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User Guide

Requirements

The following prerequisites must be met prior to installing and running the application:

Supported Operating Systems

Windows 10 (64-bit)

Software

Retail Management Hero (v3.11.11 and above)

Microsoft .NET Framework v4.7.2

SQL Server 2014 (Express allowed, Requires SQL Browser service to be running)

Hardware

Other

ISP (Internet Service Provider)

SensePass Account

Pre-Installation Check List

1) What operating system are you running on the POS client stations?

Confirm the operating system is supported. Refer to Requirements – Supported Operating System.

Steps to determine the operating system used:

- Click on the Windows Start Menu
- Choose Run
- Type “winver"

Press Ok

2) What version of Retail Management Hero RMH are you running?

Steps to determine the RMH version:

Run Retail Management Hero Store Administrator, click File and About.

3) Do you have the SQL Database credentials available? You will need the following at the time of installation:

- SQL Server Computer Name SQL Database Name
- SQL Server Login ID
- SQL Server Password

4) What version of SQL Server are you running? Confirm the SQL Server version meets supported version.

Steps to determine the version of SQL Server using a SQL script ran against the RMH database:

- Run Retail Management Hero Store Administrator
- Click File, Connect
- Select the correct database, enter the SQL password and press OK
- Choose Query and New

Enter the following SQL script in the query window and Press F5 SELECT @@VERSIONAS SQL_Version

5) Was SQL Server installed with the RMH Installation Disc or as a separate instance?

If installed separately, the SQL client components required for our integration to connect to the RMH SQL database may be missing.

If this is the case.

6) Is the SQL Instance listening on Port 1433?

To check the SQL Server port.

7) Is Microsoft.NET framework v3.5 installed on the POS client stations? If not, please download from:

http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en

8) Are you running any other RMH Add-ins?

SensePass Installation

Step 1

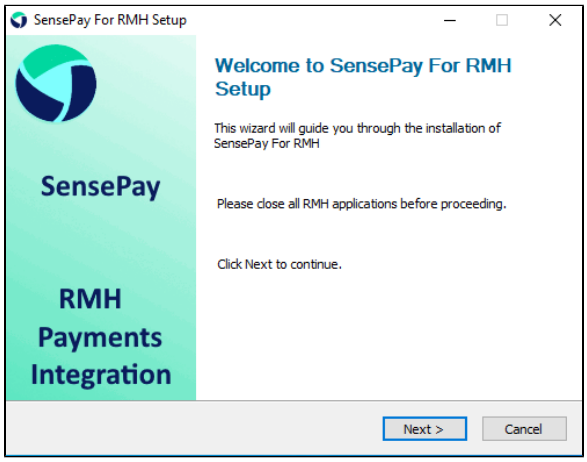
Locate and open the installation program. Double- click the icon to begin installation.



Step 2

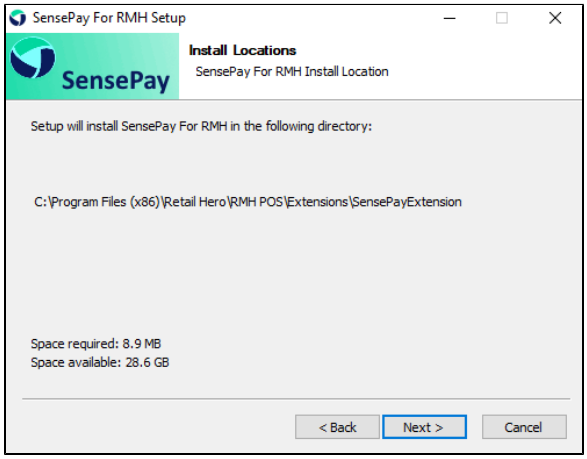
Please review the welcome screen and perform any recommended tasks.

Click **Next** to continue.



Step 3

Click **Next** to continue.

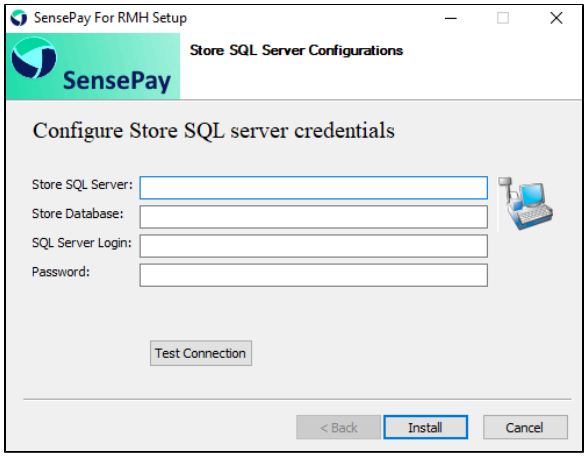


Step 4

Please enter your SQL server credentials. These are the same credentials you would use to connect to your RMH database. Then click Install.

- **The SQL server address**
  Example: 192.168.0.100
  Example: (local)
  Example: 192.168.0.11/R2
- **Port Override**
  Check this if your SQL Server is setup to use a different port then the default port
- **Port Number**
  If Port Override is checked, enter the port number here
- **Username**
  The username used to log into the SQL Server

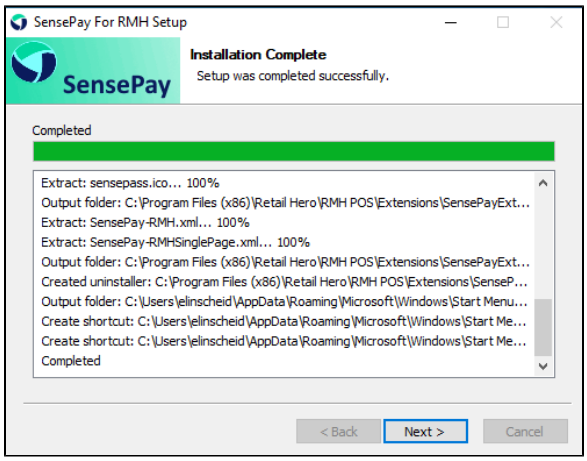
- **Password**
  The password for the username used to log into the SQL Server
- **Database**
  The name of the RMH database
- **Test Button**
  Push the Test button to confirm the database connection settings are correct



Step 5

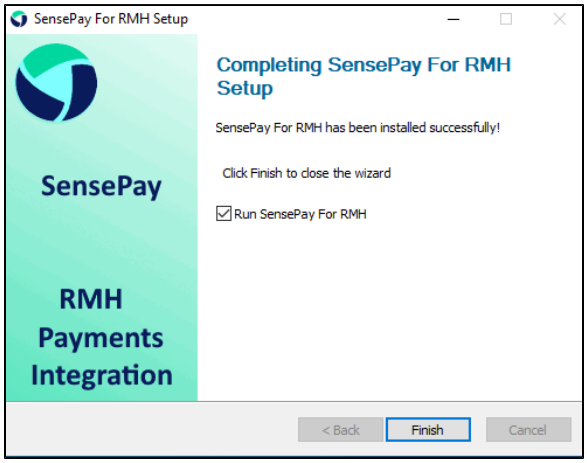
The installation is complete.

Click Next to continue.



Step 6

Click Finish to complete the installation process.



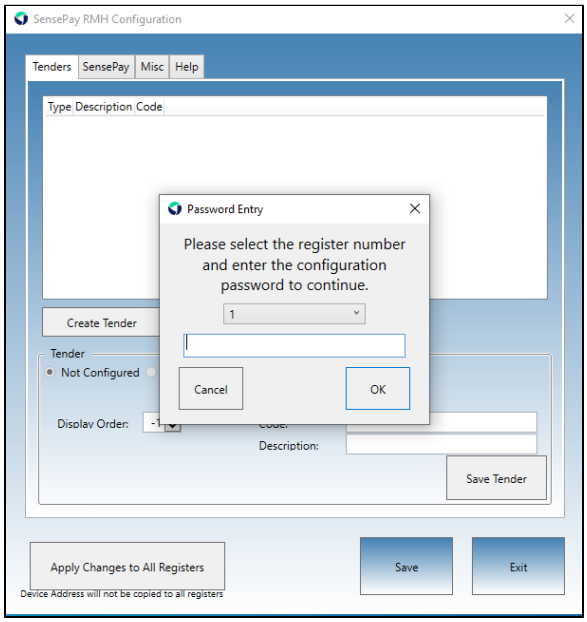
SensePass Configuration

Locate and launch the icon on your desktop labeled SensePay Configuration Management.



Select the register number and enter the password for the SensePay Configuration Management program.

- Each register can have different settings configured independently of each other. These settings are saved in your store database.
- The default password for SensePay Configuration is 'SensePay P@5$!'.



Tenders Settings

- **Create Tender -**

  Select Create Tender to add a new tender type. Enter the required information, select the appropriate tender type from the list of tender options.

Tender Settings:

- **Not Configured -**
  Check the enabled option to disable the use of the selected tender with SensePay.

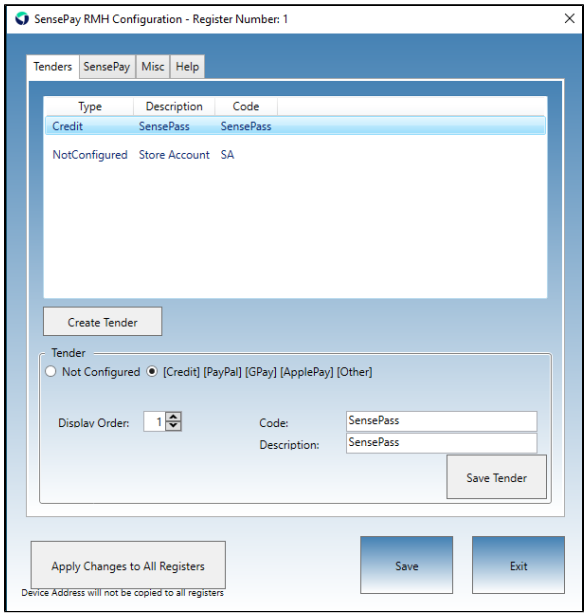
- **Credit - PayPall - GPay (Google Pay) - ApplePay - Other**

  Check this option to configure the selected tender as Credit.
- **Display Order -**

  Set the display order of the selected tender so the cashiers will have easy access to those they use most often.
- **Code -**

  The tender code is a unique tender ID for each tender type created. The code may consist of no more than 17 alphanumeric characters and must be unique.
- **Description -**

  The tender description is a description of the tender type and will be displayed from the RMH tender window. The description may consist of no more than 25 alphanumeric characters.
- **Save Tender -**



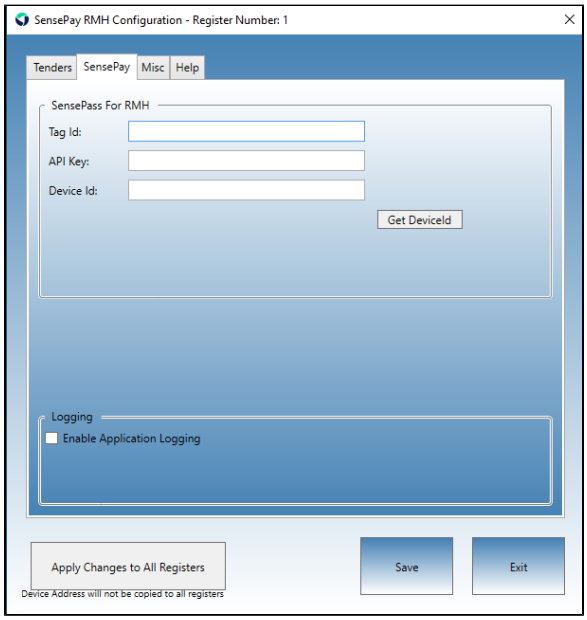
- **Important Note:** SensePay does not allow Debit or Independent Returns.
- **Important Note** - When using SensePay with other New West Technologies payment programs, make sure that the

Selecting save tender will save the current tender configuration.

SensePay tender Display Order is configured to come first. For example, if your SensePay tender is configured with Display Order is 1 and the other NWT program tender is set to 4, then the SensePay tender will always be used first as 1 comes before 4.

SensePass Tag ID and Device ID:

Enter your **Tag ID** and **API Key** which are provided by SensePass. Then Click on the **Get Device ID** button and the **Device ID** field will be auto populated with the associated data.



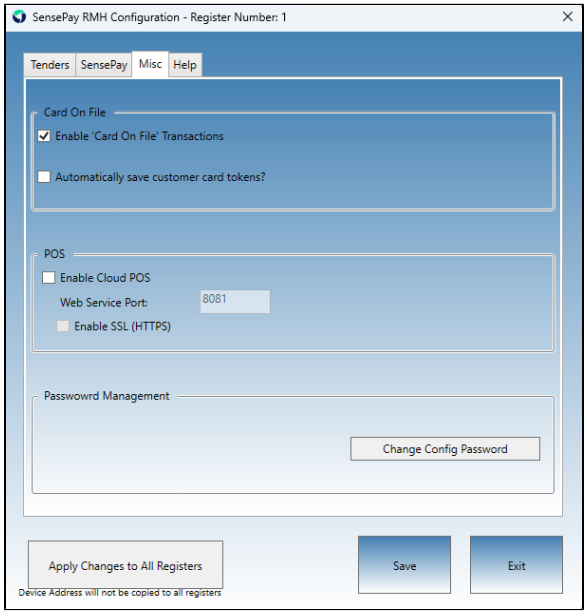
Logging:

Check this box to Enable Application Logging. The log files will contain transaction history data and will be located in your Windows User Documents directory.

Misc Tab

Card on File:

- **Enable 'Card On File' Transactions -** Check this option to prompt the cashier to use the assigned payer token on file. A customer must be assigned during the transaction. The prompt takes place at the end of the tender process. The next time a transaction occurs while that same customer is assigned the SensePay software will ask you if the customer would like to use the credit card they already have on file.
- **Automatically Save Customer Tokens -** With this option enabled the SensePay software will automatically record the customer's credit card using 'Card On File'. A customer must be assigned during the transaction process for this to take place.



POS:

- **Enable Cloud POS -** When using a "Cloud POS" type of front end for RMH, this checkbox must be checked.
- **Web Service Port -** Enter the PORT number being used by your Cloud POS front end.
- **Enable SSL (HTTPS) -** Check this box if your Cloud POS front end for RMH is utilizing SSL (HTTPS)
    - **SSL Certificate Bindings**
      To serve requests over HTTPs, open the command prompt(as Admin) and enter the following **Netsh http** commands.

      $ netsh http add urlacl url=https://+:4443/ user="Everyone"
      $ netsh http add sslcert ipport=0.0.0.0:4443 certhash=YOUR_THUMBPRINT_WITHOUT_SPACES appid={06aabebd-3a91-4b80-8a15-adfd3c8a0b14}

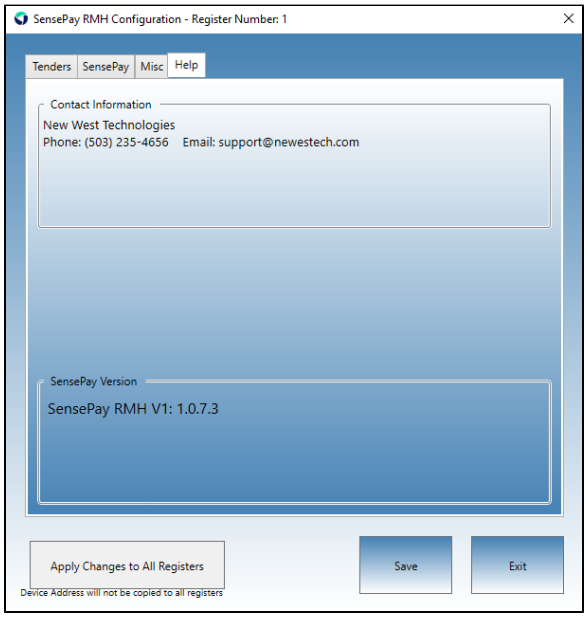
      Change the SSL port number in the **netsh** commands above to match the one configured in the CMC. The

Password Management:

second command binds a signed certificate to the local server IP. Open the signed certificate from the Certificate Manager to find the thumbprint of the certificate. Substitute the thumbprint in the **certhash**. The **appid** can be any random Guid.

Change Config Password - Click here to reset the password for SensePay Configuration.

Help Tab:



Contact Information:

New West Technologies

Phone: (503) 235-4656

Email: support@newestech.com

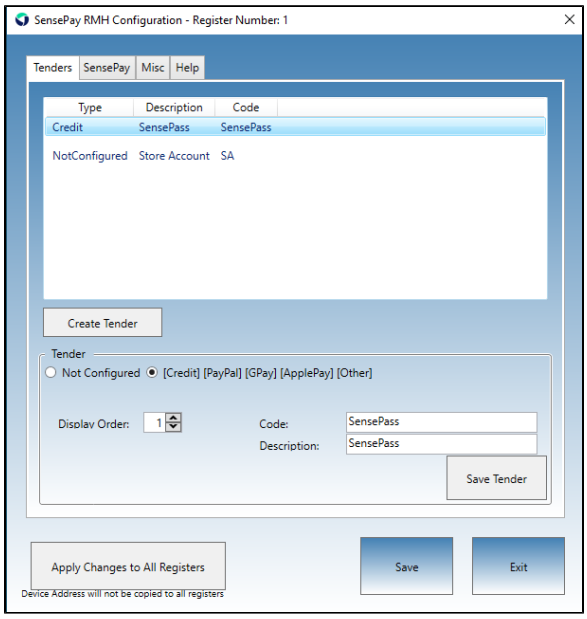
SensePass Merchant Services:

https://merchant.sensepass.com/pages/auth/login-2?returnUrl=%2Fapps%2Fdashboards%2Fbusiness

Click on the **Save button** when you are finished configuring the settings in the SensePay Configuration Management program.

Processing Transactions

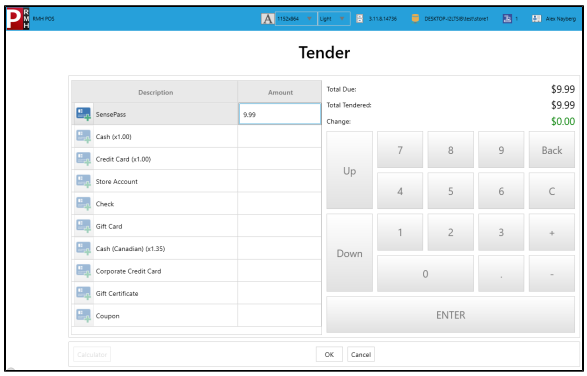
SensePay Transaction -



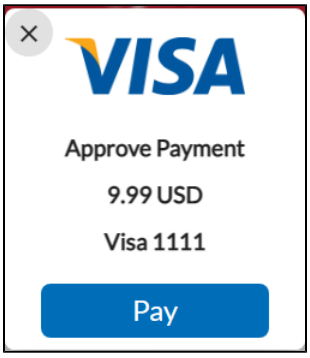
SensePay is designed to process transactions using a single Tender type.

Tenders must be set up correctly and enabled in the SensePay Configuration Management utility before attempting to use them in RMH POS.

- **Important Note** - **Debit** transactions are not supported at this time.
- **Important Note** - If using SensePay with other New West Technologies payment programs, your RMH POS Profile must be configured for Sequential Tendering.



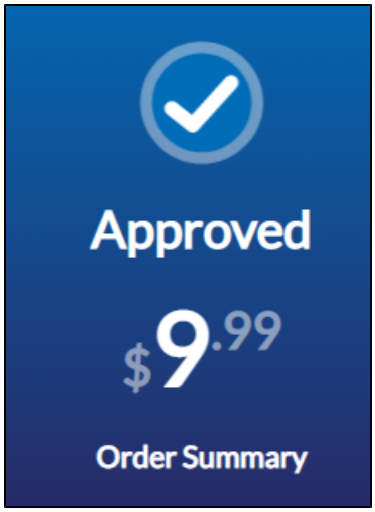
Enter the amount the customer wants to pay into the appropriate tender field and press the OK button in the Tender window or Enter on the keyboard.



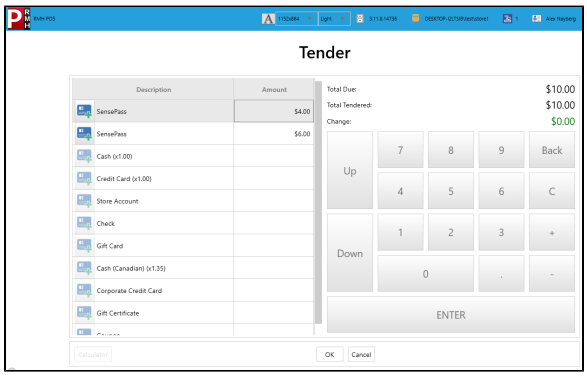
The customer can scan the QR code provided by SensePay at the register to bring up the payment window on their smart device (smart phone) and then select the tender option they wish to use.

In this example, the VISA tender was selected. The customer clicks on the Pay button.

The customer will see a window indicating if the payment was successful. The cashier will see that the transaction has completed in RMH POS.



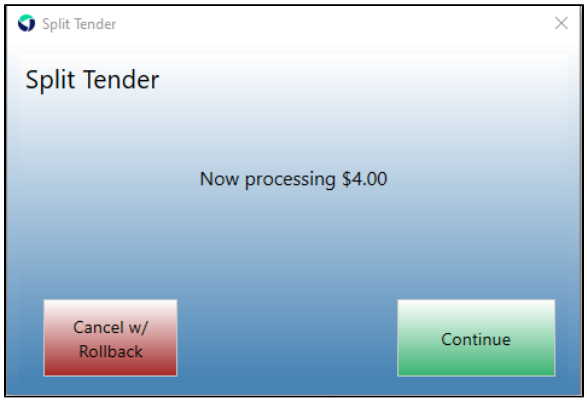
Split Tender -



SensePay allows the customer to pay the balance of the sale using multiple cards to "split the tender".

For example if the customer has $6.00 remaining on their card balance but the item they want to purchase is $10.00. The customer could choose to pay the remaining balance of the purchase with a different card or tender type.

Once the tender fields have been filled out appropriately and you click the OK button or Enter on the keyboard then you will see a series of prompts on the monitor screen indicating which tender and card will be used in order.



Returns and VOIDS -

Returns and Voids with SensePay are very similar to standard RMH POS return and void processes. In RMH POS click Transaction, Recall Transaction. Here you can select the Dependent Return or Void functions. You can also press F11 to bring up the Recall For Return window.

Important -SensePay does not support Independent Returns.

Dependent Return -

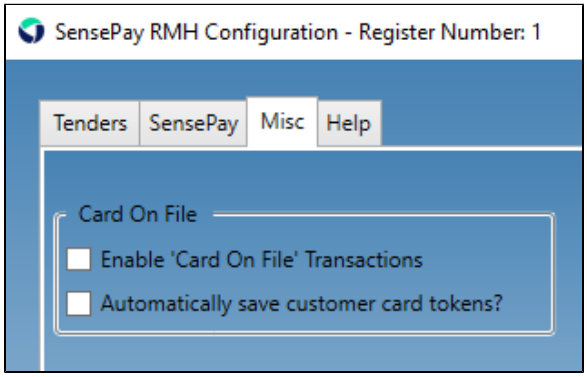
- A dependent return is performed when the cashier can recall the original transaction. This is often done when the customer has proof of purchase or the cashier can look up the transaction based on customer information, or time and date of purchase.

Void -

- Performing a void will allow you to cancel a transaction that occurred earlier in the day. In order to return funds on a transaction from an earlier date you must complete a return instead of a void.

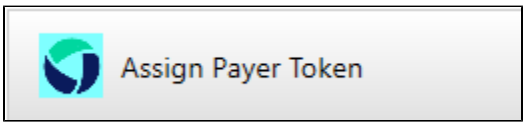
Card on File -

provides the ability to save a customer's card data for use in future transactions. The software can create an encrypted "Payer Token" to keep the card data on file in a secure state. The next time that specific customer is specified in RMH and the credit/debit tender is selected the cashier will be given the opportunity to utilize the previously saved card data. This might be useful in situations where the store takes web or phone orders. SensePay can save multiple cards per customer if required.



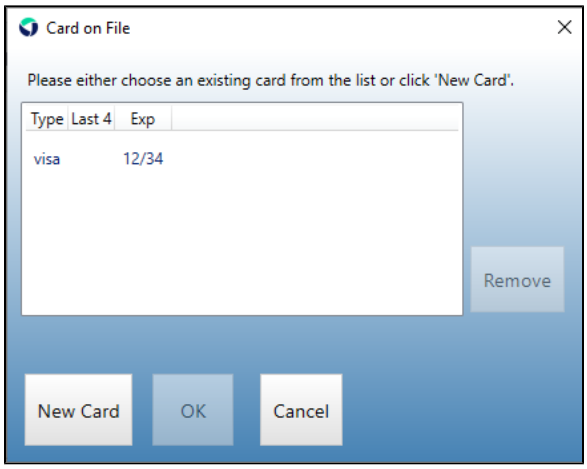
In order to utilize Card on File you must first enable it in the SensePay Configuration Management utility.

After enabling Card on File you can bring up the Card on File console window by assigning a customer to POS and then click on the custom button labeled Assign Payer Token.



The Card on File console window gives you the ability to:

- New Card
- Remove Card
- Press Cancel
- Press OK



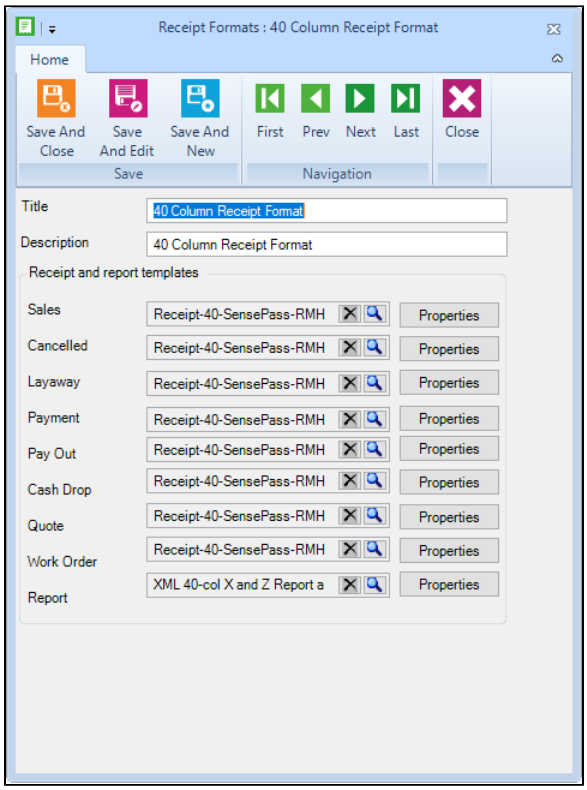
The Cashier will click New Card and the customer can use SensePass to select the payment type on their device. If successful you will receive a prompt on the monitor screen saying "A card on file entry has been created for this customer". You should now find the recorded card data show up in the list.

To **Remove** Card a Card on File record you simply bring up the Card on File console for a specific customer, highlight the record and click Remove Card.

To complete a tender using Card on File data you must first select the customer record in Point of Sale. Tender out using the Credit tender and SensePay will alert you to the previously saved Card on File data for this customer. At this point you can select the specific Card on File record you wish to use for the sale and press OK. The payment process will complete just as if the customer had used the physical card.

SensePay Receipts

Receipt Configuration



To change the receipt settings in RMH you must first launch and log into RMH Store Manager. Next go to menu bar at the bottom left, click on Setup, expand Hardware and select Receipt Formats. Highlight the receipt format you wish to modify and click the Edit button at the top left of the screen.

SensePay does install custom receipt templates but does not enable them by default. Many RMH customers already have custom receipts so it is important not to replace them automatically.

- Important - The receipt templates included are based on a basic receipt template. If you are already using a customized receipt template, any customizations will need to be merged.

There are two standard SensePay custom receipt templates for use with normal 40 Column receipt printers:

- SensePay-RMH.xml
- SensePay-RMHSinglePage.xml

If you wish to use any of these receipt templates then you must click on the magnifying glass to the right of the Sales field in the Receipt Format window. In the Open window you can browse until you locate the folder directory containing the template you wish to use. The default location for RMH custom receipts is: C:\Program Files (x86)\Retail Hero\RMH POS\Extensions\SensePayExtension\ReceiptTemplates

- Important: For additional information on Receipt Formats please contact your authorized Retail Management Hero support partner for assistance.

Appendix

DATABASE CONNECTION TROUBLESHOOTING

Confirm you have a successful connection to the database from Retail Management Hero Store Administrator>File>Configuration and Test Database Connection.

If connection fails and you are running SQL 2005 – 2008 on the server hosting the RMH database, install the SQL backward compatibility tools http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=16177

Microsoft SQL Server 2005 Backward Compatibility Components
The SQL Server Backward Compatibility package includes the latest versions of Data Transformation Services 2000 runtime (DTS), SQL Distributed Management Objects (SQL-DMO), Decision Support Objects (DSO), and SQL Virtual Device Interface (SQLVDI). These versions have been updated for compatibility with both SQL Server 2005 and SQL Server 2008 and include all fixes shipped through SQL Server 2000 SP4 and SQL Server 2005 SP2.

Audience(s): Customer, Partner, Developer

X86 Package (SQLServer2005_BC.msi) - 11273 KB X64 Package (SQLServer2005_BC.msi) - 18569 KB IA64 Package (SQLServer2005_BC.msi) - 23510 KB

Confirm the database settings entered match the database settings used in Retail Management Hero Store Administrator.

If using the Servers PC name, try using the Servers IP address instead. The network may not be configured to convert the PC host name to the proper IP.

Try running a Telnet test from a PC on the network connecting to the server... Telnet [IP Address of server] [SQLport] (e.g. Telnet 192.168.1.111 1433).

If failed, confirm the server has the required port open to allow connection in the firewall.

- Important: Some operating systems do not have the telnet command enabled by default. If you are unable to complete this test, move on to the next or contact your system administrator for assistance. (search keywords - Enable Telnet)

In some cases the server may have multiple Instances of SQL installed. If this is the case, you will need to confirm which instance the RMH database resides on and add this information to the server name (e.g. Server\MSSQLEXPRESS or 192.168.1.111\MSSQLEXPRESS).

Confirm the SQL instance is configured to the default port 1433.

If not, enter the assigned port number in the port over ride field or add the port number to the end of the server field (e.g. server,1320).

In some cases it may be required to combine steps 6-7 (e.g. Server\MSSQLEXPRESS,1320)

OSQL Test

Run an OSQL connection test to ensure database connection via OSQL (enter information specific to clients environment determined from above steps). Expected Format:

1. OSQL
2. –Stcp: = Enter server details (this may include SQL Instance and port number)
3. –U = SQL user login credentials
4. –P = SQL password login credentials
5. –d = Database name

(e.g. OSQL –Stcp:192.168.1.1\SQLinstance,1433 –U sa –P password –d database)

Contact Information

New West Technologies

Phone: (503) 235-4656

E-mail: support@newestech.com

-

SensePass Support:

https://sensepass.com/contact-us/

SensePass Merchant Portal:

https://merchant.sensepass.com/pages/auth/login-2?returnUrl=%2Fapps%2Fdashboards%2Fbusiness