

Semi Integrated Credit Authorization for MyPOS and Global Payments

User's Guide

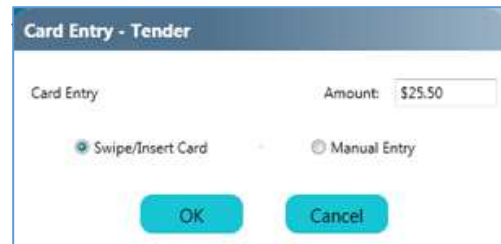


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Processing Sales - Single Payment

Ring in your items as usual. Press Subtotal and Card Payment screen.



The screenshot shows a 'Card Entry - Tender' dialog box. It has a title bar with the text 'Card Entry - Tender'. Inside, there's a 'Card Entry' label on the left and an 'Amount: \$25.50' 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 two buttons: 'OK' and 'Cancel'.

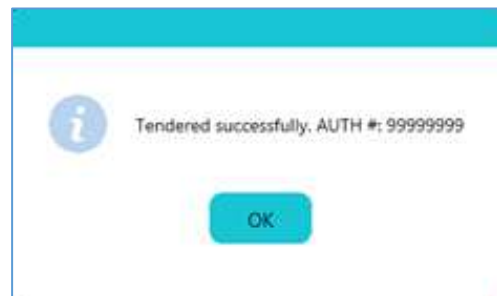
The PIN Pad will prompt with a similar message

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



The screenshot shows a 'Card Entry - Tender' dialog box. It has a title bar with the text 'Card Entry - Tender'. Inside, there's a message: 'Sale Card Entry, please wait for authorization.' Below the message, there's a circular loading indicator consisting of several blue dots arranged in a circle.

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



The screenshot shows a confirmation dialog box. It has a title bar with the text 'Card Entry - Tender'. Inside, there's an information icon (a lowercase 'i' in a circle) on the left and the text 'Tendered successfully. AUTH #: 99999999' on the right. Below the text, there's an 'OK' button.

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

The 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 Global Payments 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_____	
CARDHOLDER ACKNOWLEDGES RECEIPT OF GOODS AND/OR SERVICES IN THE AMOUNT OF THE TOTAL SHOWN ABOVE	

Ring in your items as usual. Press Subtotal and **before you press Card Payment**, type in the amount being applied to the first card payment. Once the tender has been processed, you will be prompted for the next payment type. Repeat the steps as necessary.

In the example below, the customer has paid \$1.00 on their Visa card. Next, assume that they attempt to put the remaining amount (\$6.74) on their Mastercard, but the transaction is declined and the customer has no other alternate form of payment.

	1 x Merchandise	\$6.85	HST	\$6.85
	HST			\$0.89
	Payment - Visa			-\$1.00
	*****7214			
Amount Due		Subtotal	Tax	Total
\$6.74		\$6.85	\$0.89	\$7.74

You will be prompted with the following “Card Entry - Void” screen and will need to use the same card to reverse the transaction.

Card Entry - Void

Card Entry Amount: (\$1.00)

☒ Swipe/Insert Card ☐ Manual Entry

Ring in your items as usual. Press Subtotal and Card Payment. You will be prompted with the following screen.

Card Entry - Tender

Card Entry Amount: \$25.50

☐ Swipe/Insert Card ☒ Manual Entry

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 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'.

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

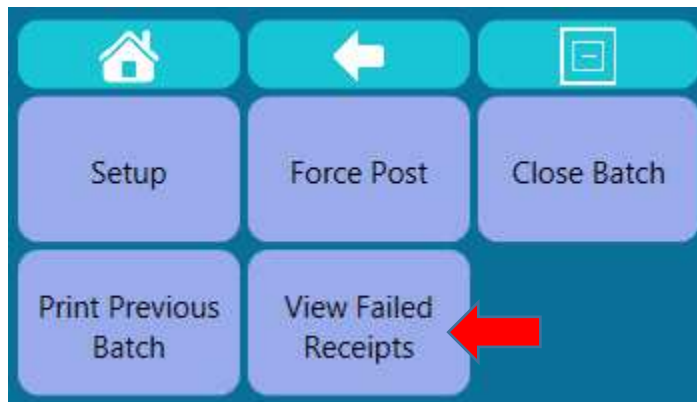
Press Enter (green button) when ready to continue.

Returns

Returns are processed exactly like sales.

Failed Receipts

Press your Global Functions button to reprint or purge failed receipts. Failed receipts are created when a card payment fails and the MyPOS transaction is not completed due to a communication error or perhaps a declined credit card. Failed receipts print automatically at the time of the transaction, however, you can also reprint these receipts from this location as they will not appear in the MyPOS receipts.

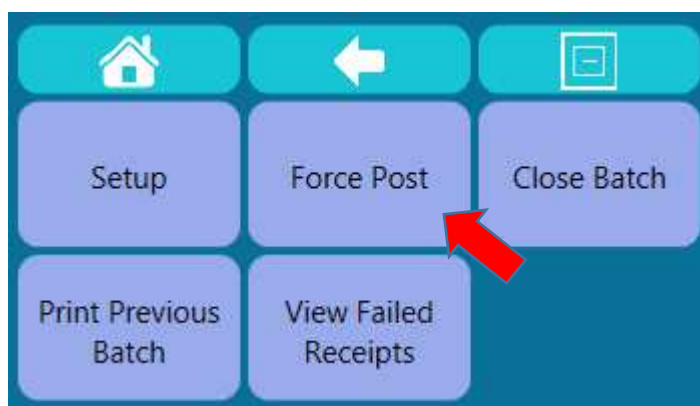


Press the 'Failed Receipts' button to select a receipt to reprint. As failed receipts are not associated with a transaction number, you will need to locate a failed receipt based on the register number, time, payment method and amount.

These receipts will print the reason the transaction failed.

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 Functions button in POS and then click the "Force Post" button.



Force Post

Force Post Amount:

OK

Cancel

User will be prompted to type in the "Force Post Amount" (this would be the transaction total).

The user will be prompted to swipe, insert or tap their card and then be prompted to pass the terminal to the merchant.

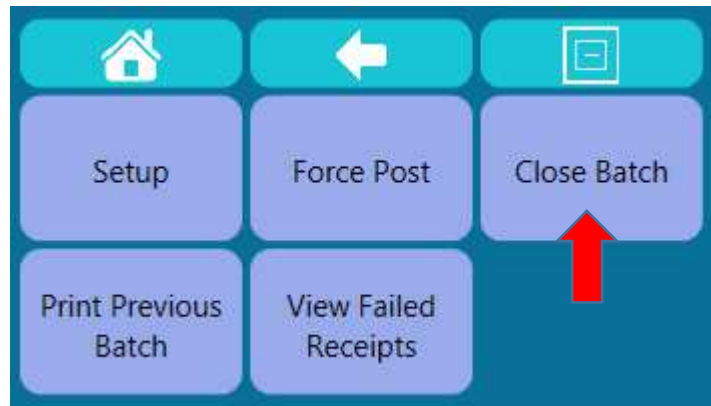
The user can then type in the authorization code received from the processor on the telephone. Carefully input this number into the PIN Pad.

These transactions will migrate to Global Payment Systems when your internet connection is restored and you perform a batch close.

End of Day

Click your “Global Functions” button in POS.

Click your “Close Batch” button.



A password may be required to close your batch. If prompted with ‘Enter Manager Password’, the manager password must be keyed.

Press Yes to continue and follow the prompts to print your settlement reports.

If you are required to enter closing amounts in MyPOS, use the totals from your settlement report for your Debit and Credit card entries.

Settlement issues must be taken up with your processor.

Stand-Alone Mode

In the case where either a credit or debit transaction needs to be processed that is not linked to any MyPOS transaction or the connection between the pin pad and MyPOS cannot be made, stand-alone mode can be used.

To use stand-alone mode:

- Press the PINPad icon on the top right corner of the touchscreen on the PIN Pad
- Press 1 to answer Yes
- You will now see a screen full of icons for the various types of transactions you can do.

- Tap on the appropriate icon for the transaction that you wish to process
- Follow the prompts to complete the transaction

IMPORTANT!

When all stand-alone transaction are complete, return the PIN Pad to Semi-Integrated mode by pressing the PIN Pad icon on the top right of the touch screen

To verify that you have exited Stand Alone Mode, press the green Enter key – if the Main Menu is not displayed, you have exited Stand Alone Mode

Troubleshooting

Communication Problems



An error occurred. No connection could be made because the target machine actively refused it at xxx.xxx.xxx.xx:xxx

The most likely reason for the error above is that you are not pointing to an IP address that exists on a device other than your pin pad.



An error occurred. A connection attempt failed because the connected party did not properly respond after a period of time or established connection failed because connected host has failed to respond xxx.xxx.xxx.xx:xxx

The most likely reason for the error above is that either the pin pad is not connected to the network or the IP address in setup is not valid.

General

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.

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)

You will also 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 below on your DESK/5000 terminal:

Press the [.,#*] button

Choose 3 – Setup Menu and enter the Admin name and 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
- Terminal IP and type in the IP address you wish to assign.
Press the green **[Enter]** button when finished
 - Gateway IP and type in the IP address you wish to assign.
Press the green **[Enter]** button when finished
 - 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
 - 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

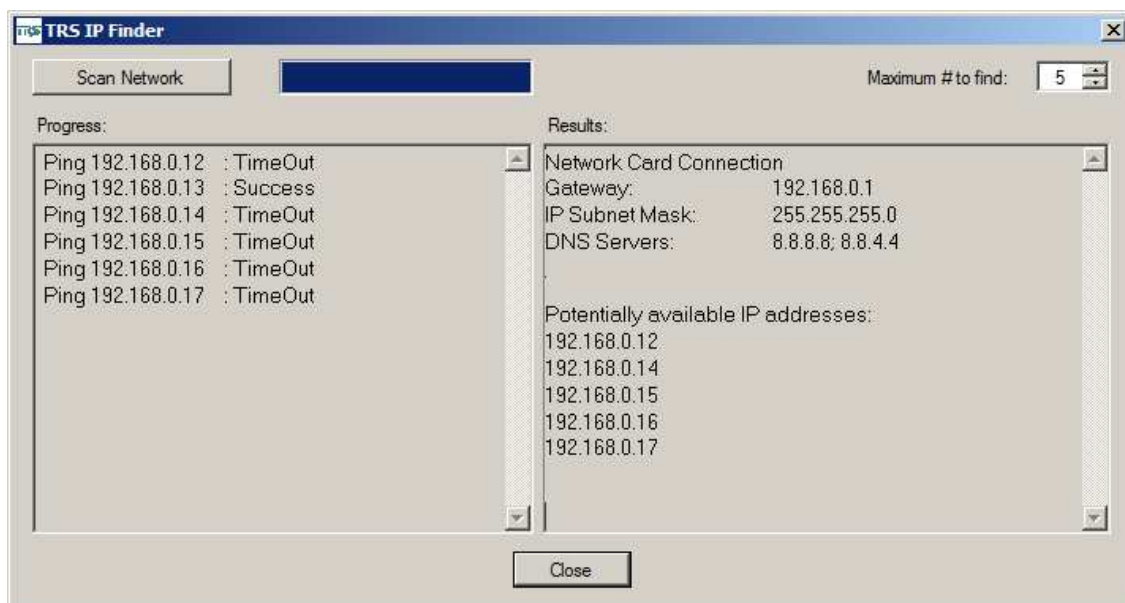
For complete instructions, refer to the Ingenico DESK/5000 Terminal User Guide.

TRS IP Finder

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

There is a button called "IP Finder" on the setup screen

- Click this and it will automatically search for available IP Addresses and 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.

Messages



Message: 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 or click No to exit



Message: 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.



Message: Tender Failed: Cancelled by User. Retry?
Reason: Transaction was cancelled at the PIN Pad
Action: Press Yes then retry or cancel the transaction



Message: Tender Failed: DECLINED. Retry?
Reason: The processor declined the transaction
Action: Try another form of payment or cancel the transaction



Message: 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.



Message: 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.



Message: 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.



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

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

Action: Answer Yes the retry or cancel the transaction.

PIN Pad Communication Error

This message box will be displayed if a MyPOS has sent a transaction to the PIN Pad and the PIN Pad has not responded within 10 seconds.

The PIN Pad sends an acknowledgement back to the computer every 5 seconds to let the software know that it is still processing. If this acknowledgement has not been received within 10 seconds the communications from the PIN Pad has stopped.



The transaction may have been processed at the PIN Pad and the PIN Pad cannot send the results back.

In this case, you have options to Continue waiting for the PIN Pad to send the results, cancel the transaction, Request the results be resent or to enter the successfully processed details manually.

Continue Waiting

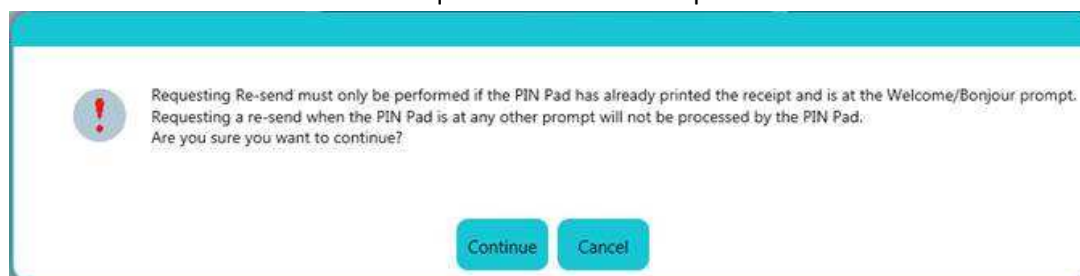
- Continue to wait for communications from the PIN Pad

Cancel

- This option will cancel the card processing and return to the transaction screen awaiting payment
- This should only be used if the transaction has not been processed at the PIN Pad

Request Re-send of Payment Details

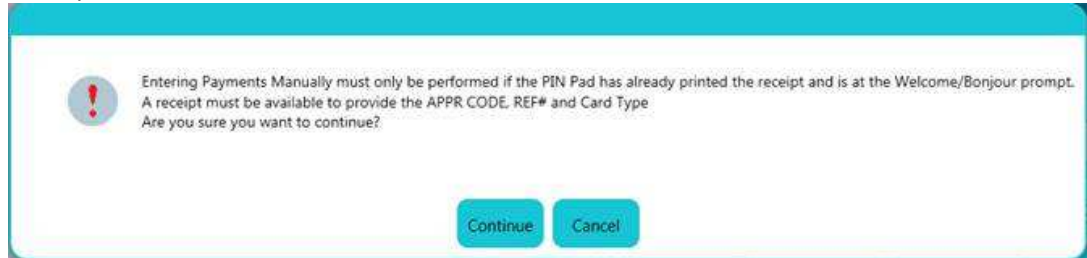
- This would be used if communications have been restored to the PIN Pad and the receipt has been processed and printed at the PIN Pad
- A warning screen will be displayed to explain when (and only when) this option may be used and allows to user to continue with the request or return to the previous screen



- Pressing continue should only be performed if the PIN Pad is back at the Welcome screen after processing and printing the receipts from the transaction
- Continue will request of payment detail of the last processed transaction is performed
- If details are returned, the current transaction information is posted appropriately (cancelled, timed out, authorized, etc.)

Enter Payment Detail Manually

- This would be used if communications have not restored to the PIN Pad and the receipt has been processed and printed at the PIN Pad
- The details from the printed receipt need to be used to enter the details so that the transaction can be completed in the till



- Pressing Cancel will return to the previous screen
- Pressing Continue will display the manual entry screen
- Enter the details from the receipt that was printed on the PIN Pad
- All three fields must be entered
- When all three fields have been entered, you may press the Continue button to complete the transaction
- Press Cancel to return to previous screen

