Colleague Split Tender Checkout (FA)

Colleague-POSConnect/AR Split Tender

Setup

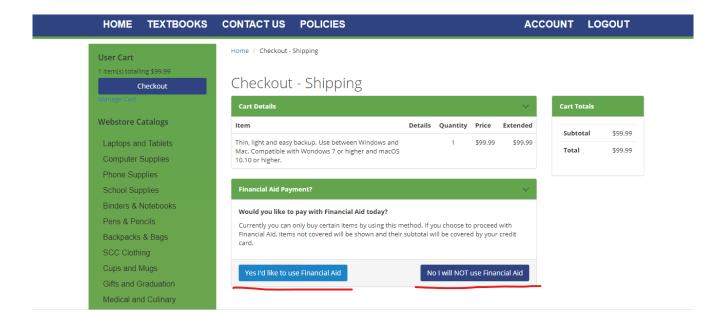
Please contact support to setup AR or POSCONNCECT Split Tender options.

Web Customer View

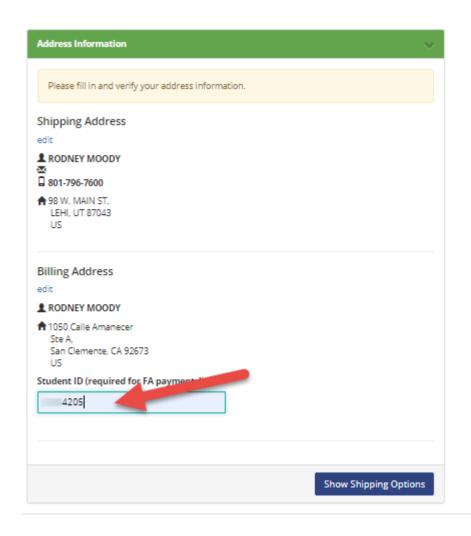
The change that you will see on the web is, as a customer, they will shop as normal. When they select the option to go to the cart the first thing they see will be the cart details and asking if the will pay with Financial Aid.

If they select 'No I will NOT use Financial Aid' then they will continue as normal

If they select 'Yes I'd like to use Financial Aid' as seen below.



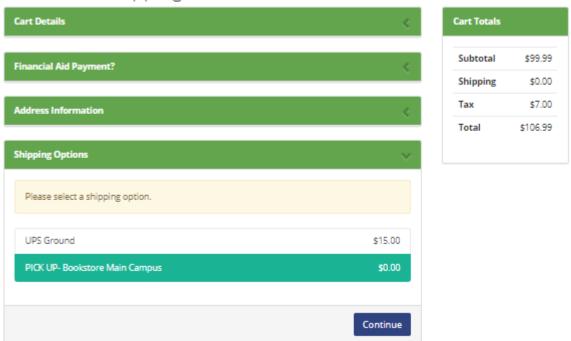
The customer will get presented with their address information to confirm/edit as needed and at the bottom of the screen they will need to enter in their student ID and then click on the 'Show Shipping Options'.



Now they will select their Shipping option from the list setup

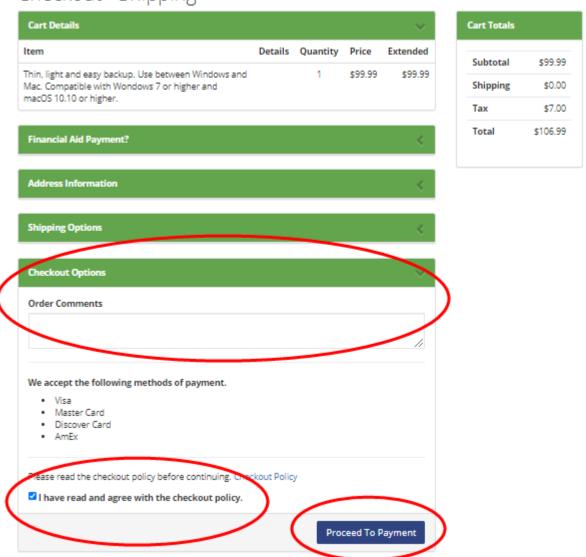
by the store.

Checkout - Shipping

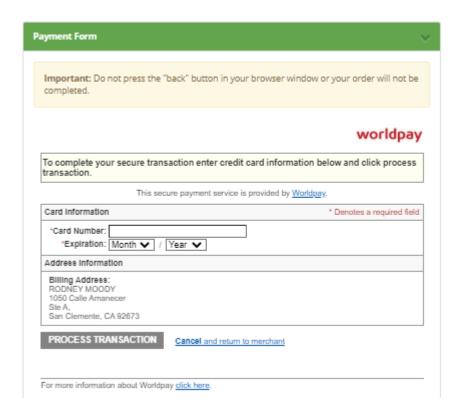


Enter in any Order Comments that are needed and then click/check the checkout policy box then 'Proceed To Payment'.

Checkout - Shipping

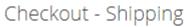


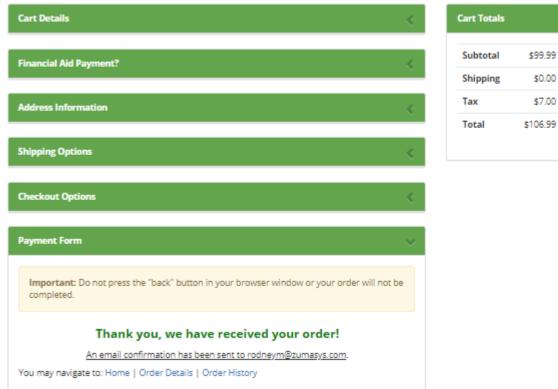
The customer will then need to enter in their credit card information, this will only be used if they order items that are not covered by the amount or type of aid the customer has.



And finally, if the customer will see a message thanking them for their order and then receive an email with the order information confirming that the order has been received.

\$7.00





Store processing of Split Tender

The order will come to the store as a suspended transaction, just like a normal CC transaction. The store personnel will be able to run the pick slip reports (POS.26.10 or 13) and pending order reports the same as they do regular web transactions.

Bring up the suspended transaction the same as other web transactions

Since this will be treated as a POS Connect or FA order, you will get prompted to look up the customer the same as your existing POSCONNECT/FA transaction (POS Connect is used in the example).

The Account ID will be brought in from the transaction where the customer entered it on the web site.

		POS Conn	ect	
Account ID: Campus ID: First Name: Last Name:	4205		Address:	
## Fund Source		Term	Available Funds	Taxable
=Start Lookup	S=Se	lect Another	X=Exit	

Select the fund source that you wish to use for this transaction

Address:	
507 Beach Dream Road	
Funds Taxable	
50.00	
<u> </u>	

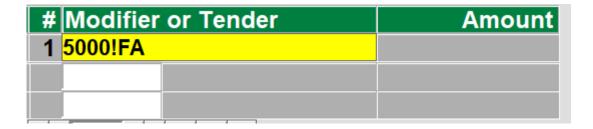
The transaction will load each item and validate the customer has the funds to cover each item that was ordered. If the customer goes over their limit or has purchased something that is not covered by their fund source then a message will display that the SubClass limit has been exceeded or that the limit has been reached. Click on the 'Yes' button to add the item to the cart and to proceed, if you select 'No' then the item will not be added to the cart.

escription	Qty	Price	Extended
eagate 2TB Backup Portable Hard Drive	1	99.99	
	GM	QOH = 3 GM	
THE BOOK INN			
SubClass Limit Exceeded by: \$56.99			
boes the customer want to pay for this?			
<u>Y</u> es <u>N</u> o			
# Modifier or Tender	Amount	SubTotal	
		Disc/Mkdn	
		· Jtai	
	THE BOOK INN SubClass Limit Exceeded by: \$56.99 Does the customer want to pay for this?	THE BOOK INN SubClass Limit Exceeded by: \$56.99 Does the customer want to pay for this?	THE BOOK INN SubClass Limit Exceeded by: \$66.99 Does the customer want to pay for this?

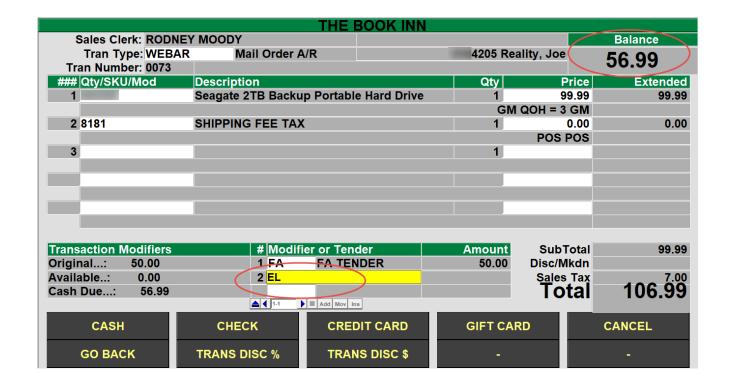
Once all of the items have been added to the transaction, the transaction will show the Total amount and also the Original fund amount, Available funds and the cash due that will be placed on to the credit card when the transaction is finalized.

### Qty/SKU/Mod	Description		Qty	Price	Extended
1	Seagate 2TB Backu	p Portable Hard Drive	1	99.99	99.99
			GM	QOH = 3 GM	
2 8181	SHIPPING FEE TAX	SHIPPING FEE TAX			0.00
				POS POS	
3			1		
▲ 1 1-1 ■ Add Mov Inc.					
Transaction Modifiers	# Modifi	ier or Tender	Amount	SubTotal	99.99
Original: 50.00	# WOUTH	lei oi Telluei	Amount	Disc/Mkdn	33.33
Available: 0.00)			Sales Tax	7 00
Cash Due: 56.99				Total	106.99
Justi Buc				IOtai	100.33
CANCEL	MAIL FREIGHT	MODIFY LINE	WEB MODI	FY	TOTAL
	DIGGG! INT #	DDIOT OULVIOR	DEL ETT. 1	0.7	11500105
QUANTITY	DISCOUNT %	PRICE CHANGE	DELETE LA	151	MESSAGE

After selecting the 'TOTAL' button, the transaction will automatically enter the amount of funds to be used by the FA/POS Connect transaction tender, the cashier will just hit the 'Enter' key on the keyboard.



The transaction will then apply the financial aid funds to the customers fund source and report if there were any issues. Once the financial aid amount has been successfully applied then any additional amount will be applied to the credit card that was entered on the website.



Mail Orders & eCommerce also known as Web Order Processing

Instructions on how to create a Mail Order transaction.