

# How to Process Credit Card Authorizations Using RoomKeyPMS Payments

The following article outlines how to use RoomKeyPMS Payments to process a credit card authorization. A credit card authorization is necessary to check whether a card holder's account holds sufficient funds and is approved to purchase from a merchant. An authorization does not process funds, but rather it places a temporary hold on a specified amount; once the guest reservation is checked out in RoomKeyPMS, this temporary hold is released.

Supported payment types: Credit Card Transactions only (Visa, MasterCard, American Express, Discover, Diners and JCB. No Debit or Gift Card currently)

## Click below to view step-by-step instructions

### To process an Authorization at check in

- Locate the applicable reservation in the **Arrivals** screen, **Reservations** screen, or by using the **Search/Advanced Search** tools
- Select **Check In**, the Guest Check-In window will appear and allow the user to review the check in details
  - By default, the PMS will process an authorization equal to the room and tax payment for the full guest stay; if incidentals are authorized at the same time, the user can enter the amount for incidentals in the **Available Credit** field

Guest Check-In

☐ Show Clean/Inspected Only      ☐ Disable on-line processing


☐ Show all available rooms      ☐ \* Override default credit

Room Number:  ...      \* Available Credit:

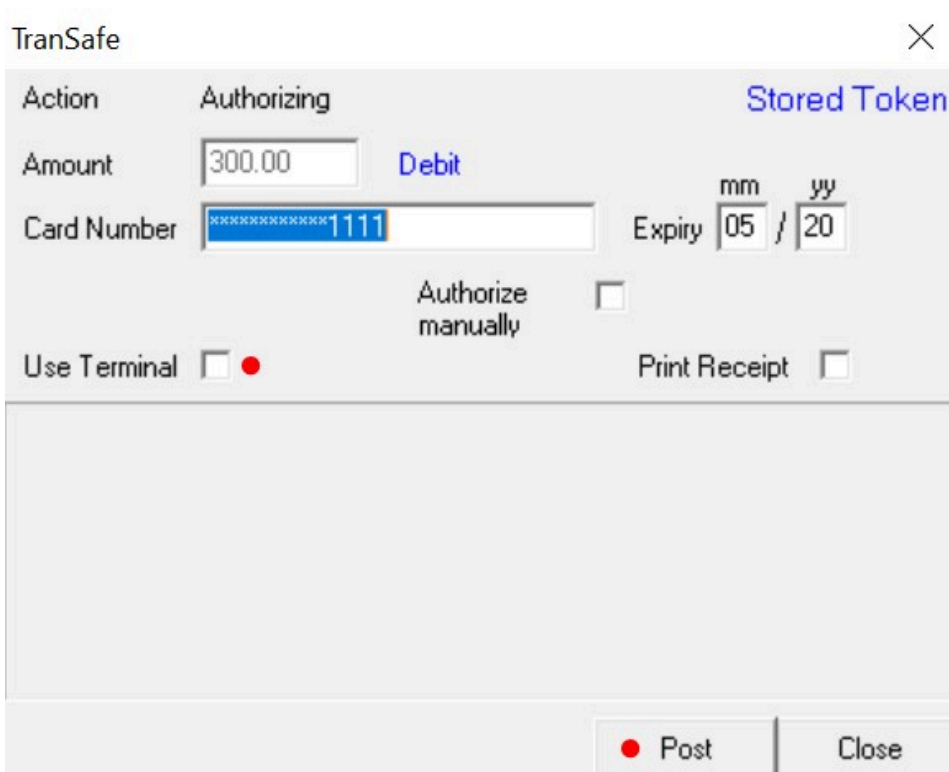
    

**This Guest has been assigned to room 201**

☒ review this reservation

 TIP - to authorize a custom amount for the guest stay, enable the **Override default credit** checkbox and enter the total amount to be authorized in the **Available Credit** field

- Once the check in details have been reviewed, select **Check-In**
- A TranSafe window will appear; enable the **Use Terminal** checkbox and select **Post**



The image shows a 'TranSafe' window with a close button (X) in the top right corner. The window is titled 'TranSafe' and has a tab labeled 'Authorizing'. Below the tab, there are several fields and checkboxes:

- Action:** Authorizing
- Amount:** 300.00
- Debit:** (checkbox)
- Card Number:** [masked] 1111
- Expiry:** mm yy (05 / 20)
- Authorize manually:** (checkbox)
- Use Terminal:** (checkbox) [red dot]
- Print Receipt:** (checkbox)

At the bottom of the window, there are two buttons: 'Post' (with a red dot) and 'Close'.

- Insert the guest credit card into the credit card terminal and follow the prompts that appear on the terminal screen



- Once the authorization is completed using the credit card terminal, a TranSafe window will appear in the PMS with an **Approved** message and transaction information

TranSafe ×

Action	Authorizing	Stored Token
Amount	<input type="text" value="300.00"/> Debit	
Card Number	<input type="text" value="XXXXXXXXXX1111"/>	Expiry <input type="text" value="05"/> / <input type="text" value="20"/>
	Authorize manually <input type="checkbox"/>	
Use Terminal <input type="checkbox"/>		Print Receipt <input type="checkbox"/>

**Approved**  
Auth Code: 702163  
Transaction ID: 916056911402240  
Reference #: 916056911402240  
Card Type: Visa

PostClose

- Select **Close** to complete the process; if the **Print Receipt** checkbox is enabled, a receipt will be printed

## To increase an Authorization for an in-house guest (increasing the guest credit limit)

❗ As of November 2019, The following process is applicable for **VISA and Mastercard** credit cards only.

i Authorizations can be increased by processing an additional amount, however authorizations cannot be decreased. Alternatively, users can void an original authorization and process a lower authorization amount if desired.

- Locate the guest reservation in the **In-House** screen, or by using the **Search/Advanced Search** tools
- Once located, access the **Transactions** drop-down menu and select **Guest Folio Credit Limit**. A Guest Folio Credit Limit window will appear
- Enter the additional amount to be authorized in the "+" field (located beside the Available Credit field)
- Select **Post** to proceed

**R** Guest Folio Credit Limit ×

Res ID **1831**

Room **138**      Guest **Jimenez, Romina**

Credit Limit

Available Credit  +  ●

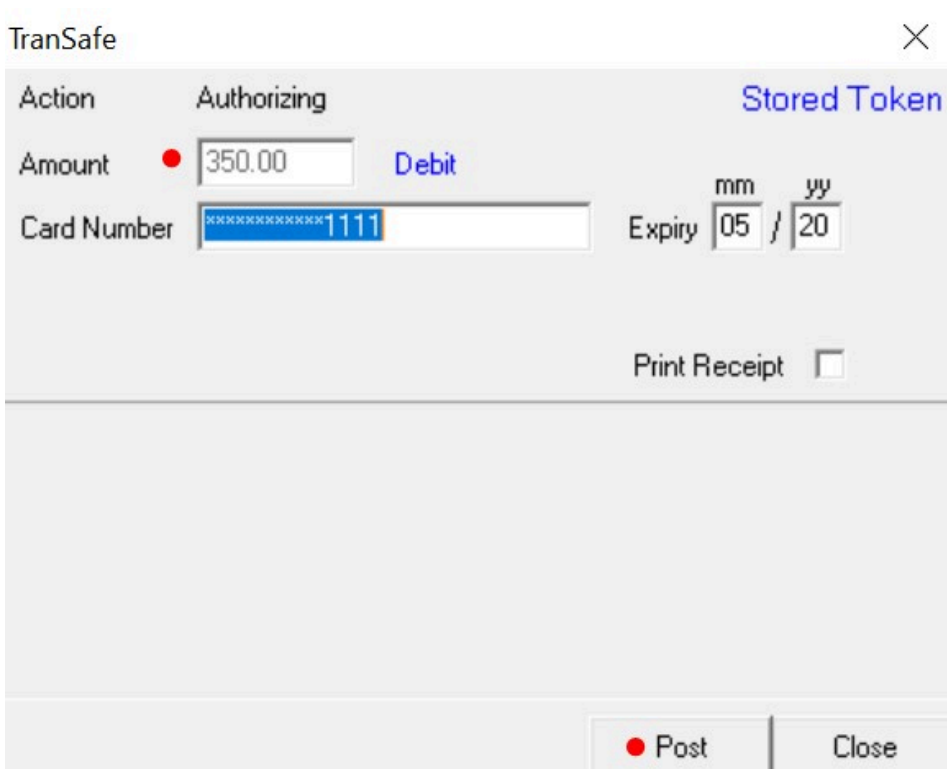
Disable on-line processing ☐

● Post Cancel

Exit

- The original authorization will be modified by the new total amount authorized (it will not take another full authorization; it will just add the additional amount – this is called “incremental authorization”)

- A TranSafe window will appear allowing the user to review the total authorization (original authorization + incremental authorization) displayed in the **Amount** field and the applicable credit card information
- Select **Post** to complete the process

The image shows a software window titled "TranSafe" with a close button (X) in the top right corner. The window is divided into several sections. At the top, there are two tabs: "Authorizing" (selected) and "Stored Token". Below the tabs, the "Amount" field shows "350.00" with a red dot to its left and the word "Debit" to its right. Below the amount, the "Card Number" field displays "XXXXXXXXXX1111". To the right of the card number is the "Expiry" field, which shows "05 / 20" with "mm" above the first box and "yy" above the second. Below the card number and expiry fields is a "Print Receipt" checkbox, which is currently unchecked. At the bottom of the window, there are two buttons: "Post" (with a red dot to its left) and "Close".

- Once complete, an approved message will appear

## To disable Online Authorization at check in

- Locate the guest reservation in the **Arrivals** screen and select **Check In**
- Within the Guest Check-In window, enable the **Disable on-line processing** checkbox
- Review the remaining details and select **Check-In**

✓ Guest Check-In

☐ Show Clean/Inspected Only Disable on-line processing

☐ Show all available rooms

Room Number:  Available Credit:

**This Guest has been assigned to room 303**

☒ review this reservation

💡 Because online credit card processing has been disabled, the TranSafe processing window will not appear and the guest credit card will remain **unauthorized**.

- To view unauthorized transactions, access the **Transactions** drop-down menu and select **Unauthorized Transactions**. A Credit Card Authorizing window will appear

Credit Card Authorizing

5/31/2019

**31-May-2019**

	Res. ID	Room ID	First name	Last Name	Card Type	Card Number	Exp.	Card Holder	Credit Limit	
	1117	104	Ian	McIntyre	DISC	*****0000	02/25	Ian McIntyre	\$51.75	<input type="checkbox"/>
▶	1119	303	Erica	Britton	VISA	*****1111	08/25	Erica Britton	\$63.25	<input type="checkbox"/>

Refresh Select All Unselect All Authorize Close

Log Clear

- To process a credit card authorization from this list of unauthorized transactions, select the applicable transaction (one or more transactions may be selected at the same time) and select **Authorize**

## To view a list of Authorizations

- Locate the guest reservation in the **In-House** screen, or by using the **Search/Advanced Search** tools
- Once located, access the **Transactions** drop-down menu and select **Authorized Transactions**
- A window will appear displaying all authorized transactions for the applicable reservation

**R** Authorized transactions for 1831 ✕

Auth.	Amount	Card	Number	Expiry	Holder	When	Closed
▶ 702163	\$300.00	VISA	XXXXXXXXXX1111	0520	Romina Jimenez	10-Jun-2019 08:51 AM	<input type="checkbox"/>

## To void an Authorization

- Locate the guest reservation in the **In-House** screen, or by using the **Search/Advanced Search** tools
- Once located, access the **Transactions** drop-down menu and select **Authorized Transactions**. The Authorized transactions window will appear
- Select the applicable transaction and select **Void**

**R** Authorized transactions for 1831 ✕

Auth.	Amount	Card	Number	Expiry	Holder	When	Closed
▶ 702163 ●	\$300.00	VISA	XXXXXXXXXX1111	0520	Romina Jimenez	10-Jun-2019 08:51 AM	<input type="checkbox"/>

- A TranSafe window will appear; review the details and select **Post** to complete the process

TranSafe ×

Action Void Authorization Stored Token

Amount  Credit

Card Number  Expiry  /  mm yy

Print Receipt ☒

**Approved**

Transaction ID: 916056911402240

## To settle an Authorization

- Locate the guest reservation in the **In-House** screen, or by using the **Search/Advanced Search** tools
- Once located, access the **Transactions** drop-down menu and select **Authorized Transactions**. The Authorized transactions window will appear
- Select the applicable transaction and select **Settle**

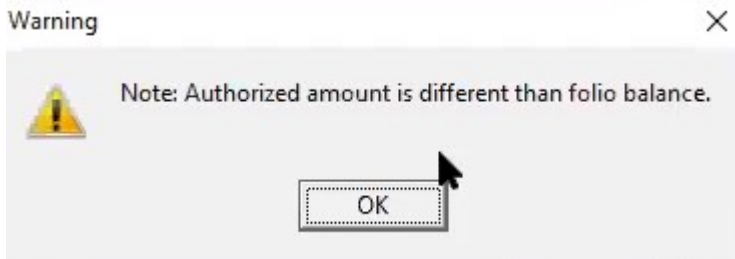
R Authorized transactions for 1832 ×

Auth.	Amount	Card	Number	Expiry	Holder	When	Closed
▶ 928720	\$170.00	VISA	XXXXXXXXXX1111	0520	Romina Jimenez	10-Jun-2019 09:46 AM	<input type="checkbox"/>





The amount to be settled must be the same as the folio. If the amount authorized is less than the folio, a warning message will appear.



- The TranSafe interface window will appear and allow the user to settle the authorization. If authorization was lower than the folio, it will settle for the higher amount.

## To check out a reservation with an Authorization

- Select reservation and click on “Check-Out”
- Click again on “Check Out”
- TranSafe interface will appear, click on post

TranSafe ×

Action

Check Out

Stored Token

Amount

120.00

Debit

Card Number

XXXXXXXXXX1111

Expiry

mm

05

/

yy

20

Print Receipt ☒

● Post

Close

- You will get an approval message (the TTID remains the same)

TranSafe ×

Action

Check Out

Stored Token

Amount

120.00

Debit

Card Number

XXXXXXXXXX1111

Expiry

mm

05

/

yy

20

Print Receipt ☒

Approved

Transaction ID: 916060523837096

Post

Close