


# CPay 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**

Genius Countertop (Verifone MX925)

https://cayan.com/genius/countertop

- The Cayan Genius device (Verifone MX925) requires a network/Ethernet connection.
- Please make sure you have an available Ethernet port open on your switch or router.
- You may need to provide your own Ethernet cable depending on the length needed.
- Some physical configuration will be required.

Genius Handheld

https://cayan.com/genius/handheld

Genius Mini

https://cayan.com/genius/mini

(The Genius app for IOS, Android or Windows can be downloaded from the above address)

**Other**

ISP (Internet Service Provider)

CPay 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?

# CPay Installation

## Step #1

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




## Step #2

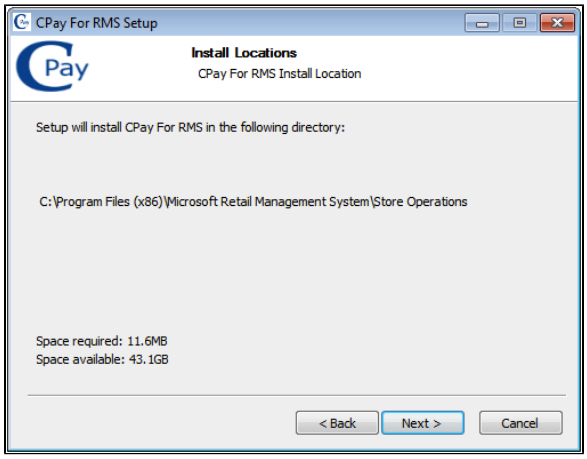
**Please review the welcome screen and perform any recommended tasks.**

**Click Next to continue.**




## Step #3

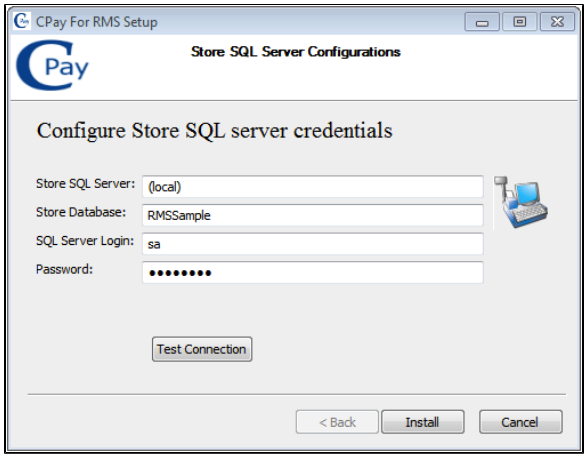
**Click Next to continue.**




## 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.**

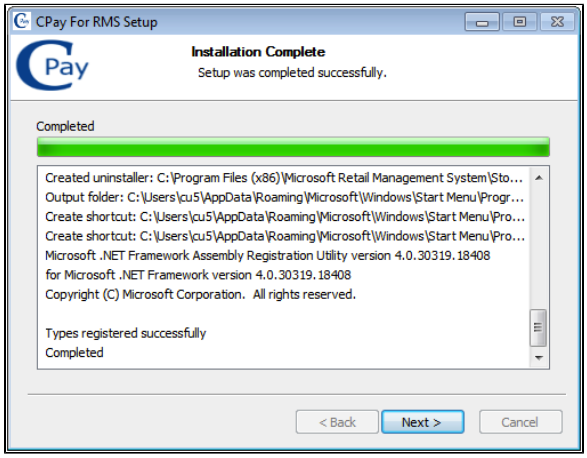
- **The SQL server address**
  Example: 192.168.0.100
  Example: (local)
  Example: 192.168.0.11/R2
- **Port Override**
  Check this if your SQL Server is setup to use a different port then the default port
- **Port Number**
  If Port Override is checked, enter the port number here
- **Username**
  The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

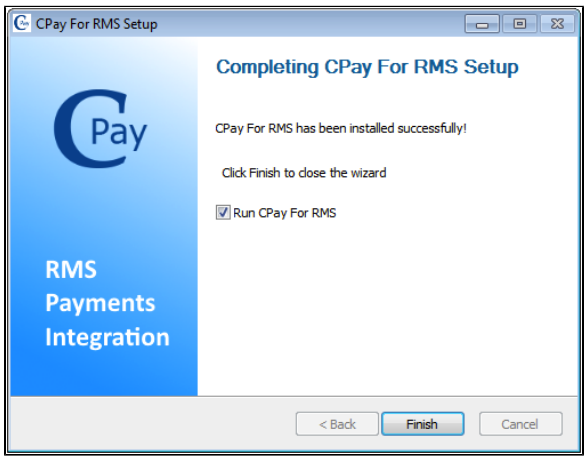
**The installation is complete.**

**Click Next to continue.**




## Step #6

**Click Finish to complete the installation process.**



# CPay Configuration

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

### Step #1

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



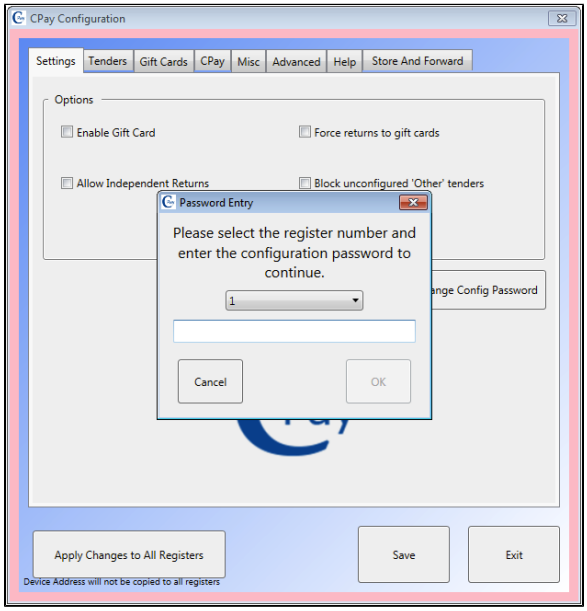

### Step #2

**You will be prompted to log into the CPay software.**

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

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

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




### Step #3

### CPay Configuration Mangement - Settings

### Options:

- **Enable Gift Card -**

  Check this option to enable the gift card tender processing. This option will also create the gift cards console button when selected or remove the custom button when deselected. Refer to Gift Card Console for more information.
- **Force Returns to Gift Cards -**
  Check this option to restrict all returns to the Gift Card tender. Leaving this option unchecked will allow you to return funds to other tender types such as credit and debit, etc.
- **Allow Independent Returns -**

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

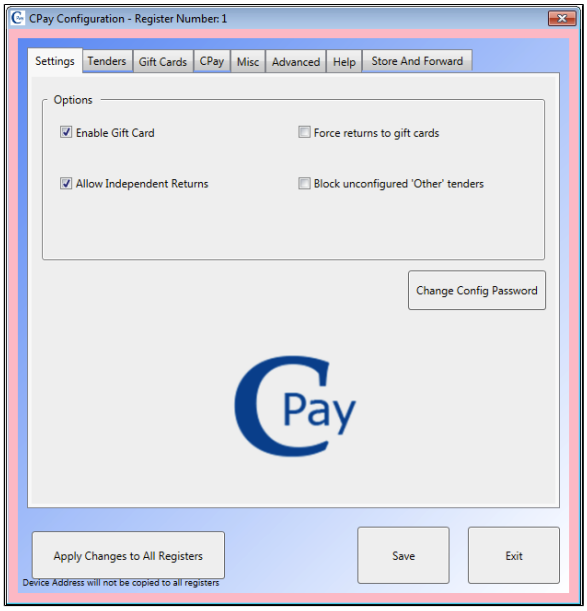
Check this option to prevent tendering of unsupported tender types configured as 'Other' and where the tender type is not configured for use in the CPay tender configuration.

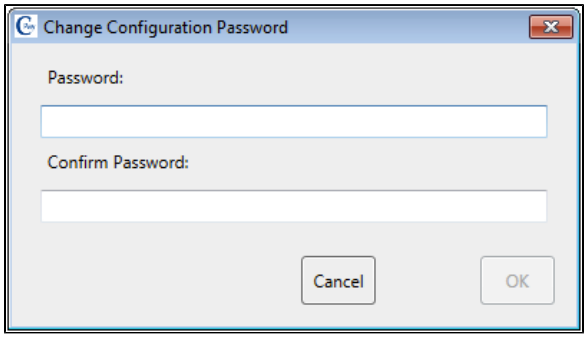
- **Apply Changes to All Registers -**

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

## Change Config Password:

- As mentioned the default password is "CPayP@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

## CPay Configuration Mangement - Tenders

- ### 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 CPay.

- **Credit/Debit/Gift -**

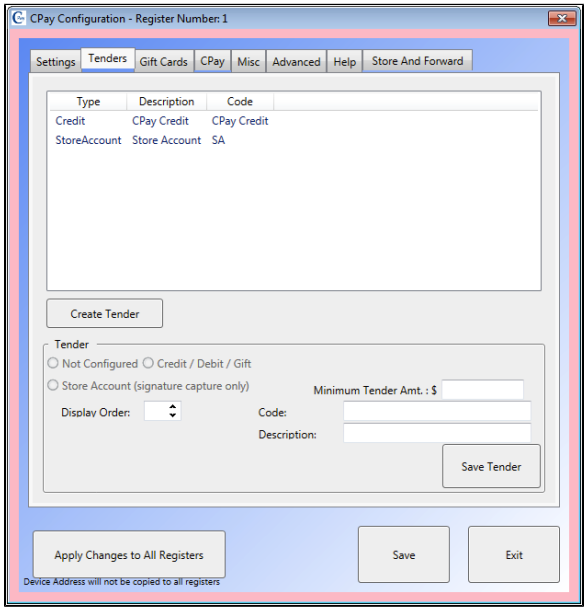
  Check this option to configure the selected tender as Credit /Debit/Gift.

- **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.
- **Save Tender -**

  Selecting save tender will save the current tender configuration.

**Important -** CPay is designed to handle Credit, Debit and Gift transactions using the single Credit/Debit/Gift tender type. It is possible to have a custom RMS report created if you need to track individual sales for different card
types.

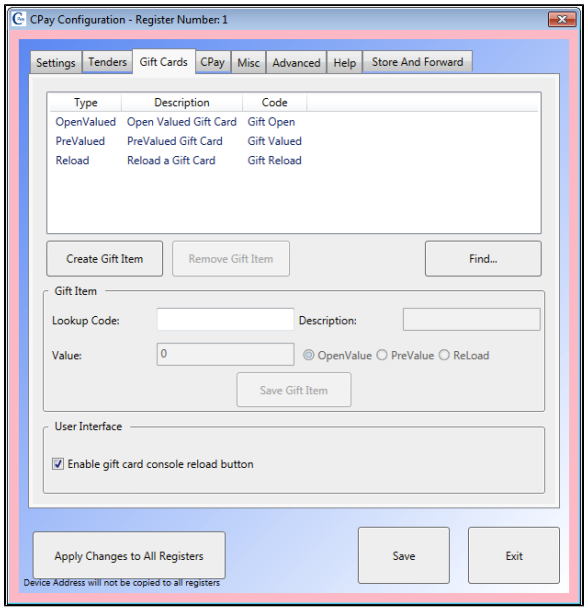
**Important -** If you edit a tender, you will need to close the register batch by performing a Z report to display tender changes. Refer to Store Operations Manager > Help > Contents > Search > Printing a Z report.

**Important -** If using accounting software, you may need to configure any new tender type with the accounting integration. Refer to Store Operations Manager > Help > Contents > Search >Assign GL Accounts option or Interfacing with accounting overview.

**Important** - In order for existing RMS tenders to appear in this window they must be configured with a tender type of "Other" in RMS Store Operations Manager. Refer to Store Operations Manager > Help > Contents > Search > Tender Type.

## Step #5

## CPay Configuration Mangement - Gift Cards




- **Create Gift Item -**
  Select Create Gift Item to add a new item to the RMS database. Enter the required information and select the appropriate gift item type from the list of options.
- **Remove Gift Item -**
  Highlight the item to be removed. Once you have selected the item, press the Remove Gift Item option to remove the item from the database and the item list.
- **Find... -**
  The Find option will retrieve the gift card item details. Enter the item lookup code of the gift card item into the Lookup Code field, press Find to add the item to the list.

**Gift Item:**

- **Lookup Code -**
  The item lookup code is a unique item ID often set to the manufacturing barcode to enable scanning of item during transaction. The code may consist of no more than 25 alphanumeric characters and must be unique.
- **Description -**

  The item description is a short description of the item created and is displayed when purchasing gift card item. The description may consist of no more than 30 alphanumeric characters.
- **Open Value -**

  Setting the item as open valued will configure the item to prompt for card value during purchase of item.
- **PreValue -**

  Setting the item to pre valued will configure the item to the value determined in the value field.
- **ReLoad -**

  Setting the item as reload will configure the item to allow adding value to a gift card. Cashier will receive prompt to enter value to be added.
- **Save Gift Item -**

  Select save item to save the current item configuration.

**Important -** If this software is deployed in an HQ environment, it is recommended to manage item changes from HQ and push the item changes to the store(s).

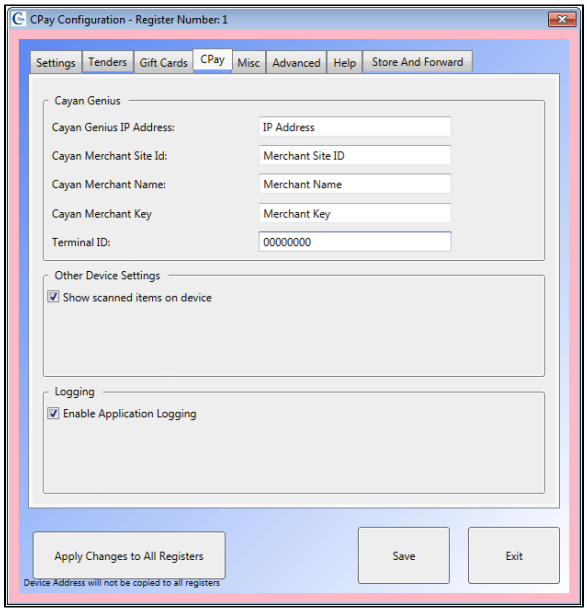
**Important -** If this software is deployed in an HQ environment, it is recommended to manage item changes from HQ and push the item changes to the store(s).

**User Interface:**

- **Enable Gift Card Console Reload Button -**
  When this box is checked you will be able to see the Reload button in the Gift Card console in RMS POS.

## Step #6

## CPay Configuration Mangement - CPay




**Cayan Genius:**

- **Cayan Genius IP address -**
  Enter the IP address of the Genius Countertop, Genius Handheld or Genius Mini pin-pad.
- **Cayan Merchant Site ID -**
  Enter the Cayan Merchant Site ID provided by your Cayan account representative.
- **Cayan Merchant Name -**
  Enter the Cayan Merchant Name provided by your Cayan account representative.
- **Cayan Merchant Key -**
  Enter the Cayan Merchant Key provided by your Cayan account representative.
- **Terminal ID -**
  Enter the Terminal ID number provided by your Cayan account representative.

**Other Device Settings:**

- **Show Scanned Items on Device**:
  When using the Cayan Genius pin-pad you can check this box to show line items on the device as they are scanned into, modified or removed from RMS Point of Sale.

**Logging:**

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

## Step #7

## CPay Configuration Mangement - MISC

**Card on File:**

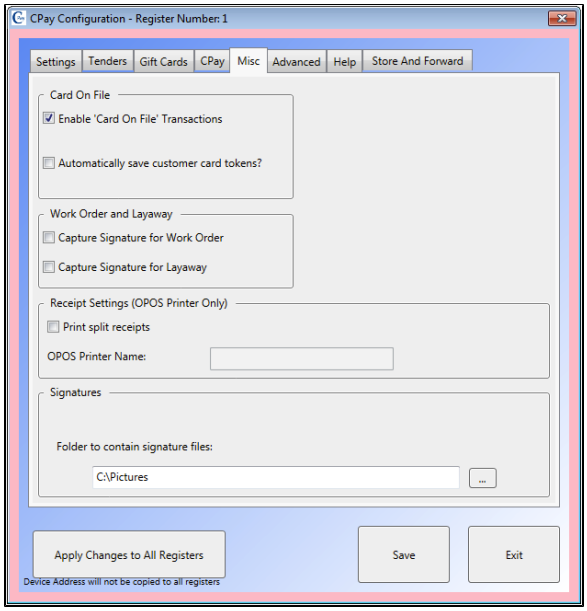
- **Enable 'Card On File' Transactions -** Check this option to prompt the cashier to use the assigned payer token on file. A customer must be assigned during the transaction. The prompt takes place at the end of the tender process. The next time a transaction occurs while that same customer is assigned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

**Receipt Settings (OPOS Printer Only):**

- **Print Split Receipts -** Settings this option will allow multiple chits to print for multiple card transaction that require a physical signature. These receipts print out AFTER the transaction is complete and can ONLY print to an OPOS Printer.
- **OPOS Printer Name -** Please enter the OPOS Printer name in the box.




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

**Signatures:**

- **Folder to contain signature files:** Press the "..." button to change the default directory of where CPay 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.

## Step #8

## CPay Configuration Management - Advanced

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

**Credit Card Information Variable:**

- Default Value: 6

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

**Signature Information Variable:**

- Default Value: 7

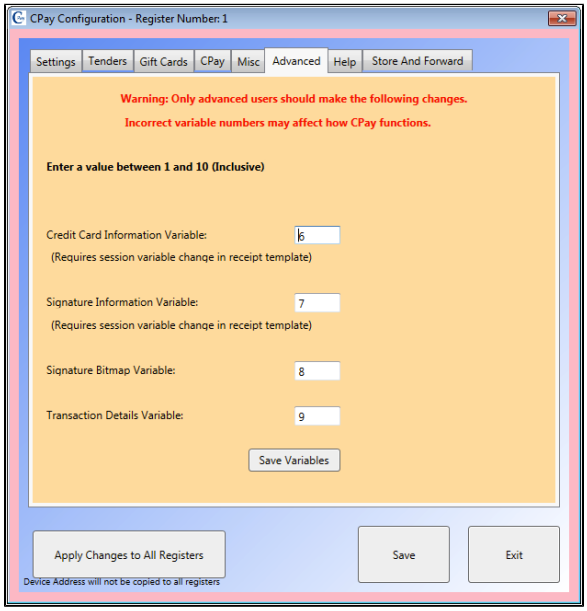
Important: Changing this value requires changes to the receipt template!

**Signature Bitmap Variable:**

- Default Value: 8

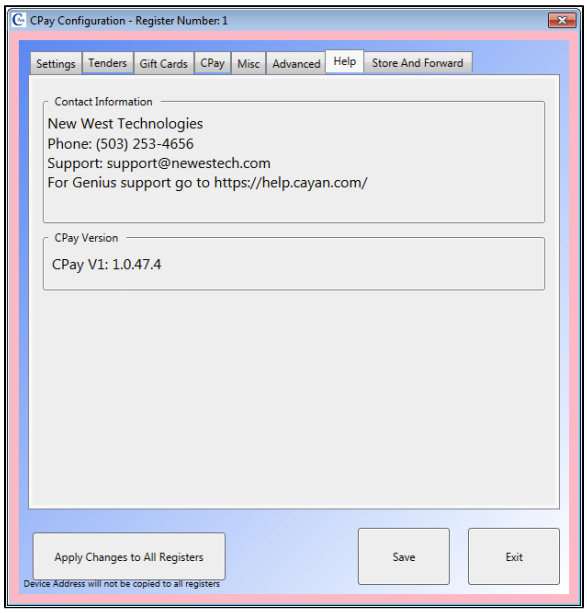
**Transaction Details Variable:**

- Default Value: 9



## Step #9

## CPay Configuration Mangement - Help



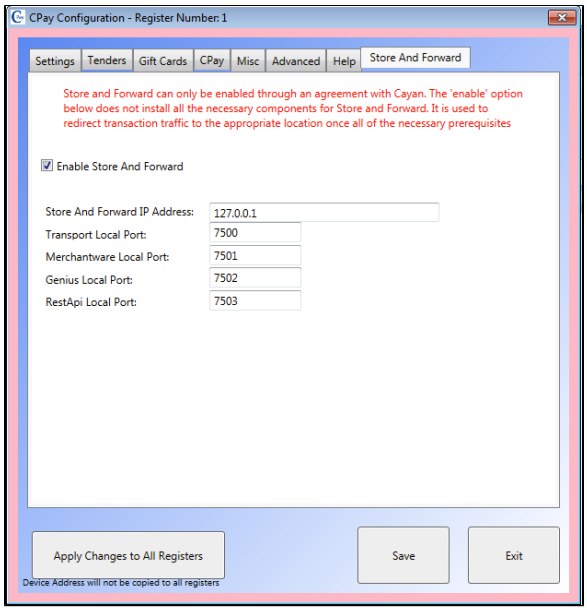

**Contact Information -**

- This section provides important information on how to contact Cayan for any support or sales requests or problems.

**CPay Version -**

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

## Step #10




**Important:** Store and Forward can only be enabled through an agreement with Cayan. The 'Enable' option located in this tab does not install all of the necessary components for Store and Forward. This tab is specifically used to redirect transaction traffic to the appropriate location once all of the requirements are met.

Separate software will need to be installed to add the core Store and Forward functionality to CPay for RMS.

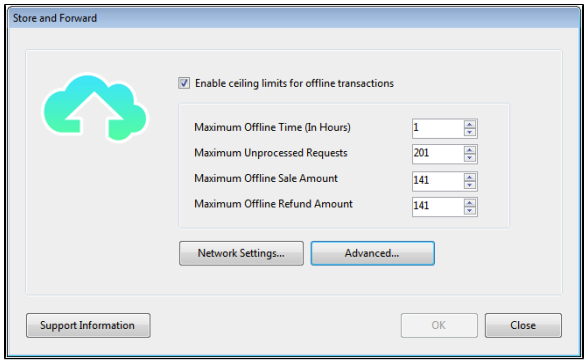
Please contact **Cayan Merchant Services** for more information regarding the possible activation of Store and Forward functionality.

Phone Number: 1.855.276.5759

The Store and Forward software has two main components:

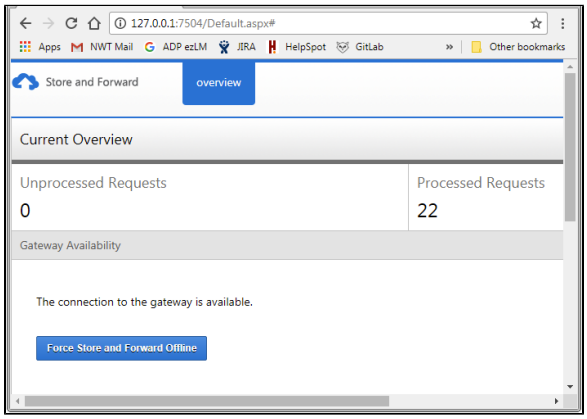
1. Store and Forward Configuration
    - Enable ceiling limits for offline transactions: This allows you to modify the Maximum Offline Time (In Hours), Maximum Unprocessed Requests, Maximum Offline Sales Amount and Maximum Offline Refund Amount.
    - Network Settings: This allows you to change the Port configuration.

- Advanced: This allows you to change the Delay Before Online Activities (In Minutes), Replay Transaction Speed and to Allow Remote Management.
- Support Information: This allows you view specific information that might be required for troubleshooting purposes.




1. Store and Forward Administration Website

   - Unprocessed Requests: This shows how many stored transactions have yet to be authorized once internet connectivity has been restored.
   - Processed Requests: This shows how many stored transactions were processed or authorized after internet connectivity was restored.
   - Force Store and Forward Offline: This not only shows the current connection status but also allows you to force CPay for RMS software to drop the connection to the online processor so you can test Store and Forward functionality.




**Important:** Each register configured with Store and Forward Functionality requires a **Static IP** address assigned on the local network.

**Important: EMV**, **Gift**, **Voids** and **Dependent Returns** are not supported with Store and Forward transactions. **Independent Returns** are supported.

## Step #11

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

# Process Transactions with CPay

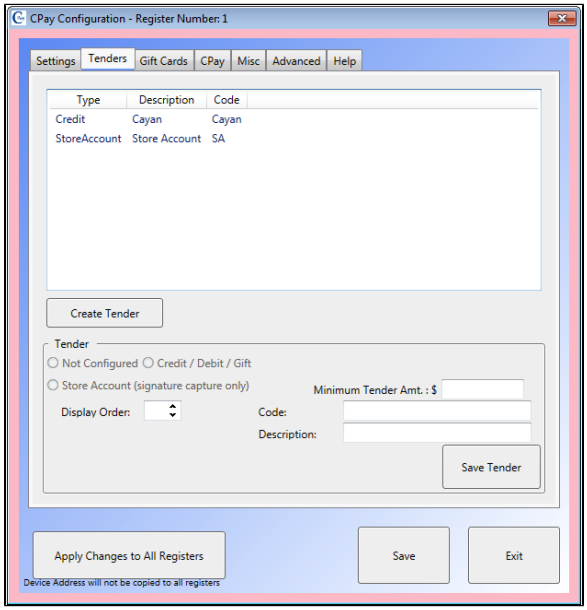
## Step #1

**Verify Tenders are configured in CPay**

CPay is designed to process **Credit** Cards, **Debit** Cards and **Gift** Cards under a single Tender type.

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

These tenders must be set up correctly and enabled in the CPay Configuration Management utility before attempting to use them in Microsoft RMS Point of Sale. Please reference CPay Configuration. You may also be required to close your current register batch before the newly created/updated tenders are visible in RMS POS.

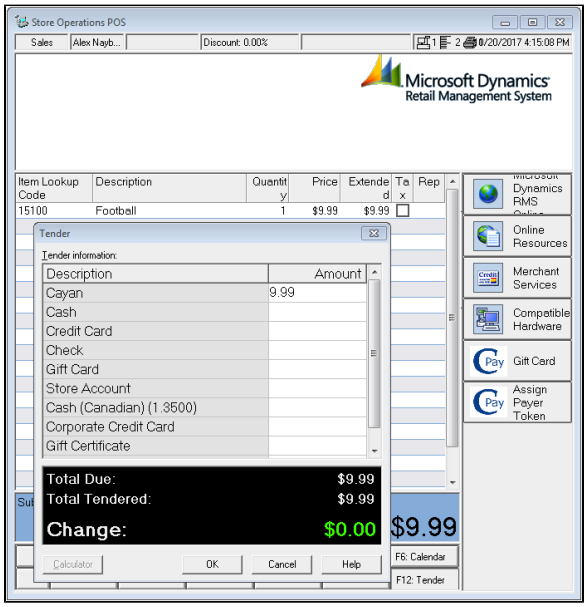



## Step #2

**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

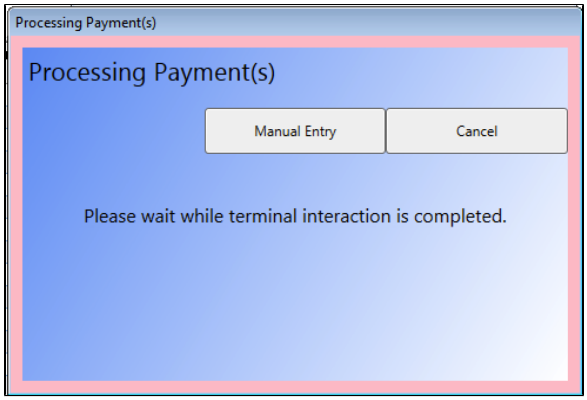
**Processing Payments Window**

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

The RMS Cashier will have the option to either Cancel the transaction or start the process of manually entering the card data into the PIN-PAD.

PIN-PAD: Insert/Swipe/Tap or else select the payment method by clicking on the appropriate button on the pin-pad.

Or click the Red X button on the PIN-PAD




## Step #4

**Swipe, Tap and Insert**

- **Swipe**
  This method is used with Credit, Debit or Gift cards that have 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 the Verifone MX915 pin-pad please visit:

https://www.cayan.com/Site/Media/Cayan/PDFs/GENIUS_Setup_Guide_SINGLE.pdf

Important - Debit EMV cards must be swiped and ran 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 the cashier must press the Manual Entry button on the Processing Payments window

The pin-pad screen will flash and then ask the customer to Enter Card Number. The customer can use the PIN-PAD to enter the card number and then press Next.

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 three digit Security Code
- Account holder ZIP code

## Step #6

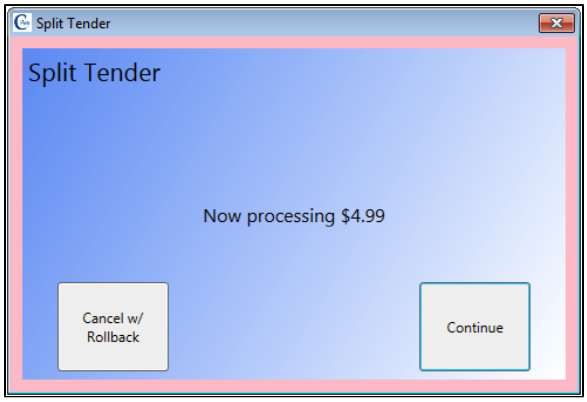
**Split Tender**

CPay 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 gift 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.

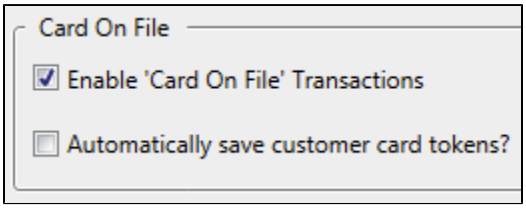



If the **Print Split Receipts** option is enabled in the CPay Configuration Management application then CPay will print out a separate receipt for each tender type used in the split tender transaction. This way if there were two customers who decided to share in the payment they would have their own receipts for optional signatures, tips or record keeping. Please reference: CPay Configuration

## Step #7

**Card on File**

CPay provides the ability to save a customer's Credit/Debit 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/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. CPay can save multiple cards per customer if required.



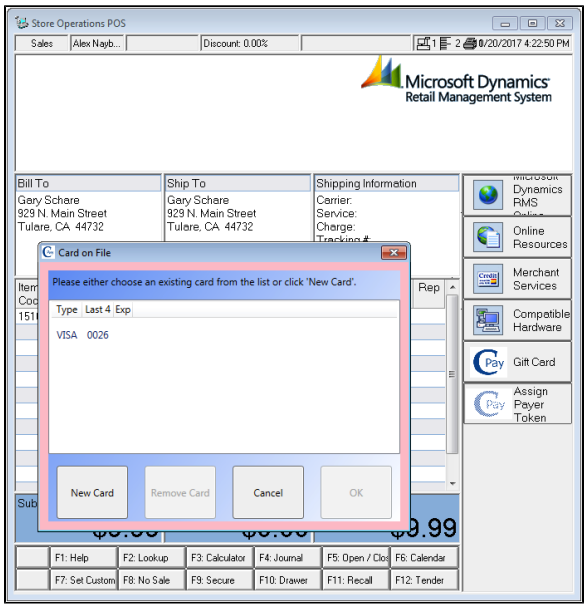

In order to utilize Card on File you must first enable it in the CPay Configuration Management utility. Please reference: CPay Configuration

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/Debit card
- Remove Card - Remove the saved Credit/Debit 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/Debit tender and VIPay 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 CPay 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.

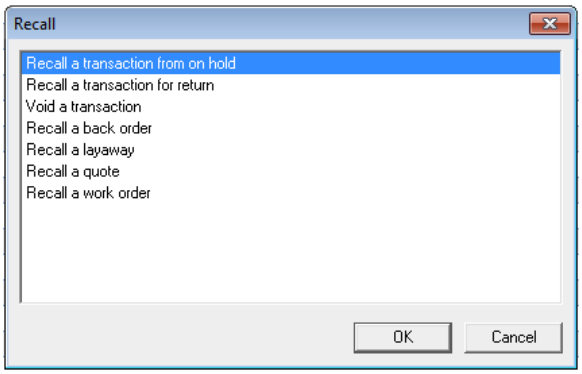
**Independent Return -**

- 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.

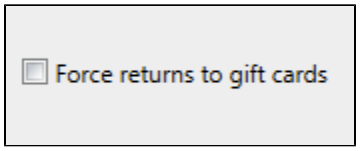
For additional information please refer to Store Operations Manager > Help > Contents > Search > Type ‘Processing Returns’ or 'Processing Voids'.




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

Important - CPay provides the ability to force all returns to be applied to gift cards if you choose to do so. This option must be enabled in the CPay Configuration Management utility. Please reference: CPay Configuration.

Important - Returns from a Gift Card purchase must be applied to a new gift card that has not yet been activated.







## Step #9

## Tips

CPay provides the ability to add a tip to a transaction at the end of the Tender process. Tips are handled exclusively from the Cayan Genius PIN-PAD.

After applying your card to the PIN-PAD the Cayan Genius screen will ask the customer: "Would you like to include a tip?"

Below there are several buttons the customer can choose from including

- 10%
- 15%
- 20%
- 22%
- 25%

Important: Tips can only be added on the PIN-PAD at the end of the Tender Process.

Or the customer can click the button labeled Other Amount. At this point the customer can enter the exact percentage of tip they wish to apply to the transaction.

After clicking the OK button an updated total will be shown for the customer to approve.

# Gift Cards

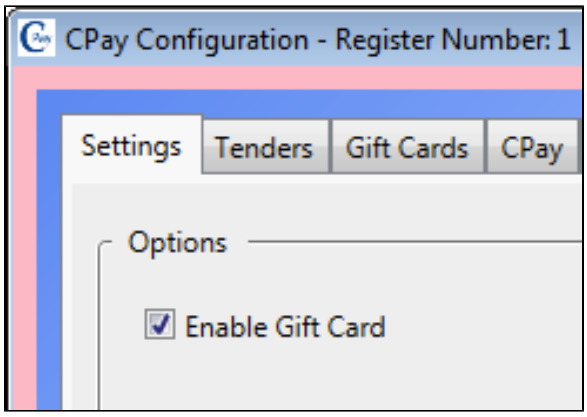
## CPay Gift Card Console Walkthrough:

### Step #1

### Enable Gift Card

The CPay add-on for Microsoft RSM provides the ability to complete several gift card functions from within the Point of Sale software. To access the CPay Gift Card Console you first need to enable Gift Cards in the CPay Configuration Manager application.

Important - Before you can utilize gift cards with CPay you will need to have configured the Gift Card Items and Gift Card Tenders in the CPay Configuration Management application. Please reference: CPay Configuration




### Step #2

### Locate CPay Custom Button

Once Gift Card functionality has been enabled in the CPay Configuration Manager you can then launch Microsoft POS and locate the CPay Gift Card custom button. This button is normally located on the right hand side of the transaction window. Clicking on this button will open the Gift Card Console.

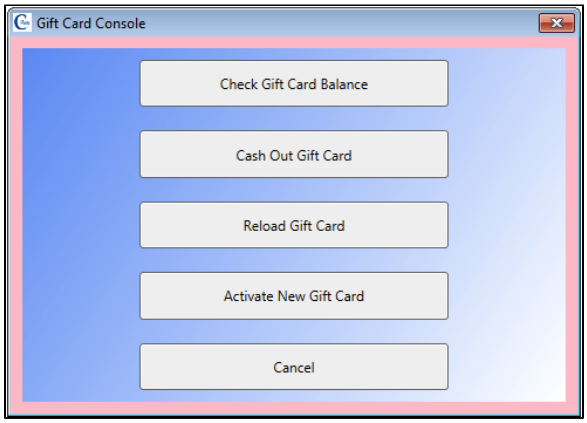



### Step #3

### CPay Gift Card Console

The following options are available to you in the Gift Card Console:

- Check Gift Card Balance
- Cash Out Gift Card
- Reload Gift Card
- Activate Gift Card
- Cancel




### Step #4

### Using your gift cards

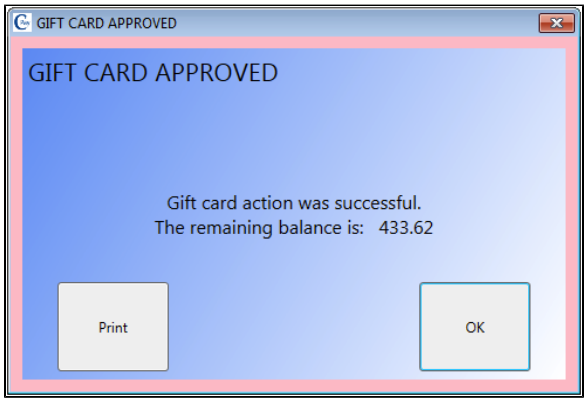
When you perform one of the gift card functions in the Gift Card Console you will be required to swipe a gift card or else use the manual entry functionality built into your pin-pad device. On the Cayan pin-pad you

can use the keypad to type in the card number and then press the OK button. Or you can click Cancel to stop the gift card action.

## Step #5

## Check Gift Card Balance

To check the balance of a gift card you first must click on the Check Gift Card Balance button in the Gift Card Console window. After choosing either to swipe or manually enter the card information you will receive a window with the current balance on the card. Next click OK.



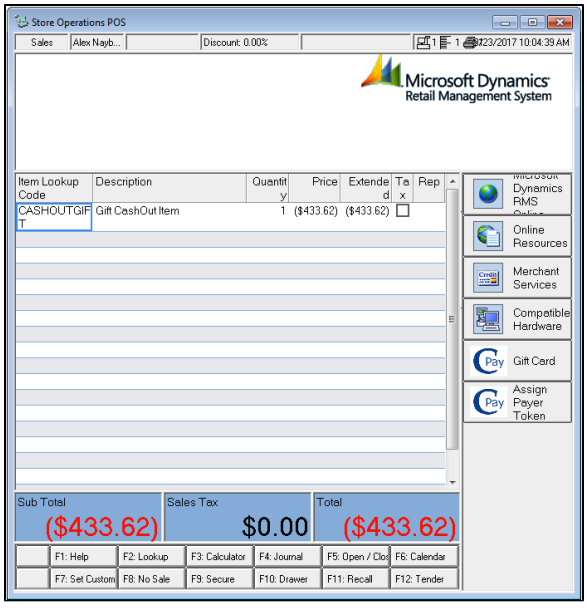

You also have the ability to print out a small receipt or "chit" for the customer that shows the last four digits of the card number and the current card balance. Once you have received the card balance click on the Print button to initiate the print process.

Important - The print functionality of the CPay Gift Card Console requires an OPOS printer be configured on the register as well as in Microsoft RMS and finally the CPay Configuration Management application. For further information on configuring OPOS printing with CPay please reference: CPay Configuration

## Step #6

## Cash Out Gift Card

To cash out a gift card and provide your customer with the remaining balance in dollar bills you must first click on the Cash Out Gift Card button in the Gift Card Console window.




Next you will be prompted to swipe the gift card or use manual entry so that Microsoft RMS Point of Sale can receive the current card balance information. A non-inventory item called "CASHOUTGIFT" will appear in the transaction screen and the price for return will match the gift card balance.

Finally when you click on the Tender button in Point of Sale to complete the transaction process you will be prompted to swipe the gift card (or use manual entry) one last time so the previous current balance will be removed from the gift card and give the cash to the customer.

## Step #7

## Reload Gift Card

To reload the balance on a gift card you must first click on the Reload Gift Card button in the Gift Card Console window. You will be prompted to enter the dollar amount the customer would like to add to the balance of the gift card. Once that dollar amount has been entered you can click on the Reload Value button.




The Microsoft RMS Point of Sale screen will now show a non-inventory line item in the transaction screen identical to the gift reload item specified previously in the CPay Configuration Management application. The item in this case has been called "Gift Reload". The line item will have a price that matches the amount you just entered into the Reload Gift Card window. At this point you can continue to add additional items to the Point of Sale transaction screen or complete the tender process.

## Step #8

## Activate New Gift Card

To activate a new gift card you must first click on the Activate New Gift Card button Gift Card Console window. You will be prompted to enter the dollar amount the customer would like to add to the balance of the gift card. Once that dollar amount has been entered you can click on the Activate button.




The Microsoft RMS Point of Sale screen will now show a non-inventory line item in the transaction screen identical to the gift PreValue item specified previously in the CPay Configuration Management application. The item in this case has been called "Gift Valued". The line item will have a price that matches the amount you just entered into the Reload Gift Card window. At this point you can continue to add additional items to the Point of Sale transaction screen or complete the tender process.

# 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.

CPay 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 the default RMS receipt template. If you are using a customized receipt template, any customizations will need to be merged.

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

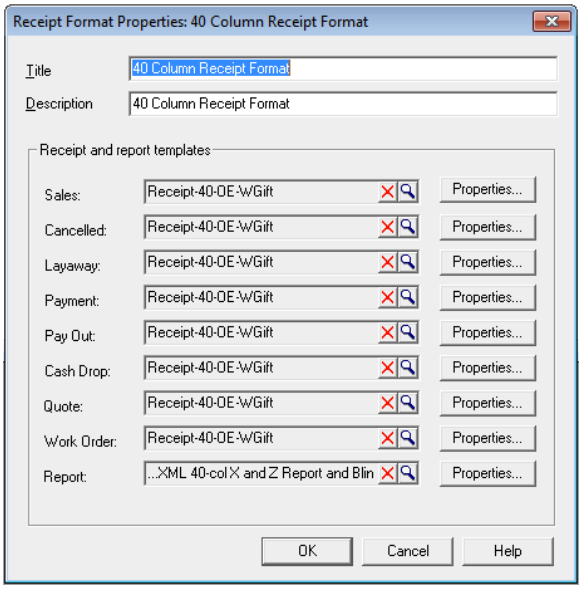
- **CPay-RMS2.0.1xxx-SigCap-V1.xml**
  This template should be used with **newer** versions of Microsoft RMS that utilize gift receipt functionality.
- **CPay-SigCap-V1.xml**
  This template should be used with **older** versions of Microsoft RMS that do **not** utilize gift receipt functionality.

If you would prefer to ONLY print out the Customer Copy receipts then you can use these two 40 Column receipt templates:

- **CPay-RMS2.0.1xxx-SigCap-V1CustomerCopy.xml**
  This template should be used with **newer** versions of Microsoft RMS that utilize gift receipt functionality.
- **CPay-SigCap-V1CustomerCopy.xml**
  This template should be used with **older** versions of Microsoft RMS that do not utilize gift receipt functionality.

Lastly, there are four FullPage receipt templates for use with 8X11" desktop or network printers:

- **CPayFullPage-RMS2.0.1xxx-SigCap-V1.xml**
  This template should be used with **newer** versions of Microsoft RMS that utilize gift receipt functionality and **do** use of signature capture pin-pads.
- **CPayFullPage-SigCap-V1.xml**
  This template should be used with **older** versions of Microsoft RMS that do not utilize gift receipt functionality but **do** use signature capture pin-pads.




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.

CPay contains an option that will enable split tender purchases to receive individual receipts for each card used in the tender process. To enable Print Split Receipts please reference: CPay Configuration.

- 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

New West Technologies

**Phone: (503) 235-4656**

**E-mail: support@newestech.com**

**-**

**For Genius support go to: https://help.cayan.com/**

Cayan Merchant Portal:

**Login**

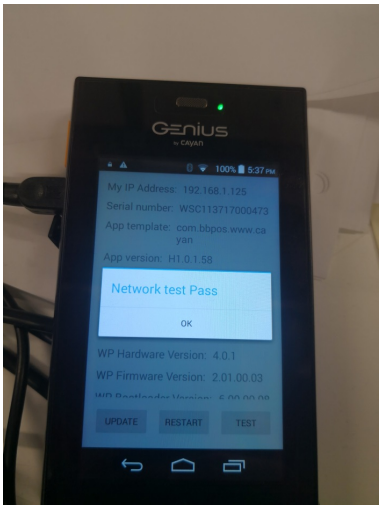
# Genius Handheld

When CPay attempts to communicate with the Genius handheld and receives no response, make sure WIFI is setup on the device and the device can be pinged from the POS. The IP address and the network status of the device can be viewed in the Cayan Setup Page. Verify the network test is passed. In addition, one can test the connection and check the status of the handheld by copying the following URL request in the browser. It should return a response status in XML format if there is no communication issue.

Note: Replace the IP 192.168.1.125 with the actual IP of the handheld.
http://192.168.1.125:8080/v2/pos?Action=Status&Format=XML




.




If the POS cannot ping the device, a workaround solution is to add the IP address and MAC address of the device to the ARP table of the POS machine.

Launch the command prompt as Admin and run the following command:

**> netsh interface ipv4 add neighbors "Ethernet 4" 192.168.1.125 cc-d3-1e-68-11-78**

Note: The address 192.168.1.125 and MAC cc-d3-1e-68-11-78 are the IP and the MAC of the handheld. Replace the with the actual ones.

Replace the "Ethernet 4" with the actual network interface name of the POS machine. Use the following command to find out all the available network interfaces on the machine.

**> netsh interface ipv4 show config**

To verify the IP and MAC have been added to the ARP table, run the **ARP -a** command on the command prompt. It should show a list of the internet address and physical address in the ARP table.

**> ARP -a**