

BoltPay For RMS Manual

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User Guide



Requirements

REQUIREMENTS

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

Supported Operating Systems

Windows 7 (32-bit/64-bit) Windows 8 (32-bit/64-bit) Windows 8.1 (32-bit/64-bit) Windows 10 (64-bit)

Software

Microsoft Retail Management System (v2.0.0105 and above) Microsoft .NET Framework v4.5.1

SQL 2008 (Express)
SQL 2008 R2 (Express)
SQL 2012 (Express)*
SQL 2014 (Express)*

*Requires SQL Browser service to be running

Hardware

Ingenico ISC250 or Ingenico IPP320 (Must be encrypted for CardConnect)

Firewall Access

BoltPay for RMS is driven by the CardConnect API and is an IP based solution. In other words, the devices must be connected to your network with access to the internet and the ability to reach the the CardConnect servers.

Please make sure your firewall allows access to the following:

https://bolt-uat.cardpointe.com:6443/ (In a test scenario, used for communicating with the pinpad)

https://bolt.cardpointe.com:8443/ (In a production scenario, used for communicating with the pinpad)

https://boltgw.cardconnect.com:6443 (Used for communicating with the processor)

Other

ISP (Internet Service Provider)

CardConnect Boltpay 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 o Choose Run Type “winver"

Press Ok

2) What version of Microsoft RMS are you running?

Confirm that RMS version meets the supported version.Refer to Requirements - Other. Steps to determine the RMS version:

Run Store Operations Administrator or Manager o Choose Help Choose 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.Refer to Requirements– Software.

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

Run Store Operations Administrator, Choose File
Choose Connect
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 RMS Installation Disc or as a separate instance?

If installed separately, the SQL client components required for our integration to connect to the RMS SQL database may be missing. If this is the case. Refer to Appendix II – SQL Configuration

6) Is the SQL Instance listening on Port 1433?
To check the SQL Server port. Refer to Appendix II – SQL Configuration

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

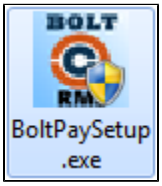
http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en

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

Boltpay Installation

Step #1

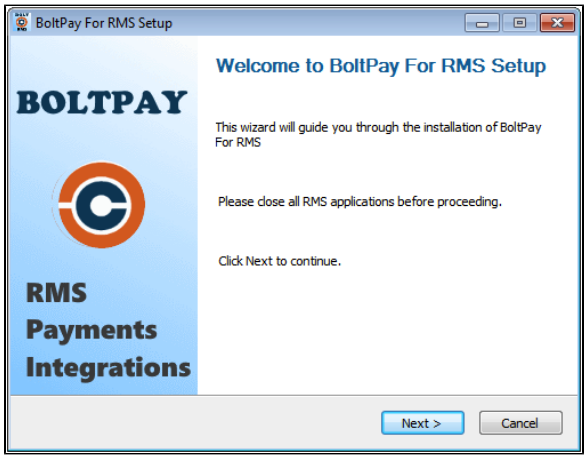
Locate and open the installation program.
Double- click the icon to begin installation.



Step #2

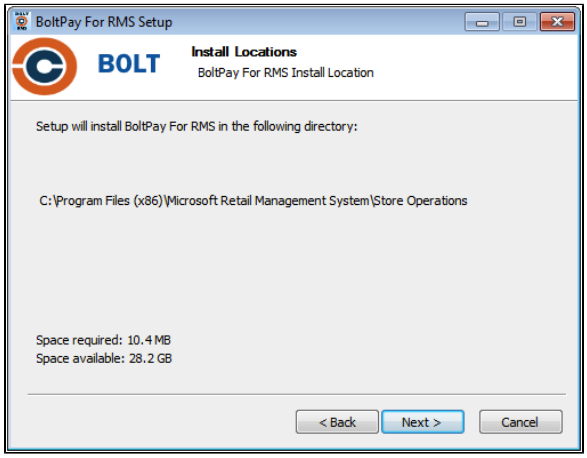
Please review the welcome screen and perform any recommended tasks.

Click Next to continue.



Step #3

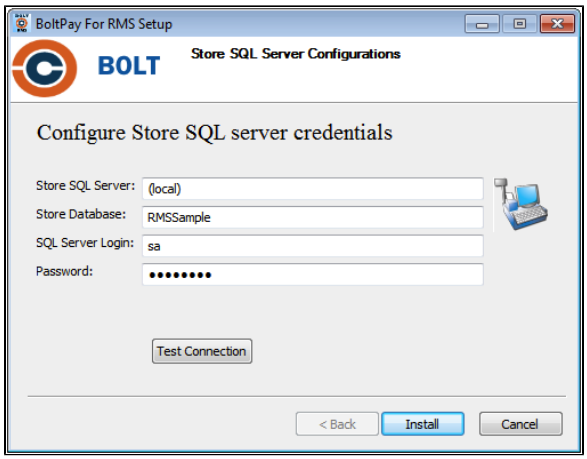
Click Next to continue.



Step #4

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

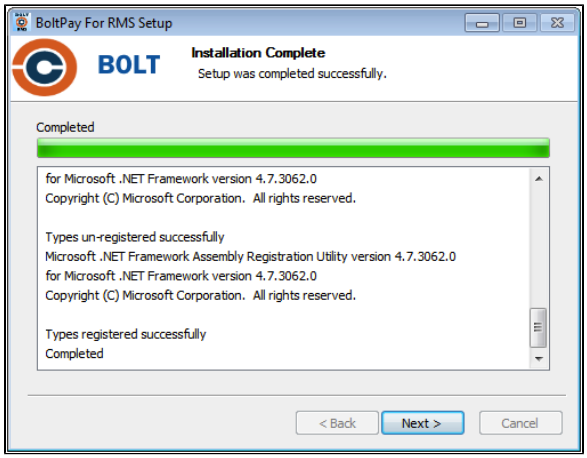
- **The SQL server address**
  Example: 192.168.0.100
  Example: (local)
  Example: 192.168.0.11/R2
- **Port Override**
  Check this if your SQL Server is setup to use a different port then the default port
- **Port Number**
  If Port Override is checked, enter the port number here
- **Username**
  The 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 RMS database
- **Test Button**
  Push the Test button to confirm the database connection settings are correct



Step #5

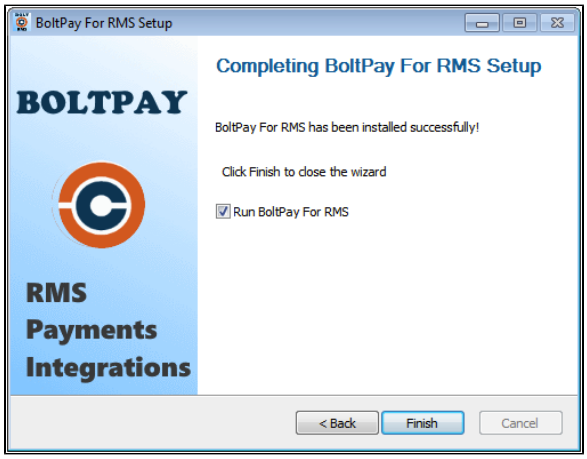
The installation is complete.

Click Next to continue.



Step #6

Click Finish to complete the installation process.



BoltPay Configuration

This section covers the different functions and features of the BoltPay Configuration Management application.

Step #1

Locate the icon on your desktop labeled BoltPay Configuration Management. Right click the icon and select Open to begin the configuration process.



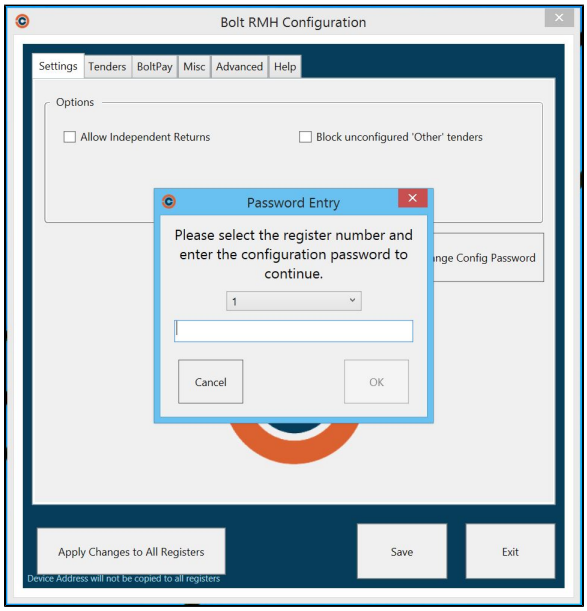
Step #2

You will be prompted to log into the BoltPay software.

- The default Password is "BoltPayP@5$!".

You are also required to select the register number this computer has been assigned in RMS POS.

- Each register can have different settings configured independently of each other. These settings are saved in your store database.



Step #3

Settings

Options:

- **Allow Independent Returns -**

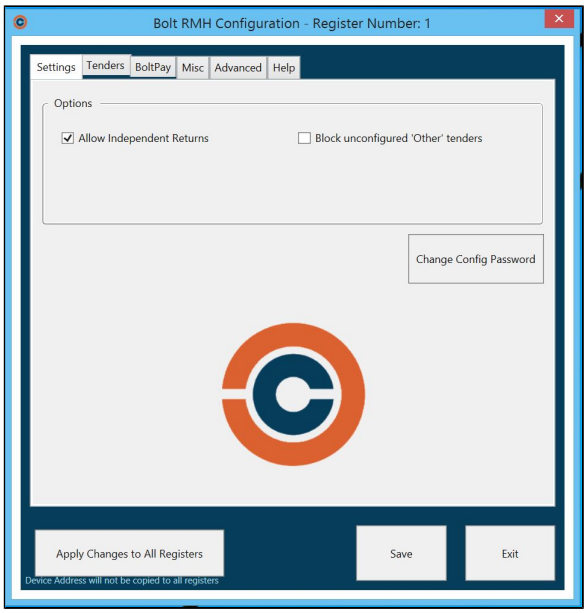
  Checking this option will allow cashiers to accept returns on both dependent and independent transactions.
- **Block unconfigured 'Other' Tenders -**

  Check this option to prevent tendering of unsupported tender types configured as ‘Other’ and where the tender type is not configured for use in the BoltPay tender configuration.
- **Apply Changes to All Registers -**

Press this button in order to apply all BoltPay configuration settings as they currently are set to each of the registers configured in your RMS Store Administrator. All of the registers will have matching BoltPay configuration settings at that point.

Change Config Password:

- As mentioned the default password is "BoltPayP@5$!". You have the ability to change the password to your choosing. Once you click on the **Change Config Password** button you will be required to enter a new password and then confirm the new password in the second field. Then click **OK**.



Step #4

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 BoltPay.
- **Credit -**

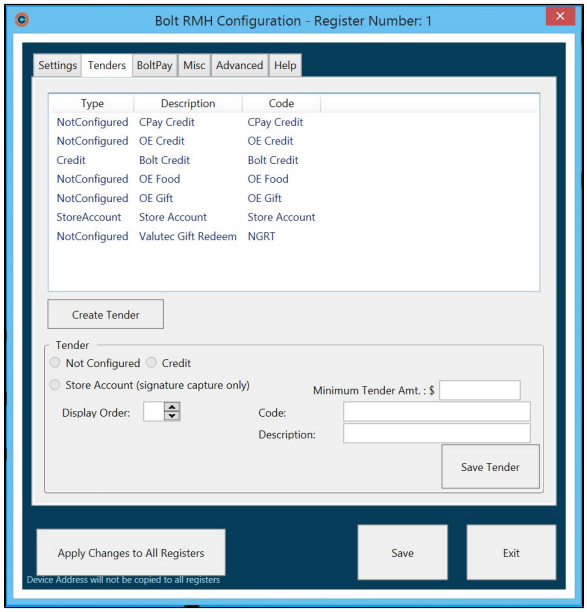
  Check this option to configure the selected tender as Credit.
- **Store Account -**

  Check the Store Account option to configure the selected tender as Store Account.
- **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 RMS tender window. The description may consist of no more than 25 alphanumeric characters.
- **Minimum Tender Amt -**
  Set the minimum dollar amount allowed before the Tender type can be used in a transaction. The default value is zero.



Important - Important - **Debit** transactions are not supported at this time. A Debit card would be processed as Credit.

Important - If you edit a tender, you will need to close the register batch by performing a Z report to display tender changes.

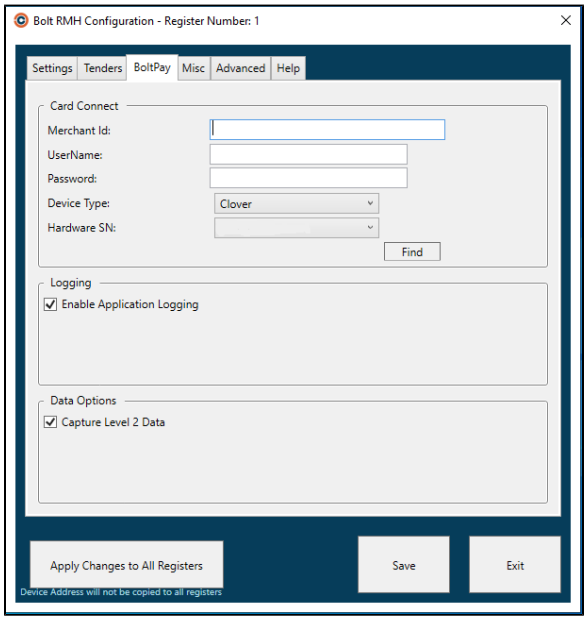
Important - If using accounting software, you may need to configure any new tender type with the accounting integration.

- **Save Tender -**

  Selecting save tender will save the current tender configuration.

Step #5

BoltPay Settings



- **Merchant ID -**
  Enter the Merchant ID provided by your CardConnect account representative.
- **User Name -**
  Enter the User Name provided by your CardConnect account representative.
- **Password -**
  Enter the Password provided by your CardConnect account representative.
- **Device Type -**
  Enter the pin-pad device provided by your CardConnect account representative.
- **Hardware SN -**
  Enter the Hardware Serial Number of the pin-pad you are using. First click the Find button, then click in the drop down menu and select the Serial Number from the device.

Logging:

- **Enable Application Logging:**
  Check this box to enable logging for the BoltPay application. The log file generated will contain information about BoltPay transactions that support staff might use for troubleshooting purposes. The log file generated is stored in the: \\Libraries\Documents folder. The file name is: BoltPayForRMS.log.

Data Options:

- **Capture Level 2 Data:** The option is disabled by default.
- If the option is enabled, it uses two service endpoints (AuthCard & Capture APIs) to complete the transaction.
- If the option is disabled, it uses one endpoint (AuthCard) with capture flag=true to complete the transaction.

Step #6

MISC Settings

Card on File:

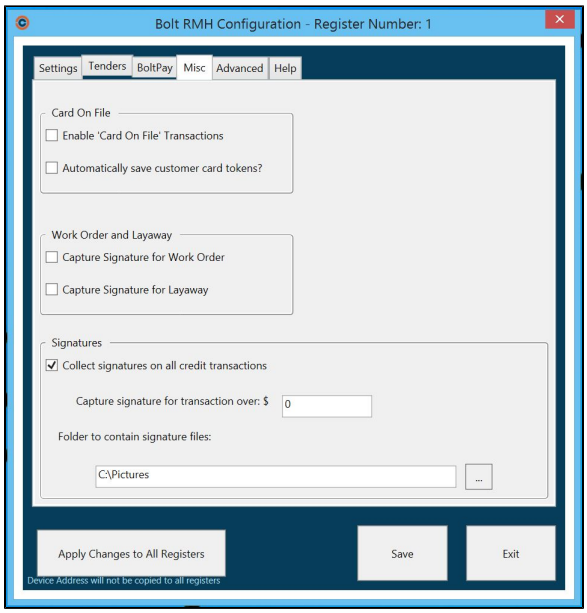
- **Enable ‘Card On File’ Transactions -** Check this option to prompt the cashier to use the assigned payer token on file. A customer must be assigned during the transaction. The prompt takes place at the end of the tender process. The next time a transaction occurs while that same customer is assigned the BoltPay 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 BoltPay 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.

Work Order and Layaway:

- **Capture Signature for Work Order -**
  Enable this option to require the customer to sign using the pin-pad when tendering a Work Order transaction.
- **Capture Signature for Layaway -**
  Enable this option to require the customer to sign using the pin-pad when tendering a Layaway transaction.

Signatures:

- **Folder to contain signature files:** Press the "..." button to change the default directory of where BoltPay stores the recorded customer signatures. You will be required to enter the complete file path of where you wish to store the files from that point on.



Important - You must have RMS Manger configured to share the OPOS device.

Step #7

Advanced Settings

Important: Only advanced user should make changes to the session variables. Incorrect settings may affect how BoltPay works.

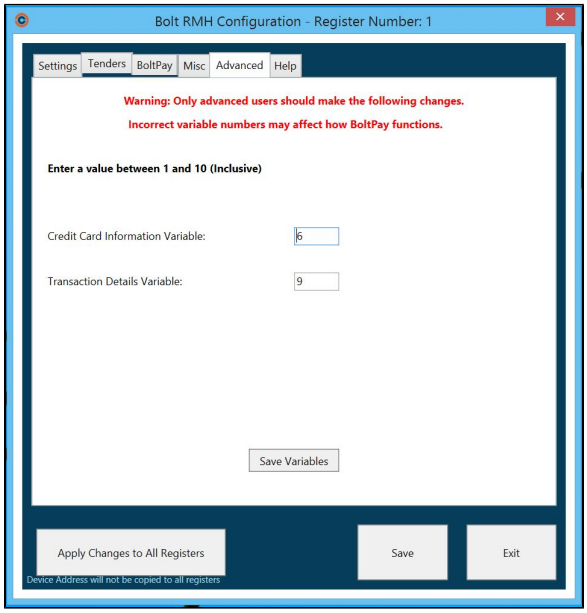
Credit Card Information Variable:

- Default Value: 6

Important: Changing this value requires changes to the receipt template!

Transaction Details Variable:

- Default Value: 9



Step #8

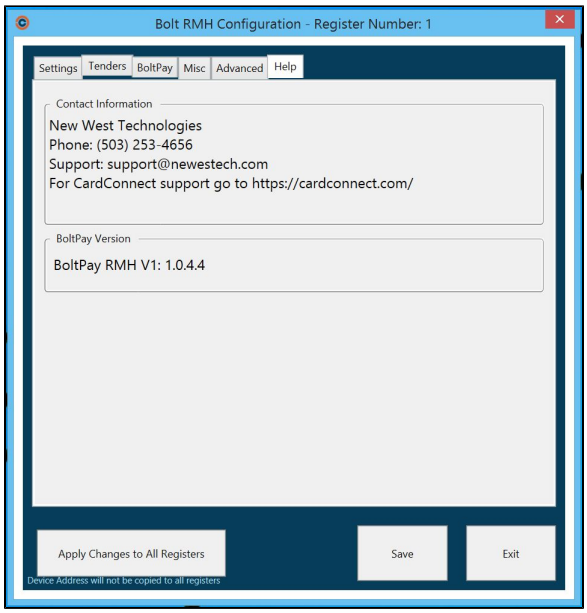
Help Information

Contact Information -

- This section provides important information on how to contact New West Technologies and CardConnect for any support or sales requests or problems.

BoltPay Version -

- This section lists the current version of the BoltPay software installed on your register.



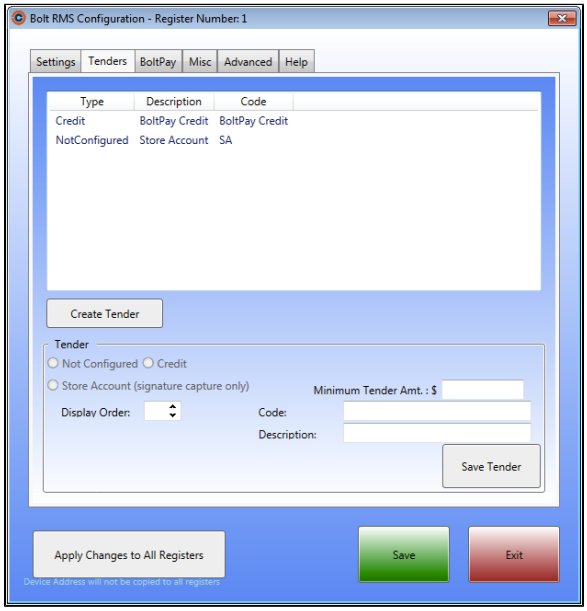
Step #9

- **Click the Save button to confirm and save your configuration in the BoltPay Configuration Management software**.

Process Transactions with BoltPay

Step #1

Verify Tenders are configured in Boltpay



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

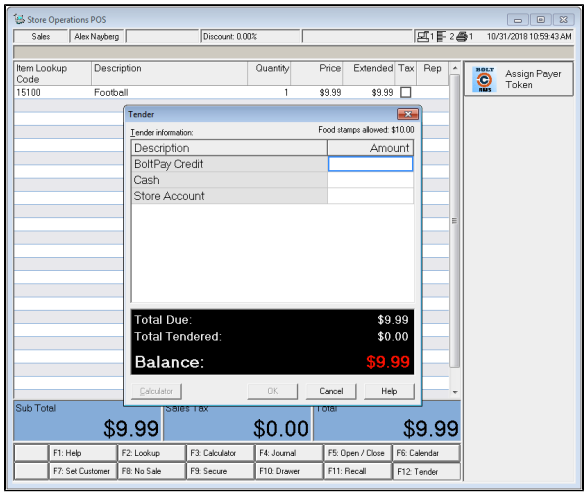
Important - **Debit** transactions are not supported at this time. A Debit card will be processed as Credit.

You can also configure a Store Account tender for the purpose of using the Ingenico ISC250 pin-pad to capture the customer's signature.

These tenders must be set up correctly and enabled in the Boltpay Configuration Management utility before attempting to use them in RMS POS.

Step #2

Tender transaction in Microsoft RMS Point of Sale



Once you have rung up items for the sale you will press the Tender button at the bottom right side of Point of Sale window or press the F12 key on the register keyboard.

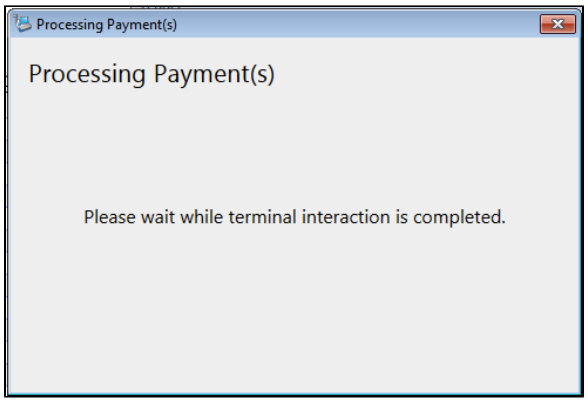
Enter the amount the customer wants to pay into the appropriate tender field and press the OK button in the Tender window or Enter on the keyboard.

Step #3

Processing Payment

After pressing OK or Enter you will see a window appear on top of the Point of Sale transaction screen.

Important - While this screen appears you are not able to cancel the transaction from the RMS POS software. If you or the customer needs to interrupt or cancel the transaction then you must press the red Cancel button on the pin-pad to properly return to the normal tender screen.



Step #4

Swipe, Tap and Insert

- **Swipe**
  This method is for Credit cards with magnetic data strips.
- **Tap**
  This method is used with Apple Pay, Android Pay or Samsung Pay phones that use NFC (near field communication) technology.
- **Insert**
  This method is used with Credit cards that contain EMV (chip and pin) technology. Rather than swiping a magnetic strip you insert the card into the pin-pad device so data on the EMV chip can be accessed. The customer may be required to enter a PIN number depending on the card issuing bank.

For additional information on processing sales with the Ingenico ISC250 pin-pad please visit:

https://ingenico.us/smart-terminals/telium2/payment-terminals/isc-series/isc-touch-250.html

Important - **Debit** transactions are not supported at this time. A Debit card will be processed as Credit.

Step #5

Manual Entry

Some cards are too old or damaged to swiped or inserted. In this case the pin-pad does allow for manual entry of card data.

In order to use manual entry you must press the red Cancel button on the pin-pad when you are asked swipe/insert the payment card. At this point the pin-pad will ask you to enter the card number (account number).

Depending on the type of card and the issuing bank, you may be ask to enter additional information into the pin-pad:

- Expiration date
- CVV code (Security code)

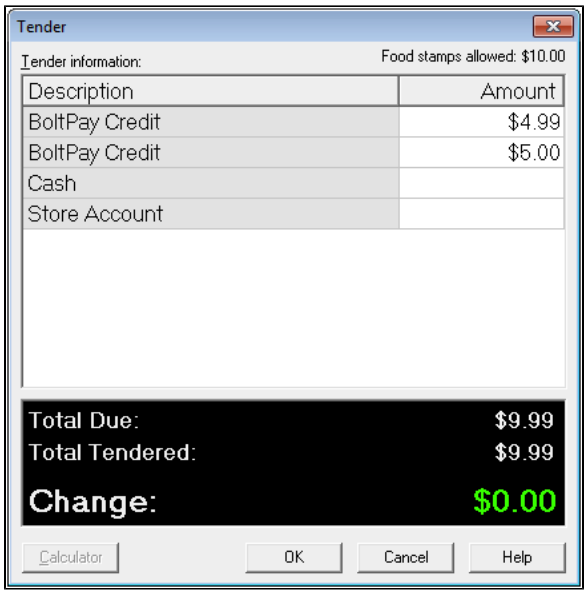
Step #6

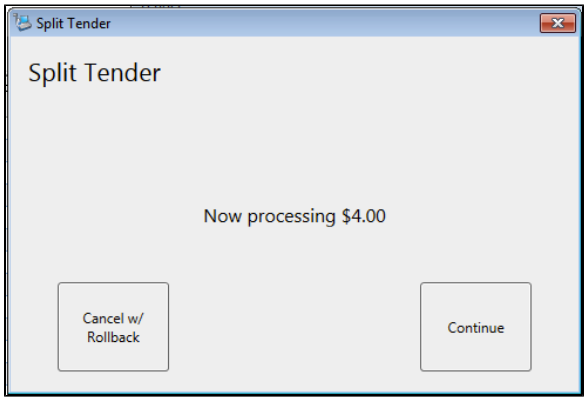
Split Tender

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

For example if the customer has $5.00 remaining on their card balance but the item they want to purchase is $9.99. 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.





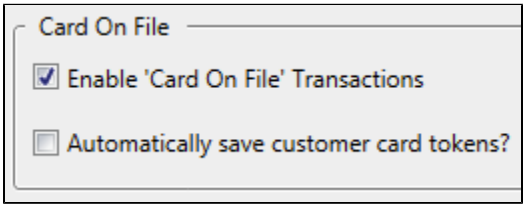
Step #7

Card on File

Boltpay provides the ability to save a customer's Credit 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 RMS and the credit 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. Boltpay can save multiple cards per customer if required.

In order to utilize Card on File you must first enable it in the Boltpay Configuration Management utility. Please reference: Boltpay Configuration

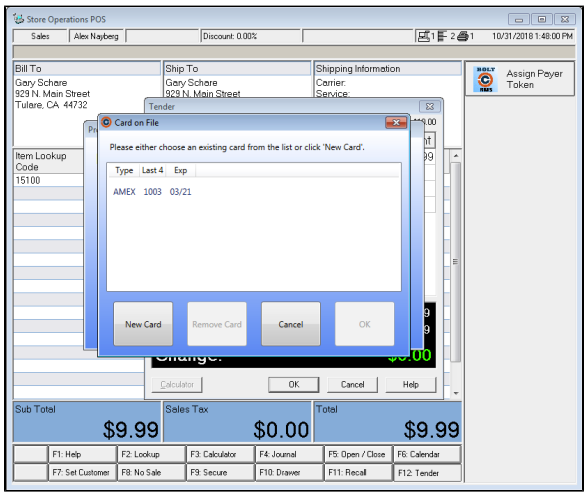
After enabling Card on File you can bring up the Card on File console window by assigning a customer to POS and then click on the custom button labeled Assign Payer Token.





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

- New Card - Add a new Credit card
- Remove Card - Remove the saved Credit card
- Press Cancel
- Press OK



When adding a N**ew Card** to a customer's record the pin-pad will prompt you to: "Verify Card $0.00, OK?". Press OK to accept and then swipe card, insert or tap. 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 Boltpay 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.

Step #8

Returns and Voids

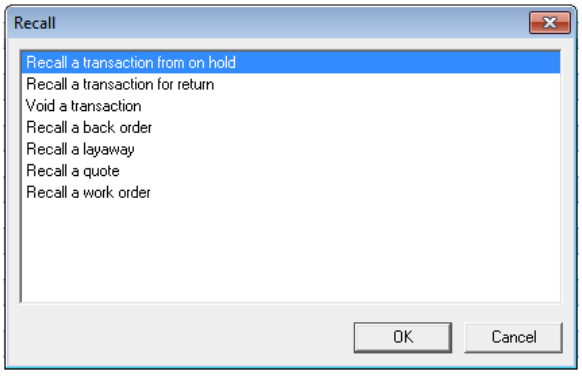


Returns and Voids with Boltpay are very similar to standard Microsoft RMS return and void processes. In Point of Sale press Recall or F11 to bring up the Recall window. Here you can select the Dependent Return or Void functions. You can also press CTRL+F4 on the register keyboard to enter "Return Mode" for 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.



Independent Return -

- An independent return is performed when the cashier returns an item without record of the original transaction. This is often done when the customer does not have proof of purchase or the cashier cannot look up the transaction based on customer information, time and date of purchase or if the item was received as a gift.

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.

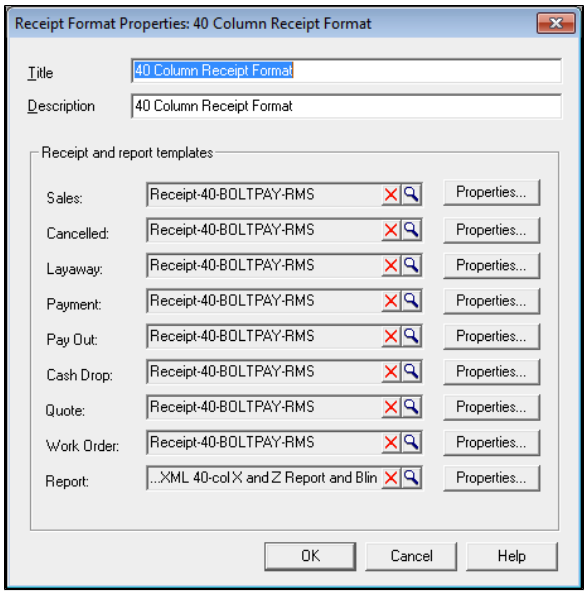
For additional information please refer to Store Operations Manager > Help > Contents > Search > Type ‘Processing Returns’ or 'Processing Voids'.

Important - Boltpay provides the ability to enable Independent Returns. This option must be enabled in the Boltpay Configuration Management utility. Please reference: Boltpay Configuration.



Receipts

Receipt Configuration



Receipt configuration in RMS is completed from Store Operations Manager. To change the receipt settings in RMS you must launch and log into Store Operations Manager. Next go to menu bar, click on Database, Registers, Receipt Formats. Highlight the receipt format you wish to modify and click Properties on the right hand side.

BoltPay does install several custom receipt templates but does not enable them by default. Many Microsoft RMS 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 Boltpay custom receipt templates for use with normal 40 Column receipt printers:

- Boltpay-RMS2.0.1xxx-SigCap-V1.xml
  This template should be used if you require digital signature capture.

- Boltpay-RMS2.0.1xxx-V1.xml
  This template should be used if you require signatures hand-written on the receipt.

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 most Windows computers will be: C:\Program Files (x86)\Microsoft Retail Management System\Store Operations\ReceiptTemplates.

- Important: For additional information on Receipt Formats please reference the Help section in Store Operations Manager or contact your authorized Microsoft RMS support partner for assistance.

Appendix

DATABASE CONNECTION TROUBLESHOOTING

Confirm you have a successful connection to the database from Store Operations Administrator>File>Connect and test connection.

- Important: It is important to perform this test from File > Connect vs File > Configuration, which uses a different connection method.

If connection fails and you are running SQL 2005 – 2008 on the server hosting the RMS 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 Store Operations 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 RMS 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

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For CardConnect support go to: https://support.cardconnect.com/

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