

Cloning an Archived Transaction to Process a Refund

Clone is the only auditing option available for an archived transaction. It produces an exact copy of the selected transaction for editing and retains the payment card information.

For example, if a refund needs to be processed to a transaction that has already been settled in a batch, you may clone the transaction. The transaction can then be edited to reflect the refund and submitted to process the refund.

To clone an archived transaction to process a refund, complete the following steps:

1. On the archived View Transaction page, select **Edit > Clone** from the side menu.

The screenshot shows the SHIFT 4 Lighthouse Transaction Manager interface. The top navigation bar includes 'Transactions', 'Shift4 Cares', '4Go', 'Settings', 'User', and 'Help'. The right side of the header shows 'Welcome, hsmith (Acct #28290) | Sign Out'. The main content area is titled 'View Transaction' and shows a transaction for 'Merchant: Tsys_Airline_MOTO'. The transaction details are displayed in a form with sections for 'Basic Transaction Information' and 'Miscellaneous Notes'. The 'Basic Transaction Information' section includes fields for Invoice, Card Type, Business Date, Token, Card Number & Expiration, Clerk, Terminal ID, Vendor Reference, Transaction Type, Transaction Date, Transaction Time, Primary Amount, Secondary Amount, and Total Amount. The 'Clone' option is highlighted in the 'Edit' dropdown menu.



Note: If your profile has been configured to unmask payment card

numbers, click  to unmask the payment card number for 10 seconds.

The payment card number will be masked again when the time runs out.

If you added two-factor authentication to your account and it's been five minutes since you've provided a passcode, you will be asked to enter a new passcode.



Important: After clicking  to unmask the payment card number, you will be prompted to enable multifactor authentication because this is a more secure way to verify your identity.

After two-factor authentication is enabled, you will need to enter the passcode (generated by the authenticator app on your smart device)

after clicking  to unmask the card number.

Each time you enter a passcode, you will be able to unmask card numbers for five minutes without entering a new passcode. (The unmasked card number is still only displayed for ten seconds at a time.) When the five minutes has elapsed, you will be prompted to enter a new passcode the next time you try to unmask a card number.

In addition, when two-factor authentication is enabled on your account, you will need to enter the passcode during the Sign-in process too.

2. On the Online Edit page, complete the following steps:

- In the Primary Amount field, enter a minus sign (-) to the left of the amount already displayed if the full amount needs to be refunded, or enter a minus sign (-) and a lesser amount if a partial amount needs to be refunded.
- In the Secondary Amount field, enter a minus sign (-) to the left of the amount already displayed if the full amount needs to be refunded, or enter a minus sign (-) and a lesser amount if a partial amount needs to be refunded.



Important: The values in the Primary Amount and Secondary Amount fields must both be negative, denoted by a minus sign (-), or positive. If they do not match, an error will be displayed.

- Click outside the Primary Amount or Secondary Amount box to confirm parenthesis surround the amount(s).



WARNING! If the amount is not in parenthesis, the payment card will be charged instead of being refunded when submitted.

- Click **Submit**.

Merchant *

Tsys_Airline_MOTO

Invoice

0000027271

Customer Name

Entry Mode *

☒ Card

☐ TrueToken

Card & Expiration *

2223xxxxxxxx0011

12

25

Billing Street Address

8320 S HARDY DRIVE

Zip Code

85284

Card not present

Card Security Code

☐ Not present☐ Unreadable

Primary Amount *

(\$22.00)

Secondary Amount

Total Amount *

(\$22.00)

Auth Only

☐

Clerk ID

00227

Terminal ID

Vendor Reference

MyPNR

Optional Purchasing Card Information

Customer Reference

Optional Miscellaneous Notes

Notes

This transaction was cloned from invoice 0000027271.
Original ARN:73011002270829800627200

Edit Notes

Delete / Void

Back

Submit

3. (Optional) If a printed record of the refund is needed, select **Print** from the side menu.

SHIFT4 | Lighthouse Transaction Manager

Welcome, hamish (Acct #03296) | Sign Out

Transactions | Shift4 Cases | 40s | Settings | User | Help

Draft

Print

Selected Merchants

Type_Airline_ECOMM | Type_Airline_MOTO

Search

REFUND

Type_Airline_MOTO

Wed Nov 02, 02:38P 2022

Invoice

0000027271

PHR / Itinerary Number

MyPHR

Card Type

MasterCard

Card Number

xxxxxxxx0011

Merchant ID

8106494

Clerk

00227

Amount

\$22.00

I agree that the amount above is correct and to comply with my merchant agreement.

X

Merchant Signature

11/02/2022 02:38 PM

TID 75628258

Refund

MasterCard XXXXXXXXXXXX0011

Entry Mode Keyed

Invoice 0000027271

Clerk 227

Auth Code VTUNCI

Amount USD \$22.00