Room Reserve- Most Common Credit Card Related Questions

Article Number: 139 | Rating: Unrated | Last Updated: Thu, Nov 3, 2016 at 12:28 PM
Purpose: This article is intended for customers who have or are considering having the credit card processing module enabled in Room Reserve. It answers most of the questions related to requirements, setup, and how it works.

- **What are the requirements for accepting credit card payments for room reservations?** Customer needs to have a combination of a merchant account/processor/gateway setup. We currently support only: Authorize.net, Payflow Pro (A Paypal Company), Sage, and BizGate as well as Smart Pay and Secure Pay. Please see the article linked for further explanation of the role each one of these components plays in this process:

  - If customer’s Room Reserve application is hosted on their own servers (not Evanced), the hosting server needs an SSL certificate. This is essential for the security of credit card transactions, and required for your library to be PCI Compliant. Evanced servers have SSL certificates, and meet PCI Compliance requirements. Room Reserve’s version needs to be at least 6.7 or later. Upgrading the software to the latest version is part of the customer’s maintenance contract; simply email support@evancedsolutions.com requesting it, if your system is not on the latest version. You can see what the latest version is here:

  - Order the Credit Card processing module/Online Pay from sales@evancedsolutions.com, if you have not already.

- **What should I do next, after receiving my order confirmation of Online Pay?** If all the requirements above are met, room charges need to be set up first, if they have not been setup yet. Rooms’ charges are configured for each room in the branch from its configuration page (Setup menu> Room Configuration>Click the Room). If you have ordered Online Pay at the same time with your Room Reserve order, then make sure you go through your basic system and room setup prior to configuring room charges. Refer to our online help material and training calendar for more information about this, here are the links in order:

  - [http://evancedsolutions.com/sales-support/](http://evancedsolutions.com/sales-support/) (Support Tab)
  - [http://host.evanced.info/lib/eventcalendar.asp](http://host.evanced.info/lib/eventcalendar.asp) When you complete your system, room, and charges setup you will be ready to enter your credit card provider’s information in Room Reserve. Please read this for more information: [http://evancedsolutions.com/docs/CCSetupQSG.pdf](http://evancedsolutions.com/docs/CCSetupQSG.pdf)

- **When does exactly the patron’s credit card get charged for their reservation?** There is a difference in when this happens, depending on whether the room request was submitted from the maintenance or the public side of the application: When a patron submits a room request from the public page an authorization of the charge happens, as these requests default to pending status. This verifies the credit card is valid and that there is enough money in the account and then a "hold" is placed for the funds. When the request is accepted a "capture" takes place, which tells your processing company that you have accepted the transaction and the sale is complete. Alternatively, if the request is denied a "release" happens and the credit card gets its fund put back into the account. When a staff member submits the room request on behalf of the patron from the maintenance page, it gets automatically charged because the reservation goes straight to accepted status.

- **How long can staff wait before reviewing a pending room request that has been paid by a credit card?** It is highly recommended that those requests are handled as soon as possible by either accepting or denying them. How long a charge can stay in the authorization state differs from one Credit Card Gateway to another and you can find out exactly how long by contacting them. It could be anywhere from 2 to 30 days; which means that reservations getting accepted after the authorization period had expired will not actually charge the card.

- **Is it possible to delay the sale transaction from happening and still accept the reservation?** This is not possible, the application is programmed to charge the card when it gets accepted. However, keep in mind that even pending reservations continue to hold the spot in the room until they are either cancelled/denied/deleted/archived, but pay attention not exceed the authorization expiration period mentioned in point 4 above.

- **How can I check whether a payment got actually charged or not?** Your credit card report that you run from your Credit Card Gateway’s site should indicate that information. You can also match your findings with a
report in Room Reserve just for credit card payments. This report is called "Credit Card Processing Report", and it will give you information like a transaction’s authorization code, date/time it was processed, amount charged, transaction type and more. Authorizations and Captures are recorded here, and can be linked back to your Credit Card Gateway’s report through the transaction/authorization number. - How do I cancel a credit card transaction within Room Reserve? A credit card transaction can only be cancelled when a pending room request is denied or cancelled. If the reservation has already been accepted, a manual refund needs to happen outside of Room Reserve and through your Credit Card Gateway. There is currently no way to issue credit card refunds in Room Reserve. - Can I change the method of payment on a room reservation after it has been paid by a credit card? In general, after a reservation has been marked as paid, payment related information like method and amount will no longer be editable. Unfortunately with credit card payments, even with pending reservations paid for by credit cards by patrons, those pieces will also not be editable. Again, in these scenarios, it is advised to refund the charged amount outside of Room Reserve manually. Then you can accept payment by check or cash noting as such in the internal notes field. Alternatively, you can also cancel/archive the original reservation that shows the credit card information (authorization code), and copy it back to retain the reservation’s information indicating the right method of payment. The refund process will still need to be handled outside of Room Reserve here. - If I change what the patron owes for the reservation by editing the selected cost classification, will that reflect on his/her credit card? Editing the reservation’s fees and/or deposit amounts after paying by credit card will not take effect on the card. In this case, the best practice would be denying the reservation if it is still pending to cancel the original charge, then copy it back from the archive selecting the right cost classification. This process starts a new reservation that has a different confirmation number than that tied to the credit card’s transaction authorization code. The reason behind this is that we only store transaction information, and not credit card or personal information. If the reservation is no longer in pending status then the manual refund will be needed, along with archiving the original reservation and copying it back with the new charges. - Is it possible to completely disable the second payment option (cash/check) after enabling the credit card option? It is not possible to do that, and neither is it recommended, as this will take effect on both the staff and patron side. Â