

Semi Integrated Credit Authorization for Microsoft Retail Management System

Setup Guide



First Data®



Semi Integrated Credit Authorization for Microsoft Retail Management System and First Data

Installation

Important: Once installed, your software will require a license. The code required to create your license can be obtained once you've installed the software.

Licenses can be requested Monday – Friday from 9 am to 5pm Eastern time.

Close all Microsoft Retail Management System applications (POS and Manager) prior to installing.

Pre-requisites

- Windows 7 or higher
- SQL 2008 R2 or higher
- RMS must be a minimum of version 2.0

Installation Step 1: Setup iCT250 PIN Pad

Ethernet

Requirements and Information required:

- Ethernet connection to network
- PIN Pad Admin Password (provided by First Data)
- Network Information
 - o IP Address of Gateway
 - o Subnet Mask of Gateway
 - o Available IP Address

To find an available IP address on your network, after the Semi Integrated Payment Software has been installed in Step 2, you can execute the **TRS IP Finder** program, found in the Windows Programs menu under Tri-City Retail Systems. It will find available IP Addresses on you network. The TRS IP Finder can also be downloaded from <http://tricityretail.com/Resources/TRSIPFinder.exe>

PIN Pad Settings

Assign Static IP Information

If any changes are made in the settings, the PIN Pad may restart after making each change. To make further changes, you will need to go back in to the setups to continue.

On the iCT250 PIN Pad

- Press the [F2] then [F3] buttons quickly
- Enter your Admin password then press [Green] button
- Press [F1] – APP
- Press [F1] – ADMIN
- Press [3] – SETUP
- Press [3] – SYSTEM SETUP
- Enter your Admin password then press [Green] button

- TERMINAL DATE – Correct the date if it is incorrect – Press [Green] button to continue
- TERMINAL TIME – Correct the time if it is incorrect – Press [Green] button to continue
- Press [F4] – ETHERNET
- Press [1] – DNS SETUP
- Press [F1] – NO
- Enter the Primary DNS Address (Google’s 8.8.8.8 can be used) then press [Green] button
- Enter the Secondary DNS Address (Google’s 8.8.4.4 can be used) then press [Green] button
- A quick verification message will be displayed
- Press [2] – TERMINAL SETUP
- Press [3] – STATIC
- Enter the IP Address then press [Green] button
- Enter the Subnet Mask ID then press [Green] button
- Enter the Gateway IP Address then press [Green] button
- PIN Pad will restart after all information has been entered or press the [Red] button until requested for the password again
- Enter the Admin password then press [Green]

Enable Heartbeat

On the iCT250 PIN Pad

- Press the [F2] then [F3] buttons quickly
- Enter your Admin password then press [Green] button
- Press [F4] - SETTING
- The display will show the current TID, MID, S/N and IP Address (The MID will be required for your software license)
- Press [Green] button to cycle through settings – stopping on ENABLE HEARTBEAT
- Press [F1] – YES
- Press the [Red] button until PIN PAD returns to ‘Welcome | Bienvenue’ screen

Enable Auto-Settlement


Use this section only if wishing to have the PIN Pad perform daily auto-settlements.

On the iCT250 PIN Pad

- Press the [F2] then [F3] buttons quickly
- Enter your Admin password then press [Green] button
- Press [F4] - SETTING
- Press [Green] button to cycle through settings – stopping on AUTO SETTLEMENT
- Enter the time to settle (24 hour clock) – 11:00 PM enter 2300 then press [Green] button
- Press the [Red] button until PIN PAD returns to ‘Welcome | Bienvenue’ screen

The PIN Pad may reboot if any settings have changed. Wait for the ‘Welcome | Bienvenue’ screen before continuing.

Installation Step 2: Install RMS Semi Integrated Payment Software

Right click  **RMSSIPaymentSetup-FD-x.x.x.x.exe** and choose “Run as Administrator” to install RMS Semi Integrated Payment Setup. Follow the prompts (Next → Next → Install → Finish).

Open Store Operations POS. This will install the custom button, but it is not yet visible.

Close POS.

Reopen POS to see your new First Data button. Note, if you are using POS Taskpads in RMS, you will need to manually assign a location using:



Button Type: Custom POS Button

Name or ID: Choose “RMSPaymentAddin.PaymentBridge”

Setup

Setup Step 1: Tender Setup

Open Store Operations Manager. Click **Database → Tender Types**

Change the code on each tender you wish to authorize.

MasterCard:	PB-MC
Debit:	PB-DB
Visa:	PB-VS
Amex:	PB-AM
Diners Club:	PB-DN
Discover Card:	PB-DC
JCB:	PB-JC
Union Pay:	PB-UP
Givex Gift Card:	PB-GC

Important Note on Gift Cards: RMS Gift Cards or third party gift cards, such as Givex, will not be authorized by your processor. Use PB-GC only if you are using Givex Gift Cards.

Setup Step 2: Receipt Setup

Before using the solution, you must do one of the following:

- Replace your receipt in RMS with a new one that contains the credit card data
- OR
- Add programming to your receipt to include the credit card data
- OR
- Program the PIN Pad to do all the printing

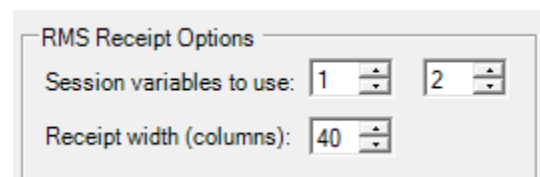
Additions to your receipt to include credit card data

There are three areas of the receipt you will add to:

1. Under Page Settings, add two new fonts

```
<!--  
    This font allows for the credit / debit receipt portion to be printed  
-->  
<FONT name="Telium">  
    <NAME>        "Courier New"    </NAME>  
    <SIZE>         7                </SIZE>  
    <UNDERLINE>    False            </UNDERLINE>  
    <ITALIC>       False            </ITALIC>  
    <BOLD>         True             </BOLD>  
    <COLOR>       vbBlack          </COLOR>  
</FONT>  
<!--  
    This font allows for paper cutting if using Epson Windows printers  
-->  
<FONT name="EPSON">  
    <NAME>         "Control"        </NAME>  
    <SIZE>         10               </SIZE>  
    <BOLD>         False            </BOLD>  
    <UNDERLINE>    False            </UNDERLINE>  
    <ITALIC>       False            </ITALIC>  
    <COLOR>       vbBlack          </COLOR>  
</FONT>
```

The following example of receipt XML code assumes that the Session Variables have been set as 1 customer receipt portion and Session Variable 2 as the merchant portion in the RMS Receipt Options.



RMS Receipt Options

Session variables to use: 1 2

Receipt width (columns): 40

2. At the end of the "PrintFooter" subroutine add the following code

- immediately before the </SUB>

```

<!--
=====
Print SIPP Receipt
===== -
-->

<IF><CONDITION> LEN(Session.Variable1) </CONDITION><THEN>
    <TABLE>
        <FONT> "Telium" </FONT>
        <BORDER> tbNone </BORDER>
        <COLUMNHEADER>
            <ALIGNMENT> "&lt;" </ALIGNMENT>
            <WIDTH> PageWidth </WIDTH>
        </COLUMNHEADER>
        <ROW>
        </ROW>
        <ROW> Session.Variable1 </ROW>
        <ROW> </ROW>
        <ROW> </ROW>
    </TABLE>
    <IF><CONDITION> LEN(Session.Variable2) </CONDITION><THEN>
        <TABLE>
            <FONT> "EPSON" </FONT>
            <BORDER> tbNone </BORDER>
            <COLUMNHEADER>
                <ALIGNMENT> "^" </ALIGNMENT>
                <WIDTH> PageWidth </WIDTH>
                <TEXT> "P" </TEXT>
            </COLUMNHEADER>
        </TABLE>
        <NEWPAGE>
            <PAPERCUTPERCENT> CCPaperCutPercent </PAPERCUTPERCENT>
        </NEWPAGE>
        <TABLE>
            <FONT> "Telium" </FONT>
            <BORDER> tbNone </BORDER>
            <COLUMNHEADER>
                <ALIGNMENT> "&lt;" </ALIGNMENT>
                <WIDTH> PageWidth </WIDTH>
            </COLUMNHEADER>
            <ROW></ROW>
            <ROW> Session.Variable2 </ROW>
            <ROW></ROW>
            <ROW></ROW>
        </TABLE>
    </THEN>
</IF>
</THEN>
</IF>

```

3. If using Givex Gift Cards you will also need to add the following prior to the section added above in step 2. This example assumes that Givex is set to use Session Variable 3.

At the end of the "PrintFooter" subroutine, add the following code immediately before the </SUB>

```
<!--  
=====  
Print Givex Receipt  
===== -  
-->  
    <IF><CONDITION> LEN(Session.Variable3) </CONDITION><THEN>  
        <TABLE>  
            <FONT> "Telium" </FONT>  
            <BORDER> tbNone </BORDER>  
            <COLUMNHEADER>  
                <ALIGNMENT> "&lt;" </ALIGNMENT>  
                <WIDTH> PageWidth </WIDTH>  
            </COLUMNHEADER>  
            <ROW>  
            </ROW>  
            <ROW> Session.Variable3 </ROW>  
            <ROW> </ROW>  
            <ROW> </ROW>  
        </TABLE>  
    </THEN>  
</IF>
```

Setup Step 3: PIN Pad Settings

Before beginning, review the check list below:

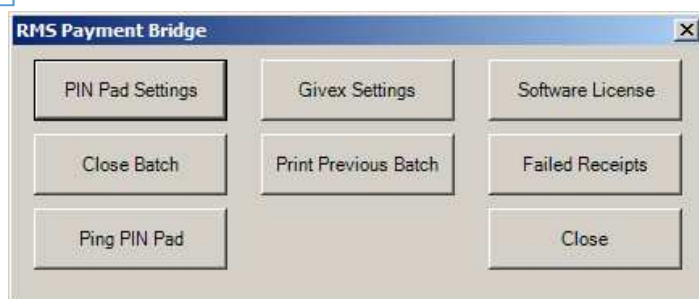
- ☒ PIN Pad is powered on
- ☒ PIN Pad is connected by Ethernet cable to your network
- ☒ Cashier that is logged in to POS has Administrative Rights (PIN Pad Settings, Givex Settings and Purging of Failed Transactions require that the cashier that is currently logged in have Administrative Privileges)

In POS, press the



button.

Press “PIN Pad Settings” button. This option requires the cashier to have Administrative Rights to press the button.



Ethernet Setup:

To find an available IP address on your network, execute the **TRS IP Finder** program, found in the Windows Programs menu under Tri-City Retail Systems. This utility will find available IP Addresses on your network. See Trouble-shooting section to configure PIN Pad.

IP Address:

Enter the Terminal IP Address of the PIN Pad.

Port: The Port must be set as 9999 unless requested to use a different port by a

technical support representative.

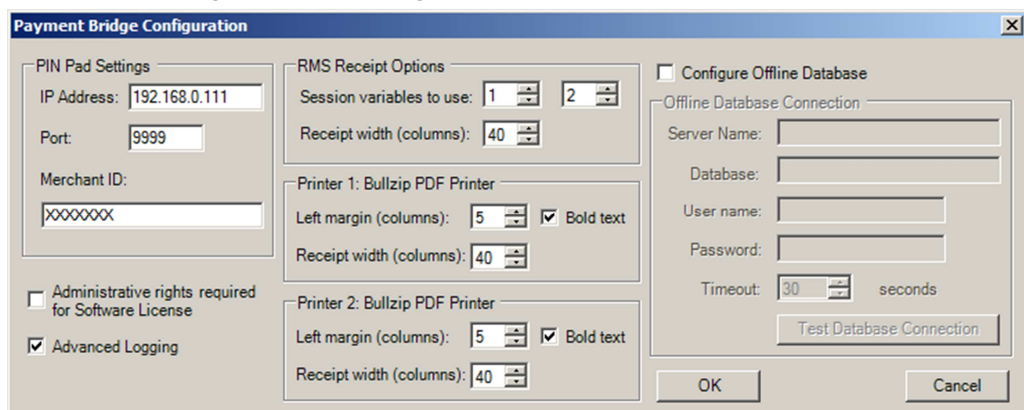
Merchant ID: Enter the MID (remove leading zeros) from the PIN Pad configuration

Administrative Rights: Check this box on to force users to have Administrator Right in order to change software license.

Advanced Logging: With this option checked on, a special logging file of raw data exchanged with the PIN Pad will be available.

RMS Receipt Options:

RMS printer assignments in the Register Properties of RMS will be used for printing.



If you are using Session Variables for other customizations in RMS, you can select a session variable to use other than 1 and 2. Session variables 1 and 2 will work for the vast majority of RMS users. If you're not sure, contact your RMS Reseller for assistance.

SessionVariable1 is used for the customer portion of the credit/debit receipt.

SessionVariable2 is used for the merchant portion of the credit/debit receipt.

Receipt width defaults to 40 columns for best results on standard receipt printers.

Printer 1 and Printer 2 for this register are detected from RMS register properties. Left Margins should be set at 5, all other settings may be left with defaults. Change these settings only if directed to by your RMS support rep.

Offline database setup

Leave the 'Configure Offline Database' box unchecked if you are not using the Offline Database feature.

If you are using the Offline Database feature:

- Check the box for 'Configure Offline Database' ON
- Enter the local SQL database server name - can usually be set as '(local)'
- Enter the local offline SQL database name - usually set as 'OFFLINE'
- Enter the local SQL user name - usually set as 'sa'
- Enter the local SQL database password – passwords are saved encrypted
- Timeout can remain at 30 seconds, unless instructed to do otherwise

Press the Test Database Connection to test.

The Offline database will be synchronized at the time of performing Z reports.

Press OK when all configuration has been entered.

Givex Setup

Givex authorizations are not processed through First Data, they are processed directly with Givex.

If using Givex cards, press the Givex Settings button.

This button will only be active if the Givex Integration was selected during the installation.

The default Server is:

dc-ca1.givex.com

The default Fallback Server is:

dc-ca2.givex.com

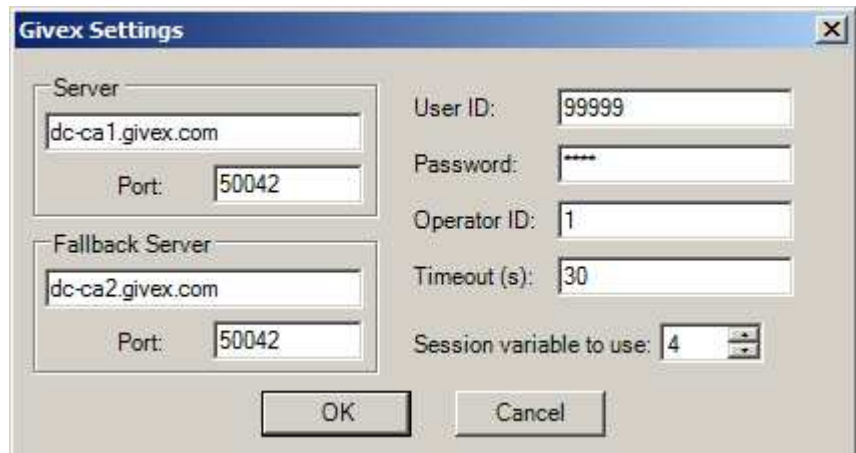
Port: 50042

Use these settings unless specifically requested to change by Givex.

Enter the User ID and

Password provided by Givex.

Operator ID should always be set to 1.



Default timeout is 30 seconds. This should not be changed unless there is an extremely slow internet connection.

Enter the Session Variable to use for receipt printing. This number must be different than the Session Variables used in the PIN Pad settings.

If using Givex within this application, all other Givex applications must be uninstalled. Failure to uninstall other Givex applications may result in double processing of Givex cards.

Software License

In order to process any credit, debit or gift cards, each terminal must obtain a software license.

To obtain a license code contact Tri-City Retail Systems Inc. via phone or email.

Phone: 519-578-8667 or 877-877-4767

Email: support@tricityretail.com

You will need to provide:

- Company Name:
- Full Mailing Address:
- Phone Number:
- Email Address:
- Name of Contact Person:
- Processor Type: First Data
- Your Merchant ID (MID):

Once you have been provided your software license, in POS, press the Chase-Paymentech button then select the Software License button.

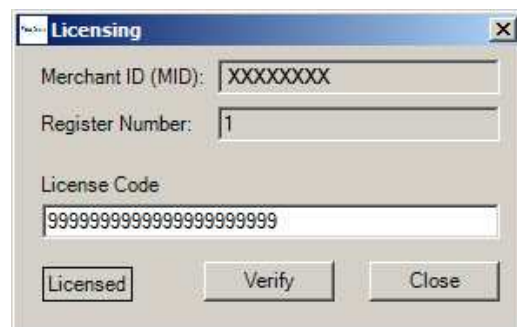
Enter your Merchant ID and Terminal ID supplied by Chase-Paymentech. These entries must match the information supplied for obtaining your license code.

Enter the License Code provided by Tri-City Retail Systems.

Press the Verify button to check the license.

If the code does not verify check to ensure that all entries are correct. If you require further assistance in verifying your license, please contact Tri-City Retail Systems by phone or email.

Once verified, all program functionality will be available.



Trouble Shooting

Communication Problems

In the event of communication problems, your first course of action will be to ensure that your internet is up and running. This is a good test to see if you have contact with “the outside world”. If you do have internet access your next step should be to power the PIN Pad off and then on again by unplugging it, visually confirming that the screen has gone dark and plugging it back in again. You will want to ensure that the network cable running to the “magic box” is connected.

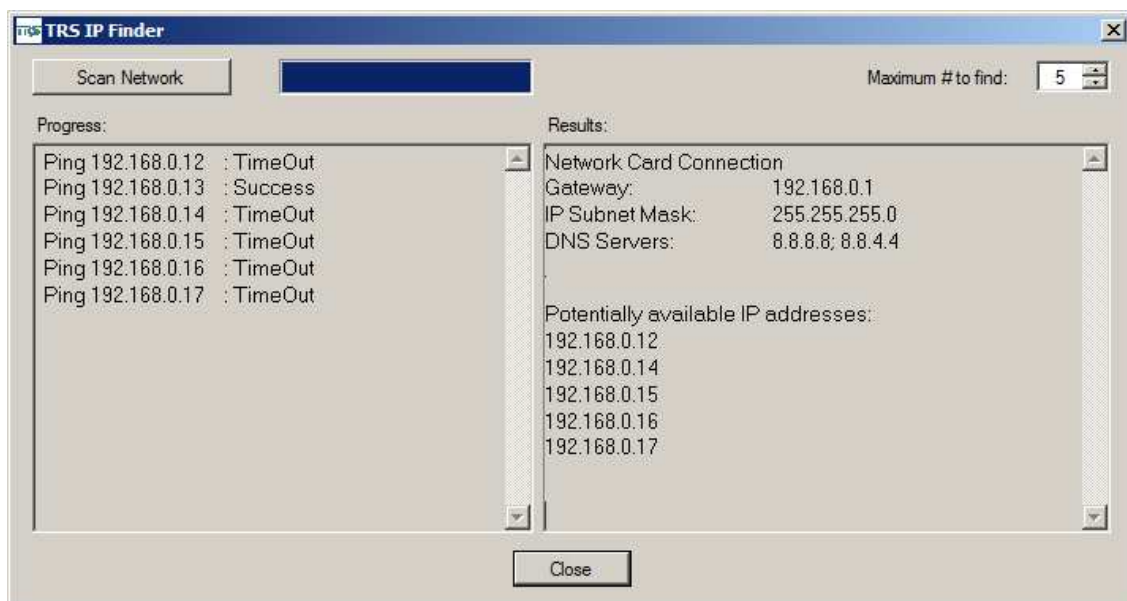
Should communication problems persist, consider changing from a Dynamic IP address to a Static IP address. Before beginning you will need to get an available IP address for your network, your gateway IP address and optionally get your DNS IP addresses. Follow the instructions “PIN Pad Settings – Assign Static IP Information” at the beginning of this guide.

TRS IP Finder

If you need to find an IP Address to use for your PIN Pad, a utility is installed with the software to find available IP Addresses on the local network.

The program can be found in the Windows Programs under “Tri-City Retail Systems”. The program is called “TRS IP Finder”.

Run this program and it will automatically search for available IP Addresses. It needs to be executed on a computer within the same local network that the PIN Pad needs to be part of.



By default, the program will list the first 5 (Maximum # to find) potentially available IP Addresses that could be used. The network gateway, subnet mask and DNS server information is also displayed.

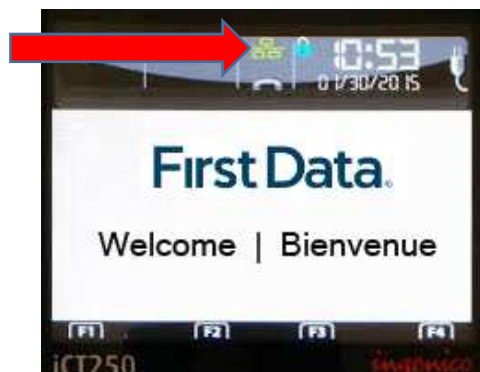
Error Messages

Error: An error occurred: No such host is known

Reason: Your computer is unable to locate your PIN Pad.

Action:

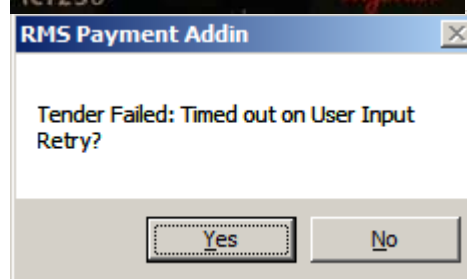
- Ensure that the network icon on the PIN Pad is yellow (white indicates no network connection)
- Ensure that the PIN Pad's Ethernet cable is securely connected to the PIN Pad.
- Reboot the computer
- Power the PIN Pad off and then on again (unplug)
- Review the "PIN Pad Setup" (in this manual)



Error: Tender Failed: Timed out on User Input. Retry?

Reason: Waiting for customer input on PIN Pad.

Action: Press Enter or click Yes to try again.
Click No to exit.



Error: Tender Failed: Communication Error. Retry?

Reason: Unable to connect via the internet or dial up backup (if available).

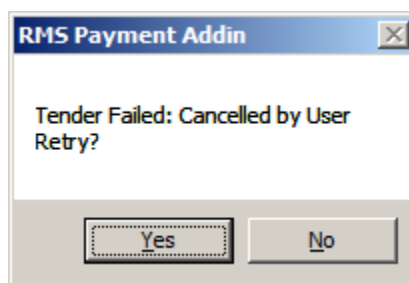
Action: Disconnect the power from the PIN Pad. Once power out is confirmed by looking at the PIN Pad display, repower and wait while terminal initializes.



Error: Tender Failed: Cancelled by User. Retry?

Reason: Transaction was cancelled at the PIN Pad.

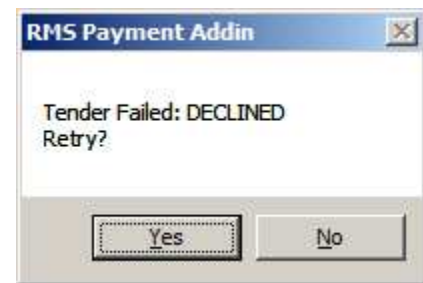
Action: Press Yes to retry or No to cancel the transaction.



Error: Tender Failed: DECLINED. Retry?

Reason: The processor declined the transaction.

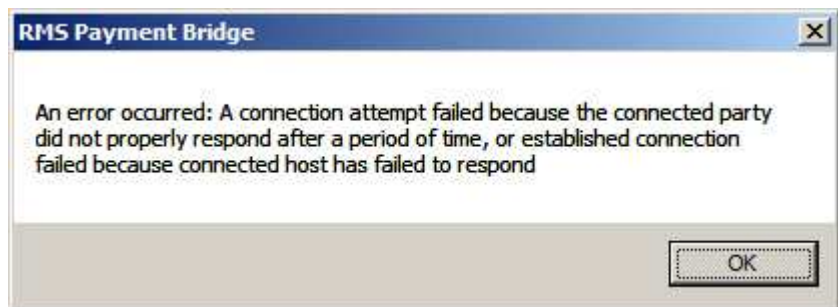
Action: Try another form of payment or cancel the transaction.



Error: Tender Failed: A connection attempt failed ...

Reason: The PIN Pad did not respond to the request.

Action: Check PIN Pad for power and network connection. Disconnect the power from the PIN Pad. Once power out is confirmed by looking at the PIN Pad display, repower and wait while terminal initializes.



Error: There was an error closing the batch:

Reason: The PIN Pad timed out waiting for response to close the batch or there was an error in communications.

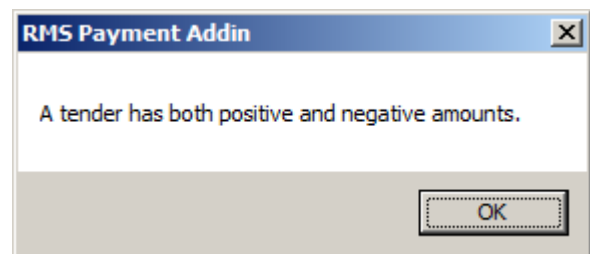
Action: Check PIN Pad for power and network connection. Ensure that you check for prompts on the PIN Pad when requesting the Close Batch.



Error: A tender has both positive and negative amounts

Reason: Each tender type in a transaction may only contain all positive or all negative values. If a single tender type contains a positive value and a change value, the transaction cannot proceed.

Action: Change the tender value then complete the transaction.



Error: Tender Failed: Timed out on User Input. Retry?

Reason: No input was performed at the PIN Pad prompts.

Action: Answer Yes to retry or No to cancel the transaction.

