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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

Verifone VX820

- If your computer does not have a Serial port and you need to use a Serial to USB adapter we suggest the Keyspan USA-19HS adapter. The driver for this adapter can be found at: https://www.tripplite.com/support/usa19hs

Firewall Access

Please make sure your firewall allows access to the following:

Port: 9000

URL1: x1.mercurypay.com
URL2: b2.backuppay.com
Type: TCP

Other

ISP (Internet Service Provider)

Vantiv CVIPay 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?

CVIPay Installation

Step #1

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



Step #2

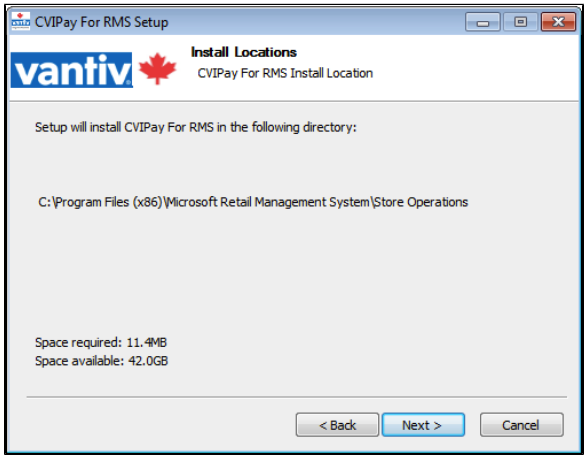
Please review the welcome screen and perform any recommended tasks.

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.

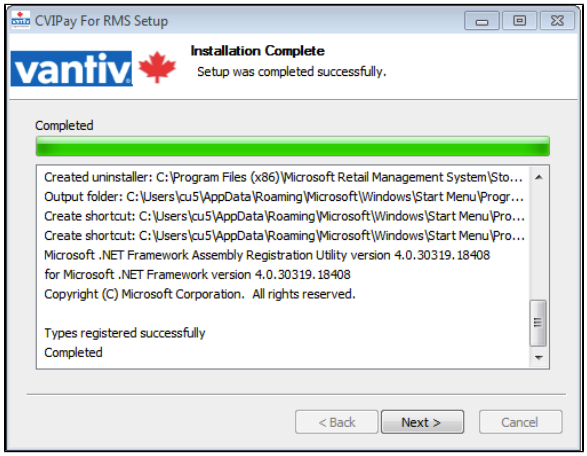


- **The SQL server address**
  Example: 192.168.0.100
  Example: (local)
  Example: 192.168.0.11/R2
- **Port Override**
  Check this if your SQL Server is setup to use a different port then the default port
- **Port Number**
  If Port Override is checked, enter the port number here
- **Username**
  The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

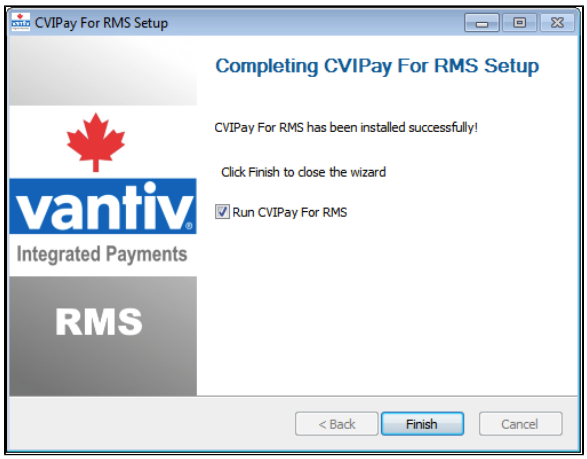
The installation is complete.

Click Next to continue.



Step #6

Click Finish to complete the installation process.


CVIPay For RMS Setup
Completing CVIPay For RMS Setup
CVIPay For RMS has been installed successfully!
Click Finish to close the wizard
Run CVIPay For RMS
vantiv
Integrated Payments
RMS
< Back
Finish
Cancel

NETePay Configuration

Step #1

Locate the NETePay icon. Double- click the icon to begin configuration.

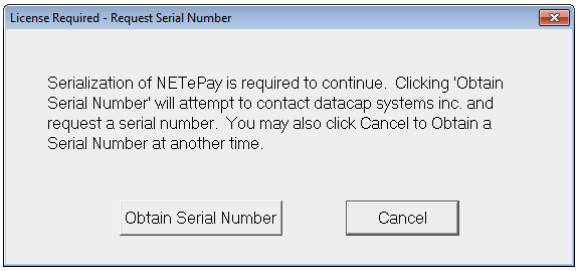


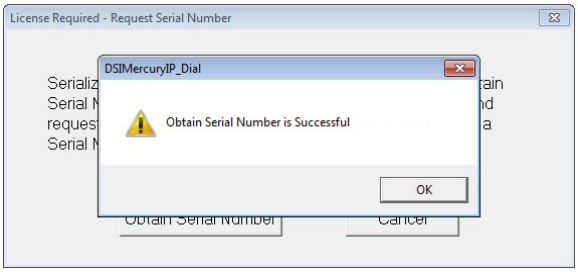
Step #2

The software requires that you obtain a serial number license.

Click Obtain Serial Number.

Click OK to continue.



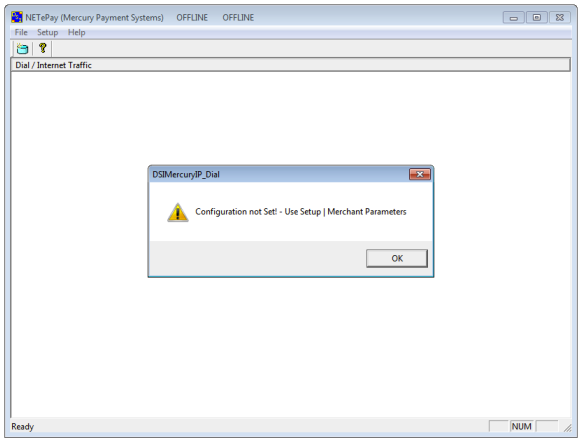


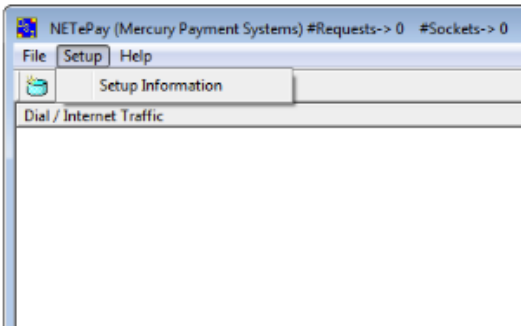
Step #3

Click OK on the warning prompt.

Go to the window menu bar and click on Setup.

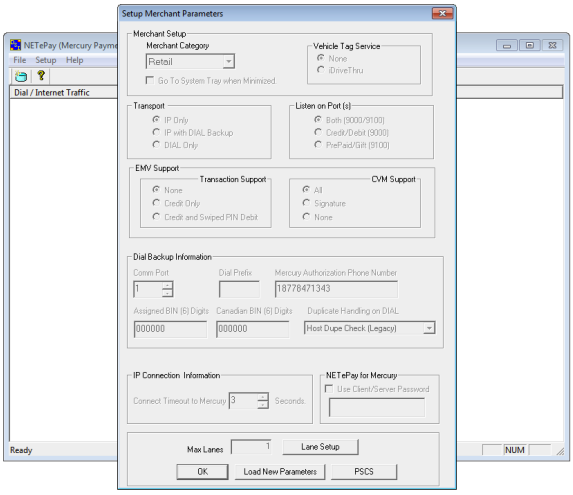
Then click on Setup Information.





Step #4

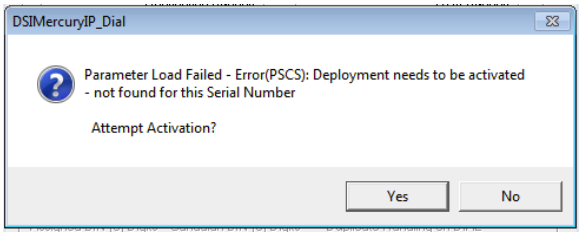
In the Setup Merchant Parameters window click on Load New Parameters button at the very bottom.



Step #5

You will be prompted to attempt activation.

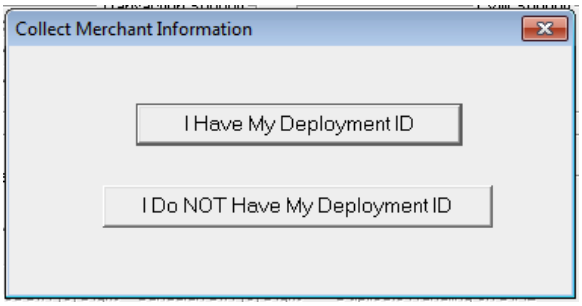
Click Yes.

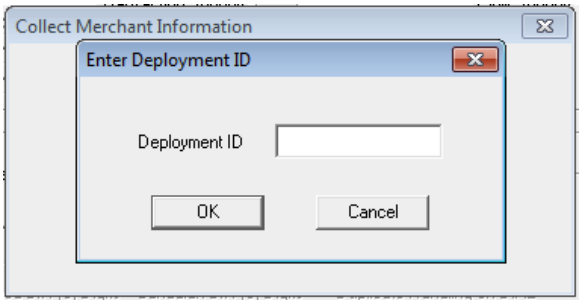


Step #6

Click on the I Have My Deployment ID button.

Enter your Deployment ID in the field and then click OK.

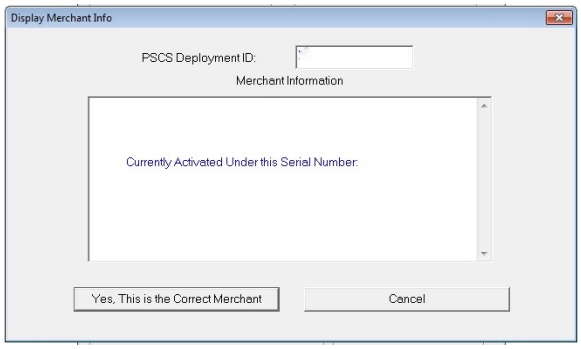




Step #7

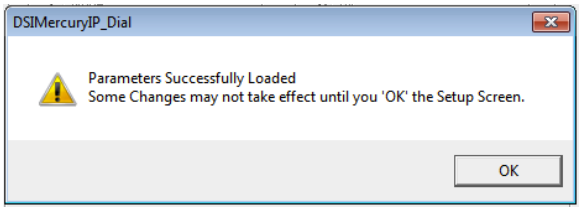
The Display Merchant Info window will now show you the Merchant Information assigned to the Deployment ID.

Click Yes, This is the Correct Merchant.



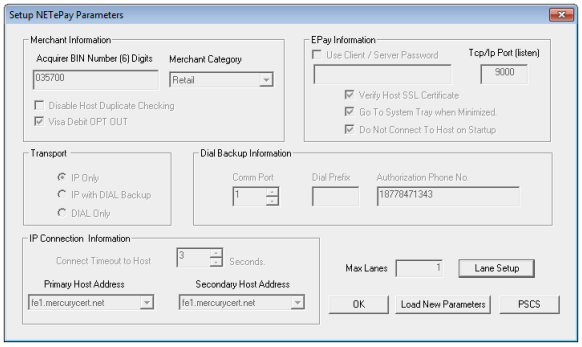
Step #8

At the Parameters Successfully Loaded prompt please click OK to continue.



Step #9

At the Setup Merchant Parameters window click <u>OK</u>.



Step #10

Minimize the NETePay window and it will continue to run in the back ground.

- Important: If you restart your computer you must make sure NETePay is running in the background before launching Microsoft RMS Point of Sale. It is possible to configure Windows to launch the application at start up by completing the following process:

    a. Click the Start button, click All Programs, right-click the Startup folder, and then click Open.
    b. Open the location that contains the item you want to create a shortcut to.
    c. Right-click the item, and then click Create Shortcut. The new shortcut appears in the same location as the original item.
    d. Drag the shortcut into the Startup folder.
    e. The next time you start Windows, the program will run automatically.

- If you require additional assistance with launching NETePay at startup please contact your authorized Microsoft RMS partner.

CVIPay Configuration

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

Important: If you have not already configured NETePay please do so before attempting to configure the CVIPay Configuration Management program.

Step #1

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



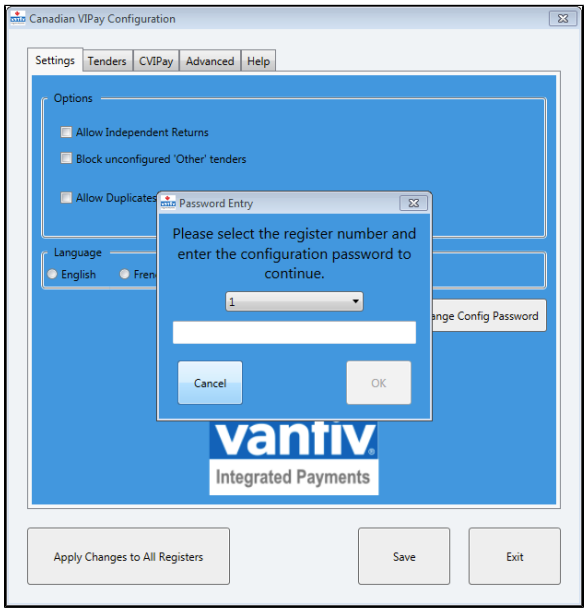
Step #2

You will be prompted to log into the CVIPay software.

- The default Password is "CVIPayP@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

CVIPay Configuration Mangement - 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 CVIPay tender configuration.
- **Allow Duplicates -**

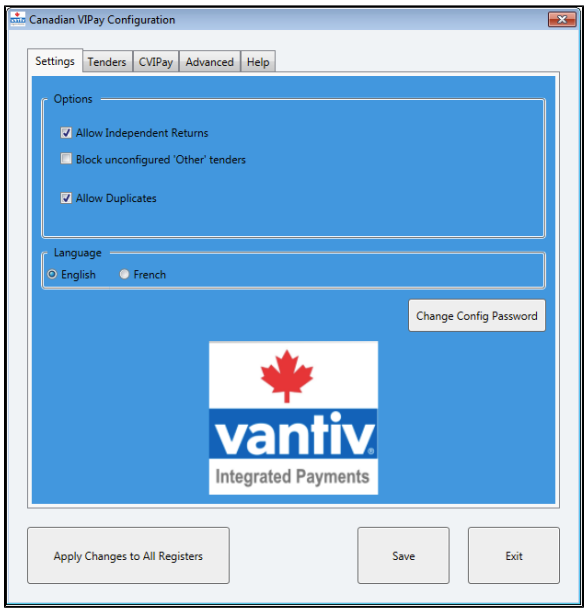
CVIPay will automatically detect if the same payment card had been previously used on a sale for the same price as a transaction earlier that day. That transaction would be blocked for security purposes. Use this option to allow for duplicate transactions.

- **Language -**

  This option allows the cashier to change the default language shown on the pin-pad. However, once the customer uses their payment card the language should switch to the language of the customer depending on the card type.
- **Apply Changes to All Registers -**

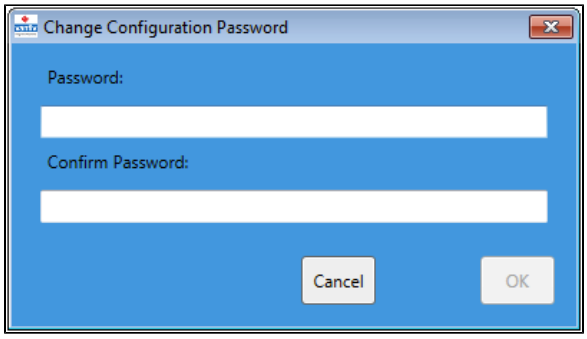
  Press this button in order to apply all CVIPay configuration settings as they currently are set to each of the registers configured in your RMS Store Operations Database. All of the registers will have matching CVIPay configuration settings at that point.

  Important - If you click the Apply Changes to All Registers button you will be given the choice of applying the same COM port number of the pin-pad to all registers. Or you can click No and the COM port number will be excluded from the settings shared among your registers. Check the Windows Device Manager to see what COM ports are assigned when you connect the pin-pads.



Change Config Password:

- As mentioned the default password is "CVIPayP@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

CVIPay 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.
- **Remove Tender -**

  Highlight the tender you wish to remove and use the remove tender option to delete the tender from the RMS database.

Tender Settings:

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

- **Credit/Debit -**

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

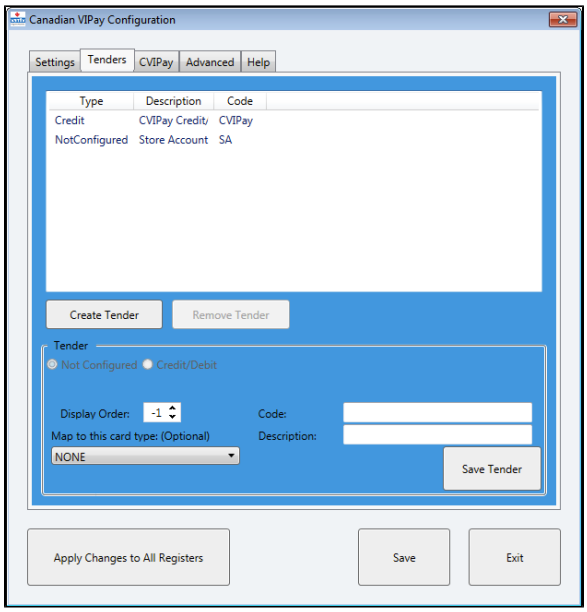
  Set the display order of the selected tender so the cashiers will have easy access to those they use most often.
- **Code -**

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

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

  Selecting save tender will save the current tender configuration.
- **Map to this card type (Optional) -**

  Some stores need to track which credit card types have been used by customers in the RMS reports. This function allows you to select a tender type above and then select the Card Type in the drop-down menu to associate that card type with the tender. This way if you require separate Visa, Discover, MasterCard or American Express tender types your RMS reports will properly reflect the credit cards your customers are using. Note: This functionality specifically works with Credit type tenders only.

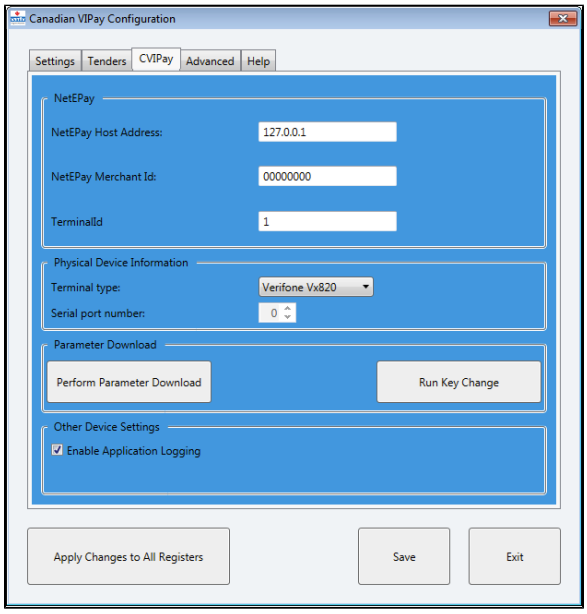


Important - If you edit a tender, you will need to close the register batch by performing a Z report to display tender changes. Refer to Store Operations Manager > Help > Contents > Search > Printing a Z report.

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.

Step #5

CVIPay Configuration Mangement - CVIPay



NETePay:

- **NETePay Host Address -**
  Enter the network name or IP address of the computer hosting the NETePay service. In this example the register is also the server so a "loopback" IP address of 127.0.0.1 has been entered.
- **NETePay Merchant ID -**
  Enter the Merchant ID provided by your Vantiv account representative.

Physical Device Information:

- **Terminal Type -**
  Select the pin-pad device you are using from this drop-down menu. Currently the Verifone VX820 is supported.
- **Serial Port Number -**
  Enter the COM port number assigned to your pin-pad device by Windows.

Parameter Download:

Perform Parameter Download -

- Press this button in order to download the current parameters to your pin-pad device.

Run Key Change -

- Press this button in order to initialize the pin-pad.

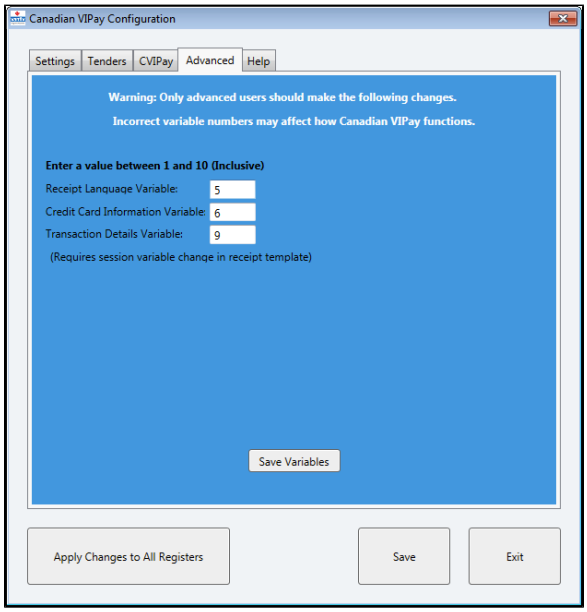
Important - This will need to be completed before you can process sales with CVIPay in Microsoft RMS. This should only need to be done once per register/device.

Logging:

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

Step #6

CVIPay Configuration Mangement - Advanced



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

Receipt Language Variable:

- Default Value: 5

Credit Card Information Variable:

- Default Value: 6

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

Transaction Details Variable:

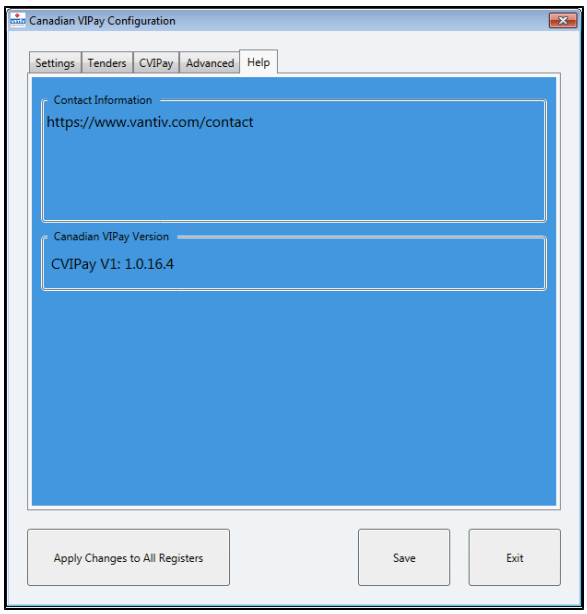
- Default Value: 9

Save Variables:

- Click this button to save the current variable settings.

Step #7

CVIPay Configuration Mangement - Help



Contact Information -

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

CVIPay Version -

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

Step #8

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

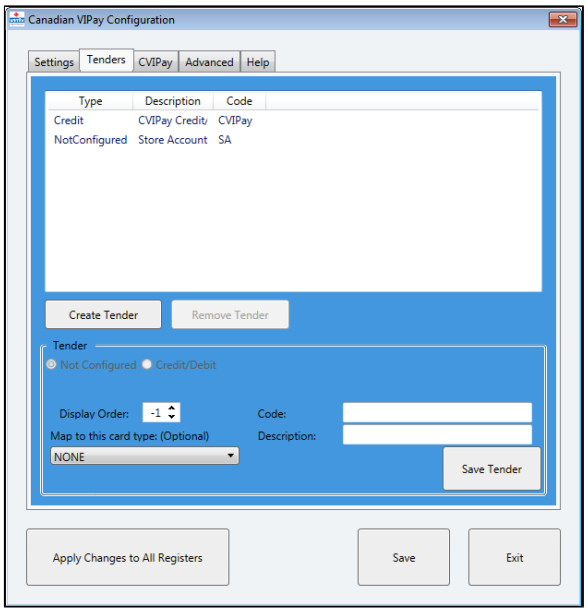
Process Transactions with CVIPay

Step #1

Verify Tenders are configured in CVIPay

CVIPay is capable of processing Credit and Debit tender types.

The tender must be set up correctly and enabled in the CVIPay Configuration Management utility before attempting to use them in Microsoft RMS Point of Sale. You can also select the default language used on the Pinpad between English and French. Be aware that once the customer swipes or inserts a payment card the Pinpad will switch between English or French depending on the language of the card holder. Please reference CVIPay Configuration.

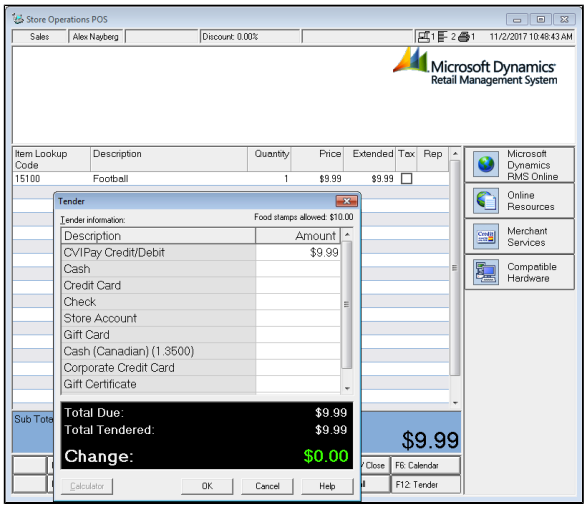


Step #2

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

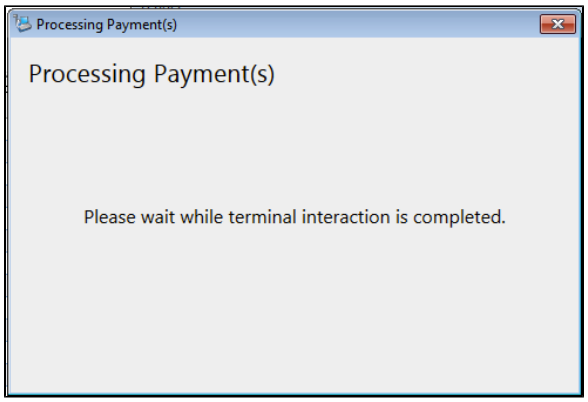
Approve dollar amount

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 Point of Sale 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.

At this point the pin-pad LCD screen will ask you to approve the dollar amount for the transaction. Press the green **OK** button to approve the amount or press the red **Cancel** button to decline the amount. Clicking the **Cancel** button twice will effectively stop the tender process and the RMS Point of Sale screen will ask if you would like to **Cancel/Roll Back** or **Retry**. **Cancel/Roll Back** will allow you to change the dollar amounts in the tender window or even cancel the sale altogether. **Retry** will use the same tender configuration and attempt it a second time.

If the customer is using a **Credit** or **Debit** card they will be prompted to choose Credit or Debit on the pin pad after approving the dollar amount.



Step #4

Swipe, Tap and Insert

- **Swipe**
  This method is used with Credit/Debit 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/Debit 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 Verifone VX820 pin-pad please visit:

https://www.verifone.com/en/us/devices/countertops-pin-pads/vx-820

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 to approve the dollar amount. The pin-pad screen will flash and then ask you to approve the amount a second time. Now press the green OK button.

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)
- Account holder ZIP code
- If Chip Card (EMV) Yes or No

Step #6

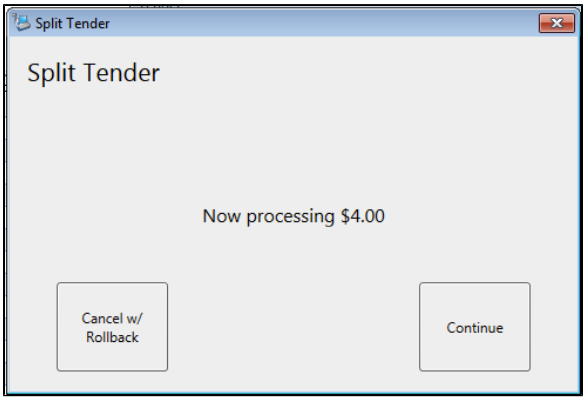
Split Tender

CVIPay 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.





Step #8

Returns and Voids

Returns and Voids with CVIPay 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.

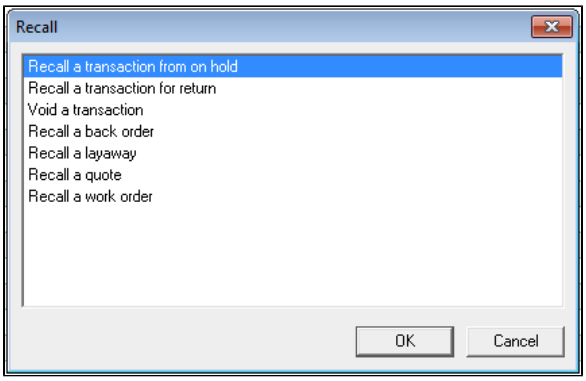
Independent Return -

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

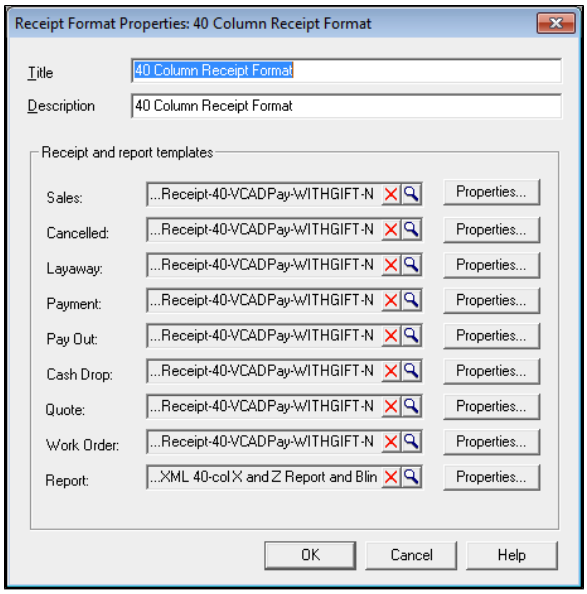
CVIPay does install custom receipt templates but does not enable them by default. Many Microsoft RMS customers already have custom receipts so it is important not to replace them automatically.

- 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.
- Important - The language printed on the receipt will either be English or French depending on the language of the card holder. This will happen independently of the default language configured in the CVIPay software.

There are four standard CVIPay custom receipt templates for use with normal 40 Column receipt printers:

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

- **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.



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.

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

https://www.vantiv.com/contact

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Vantiv Contact Center (Available: 24x7x365) - 866-622-2390

eCommerce Merchant Support - 800-548-5326

Merchant Activation Team (MAT) - 866-622-2907

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