EMV and PayAtTable Setup Guide

Version 10

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Chapter 1-EMV w/Datacap EPay configuration

This document will instruct you on the installation and the configuration of your MicroSale system to work with PinPads for EMV authorization.

Before you begin please make sure that you have the following:

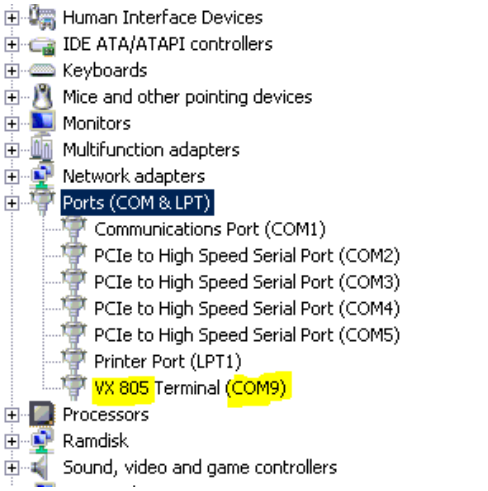
1. Verifone PinPad, Ingenico, Ingenico ISC 2xx, ID Tech MiniSmart, or another approved Datacap EMV compatible device. You will need one for each register that you wish to process credit cards on. USB interface is recommended.
2. Datacap Net EPay. Confirm EMV compatible Epay products' version is correct.
3. Micro$ale Version 10.0.xxxx or higher

Installation of Datacap Net EPay:

1. Install Datacap SQL instance.
2. Install Datacap DSI EMV Client (or PDCX Client if using the out of scope non emv solution). Use the most up-to-date DSI Client installation package. It can be downloaded from the MicroSale FTP site or from the Datacap website at the following link: http://www.datacapepay.com/downloadmenu/
3. Install Vendor specific EPay version with EMV support. (i.e. FDMS Rapid Connect Host 5.06.**10**)
4. These steps only need to be followed on the computer that will be hosting the EPay software.

Installation and Configuration of Verifone Pinpads (USB/Serial):

1. Install Verifone VX-805 Virtual Com Driver. This can be downloaded from the MicroSale FTP site or from the Datacap website at the following link: http://files.datacapepay.com/software/drivers/verifone/VeriFoneUSBUARTDriver_Vx_1.0.0.52_B5.zip
2. Connect the Verifone VX-805 to your register Via the provided USB interface cable. Windows should recognize the device and load the previously installed Virtual Com Port Driver.
3. Confirm Windows has detected the device by going to Windows Device Manager→ Ports (COM & LPT). You should see a port listed as "VX 805 Terminal (COM9)".
    a. You can access Device Manager by right-Clicking "My Computer" → Select Properties→ then from the properties screen select "Device Manager".



4. If the VX-805 fails to initialize then the device may not be setup for USB interface. To configure it for USB If it is determined that the VX805 is set for the wrong interface, you can change it by pressing the "alpha and the 8 key" when the XPI version is displayed during the boot cycle. Once

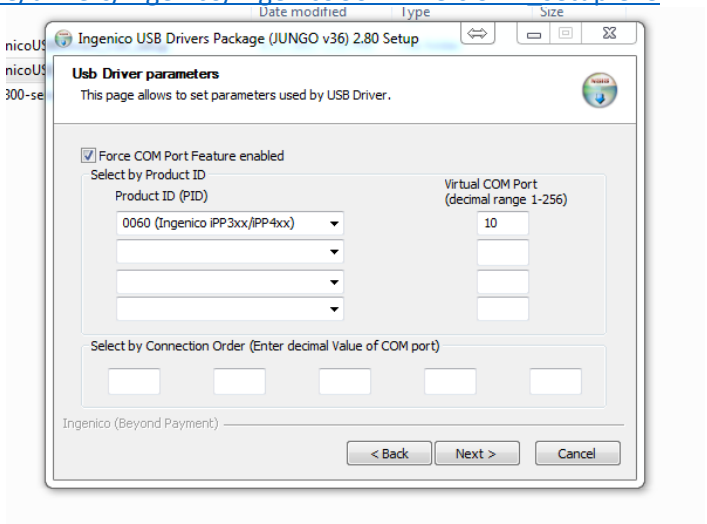
the screen changes to a new menu, select the correct interface by pressing the corresponding function key. If these steps do not work please try following the instructions below:
A. Press the **F2** and **F4** keys to enter the **System Menu**.
B. Enter the password **Z66831** by pressing 1 alpha-alpha and 66831, and then press the green **Enter** key. The **VERIX TERMINAL MGR** screen will appear with 6 options.

C. Select **2**, **Edit Parameters**.
D. When **GID 1** is prompted, press the green **Enter** key.
E. Enter the password **Z66831** again and press the green **Enter** key.
F. When the **File Config Sys** screen appears, press the green **Enter** key.
G. Press **1** for **NEW**.
H. Enter **COMMPORT** in the parameter field and press the green **Enter** key.
I. Enter a value of **U** (1 is for Serial) and press the green **Enter** key.
J. Press **1** for **NEW**.
K. Enter **#CZE** in the parameter field and press the green **Enter** key.
L. Enter a value of **1** and press the green **Enter** key.
M. Press the red **Cancel** key to exit to the **VERIX TERMINAL MGR** screen.
    a. 14. Press **1** to restart the device.

5. Repeat steps 1-4 on each register that will be using an EMV PinPad.

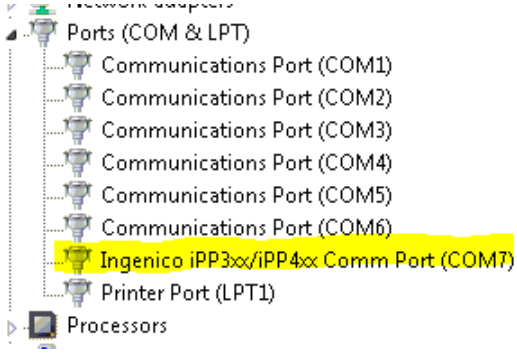
Installation and Configuration of Ingenico PinPads (USB/Serial):

1. Install the Ingenico USB Driver. This can be downloaded from the MicroSale FTP site or from the Datacap website at the following link: http://files.datacapepay.com/software/drivers/ingenico/IngenicoUSBDrivers 3.11_setup.exe (**The Driver Version is subject to change as new releases come out)
2. When you get to the USB Driver parameters screen you have two options:
    a. If you want Windows to decide the COM port make sure that the check box is not enabled to “Force COM Port Feature enabled”. Click “Next”.
    b. If you want to preset the COM port that the Ingenico will always use then you will want to check the box “Force COM Port Feature enabled”. In the ”Product ID” drop-down menu select “0060 (Ingenico IPP3xx/IPP4xx)” or “0062 (Ingenico ISC 2xx)”, then type in the COM in the “Virtual COM Port” field. In this example we are using port 10.



3. The next screen is the “Advanced Parameters” window. On this screen make sure that the check box is not enabled for “Uninstall Microsoft Usbser driver(s). Click “Next”.
4. Click next through the remaining prompts of the installation.

5. Connect the Ingenico IPP to your register Via the provided USB interface cable. Windows should recognize the device and load the previously installed Virtual Com Port Driver.
6. Confirm Windows has detected the device by going to Windows Device Manager→ Ports (COM & LPT). You should see a new port listed as for the Ingenico PinPad.
    a. You can access Device Manager by right-Clicking "My Computer" → Select Properties→ then from the properties screen select "Device Manager".



7. If the device fails to recognize or if MicroSale fails to communicate with the device then it may not be configured for the correct interface. To change this setting on the pinpad follow the steps below:

IPP320/350

a. Once the iPP320/iPP350 loads the "splash" screen (see screenshot below), quickly press 2-6-3-4, the green enter key, followed by the "F" key.
b. Use the "F2/F3" keys to scroll down and select "TDA". Press the green enter key. Select "configuration" and press the enter key, "communication" and press the enter key, and "select comm. type" and press the enter key.
c. Choose your desired interface and press the green enter key. Press the red cancel key three times. Press the "1" key (yes) at the "save and reboot" screen. The iPP320/iPP350 will then reboot with your saved settings.

ISC250

a. Once the iSC250 loads the "splash" screen, quickly press 2-6-3-4, enter key, followed by the "+" key.
b. Use the included stylus to scroll down and select "TDA". For the remaining steps, you'll need to use the +/- keys to scroll up and down.
c. Select "configuration" and press the enter key, "communication" and press the enter key, and "select comm. type" and press the enter key.
d. Choose your desired interface method and press the green enter key. Press the red cancel key three times. Press the "1" key (yes) at the "save and reboot" screen.

8. Repeat steps 1-6 (or7) on each register that will be using an EMV PinPad.

Configuration of Ingenico ISMP4 Wireless Pinpad (Note: this is only available in MicroSale V9.01631 or Higher):

CONNECTING TO WIFI:

PRESS THE "F" KEY 4 TIMESTO ACCESS MENU.

1.) PRESS "F4" FOR ACCESS POINTS. PRESS "F1" FOR NEW POINT. MAKE SURE YOUR NETWORK OF CHOICE IS SELECTED AND PRESS THE ENTER KEY.

2.) CONFIRM THAT **"WPA/WPA2"** IS SELECTED FOR SECURITY (PRESS ENTER KEY). USE THE NUMBER KEYS TO ADD YOUR WI-FI PASSWORD.

3.) PRESS "F1" TO SAVE. THE ISMP4 WILL THEN REBOOT. THE ISMP4 WILL SHOW A WI-FI ICON IN THE UPPER RIGHT-HAND CORNER OF THE SCREEN, AND WILL DISPLAY A MESSAGE THAT SAYS "THIS LANE CLOSED".

SETTING UP STATIC IP (IT IS HIGHLY RECOMMENDED THAT YOU DESIGNATE THE IP ADDRESS THE PINPAD IS USING THROUGHTHE ROUTER AS WELL)**:**

1.) PRESS THE "F2" KEY TO CHANGE THE INTERFACE TO **WI-FI.**. PRESS THE ENTER KEY.

F1-F4 keys are used to select items on the screen. F2-F3 can be used to scroll when making selections. The green button in the bottom right is the enter key. The power button is on the side of the device (upper right hand side)

2.) PRESS THE F3 KEY TO CHANGE SETTINGS. SELECT **"STATIC"**. PRESS THE ENTER KEY.

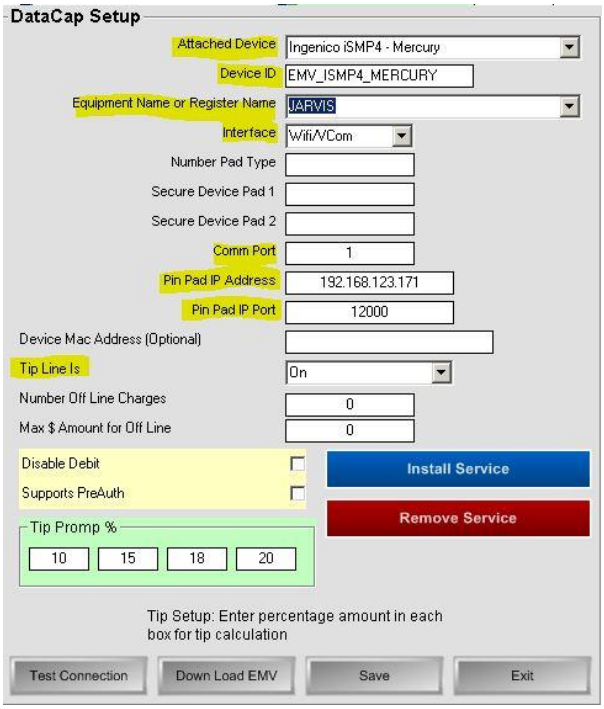
3.) ENTER **IP ADDRESS** AND PRESS THE ENTER KEY. PRESS F4 TO SKIP SUBNET MASK.

4.) ENTER **GATEWAY ADDRESS** AND PRESS THE ENTER KEY.
5.) ENTER **DNS1 AND DNS2** AND PRESS THE ENTER KEY
6.) **CONNECTION MODE** SELECT **"SERVER"** AND PRESS THE ENTER KEY.
7.) **SELECT SSL MODE** CHOOSE **"OFF"** AND PRESS THE ENTER KEY.

8.) PRESS THE RED CANCEL BUTTON TO EXIT.

In the pinpad assignment and configuration in MicroSale you will select the “Ingenico iSMP4-ProcessorName” attached device. Interface will be “WiFi/VCom”. And then “Equipment Name or Register Name”. For this field you will either select the register name from the list; or type in a name for device if it will be used for PAT.

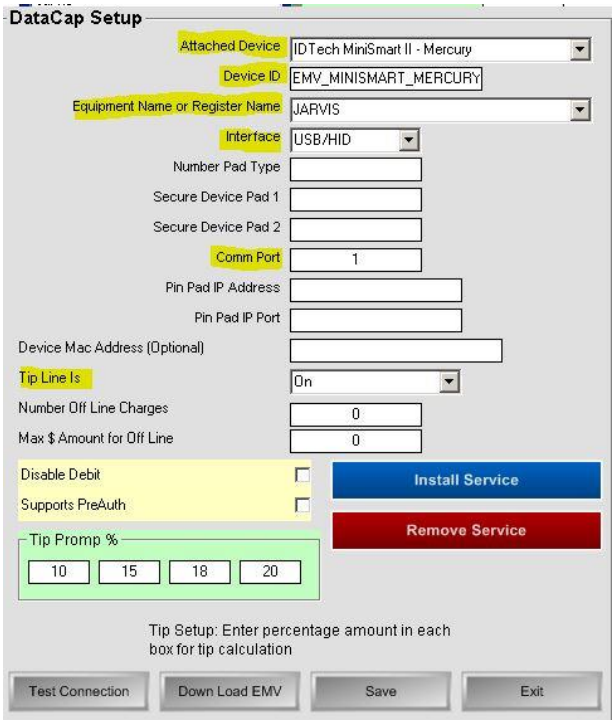
The only other fields required for this device will be “Pin Pad IP Address” which you will input the IP of the pinpad, and the “Pin Pad IP Port” will be the IP Port programmed on the pinpad (Default is 12000).



Installation and Configuration of IDTek MiniSmart II and Augusta:

The unit is installed as an HID compliant device and does not require any additional setup in Windows. This is also the integrated EMV chip reader solution utilized by the Quest Tablet and Pioneer Dash Tablets. In the pinpad assignment and configuration in MicroSale you will select the “ID Tech MiniSmart II” or “Augusta” attached device, assign it to Comm Port “1”, and select the name of the register from the “Equipment Name or Register Name” field.

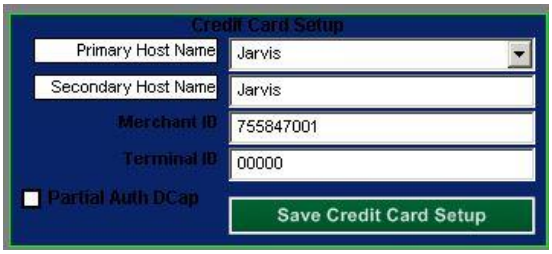
If you attempt to test connection and the connection fails the common solution for this with this particular device is that it is not set in HID mode. To fix this you can run the “IDTech SecureMag USB Demo.exe”→ General Setting→ then selected “USB HID Mode” at the bottom of the list.



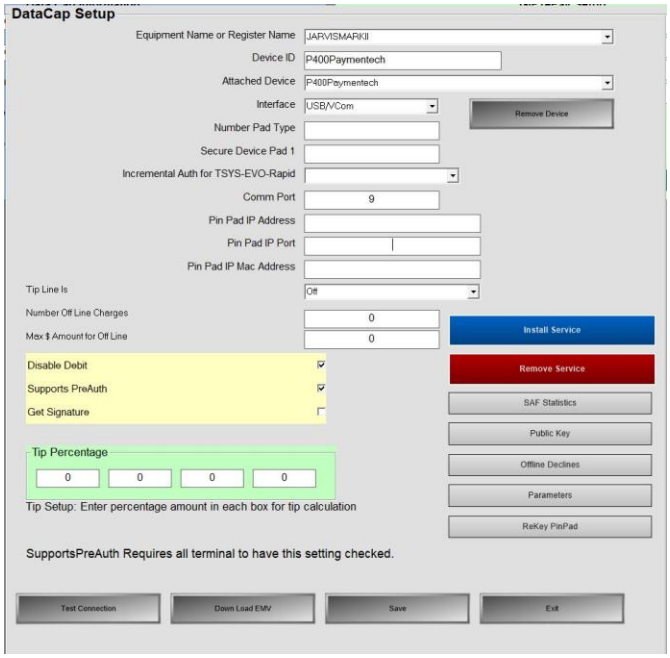
MicroSale Datacap Configuration:

1. Start Up MicroSale and go to Managers Menu→ Register Setup→Terminal Configuration→Credit Card Setup.

2. Use the “Dial EPay Setup” button to lay the default settings for EPay.
3. Click on the “Primary Host Name” button to display a list of available registers on the network and select the machine hosting the EPay software. This should populate the “Primary Host Name” as well as the “Secondary Host Name”



4. Depending on the Processor you may also need to provide the Merchant Id and the Terminal Id numbers.
5. When finished touch the “Save Credit Card Setup” button to save these changes.
6. Next, click on the “Data Cap EMV” button to populate the EMV Device setup window.
7. From the “Attached Device” drop-down menu, select the EMV PinPad Model and processor you will be using. In this example we will be using the “Verifone Vx805 XPI- Mercury”.
8. Select the name of the register from the “Equipment Name or Register Name” field
9. Select the connection type by clicking the “Interface” drop-down menu and selecting “USB/VCom”.
10. In the “Comm Port” field type in a port number to match the virtual Com created during the USB Driver Install for the EMV device you are using.
11. Optional Selections:
    a. Place a check next to “Disable Debit” to remove the additional prompt screen for Credit/Debit when selecting the credit card tender.
    b. Place a check next to “Supports PreAuth” to allow Preauth/Capture. Always check this when using TSYS or FDMS RapidConnect to allow tips.
    c. Place a check next to “Get Signature” to enable signature capture.



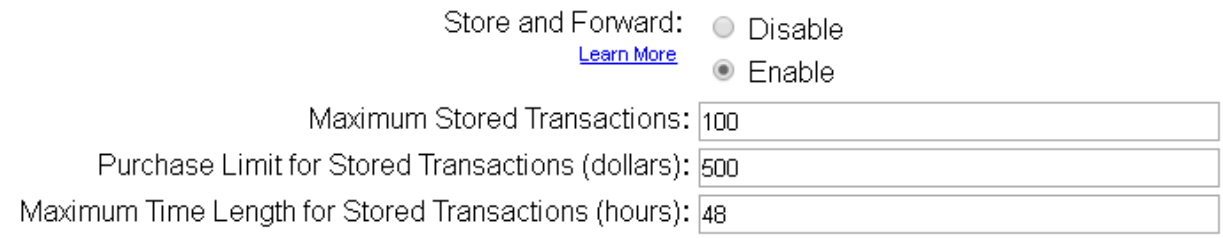
12. Touch “Save” to record these settings.
13. Verify these settings are good and the device is recognized by clicking on the “Test Connection” button. It will either say “Successful” or provide a connection error. If successful, move on to Step 14. If not, please confirm device is installed correctly and configured for USB connection.
14. If your test was successful then the remaining step is to click on the “Download EMV” button from this screen. This will take approx. 60 seconds to download to the EMV reader and will post a message when completed.
15. Exit all screens when completed.
16. Repeat steps 1-15 on all registers.

Creating the Tender:

To add a new “Credit Card” tender go to Managers Menu→ Register Setup→ Terminal Configuration→ Tenders-Job Codes-Paid Outs-etc. In the field for “Tender Name” type in “Credit Card”. Place a check box next to “EMV Pad”. “Save” when done.

Offline CC Storage (Store and Forward):

This feature works with Datacap’s Net Epay EMV solutions only. To enable the feature you will need to allow it and configure it in the Net Epay software setup through the Datacap PSCS website. Along with enabling/disabling the feature you are also able to set limits on the number of transactions stored offline, purchase limit for stored transactions, and the amount of time that it will allow you to store offline transactions.



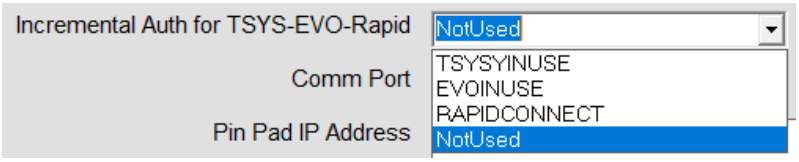
A few offline settings can also be set in the MicroSale application. You will also be able to set the maximum number of offline charges the POS will allow as well as the maximum $ amount per transaction allowed.

Tabs and PrePay Phone Orders:

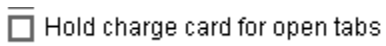
These features do not work with all processors so please be sure to discuss with your merchant provider to see if this option works with them before proceeding. Also, even though the processor may support this feature the specific card types may not; such as AMEX.

Depending on processor you may need to enable/disable the setting in Managers Menu→ Register setup→ Terminal Configuration→Credit Card Setup→ Datacap EMV→ “Supports PreAuth”

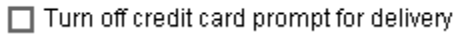
Additionally, due to the unique requirements of some processors there is a field “Incremental Auth for TSYS-EVO-Rapid” that will need to be selected to provide proper support for the particular processor being used. This is needed is using TSYS, EVO, or First Data RapidConnect.



To enable the **TAB** feature go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option “Hold Charge Card for Open Tabs”.



By default, PRePay is enabled for Delivery orders. To disable the **PrePay Order** prompt go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option “Turn off credit card prompt for delivery””



Batch Settlement:

Most processors will still settle the batch through the POS if using EMV. This process is just like the settling of charges using our non emv processing solutions. During the end of day MicroSale will prompt to settle/clear the batch. No additional settings are required.

With Datacap NetEpay you do not have t have an EMV device attached to the computer that the EOD /Batch is settled from, unless you have “Supports PreAuth” enabled. If this is enabled then it is required to have an EMV device on the machine EOD is ran from, and make sure that “Supports PreAuth” is enabled on ALL stations.

If batch is not emailing you can edit the following line in the Function.InI file :

[Printing Options]
EMV Batch 80 Column Only=Yes

To Clear Batch during EOD. **Note: this cannot be enabled if using Preauth/PostAuth.

[Credit Cards]
EMV Clear Records=On/Enabled

Disable Amount Confirmation Prompt:

Make sure the site is above 10.0.410 and then set the following line in the functions.ini file,

[Credit Cards]
Skip Prompt For Amount=On/Enabled

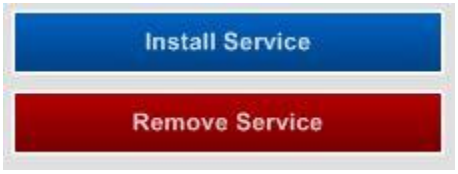
Disable Verification Prompts:

Make sure the site is above 10.0.410 and then set the following line in the functions.ini file,

[Credit Cards]
Skip Prompt=On/Enabled

Datacap PAY AT THE TABLE Setup:

Pay-At-The-Table (PAT) allows the server to take the pinpad to the customer so that the credit card never has to leave the customer's sight. This provides security and convenience for both the staff and customer. Supported PATT devices with the Datacap Net Epay solution are any that offer wireless connectivity including several from Ingenico. Pay at The Table will need to be activated in the location's user license.

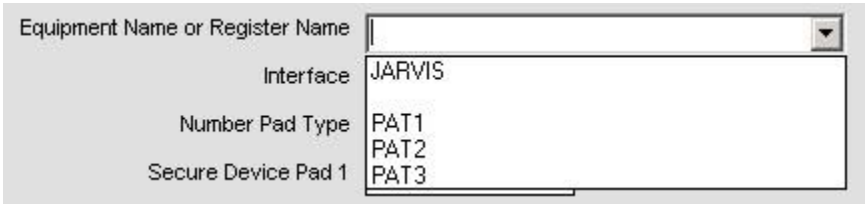


!!On 1 Station Only!! The PAT Service can be installed by going to Managers Menu→ Register setup→ Terminal Configuration→ Credit Card Setup→ Datacap EMV, and clicking on the button "Install Service". The service will need to be started by either rebooting the register or going to the Windows task manager, finding the "DatacapTablePay", right-clicking and selecting "Start Service".

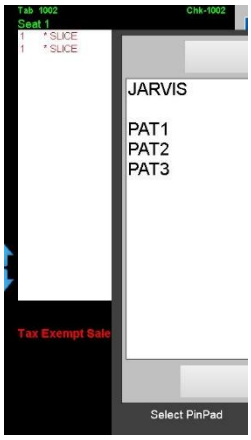
You will need to adjust the "Credit Card" tender for PAT by going to Managers Menu→ Register Setup→ Terminal Configuration→ Tenders-Job Codes-Paid Outs-etc. In the field for "Tender Name" click the drop-down and select "Credit Card". Place a check box next to "Pay @ The Table with Datacap" as well as "EMV Pad". "Save" when done.

A function key will also need to be added to utilize Pay At Table. To add the function go to Managers Menu→ Register setup→ Terminal Configuration→ Edit Order Screen Buttons. Find the function "Pay At Table" and place onto any available function space. "Save" when done.

Finally, in the Managers Menu→ Register Setup→ Terminal Configuration→ Credit Card Setup→ Datacap EMV you will setup your PAT device(s). You will use the same setup procedures for the ISMP4 or other wireless EMVpinpad. The only exception is that instead of selecting the register name in the "Equipment Name or Register Name" field you will type in the name you want to use for the PAT devices. In this example we have named our mobile pinpads "PAT1", "PAT2", and "PAT3".



PAY AT THE TABLE Use (EPay):



Once Pay at The table is configured the next step is to use it. The procedures are outlined below:

1. Open the Table/Tab that you want to close.

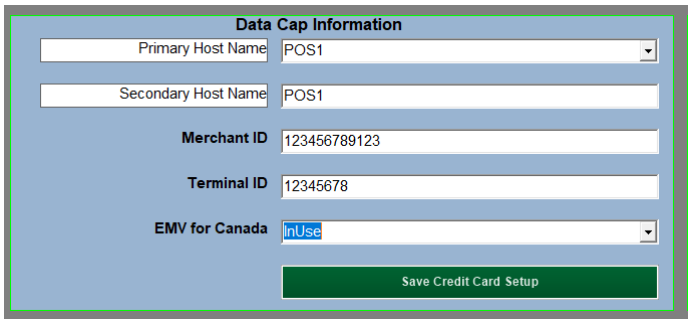
2. Touch the "Pay at Table" function button.

3. Select EMV device that will be brought to the table.

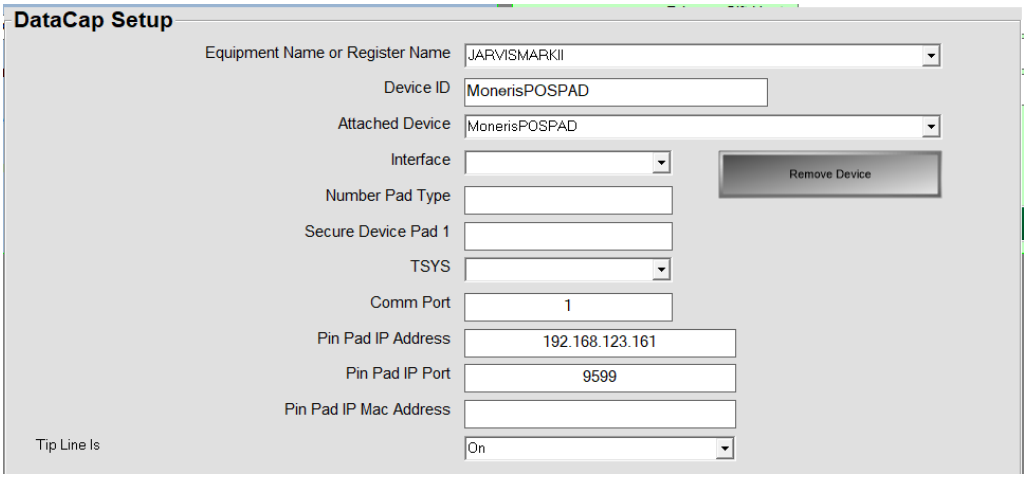
4. After PAT device selection the transaction will close on the register. Follow on-screen prompts on the EMV pinpad to finalize sale.

Datacap Canadian EMV Setup:

MicroSale supports Canadian EMV through Moneris using the Net ePay solution. Installation of Net ePay would be the same steps as standard Net ePay. However, the Canadian EMV requires the use of the "DSIEMVClientX" instead of the "dsiEMVUS" libraries.



In MicroSale Primary host, Secondary Host, Merchant ID, and Terminal ID fields would be completed as normal. There is an addi0otnal drop-down selection called "EMV for Canada" that has two options: "InUse" and "NotInUse". For Canadian EMV you would set this to "InUse". This allows for a different device list to be available when you click on the "Data Cap EMV" button to access the screen shown in the image below. Be sure to "Save Credit Card Setup" before exiting the screen.



1. "Equipment Name Or Register Name" you would select the name of your computer from the drop-down list.
2. "Attached Device" you would select "MonerisPOSPAD".
3. "Pin Pad IP Adress" you would enter the IP address of the EMV device (Verifone P400).
4. "Pin Pad IP Mac Port" you would enter the default port number "9599"
5. Save settings before using the "Test Connection" and/or "Down Load EMV" buttons.

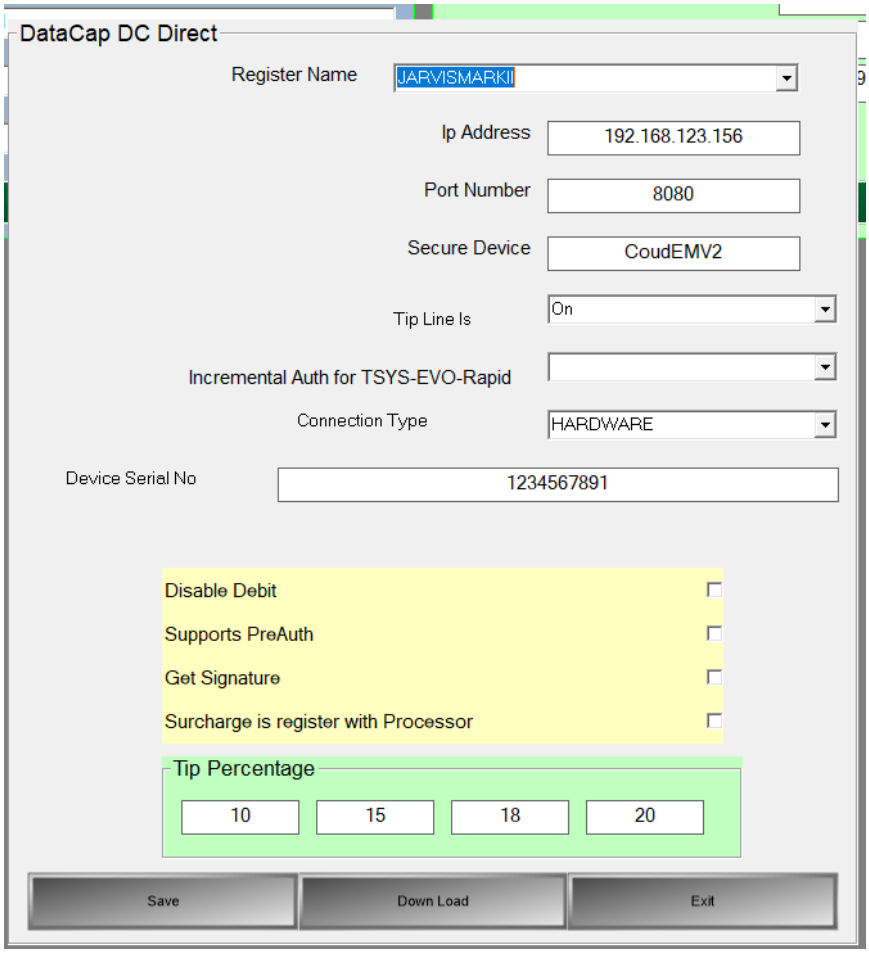
Canadian EMV has certain requirements that create the need for addiotnal fucntionality. On the "Data Cap EMV" setup screen you will find 5 unique buttons thatgenerate reports that will automatically print out on the receipt printer for that register; the are: SAF Statistics, Public Key, Offline Declines, Parameters, and ReKey PinPad. Select the register and device in the respective fields on this screen before seelcting one of these reports.

Chapter2-Datacp Direct Setup

This document will instruct you on the installation and the configuration of your MicroSale system to work with Datacap Direct certified PinPads for EMV authorization. This solution provides the full features of Datacap without the need for the Net Epay software.

Installation of Datacap Direct EMV:

Startup MicroSale and go to Managers Menu→ Register Setup→Terminal Configuration→Credit Card Setup→ DataCap Direct. Refer to notes below for description of the fields available.



Register Name - Name of computer EMV device will be assigned to.

Ip Address - LAN Ip of Datacap Direct EMV device.

Port Number – 8080 is the default port and should not be changed unless instructed by Datacap.

Secure Device – CloudEMV2 is the default and will not require changing.

Tip Line Is – Off, On (Printed), or Prompt (EMV Device Screen)

Incremental Auth for TSYS-EVO-Rapid - that will need to be selected to provide proper support for the particular processor being used if using Preauth.

Connection Type – Two options; Hardware or Cloud. Hardware is the required selection if using “store and Froward”.

Device Serial No – serial number of the EMV device being used.

Optional Selections:

a. Place a check next to “Disable Debit” to remove the additional prompt screen for Credit/Debit when selecting the credit card tender.

b. Place a check next to “Supports PreAuth” to allow Preauth/Capture. Always check this when using TSYS or FDMS RapidConnect to allow tips.
c. Place a check next to “Get Signature” to enable signature capture.

“Save” - to record these settings.

“Download” - button This will take approx. 60 seconds to download to the EMV reader and will post a message when completed.

“Exit” - Exits screen back to main credit card menu.

Creating the Tender:

To add a new “Credit Card” tender go to Managers Menu→ Register Setup→ Terminal Configuration→ Tenders-Job Codes-Paid Outs-etc. In the field for “Tender Name” type in “Credit Card”. Place a check box next to “EMV Pad”. “Save” when done.

Offline CC Storage (Store and Forward):

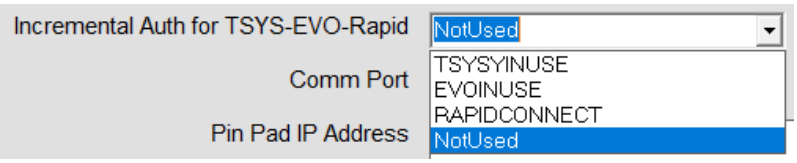
To enable the feature you will need to allow it and configure it in the Datacap Direct portal. Along with enabling/disabling the feature you are also able to set limits on the number of transactions stored offline, purchase limit for stored transactions, and the amount of time that it will allow you to store offline transactions.

Tabs and PrePay Phone Orders:

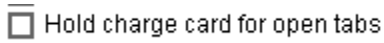
These features do not work with all processors so please be sure to discuss with your merchant provider to see if this option works with them before proceeding. Also, even though the processor may support this feature the specific card types may not; such as AMEX.

Depending on processor you may need to enable/disable the setting in Managers Menu→ Register setup→ Terminal Configuration→Credit Card Setup→ Datacap EMV→ “Supports PreAuth”

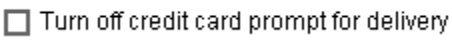
Additionally, due to the unique requirements of some processors there is a field “Incremental Auth for TSYS-EVO-Rapid” that will need to be selected to provide proper support for the particular processor being used. This is needed is using TSYS, EVO, or First Data RapidConnect.



To enable the **TAB** feature go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option “Hold Charge Card for Open Tabs”.



By default, PRePay is enabled for Delivery orders. To disable the **PrePay Order** prompt go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option "Turn off credit card prompt for delivery""



Batch Settlement:

Most processors will still settle the batch through the POS if using EMV. This process is just like the settling of charges using our non emv processing solutions. During the end of day MicroSale will prompt to settle/clear the batch. No additional settings are required.

If batch is not emailing you can edit the following line in the Function.InI file :

[Printing Options]
EMV Batch 80 Column Only=Yes

To Clear Batch during EOD. **Note: this cannot be enabled if using Preauth/PostAuth.

[Credit Cards]
EMV Clear Records=On/Enabled

Disable Amount Confirmation Prompt:

Make sure the site is above 10.0.410 and then set the following line in the functions.ini file,

[Credit Cards]
Skip Prompt For Amount=On/Enabled

Disable Verification Prompts:

Make sure the site is above 10.0.410 and then set the following line in the functions.ini file,

[Credit Cards]
Skip Prompt=On/Enabled

Chapter3-EMV PAX Setup

This document will instruct you on the installation and the configuration of your MicroSale system to work with PAX PinPads for EMV authorization.

Before you begin please make sure that you have the following:

1. PAX SP30, S300, D190, D210, S920, A920, A80, A60, A35 or other MicroSale compatible PAX PinPad. You will need one for each register that you wish to process credit cards on.

2. Micro$ale Version 10.0001 or higher

Installation and Configuration of PAX SP30, S300, D210, and S920:

If "POS Auto Register" is enabled on the PAX device then in Microsale you can enter in the device serial number and use the "Find Device" button to populate the IP address. If Pos Auto Register is not enabled then you will need to acquire the IP address manually. To do this go to the PAX unit and follow the steps below:

a. Touch the "Menu" button.
b. When asked for password please enter the password (mm/dd/yyyy) then select the green "Enter" key.
c. Page Down to "Communication" , re-enter password.
d. Page Down to "Lan Parameters"
e. Select "Lan Type" and choose "DHCP" to obtain IP automatically. (Once IP is obtained go back through setup to put in static IP address, Subnet, Gateway, and DNS.) Make note of these settings.
f. Restart PAX to activate changes.

Installation and Configuration of PAX A80, A920 or Other Android Model using WIFI:

If "POS Auto Register" is enabled on the PAX device then in Microsale you can enter in the device serial number and use the "Find Device" button to populate the IP address. If Pos Auto Register is not enabled then you will need to acquire the IP address manually. . To do this go to the PAX unit and follow the steps below:

a. Touch the "Settings" button.
b. When asked for password please enter the password (9876 or Vendor specific password) then select the "Done" key.
c. Select "WiFi".
d. Select the SSID you are connected to.
e. The Ip address of the unit will display on the screen.

2. You will also need to go into the BroadPOS APP installed on the PAX unit to enable POS Integration.

a. Select Settings. When prompted for password enter (mm/dd/yyyy), then "Enter"

b. Select “System Settings.

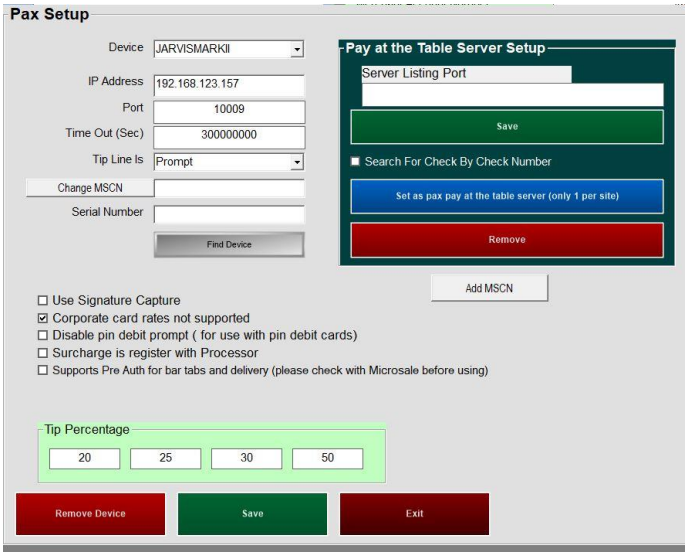
c. Scroll down and select “ECR-Terminal Integration Mode”.

d. Select “External POS”.

e. Arrow back to exit.

MicroSale PAX Configuration:

On All Registers:



1. Startup MicroSale and go to Managers Menu→ Register Setup→Terminal Configuration→Credit Card Setup.

2. Next, click on the “PAX” button to populate the EMV Device setup window.

3. From the “Device” drop-down menu select the register name.

4. Enter the Serial number of the device in the “Serial Number” field and select “find device” and the remaining fields should auto-complete. If “POS Auto Register” is not Enabled in the PAX device then you will need to manually enter the “IP Address” and “Port” fields. Default port is 10009.

5. Check any options required for your processing platform and POS configuration:

a. “*Change MSCN” and “Add MSCN”*- this is <u>ONLY</u> used if using the Bank of America PAX integration to MicroSale. The MSCN number is initially provided by BAMs and then MicroSale resets it if necessary each time the batch settles/clears.

b. Use Signature Capture- enables the use of signature capture pad on certain PAX devices

c. *Corporate Card Rates Not Supported*- M$ sends sales tax by default but some processors do not support it. In those cases you can disable it by checking this option.

d. *Disable pin Debit Prompt*- Removes Debit/Credit selection screen after touching Credit Card tender.

e. *Surcharge is register with processor*- If using processing fee/cash discounting, you can enable the feature in the PAX device itself. The benefit of this is it will not apply processing fee to debit cards which the POS does not have the ability to distinguish directly.

f. *Support PreAuth / PostAuth*- Full support for all order types including PrePay phone orders and Bar tabs. This feature is limited depending on processor.

6. Touch “Save” to record these settings.

7. Repeat steps 1 through 6 for each “device” name using a PAX terminal.

8. Exit all screens when completed.

Creating the Tender:

To make an existing “Credit Card” tender EMV enabled go to Managers Menu→ Register Setup→ Terminal Configuration→ Tenders-Job Codes-Paid Outs-etc. Click the drop-down menu for “Tender Name” and Select “Credit Card”. Remove the check box next to “Authorization Required” and place a check box next to “EMV Pad”. “Save” when done.

To add a new “Credit Card” tender go to Managers Menu→ Register Setup→ Terminal Configuration→ Tenders-Job Codes-Paid Outs-etc. In the field for “Tender Name” type in “Credit Card”. Place a check box next to “EMV Pad”. “Save” when done.

Tabs and PrePay Phone Orders:

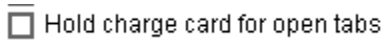
These features do not work with all processors so please be sure to discuss with your merchant provider to see if this option works with them before proceeding. Also, even though the processor may support this feature the specific card types may not; such as AMEX.

Depending on processor you may need to enable/disable one of the following settings in Managers Menu→ Register setup→ Terminal Configuration→Credit Card Setup→ PAX.

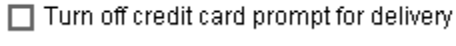
Disable PreAuth→ 

Supports Pre Auth / Post Auth→ 

To enable the **TAB** feature go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option “Hold Charge Card for Open Tabs”.



By default, PrePay is enabled for Delivery orders. To disable the **PrePay Order** prompt go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option “Turn off credit card prompt for delivery””



Batch Settlement:

Using PAX there are two ways to settle the batch at the end of day.

1. PAX Auto Settle- you will need to set PAX unit on Broadpos to auto settle at a specific time window and interval. Our standard setting is to settle between 4am-5am at 10 minute intervals.

MicroSale will run end of day as normal but in the functions.ini you will need to edit the line "EMV Clear Records=" to "Yes" so that it will clear the batch records from MicroSale.
****Note: *You cannot set the PAX for Auto Settle if you have PreAuth /Post Auth Enabled. The MicroSale software must initialize the PAX batches to capture and settle charges.*

2. Option 2 is to settle the batch through the POS. This process is just like the settling of charges using our non emv processing solutions. During the end of day MicroSale will prompt to settle/clear the batch. No additional settings are required.

To Force Settle the batch on a PAX device follow the instructions below:

1. Press Menu (or press 1 and FUNC at the same time)
2. Enter this password: MMDDYYYY
3. Press Host Settings
4. Enter this password: MMDDYYYY
5. Press Down Arrow and select BATCH CLOSE
6. Settle batch

To Clear the batch or individual transactions on a PAX device follow the instructions below:

1. Press Menu (or press 1 and FUNC at the same time)
2. Enter this password: MMDDYYYY
3. Arrow Down and Press System Settings
4. Select Database
5. Enter this password: MMDDYYYY
6. Select Clear Database or Clear Trans.

To Settle Batch on PAX A-Series

1. Tap **FUNC**
2. Tap **Batch**
3. Tap **Batch Close**
4. If prompted to settle with untipped transactions, confirm your choice and either tap **OK** settle the batch, or C**ancel** to go back and adjust tips (Note: tips cannot be adjusted after the batch has settled)

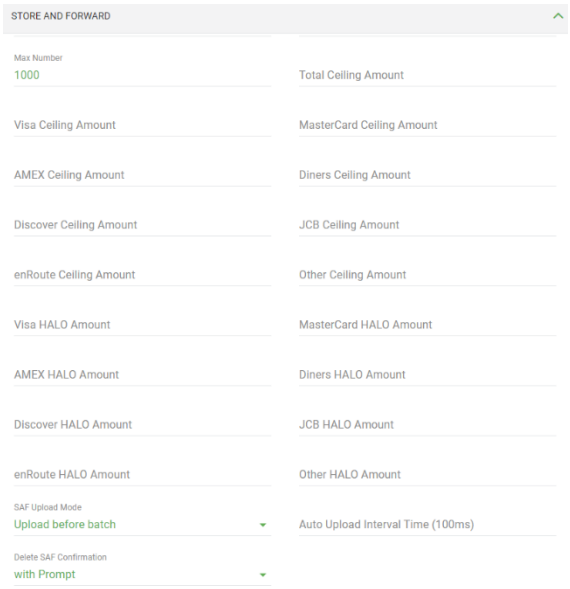
If batch is not emailing you can edit the following line in the Function.InI file :

[Printing Options]
EMV Batch 80 Column Only=Yes

To Clear Batch during EOD. **Note: this cannot be enabled if using Preauth/PostAuth.

[Credit Cards]
EMV Clear Records=On/Enabled

Store and Forward:



Store and Forward is enabled in the PAX file build under the Industry tab. "Allow Store&Forward should be set to "enabled". "Max Number" is set to 1000 by default but can be changed to a smaller number if needed. Additionally, "Ceiling Amount's" can be set for total as well as each card brand (i.e. Visa, MC, etc). No Settings need to be changed in MicroSale to support this feature.

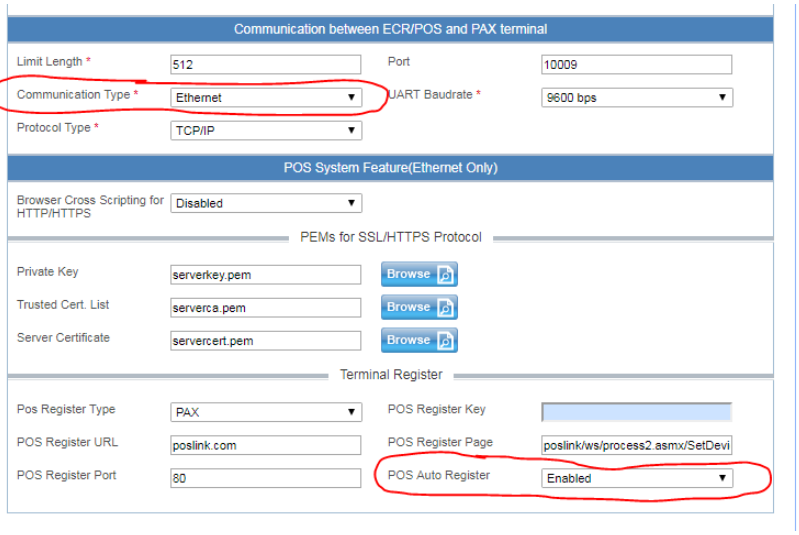
Misc MicroSale:

Some processors do not currently allow tip adjustments. What this means is that a tip has to be applied at the time the payment is made instead of later after authorization. To accommodate this some places will want the tip line to print on the itemized receipt (normally it just prints on the credit card slip). To do this go to Managers Menu→ Register Setup→ Register Options by Terminal→ Printing/Cash Drawer Options. Check the box "Print Tip Add Line on Receipt"/ Click "Save" before exiting. This would need to be done on each register.

Troubleshooting Device:

1. If the PAX terminal is configured correctly for "POS Auto Register" then the Ip, Port, and Mac Address will populate when entering the serial number and touching the "Find Device" button.

   If you receive the message "**SN Not Found**" then the PAX device is not configured correctly for operation with MicroSale and needs to be adjusted through the PAX BroadPOS website. The screen shot below shows the settings that need to be adjusted on the "communication" tab of the terminal's BroadPOS setup.



2. "Connect Error" Is a generic response back to the Pos. IT usually refers to one of two things:

    a. If “Connect Error” occurs before the PAX lights up and asks for card then the issue is network related usually. Ethernet cable or wireless connection has been disconnected; or, there is an IP conflict with another device on the network. Unplugging the power to the PAX device and restarting will allow it to acquire a new IP address if DHCP is enabled on the device. Otherwise you will need to manually assign a new static IP address through PAX BroadPOS or on the pinpad menu itself.
    b. If “Connect Error” occurs after the PAX lights up there is usually an issue with the merchant parameters loaded onto the PAX. Please verify that the MID, TID, or other parameter is correctly set.
3. “Tip not allowed” error when attempting a transaction. This too, can be the result of several different factors:
    a. how the merchant account is setup (retail). In some cases, MicroSale can bypass this by going to the PAX setup in MicroSale and enabling the check option, “Tax Not Allowed”.
    b. Merchant account may not support tip adjust.
    c. POS may not be configured to allow preauth or preauth / post auth.
    d. Batch may have already settled.
4. Batch does not clear from MicroSale- in the functions.ini in the credit card section there is an line “EMV Clear Records=”, set it to “Yes”. **ONLY SET THIS OPTION IS YOU HAVE CONFIRMED THAT THE PAX DEVICE IS SET TO AUTOSETTLE; OTHERWISE THE BATCH WILL NOT SETTLE.**
5. Notes if you are using the “ Supports PreAuth / Post Auth.
    a. The PAX prompt for tip option does not work with this option.
    b. You do not want the PAX set to auto settle. You want the pos to initiate the settlement or the transactions will not capture.

Disable Amount Confirmation Prompt:

Make sure the site is above 10.0.410 and then set the following line in the functions.ini file,

[Credit Cards]
Skip Prompt For Amount=On/Enabled

Disable Verification Prompts:

Make sure the site is above 10.0.410 and then set the following line in the functions.ini file,

[Credit Cards]
Skip Prompt=On/Enabled

PAX PAY AT THE TABLE Setup:

Pay-At-The-Table (PAT) allows the server to take the pinpad to the customer so that the credit card never has to leave the customer's sight. This provides security and convenience for both the staff and customer. Supported PATT devices with this PAX solution are any that offer wireless connectivity such as the D210 and S920. Pay at The Table will need to be activated in the location's user license.

PAX Broadpos You will need to enable Pay at Table. Depending on the processor this feature may not be available. In BroadPOS→ PATT Tab, set the following options:

1. Enable Pay at Table

2. "User Name" leave blank.

3. Input any number into the "Password" field.

4. "Protocol" select "HTTP

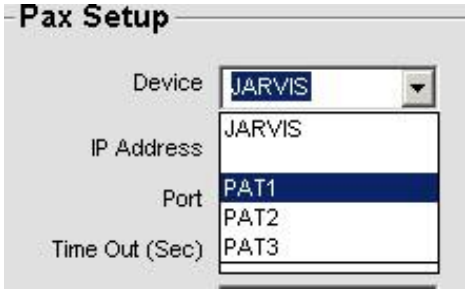
5. "Server URL" you will type the Ip addres of the register running the PAT service.

6. "Server Port" field you will type in the port to listen on. In this example we are using "5000".

On all Stations PATT must be enabled by going to Managers Menu→ Register setup→ Terminal Configuration→Register Options→ Full Service, and checking the box next to "Enable Pay at the Table".

!!On 1 Station Only!! The PAT Service can be installed by going to Managers Menu→ Register setup→ Terminal Configuration→ Credit Card Setup→ PaX, In the "Server Listening Port" field type in the port you defined on the PAX unit in the previous step. Click "Save" when done. Then click on the button "Set as PAX Pay at the Table Server". The service will need to be started by simply restarting MicroSale.

Finally, in the Managers Menu→ Register Setup→ Terminal Configuration→ Credit Card Setup→ PAX, you will setup your PAT device(s). You will use the same setup procedures for standard (wired) PAX terminals. The only exception is that instead of selecting the register name in the "Device" field you will type in the name you want to use for the PAT devices. In this example we have named our mobile pinpads "PAT1", "PAT2", and "PAT3".



**Note: if still using wired PAX devices along with PAT devices you will set the wired devices up as normal. i.e. assigned to the particular register name.

PAY AT THE TABLE Use (PAX):

Once Pay at The table is configured the next step is to use it. The procedures are outlined below:

1. On the PAX device you are going to take to the table touch the “Login” button to enter your ID.

2. A list of your checks will display. Select the correct check you wish to close.

3. Follow on-screen prompts on the EMV pinpad to finalize sale and the transaction will close on the register the next time you log in to the POS.

Chapter4-DeJaVoo

DeJaVoo is the newest MicroSale EMV solution. Similar to PAX, DeJaVoo does not require middleware in order to integrate to MicroSale.

To find the TPN of the device in order to assign to each register touch the Red Gear on the DeJaVoo device. Write down the TPN to use in the MicroSale DeJavoo Configuration.

MicroSale Dejavoo Configuration:

On All Registers:

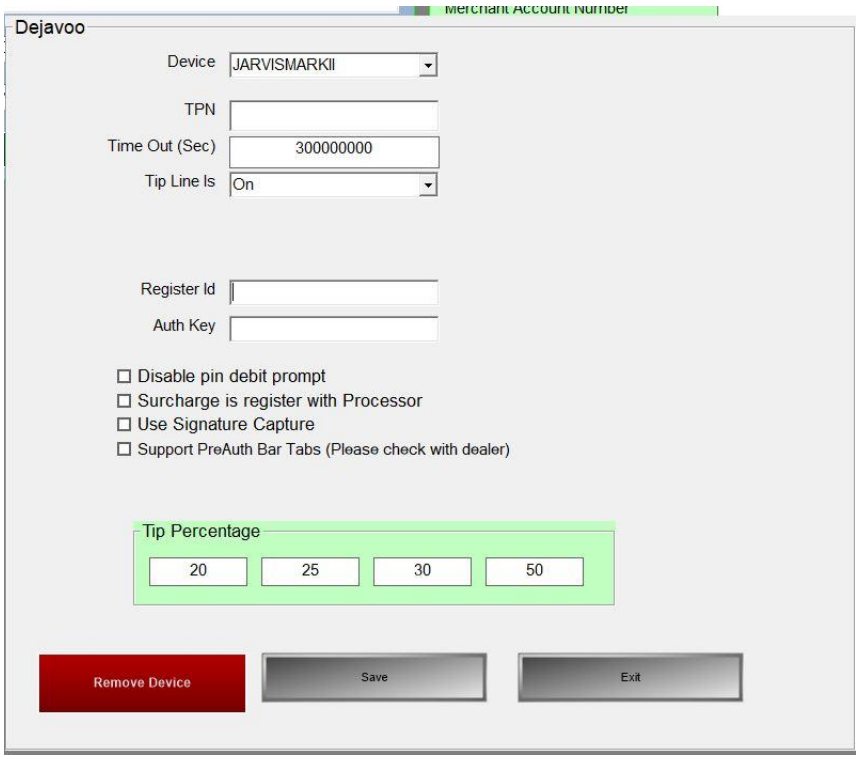
1. Startup MicroSale and go to Managers Menu→ Register Setup→Terminal Configuration→Credit Card Setup.

2. Next, click on the "Dejavoo" button to populate the EMV Device setup window.

3. From the "Device" drop-down menu select the register name.

4. In the "TPN" field enter the unique device ID. Provided in your DejaVoo setup.

5. "Register ID" field enter the register ID. Provided in your DejaVoo setup.



6. "Auth Key" field enter the unique Auth Key. Provided in your DejaVoo setup.

7. Check any options required for your processing platform and POS configuration:

   a. *Disable pin Debit Prompt*- Removes Debit/Credit selection screen after touching Credit Card tender.

   b. *Surcharge is register with processor*- If using processing fee/cash discounting, you can enable the feature in the PAX device itself. The benefit of this is it will not apply processing fee to debit cards which the POS does not have the ability to distinguish directly.

   c. Use Signature Capture- enables the use of signature capture pad on certain PAX devices

   d. *Support PreAuth Bar Tabs*- Full support for all order types including PrePay phone orders and Bar tabs. This feature is limited depending on processor.

8. Press “Save” when complete.
9. Repeat steps 1-8 on each station.

Creating the Tender:

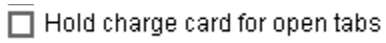
To make an existing “Credit Card” tender EMV enabled go to Managers Menu→ Register Setup→ Terminal Configuration→ Tenders-Job Codes-Paid Outs-etc. Click the drop-down menu for “Tender Name” and Select “Credit Card”. Remove the check box next to “Authorization Required” and place a check box next to “EMV Pad”. “Save” when done.

To add a new “Credit Card” tender go to Managers Menu→ Register Setup→ Terminal Configuration→ Tenders-Job Codes-Paid Outs-etc. In the field for “Tender Name” type in “Credit Card”. Place a check box next to “EMV Pad”. “Save” when done.

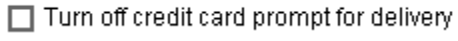
Tabs and PrePay Phone Orders:

These features do not work with all processors so please be sure to discuss with your merchant provider to see if this option works with them before proceeding. Also, even though the processor may support this feature the specific card types may not; such as AMEX.

To enable the **TAB** feature go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option “Hold Charge Card for Open Tabs”.



By default, PrePay is enabled for Delivery orders. To disable the **PrePay Order** prompt go to Managers Menu→ Register Setup→ Terminal Configuration→ Register Options→ Full Service→ check the box next to the option “Turn off credit card prompt for delivery””



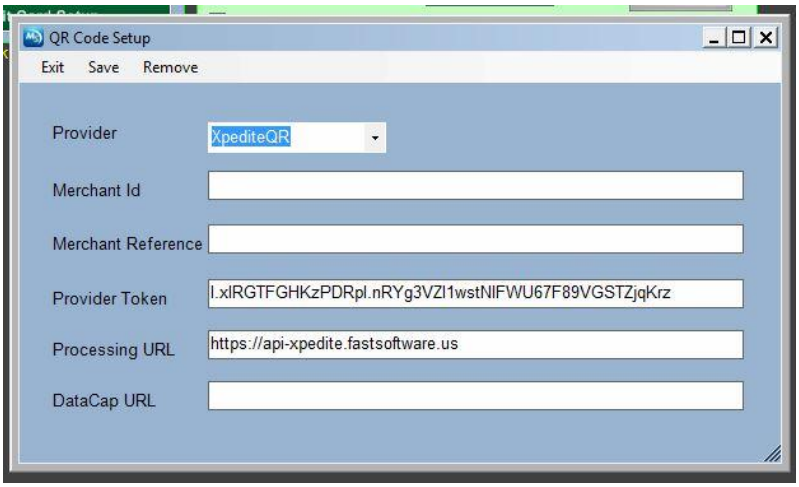
Batch Settlement:

Settle the batch through the POS. This process is just like the settling of charges using our non emv processing solutions. During the end of day MicroSale will prompt to settle/clear the batch. No additional settings are required.

Chapter5-Xpedite QR Pay at Table

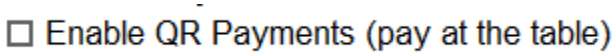
Xpedite is the QR service provided through the RedFin Processing Gateway. It can work with any credit card processing platform and allows the customer to pay their own way using their smartphone.

To enable Xpedite QR go to Managers Menu→ Register Setup→ Terminal Configuration→ Credit Card Setup→ QR Code Setup. The URL is by default. Enter in site specific parameters provided by the merchant: *Provider Token, and Processing URL(https://api-xpedite.fastsoftware.us)* .



!!On 1 Station Only!! The Xpedite QR Service can be installed by going to Managers Menu→ Register setup→ Terminal Configuration→ Credit Card Setup→ Sling Shot Setup, and clicking on the button "Install Service". The service will need to be started by either rebooting the register or going to the Windows task manager, finding and right-clicking and selecting "Start Service".

The last step of the setup is to go into Managers Menu→ Register setup→ Terminal Configuration→ Register Options→ Full Service and enable the option:



After this each customer receipt will contain a QR Code like the one shown here:

The customer then uses their smart phone or other mobile device with a camera to scan the QR code and be immediately redirected to the payment link. Below are screenshots of the payment process from an android smartphone.