# Valutec For RMH Manual

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# User Guide



# Requirements

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

## Software

- Windows 7 (32 bit, 64 bit), Windows 10 (64 bit)
- Retail Management Hero v3.8 (RMH)
- Microsoft SQL Server 2005, 2005 Express (Not officially supported, please contact your sales rep for details)
- Microsoft SQL Server 2008 or 2008 Express, 2012 and 2012 Express, 2014 and 2014 Express
- Microsoft .NET Framework v3.5 (click here)

## Hardware

- Magnetic Swipe Reader (MSR) configured to read both tracks 1 and 2 (optional, manual card entry permitted). Requires Keyboard Wedge MSR, OPOS is not currently supported.

## Other

- Valutec Terminal ID (Contact www.valutec.net)
- Location Name (Contact www.valutec.net)
- Merchant ID (Contact www.valutec.net)
- Terminal ID (Contact www.valutec.net)
- Client Key (Contact www.valutec.net)
- ISP (Internet Service Provider)
- Access to the payment gateway **https://ws.valutec.net/valutec.asmx** over port 443

# 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.

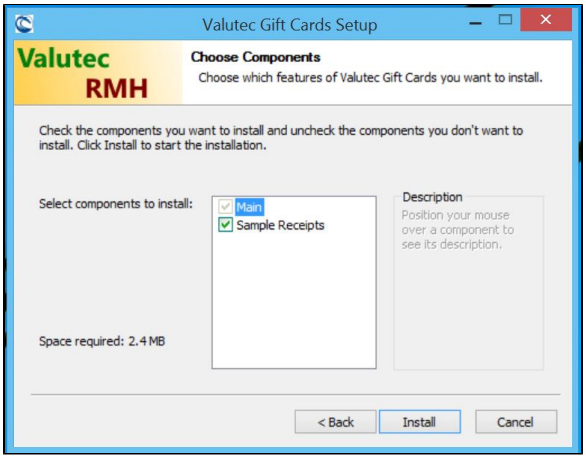
Click **Next** to continue.




**Step 3:**

Select the components you wish to install (all components are recommended). Components which are grayed out and checked are required. Components which are grayed out and unchecked, indicates a compatible version has been detected.

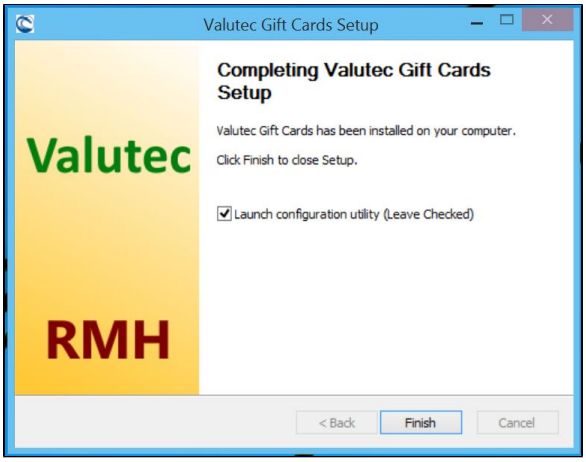
Click **Install** to continue.




**Step 4:**

It is recommended to launch the configuration utility, or uncheck this option to complete the configuration later. (See **Configuration**)

Click **Finish** to continue.


Valutec Gift Cards Setup
Valutec
RMH
Completing Valutec Gift Cards Setup
Valutec Gift Cards has been installed on your computer.
Click Finish to close Setup.
Launch configuration utility (Leave Checked)
< Back
Finish
Cancel

# Configuration

**Step 1:**

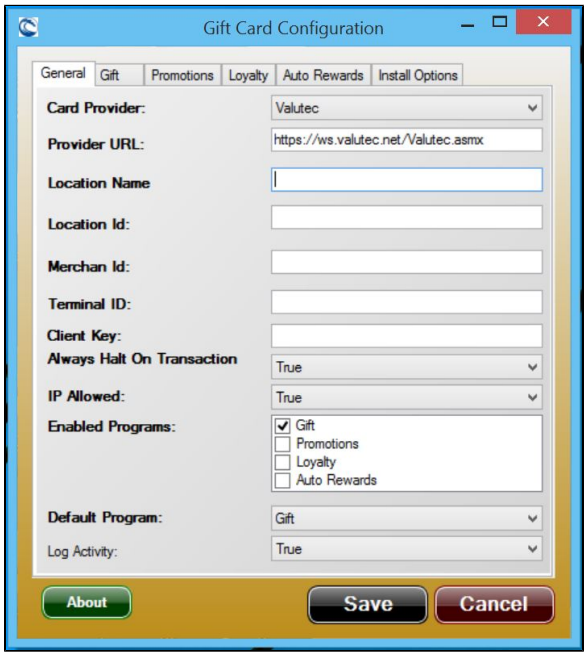
Locate and launch the Valutec RMH Configuration Console from the desktop shortcut or from the Start menu.




**Step 2:**

Select the configuration which meets your needs.

- **Card Provider:** Valutec
- **Provider URL:** This is the URL provided by Valutec to update card data. *https://ws.valutec.net/valutec.asmx*
- **Location Name:** Enter the Location Name provided by Valutec.
- **Location ID**: Enter the Location ID provided by Valutec.
- **Merchant ID**: Enter the Merchant ID provided by Valutec.
- **Terminal ID:** Enter the Terminal ID provided by Valutec.
- **Client Key:** Enter the Client Key provided by Valutec.
- **Always Halt On Transaction Error:** Here you may configure how you would like the transaction to be completed in the event you swipe an invalid card.
- **IP Allowed**: True allows you to use a new Card (recommended), False will continue to process sale but will not prompt for card nor will it apply value to the card.
- **Enabled Programs:** Select the program/card types you wish to sell and support in your store.
- **Default Program:** Select the default program/card type you will commonly use.
- **Log Activity:** This feature allows you to log all transaction history, from selling of a card, to simply checking the balance. All data is viewable from the Gift Card Console.

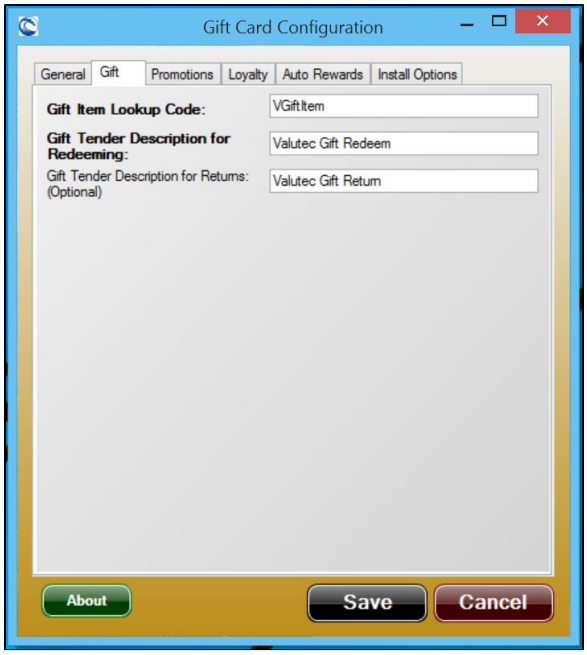



**Step 3:**

**Gift Item Lookup Code:** Enter the Item Lookup code you would like to use when purchasing gift cards.

**Gift Tender Description for Redeeming:** Enter the tender description used to redeem gift cards.

**Gift Tender Description for Returns:** Enter the tender description used to return gift cards. This feature is optional for reporting purposes only.



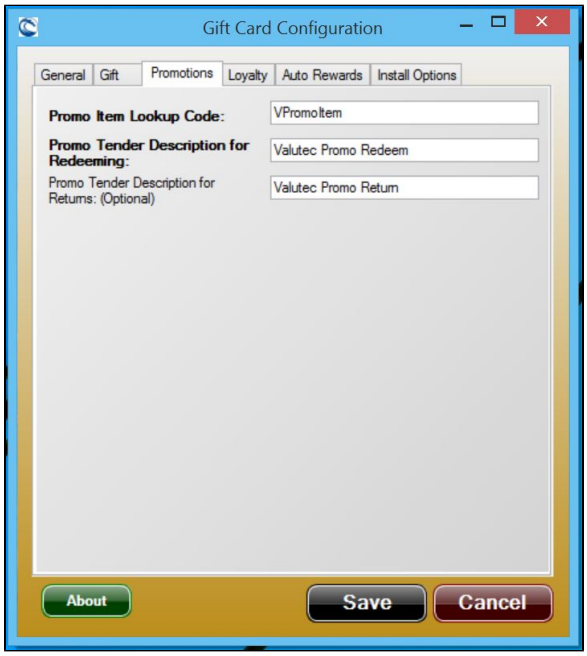

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**Step 4:**

**Promo Item Lookup Code:** Enter the Item Lookup code you would like to use when issuing promo cards.

**Promo Tender Description for Redeeming:** Enter the tender description used to redeem promo cards.

**Promo Tender Description for Returns:** Enter the tender description used to return promo cards. This feature is optional for reporting purposes only.




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**Step 5:**

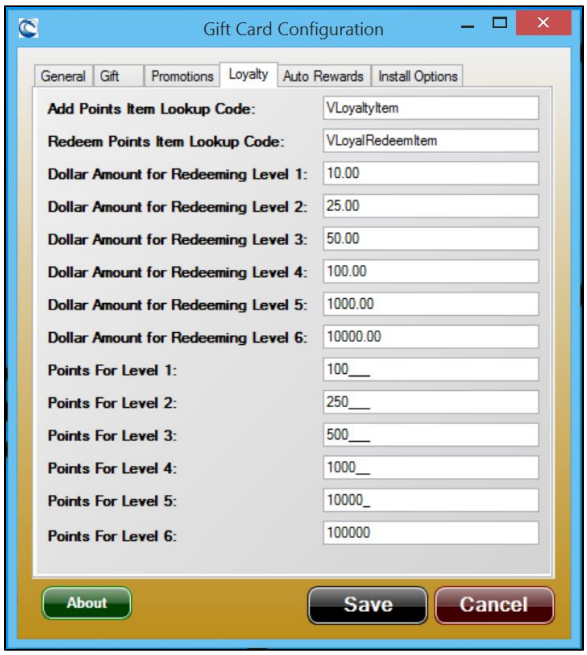
**Add Points Item Lookup Code:** Enter the Item Lookup code you would like to use when issuing Loyalty cards.

**Redeem Points Item Lookup Code:** Enter the Item Lookup code you would like to use when processing Loyalty cards.

**Dollar Amount for Redeeming Level 1 – 6:** Enter the redeemable dollar amount for each point level. The amount entered will later be used when redeeming loyalty points. See **Redeem Loyalty Card** for more information.

**Points For Level 1-6:** Enter the minimum points required to reach each level.

***Important: You will need to work with your Gift Card Sales Rep to setup point levels and points per dollar.***



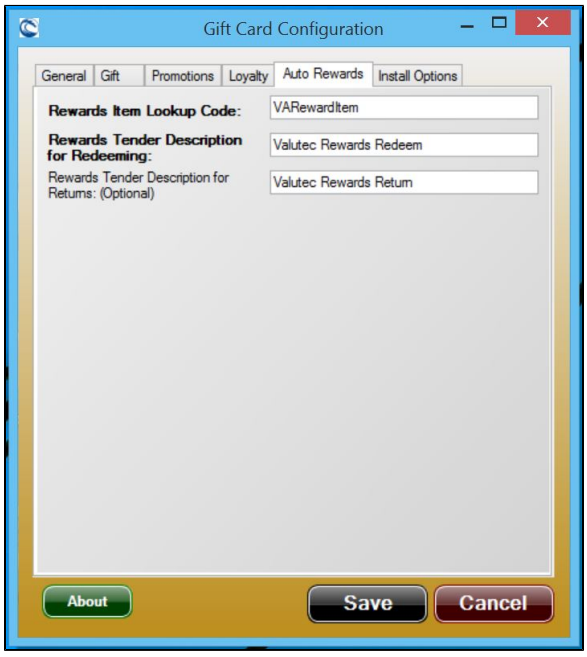

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**Step 6:**

**Rewards Item Lookup Code:** Enter the Item Lookup code you would like to use when issuing rewards cards.

**Rewards Tender Description for Redeeming:** Enter the tender description used to redeem rewards cards.

**Rewards Tender Description for Returns:** Enter the tender description used to return rewards cards. This feature is optional for reporting purposes only.




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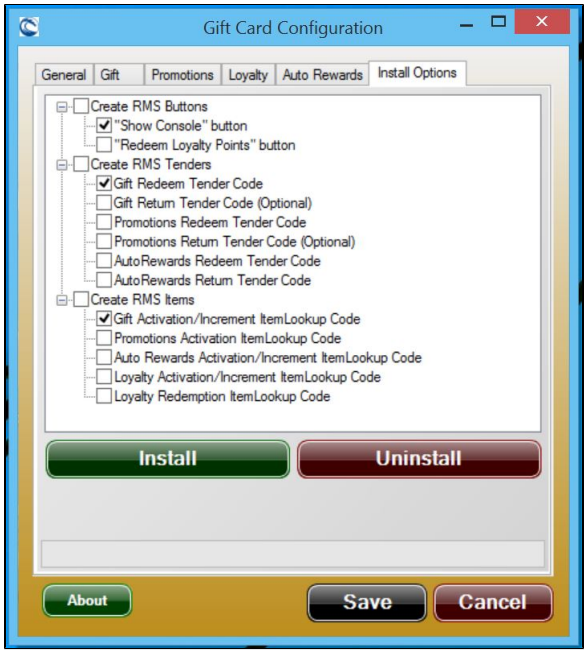
**Step 7:**

Select the options you wish to Install. Once you have selected all features you wish to use, simply select **Install** to add these features to your existing database or select **Uninstall** to remove features.

**About:** Press about to view product details.

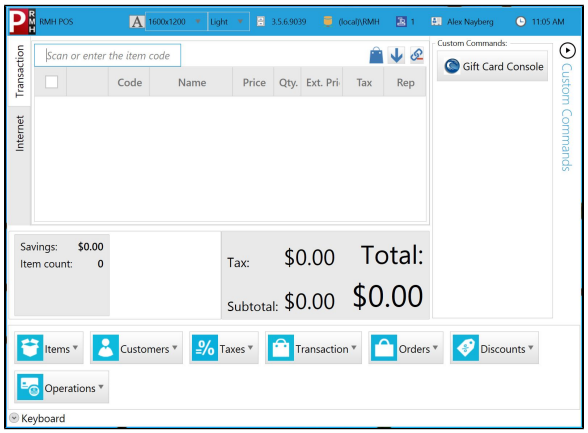
**Save:** Press save to save all configuration changes.

**Cancel:** Press cancel to exit and discard any changes made.



# Gift Card Console

The Gift Card Console can be launched from the RMH POS transaction screen. Click on the custom button labeled Gift Card Console on the right hand side of the POS screen.



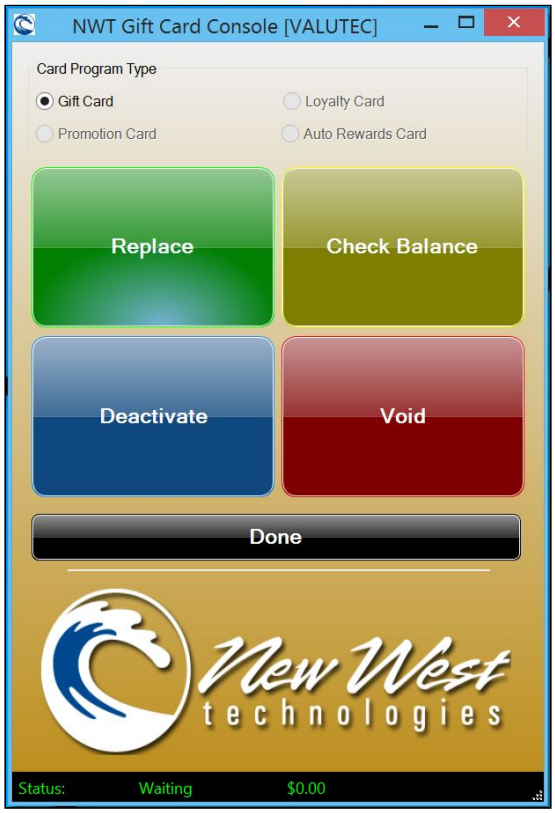

## Card Program Type

- Gift Card
- Promotion Card
- Loyalty Card
- Auto Rewards Card

You must select the card program type before performing the selected task.

**Examples:**

1. Select Gift Card before selecting check balance to check the balance of a Gift Card.
2. Select Loyalty Card before selecting check balance to check the balance of a Loyalty Card.




## Replace

This feature allows you to replace an existing card.

1. Select the Card Program Type and then press **Replace**.
2. Swipe the card or enter the card number of the card you wish to transfer balnce from.

## Check Balance

This feature allows you to check the balance of an existing card. This may also be done from www.valutec.net.

1. Select the Card Program Type and then press **Check Balance**.
2. Swipe the card or enter the card number of the card you wish to check balance.check balance

3. Swipe the card or enter the card number of the card you wish to transfer balance to (card must not be active).

*Important: The card which you are transferring balance from will deactivate and will no longer be usable.*

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## Deactivate

This feature allows you to deactivate an existing card.

1. Select the Card Program Type and then press **Deactivate**.
2. Swipe the card or enter the card number of the card you wish to deactivate.

*Important: When deactivating a card and refunding money to customer, you will need to complete the transaction void process. See void process dependent on the Card Program Type used.*

## Void

This feature allows you to void an existing card transaction.

1. Select the Card Program Type and then press **Void**.
2. Swipe the card or enter the card number of the card you wish to void.

*Important: When voiding a card and refunding money to customer, you will need to complete the transaction void process. See void process dependent on the Card Program Type used.*

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# Usage

## Purchase Gift/Promo Card

Purchasing a gift/promo card is as easy as purchasing any item. Add the item to the transaction screen and enter the value to be applied to the gift /promo card. Tender the transaction by completing the tender process within your store environment. When prompted for the card information, simply swipe the gift/promo card to activate or add value.

*Note: See Configuration for available gift card item lookup codes.*

***Important:*** *You may not purchase a gift card with a gift card so you will need to use another payment method (i.e. cash, credit, etc.).*

***Important:*** *Adding value to promo cards is optional. Contact your Valutec sales rep for details.*

## Redeem Gift/Promo Card

Redeeming value from a gift/promo card is done simply by selecting the appropriate tender type. Tender the transaction by completing the tender process within your store environment. When prompted for the card information, simply swipe the gift/promo card to redeem value from that card. If redeeming multiple cards, each card swipe request will display the amount to be applied for that card.

**Example:**

Jane purchases 1 pair of shoes for $40.00. Jane has 2 gift cards:

1. $10.00 balance
2. $30.00 balance

From the tender screen, enter the amount to be applied to the first gift card in the gift card tender field and press enter. Note a second line appears for the same tender type. Enter the amount to be applied to the second gift card in the gift card tender field and press enter. Note the total due and total tendered match and the balance equals (0). Complete the tender process and swipe the appropriate card (expected card balance is denoted in bottom left corner of card swipe window).

## Void Gift/Promo Card

- For standard gift card redemption transactions, the normal POS method of recalling and voiding the transaction is all that is required.
- For transactions where gift cards are sold or gift card balance is increased, you will need to void the transaction in the Valutec Gift Card Console in addition to the standard void process in POS.

**Void transaction from RMH void process**

a. Select **Recall** (F11)
b. Select **Void a transaction**
c. Enter **Date Range**
d. Select **Transaction #**
e. Press **OK** to apply value back to the tender type used durring sale
f. Acknowledge message informing you to complete steps required to void gift card
g. Select the **Card Program Type**
h. Select **Void** form the gift card console
i. Swipe card when prompted
j. Enter **Authorization Code** when prompted (can be found on receipt)
k. Acknowledge message informing you of card balance
l. Press **Done** from the gift card console
m. Complete transaction per current environmental configuration

**Void transaction from gift card console**

a. Run **Gift Card Console**
b. Select the **Card Program Type**
c. Select **Void**
d. Swipe card when prompted
e. Enter **Authorization Code** when prompted (can be found on receipt)

## Issue Loyalty Card

Issuing a loyalty card requires that you add the loyalty Item to the transaction. When tendering the transaction, you will be prompted to swipe/enter the card number. Upon completion of sale, the card will receive points and increment the level of redemption.

*Important: Point values are determined and set per customer and their gift card processor. See Gift Card Configuration > Loyalty.*

f. Acknowledge message informing you of card balance
g. Press **Done** from the gift card console to exit

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## Redeem Loyalty Card

Points are redeemed by selecting the **Redeem Points** button from your point of sale screen. Select the appropriate point level to redeem when prompted (check card balance to determine available point level). Upon successful redemption of points, you will see an additional line item added to the sale which will contain a (neg) dollar amount and will be applied to the transaction. Any remaining balance will need to be tendered from a non-gift card tender type.

*Important: When redeeming points, be sure to note the authorization code received upon successful redemption of points.*

*Important: if you remove the loyalty redeem item from the transaction, the points will not be placed back to the card used. Complete the below steps to apply points back to card:*

1. *Cancel the current transaction*
2. *Complete Void Loyalty Card > Option (B)*

## Void Loyalty Card

There are a couple ways to void the loyalty cards. It is recommended to complete the void from RMH. Simply perform the standard RMH void procedure and complete the requested steps when prompted.

**Void transaction from RMH void process**

a. Select **Recall** (F11)
b. Select **Void a transaction**
c. Enter **Date Range**
d. Select **Transaction #**
e. Press **OK** to apply value back to the tender type used during sale
f. Acknowledge message informing you to complete steps required to void gift card
g. Select the **Card Program Type**
h. Select **Void** form the gift card console
i. Swipe card when prompted
j. Enter **Authorization Code** when prompted (can be found on receipt)
k. Acknowledge message informing you of card balance
l. Press **Done** from the gift card console
m. Complete transaction per current environmental configuration

**Void transaction from gift card console**

a. Run **Gift Card Console**
b. Select the **Card Program Type**
c. Select **Void**
d. Swipe card when prompted
e. Enter **Authorization Code** when prompted (can be found on receipt)
f. Acknowledge message informing you of card balance
g. Press **Done** from the gift card console to exit

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# Receipt Templates

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.

Valutec 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.

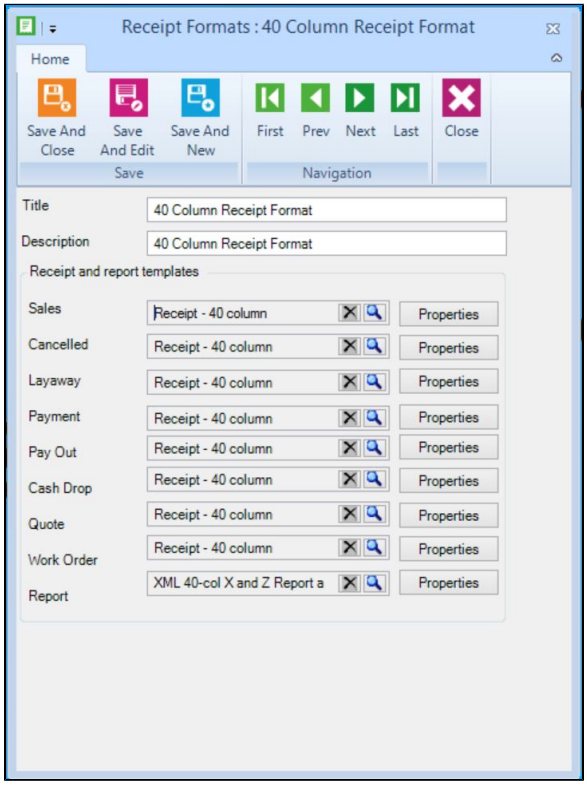
- Important - The receipt templates included are based on a basic receipt template. If you are already using a customized receipt template, any customizations will need to be merged.

There are two standard Valutec custom receipt templates:

- Receipt.XML
  For use with standard 40 column receipt printer.
- FullPage.XML
  For use with standard full page desktop printer.

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 Valutec custom receipts is: C:\Program Files (x86)\New West Technologies\Valutec Gift Cards\ReceiptTemplates\GiftCard

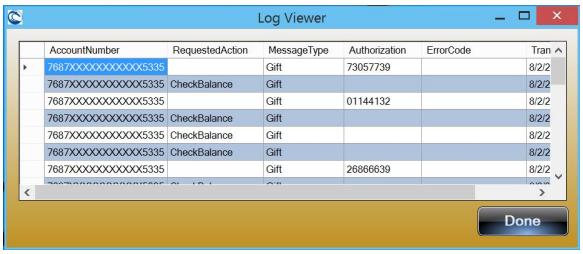
- Important: For additional information on Receipt Formats please contact your authorized Retail Management Hero support partner for assistance.



# Log Viewer

You can view the log viewer by selecting the hidden button when pressing **Status** from the Gift Card Console. Here you will find:

- **AccountNumber** = Card Number
- **RequestedAction** = Task performed
- **MessageType** = Card Type
- **Authorization** = Authorization Code for transaction
- **ErrorCode** = Error message received
- **TransactionTime** = Time and Date of transaction




Log Viewer is enabled (default) to track all gift card transactions (see Gift Card Configuration > General).

Selecting one of the column headers will filter either ascending (up arrow) or descending (down arrow). This feature can be useful when needing to find a card which was sold in a specific date range or retrieving the authorization code for transactions completed on a specific card number, etc.