email is received indicating batch group has processed, the Batch Queue will display the authorization status of each transaction. This process may take up to one hour, depending on batch size.
7. Click "Clear Approved" to display only the declined transactions and those that returned an error message. Print this screen for reference in order to obtain an alternative form of payment from these customers.
8. Click "Clear All."
9. Your transactions will now be listed in the Settlement Queue. To get to the Settlement Queue, select Credit Cards and select Settlement Queue.

## Quick Reference Guide for BASYS IQ

Merchant # \_\_\_\_\_

## 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 information that is required (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 relevant information may be entered in the Transaction Note field. If entering, this information must be entered prior to clicking Process. This field will appear on the receipt.
4. After all customer information is entered, 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. The transaction type is found in the blue bar at the top of the screen.
6. When the transaction is approved, three receipt options will be found to the right of the Receipt header in the light blue box on the right hand side of the screen.

## 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 will settle all transactions in the Settlement Queue. It is not possible to only settle selected transactions.
4. To void a transaction, highlight it and press the Void button. 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 white boxes below the column headers. These are search fields.

## 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. Include all important client data in the fields provided. The only required field in this screen is the Business Name field. Please add all fields required for your clients.
3. After the record has been saved, you can click on the Add Credit Card button 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 the Save As: Rolodex button in the bottom left corner of your screen. 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. 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 on the arrow to the left of the customer record.
2. Verify all contact and credit card information before proceeding with the transaction.
3. Click the Create -Transaction button on the lower right. This will move the rolodex record into the main transaction screen.
4. Input the total amount and click the Process button 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.

## Adding a User to BASYS IQ

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 user name.
6. Pick a temporary password for the new user. The new user will be prompted to change the password when logging into BASYS IQ.
7. Next to Account Status, the Admin User box may be checked. This will give the user access to change settings for other users.
8. Set the User Permissions. Any or all of these may be selected. These can be changed at any time by an admin user.

## Accessing Reports in BASYS IQ

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 of the 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.