

Semi Integrated Credit Authorization for Microsoft Retail Management System using Global Payments

Credit / Debit

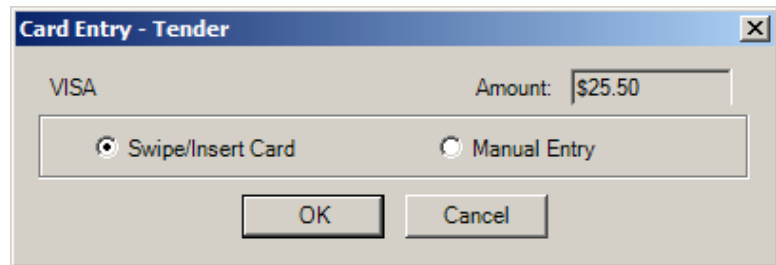
User Guide



With Pre-Authorization capabilities

Processing Sales - Single Payment

Ring in your items as usual. When you advance to the tender screen choose the payment type and press the + key, or type in the amount if it is less than the entire amount due. You will see the “Card Entry – Tender” window along with the name of the payment type. Press ENTER or click OK.



A screenshot of a software dialog box titled "Card Entry - Tender". It features a close button (X) in the top right corner. The card type "VISA" is displayed on the left, and the "Amount:" is set to "\$25.50" in a text field on the right. Below these, there are two radio buttons: "Swipe/Insert Card" (which is selected) and "Manual Entry". At the bottom, there are "OK" and "Cancel" buttons.

The PIN Pad will prompt with a similar message.

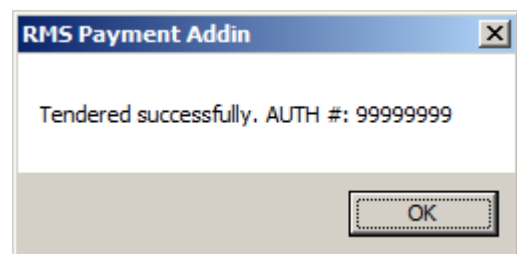


While processing at the PIN Pad, this screen will be displayed at the POS.



A screenshot of the "Card Entry - Tender" dialog box during the processing phase. The title bar remains "Card Entry - Tender". The main text area displays "Tendering" and "Please wait for authorization." followed by a series of dots ".....". On the right side, there is a 3x3 grid of small square icons, some of which are highlighted in blue.

Perform the actions at the PIN Pad. When the transaction is complete, provided the transaction is approved, the POS will show the following message.



A screenshot of a software dialog box titled "RMS Payment Addin". It has a close button (X) in the top right corner. The main text area displays the message "Tendered successfully. AUTH #: 99999999". At the bottom right, there is an "OK" button.

Provided the transaction is approved, the PIN Pad will show a message similar to the following.



The RMS Receipt will include the credit card or debit authorization information and/or any error messages that occurred.

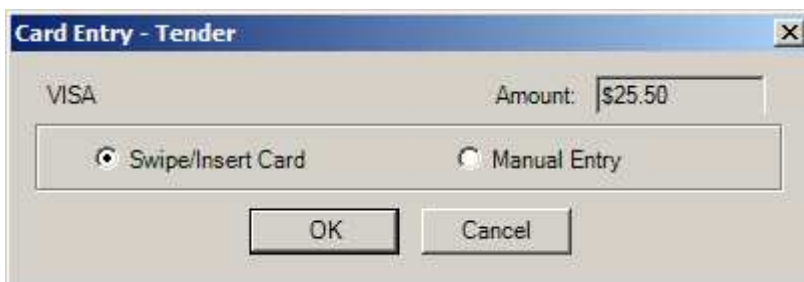
Receipt Note:

The “Batch” on the receipt refers to the processor batch, not the RMS batch.

Store Name Here	
Store Address Here	
Sale / Purchase	
Clerk #: 000001	
MID: 1234567890	
TID: 123	REF: 00000001
Batch: 001	
DATE	TIME
APPR CODE: 123456	
VISA	Chip
*****0001	**/**
AMOUNT:	\$25.75
00 - APPROVED - 000	
X _____	
Visa Credit	
AID: A0000000000009999	
TVR: 000000000000	
TSI: 0000	
I AGREE TO PAY ABOVE TOTAL AMOUNT IN ACCORDANCE WITH CARD ISSUER'S AGREEMENT (MERCHANT AGREEMENT IF CREDIT VOUCHER) RETAIN THIS COPY FOR STATEMENT VERIFICATION	

Processing Sales – Manual Entry

Ring in your items as usual. When you advance to the tender screen choose the payment type and press the + key or type in the amount if it is less than the entire amount due. You will see the “Card Entry – Tender” window along with the name of the payment type. Select Manual Entry then press OK.



Only credit cards may be entered manually. Debit cards must be swiped, inserted or tapped.

POS screen will wait for entry from the PIN Pad.



PIN Pad will prompt with ‘Pass Terminal To Customer’ to allow customer to manually enter card number.



PIN Pad will prompt with Swipe/Insert/Tap/Key. The credit card number may be entered directly on the PIN Pad. Enter the card number then press Enter (green button).

Enter the expiry date in MMY format then press Enter.



After successfully entering card number and expiry date, PIN Pad will prompt to 'Pass Terminal To Merchant'.



A password may be required to accept the manually entered card number. If prompted with 'Enter Manager Password', the manager password must be keyed.



PIN Pad will prompt with 'Card Present?'.

Press F1 if card is present.

Press F4 if card is not present.



If card is present PIN Pad will prompt to warn that the card should be imprinted.

Press Enter (green button) when ready to continue.

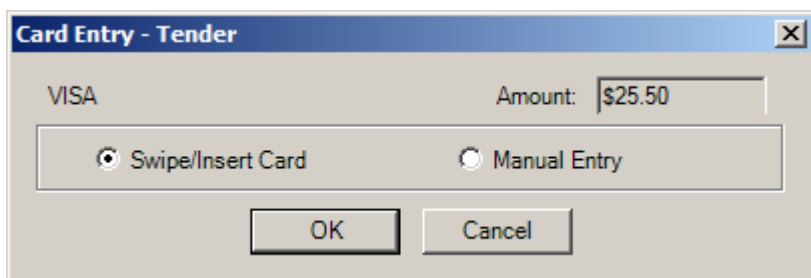


Multi Payment (Split tender)

Ring in your items as usual. Enter the amount for each payment type on the tender screen. Optionally press the + key on the final payment type. You will see the “Card Entry – Tender” window along with the name of the payment type. Communicate to your customer which payment type is expected first. Press ENTER or click Enter.

Once the tender has been processed, you will be prompted for the next payment type. Repeat the steps as necessary.

Important note: If any of the payments fail or are declined, any previously authorized payment types will be reversed.

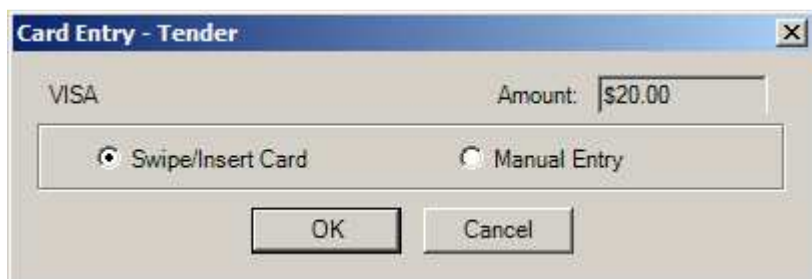


The screenshot shows a dialog box titled "Card Entry - Tender". It contains the text "VISA" on the left and "Amount: \$25.50" on the right. Below this, there are two radio buttons: "Swipe/Insert Card" (which is selected) and "Manual Entry". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Transaction Returns

In RMS, select the transaction to return using the F11 Recall – Recall a Transaction for Return option.

Enter the amount for each tender type on the tender screen. Optionally press the + key on the final payment type. You will see the “Card Entry – Tender” window along with the name of the payment type. Communicate to your customer which payment type is expected first. Press ENTER or click OK



The screenshot shows a dialog box titled "Card Entry - Tender". It contains the text "VISA" on the left and "Amount: \$20.00" on the right. Below this, there are two radio buttons: "Swipe/Insert Card" (which is selected) and "Manual Entry". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Transaction Voids

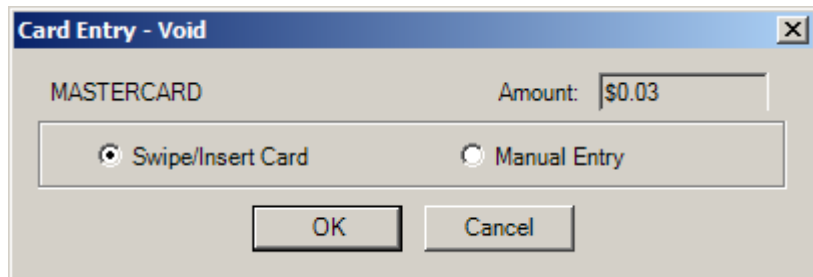
In RMS, select the transaction to void using the recall - Void a Transaction option. This is the only way to void a credit/debit transaction. All other negative transaction will be performed as a refund/return.

Please keep in mind that credit and debit voids must be done prior to closing the batch.

Select the transaction that needs to be voided. The tender screen should automatically populate the tender(s) that was originally used to pay for the transaction. If the tender amount is not populated, the tender type may not be set as 'Other' in the 'Tender type' field – all credit card, debit card and gift cards should be set as 'Other'.

Once the total has been entered in the tender screen, press Ok to proceed.

The Card Entry screen will be displayed.

A screenshot of a software dialog box titled "Card Entry - Void". It features a blue header bar with a close button (X) in the top right corner. The main area has a light gray background. At the top, "MASTERCARD" is displayed on the left and "Amount: \$0.03" is on the right. Below this is a horizontal bar containing two radio buttons: "Swipe/Insert Card" (which is selected) and "Manual Entry". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Press OK to continue.

The Card Entry – Void screen will provide the Reference # to enter on the PIN Pad.

A screenshot of a software screen titled "Card Entry - Void". It has a blue header bar with a close button (X) in the top right corner. The main area is white and contains the text: "Voiding MASTERCARD", "Ref Num: 8", and "Please wait for authorization." To the right of the text is a small grid of blue squares, likely a PIN pad interface.

A password may be required to accept void. If prompted with 'Enter Manager Password', the manager password must be keyed.



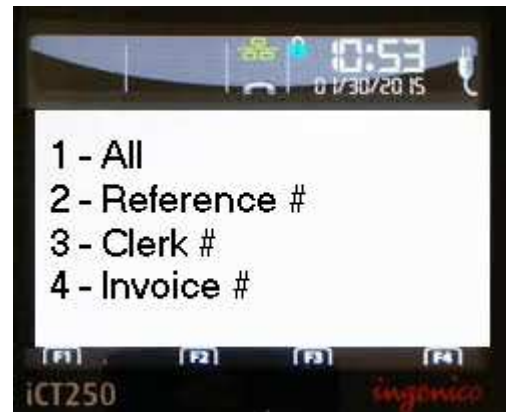
The PIN Pad will prompt 'Void Pre-Auth'

You must answer No to this by pressing the F4 key.



The PIN Pad will prompt for how to select the transaction.

Press 2 for Reference #



Enter the reference # provided on the Card Entry screen.



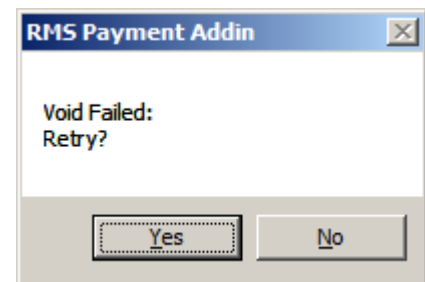
Press the button below 'Select' to select the transaction to void or press the red button to cancel..



Press the button below the Yes (F1) to void the transaction or press the button below the No to cancel.



If at any time the transaction is cancelled, this screen will be displayed. Select Yes to try again or No to cancel.



Only work order transactions with an item from the pre-defined category will trigger pre-auth transactions.

Create a work order and add an item from the pre-auth category.

When the work order is saved (without a deposit), even though the transaction will have a zero balance due, a pre-auth transaction will be requested from the PIN Pad.

Tender the work order.

[illegible]

With \$0.00 balance, press Ok button to complete the transaction and request the pre-auth.

The pre-auth will be requested. Select either Swipe/Insert Card or Manual Entry to process at the PIN Pad.

Process the transaction at the PIN Pad as you would for any normal sale transaction.

Tender

Tender information:

Description	Amount
MASTERCARD	\$0.50
DINERS-	
CHECK	

Card Entry - Tender

Credit Card Amount: \$0.50

☒ Swipe/Insert Card ☐ Manual Entry

OK Cancel

Total Due: \$0.00
Total Tendered: \$0.00
Change: \$0.00

Calculator OK Cancel Help

Follow the prompts at the PIN Pad to complete the transaction.

The PIN Pad will first prompt to pass the terminal to the customer.



The card may now be swiped, inserted, tapped or manually entered.

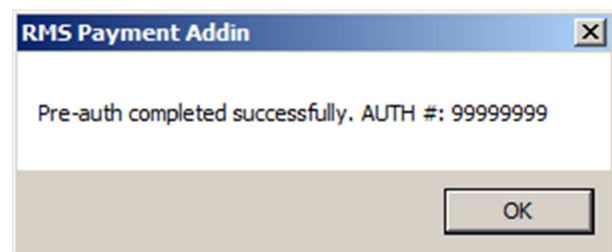


If the transaction is approved, you will be prompted to press Enter. Press the green / Enter button to complete the transaction.



An authorization window will be displayed with the authorization number. Press Ok.

The transaction receipt will be printed.



Completing a Pre Authorization Transaction

Recall a previously pre-authorized work order.

Work Orders

Lookup Order #: 316 11 entries

Order #	Date	Reference	Customer	Comment
246	12/08/2015 12:11:28 PM		LAST-NAME	
249	12/15/2015 8:25:49 AM		LAST-NAME	
250	12/15/2015 10:21:56 AM		LAST-NAME	
276	06/15/2016 12:41:24 PM		LAST-NAME	
277	06/20/2016 3:29:54 PM		LAST-NAME	
280	07/04/2016 9:46:17 AM		LAST-NAME	
281	07/04/2016 4:39:14 PM		LAST-NAME	
282	07/04/2016 4:42:30 PM		LAST-NAME	
293	07/08/2016 3:59:02 PM	Pre-Auth: 9999999	LAST-NAME	
295	07/08/2016 5:25:56 PM	Pre-Auth Approver:	LAST-NAME	
316	07/13/2016 5:03:14 PM	Pre-Auth Approver:	LAST-NAME	

OK Cancel

The entire order must be picked up.

Select Pick up entire work order then press Ok.

Work Order

Save Changes

Pick up entire work order

Pick up partial work order

OK Cancel

Select the appropriate credit card type then press + (or enter the exact total to be charged then press Ok).

A pre-auth completion screen will be displayed.

Press Ok to continue processing the completion.

The original reference number will be displayed on the screen. This reference number must be entered at the PIN Pad.

Pre-Auth Completion

Tendering VISA

Reference Number: 1

Please wait for authorization.

The PIN Pad will prompt with a screen to select the search type.

You must select 2 – Reference #.

Press 2

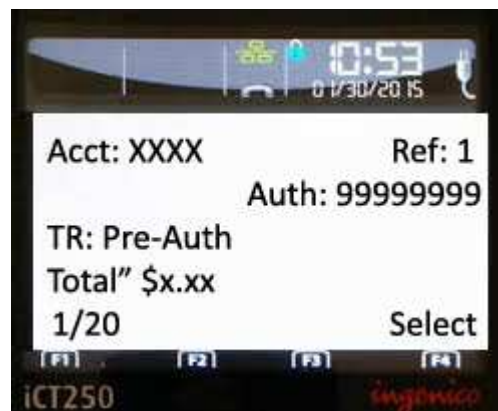
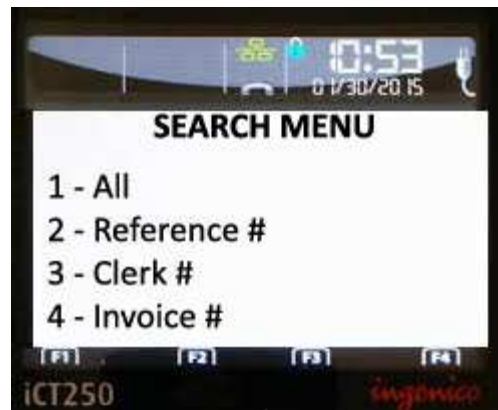
A prompt will request the reference number.

Enter the reference number from the POS screen then press Enter (green button).

If the correct transaction is displayed, press the F4 (Select) button.

Press F1 (Accept) to accept the value in amount only if the transaction total in POS is the same.

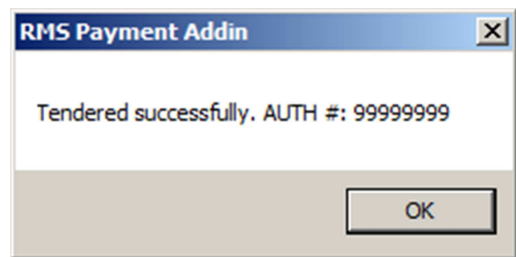
If the transaction amount in POS is different than the amount displayed on the PIN Pad, press F4 (Change).



If the amount is to be changed, enter the value from the POS screen then press Enter (green button).



Once the transaction is approved, a message, with the authorization number, will be displayed on the POS screen.



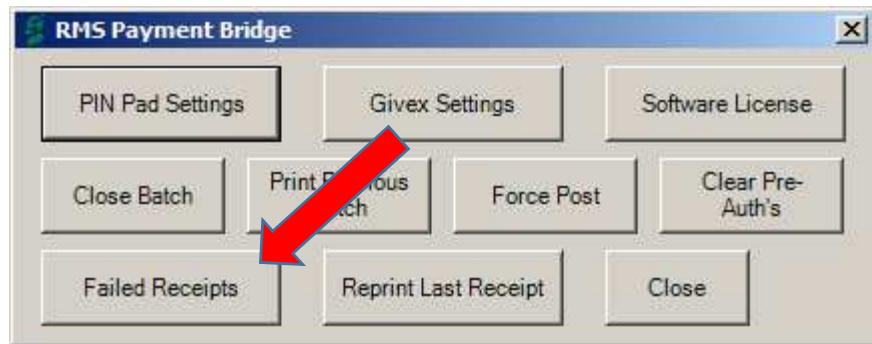
Press Ok to print receipt and complete the transaction.

The pre-auth transaction will be completed and removed at the PIN Pad and .

Failed Receipts

Failed receipts are created when a card payment fails and the RMS transaction is not completed due to a communication error or perhaps a declined credit card. Failed receipts print automatically. Press the 'Failed Receipts' button to

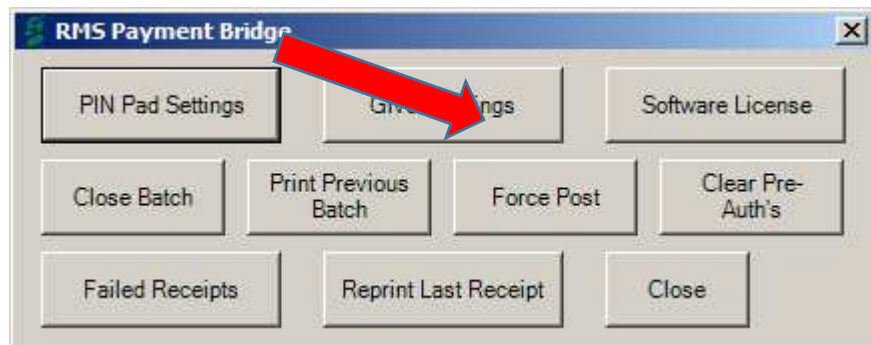
select a receipt to reprint. As failed receipts are not associated with a transaction number, you will need to locate a failed receipt based on the register number, time, payment method and amount.



Force Post

Force post can be used in cases where all communication is down between the PIN Pad and the processor. In these cases, you would call your processor for authorization. First, click the Global Payments button in POS and then click the "Force Post" button and type in the amount of the transaction and select a card type.

The user will be prompted to swipe, insert or tap their card and then be prompted for the authorization code you received from the processor on the telephone. Carefully input this number into the PIN Pad.



Clear Pre-Auth's

Clear Pre-Auth's button will clear all open workorders in POS that have been processed as pre-auths in the current day.

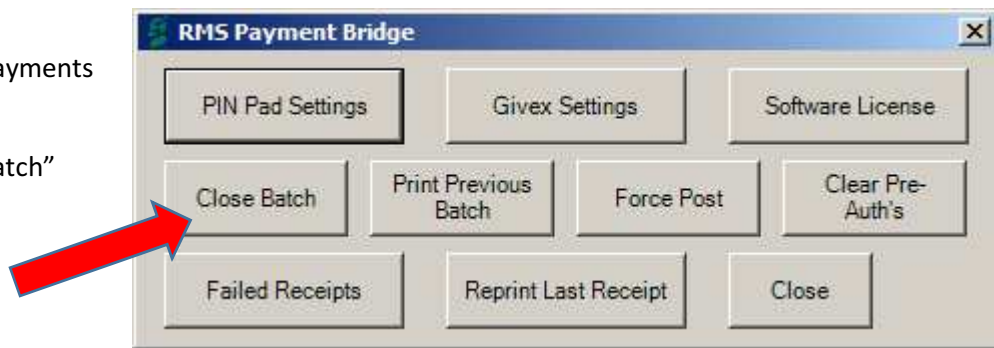
Any pre-auth transactions processed at the PIN Pad will not be affected.

Pre-auth transaction at the PIN Pad must be removed manually at the PIN Pad.

End of Day

Click your Global Payments button in POS.

Click your “Close Batch” button.



A password may be required to accept void. If prompted with 'Enter Manager Password', the manager password must be keyed.



Press the button under the “Yes” option (F1) to continue and follow the prompts to print your settlement reports. The totals from your settlement report can be used to close your RMS batch if you are required to enter closing amounts.



Settlement issues must be taken up with your processor.

Using Stand-Alone Mode

In the case where a credit or debit transaction needs to be processed that should not affect any transactions in RMS, stand-alone mode can be used. This can be useful if a transaction has been processed through the system, the PIN Pad has successfully processed the transaction, but an error occurred in POS in that it did not receive the processed transaction information from the PIN Pad.

To use stand-alone mode:

- Press the F1 button on the PIN Pad.
- Press F1 again to answer Yes.



- Press the green Enter button.
- Select the appropriate number for the transaction that you wish to process .
- Follow the prompts to complete the transaction.



When all stand-alone transaction are complete, return the PIN Pad to Semi-Integrated mode by pressing F1.



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. If you are not sure about how the PIN Pad connects, it is strongly recommended that you watch the installation video located at this link (you can ignore instructions beyond the 1:57 mark as they explain adding a second PIN Pad which is not required):

<http://ingenico.us/terminals/ict250/>

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 below on your ICT 250 terminal:

Press the [.,#*] button

Choose 3 – Setup Menu and enter the Manager Password

Choose 2 – Communications

Choose 3 – Ethernet

Choose 1 – Current setup to view the existing settings (use the red button to back out)

Choose 2 – Ethernet setup

Choose 2 – Static IP

Choose 1 – Terminal IP and type in the IP address you wish to assign.

Press the green **[Enter]** button when finished

Choose 2 – Gateway IP and type in the IP address you wish to assign.

Press the green **[Enter]** button when finished

Choose 4 – PriDNSIP and type in your primary DNS (if unsure, you can try using Google’s - 8.8.8.8)

Press the green **[Enter]** button when finished

Choose 5 – SecDNSIP and type in your secondary DNS (if unsure, you can try using Google’s - 8.8.4.4)

Press the green **[Enter]** button when finished



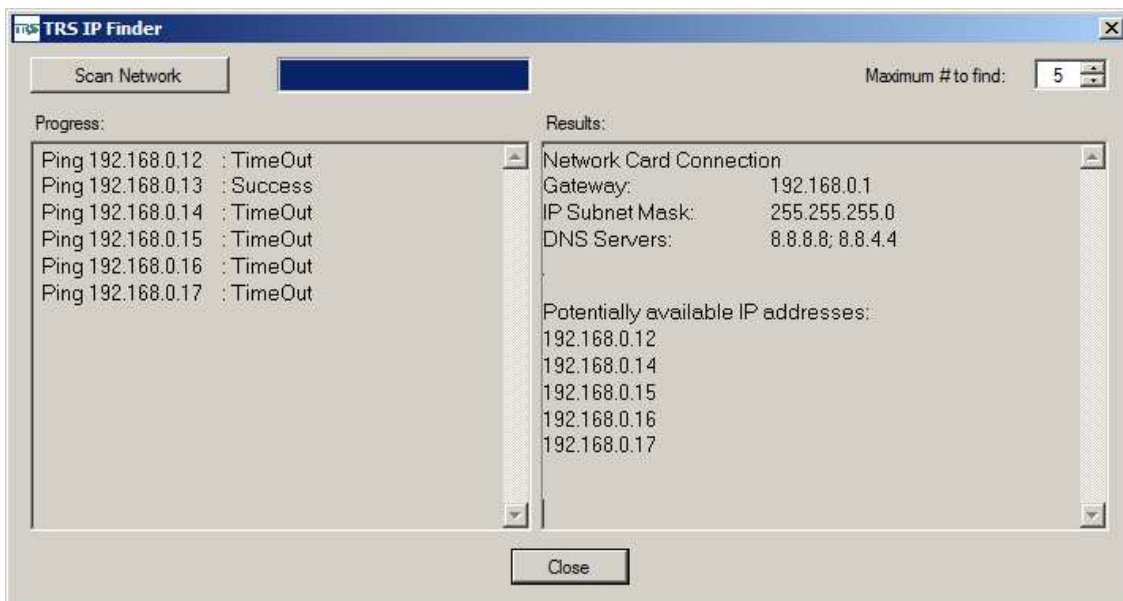
For complete instructions, refer to the Ingenico ICT 250 Terminal User Guide.

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.

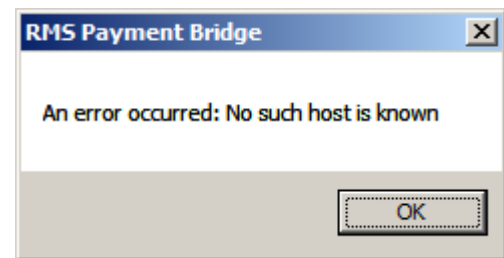
Error Messages

Error: An error occurred: No such host is known

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

Action:

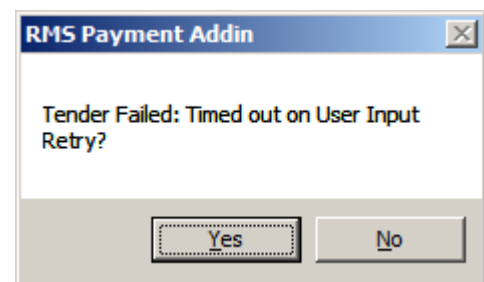
- Ensure that the PIN Pad's Ethernet cable is securely connected to the PIN Pad.
- Ensure that the network icon on the PIN Pad is on
- Reboot the computer
- Power the PIN Pad off and then on again (unplug)
- Review the "Ingenico USB driver setup" (in this manual)
- Review the "PIN Pad Setup" (in this manual)



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

Reason: Waiting for customer input on PIN Pad.

Action: Press Enter or click OK 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).

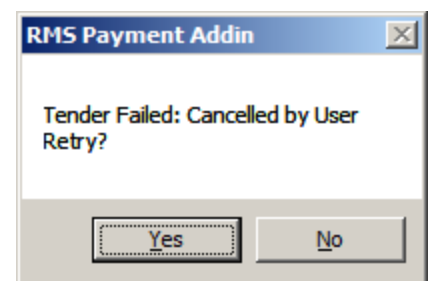
Action: Disconnect the power from the PIN Pad. Once power out is confirmed by looking at the PIN Pad display, repower and wait while terminal initializes.



Error: Tender Failed: Cancelled by User. Retry?

Reason: Transaction was cancelled at the PIN Pad.

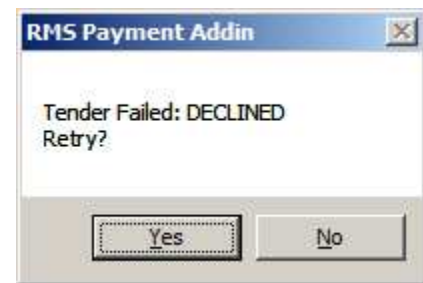
Action: Press Yes to retry or No to cancel the transaction.



Error: Tender Failed: DECLINED. Retry?

Reason: The processor declined the transaction.

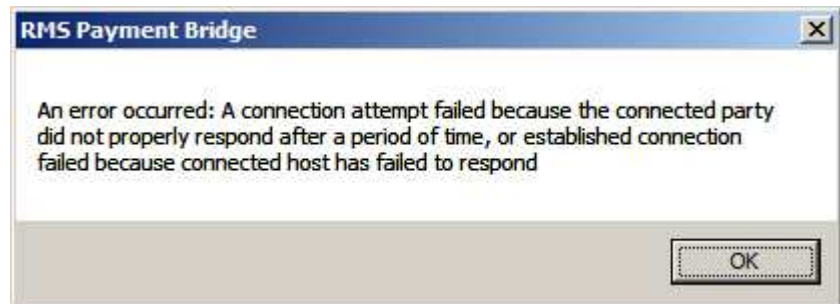
Action: Try another form of payment or cancel the transaction.



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 .

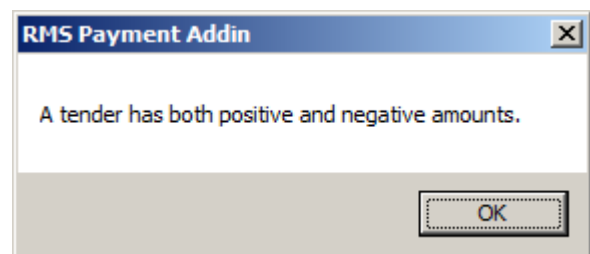
Action: Check PIN Pad for power and network connection. Ensure that you check for prompts on the PIN Pad when requesting the Close Batch.



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.

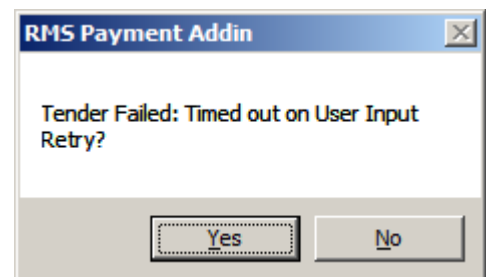
Action: Change the tender value then complete the transaction.



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.



Error: There was an error: No communication from PIN Pad received in 90 seconds.

Reason: PIN Pad is offline or not completed with a previous task.

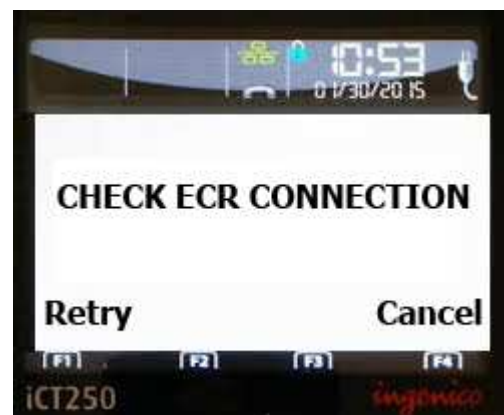
Action: Check PIN Pad for power and network connection. Disconnect the power from the PIN Pad. Once power out is confirmed by looking at the PIN Pad display, repower and wait while terminal initializes.



Error: CHECK ECR CONNECTION (Retry / Cancel)

Reason: Communication from the PIN Pad to the computer was not completed.

Action: Check connection to computer.



Error: TIMEOUT

Reason: Response to prompt on PIN Pad not entered in a reasonable amount of time.

Action: Cancel then retry transaction.



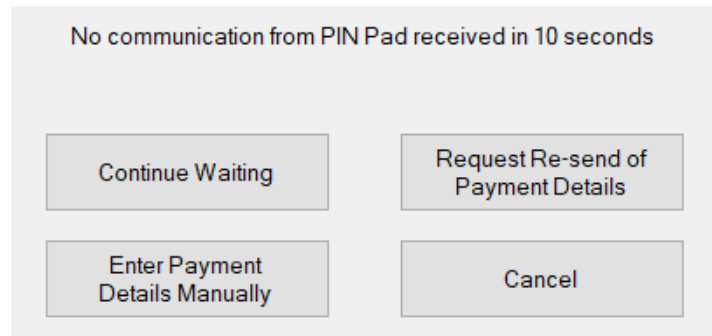
Error: PIN Pad Communication Error

Reason: PIN Pad has lost communications with the network

Action: The PIN Pad should have an option to Retry or Continue.

Retry/Continue at the PIN Pad: Press the Continue Waiting button at the Till along with the Retry at the PIN Pad.

If the communications has been restored, the transaction will be completed. If communication has not been restored, the PIN Pad Communication Error will be displayed again and an alternate option should be used. Pressing the Continue button at the PIN Pad will have the PIN Pad print the receipt.



Request Re-send of Payment Details: This is the preferred option to use. A warning message will be displayed to inform the cashier that this option may only be used when the PIN Pad is back at the Welcome screen and the authorized transaction has already been printed at the PIN Pad. Now select Continue on the PIN Pad. The PIN Pad will print the receipt and return to the Welcome screen. . The last authorized transaction results will be retrieved and the transaction will complete as normal, but credit card details are only available from the PIN Pad printed receipt. Pressing Cancel will return to the previous screen.

Enter Payment Manually: This option should only be used if the Request Re-send option does not provide closure to the transaction. A warning message will be displayed to inform the cashier that this option may only be used when the PIN Pad is back at the Welcome screen and the authorized transaction has already been printed at the PIN Pad. Pressing Continue will provide a screen to enter the Authorization Code, Reference Number and the Card Type. This information can be read from receipt that printed at the PIN Pad. The cashier must type in the exact details for each of the entry fields then press Continue. If the values have all been entered, pressing the Continue button will finalize the transaction. Pressing Cancel will return to the previous screen.

Cancel: Pressing Cancel should only be used if the Request Re-send and the Enter Payment Details Manually do not provide results. This will return you to the Transaction Screen. You will need to provide an alternate form of payment that does not require authorization to finish the transaction