

MPS integration

January 2008



## installation guide

Mercury Payment Systems integrates with Microsoft RMS for high-speed authorization of credit, debit, and gift card transactions.

Processing is fully integrated into Microsoft RMS tender screens. Credit and debit make use of the built-in interface. Gift card processing requires a small, easy to install software component that interacts seamlessly with RMS.

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# Quick Facts



## Why Mercury?

- Free payment processing software built into the POS
- Free 24/7 live technical and customer support
- Competitive rates
- Payment Card Industry Data Security Standard (PCI) Compliance
- Easy enrollment in 24-48 hours



## Enhanced Processing Features

- Free MercuryGift™ card processing for single and multi-store locations
- Free real-time Web reporting on all transactions
- Authorization outage protection
- Microsoft supported devices for signature capture and PIN-based debit
- Reliable backup processing options

# Pre-Installation Requirements



## One

Version 1.2 with Service Pack 3, Version 1.3, or Version 2 for RMS Store Operations must be installed prior to performing the Mercury setup.



## Two

You need the MerchantID provided on the merchant's set-up letter.



## Three

For PIN debit processing: you need a PIN pad supported by the version of RMS installed, injected with the Mercury key.

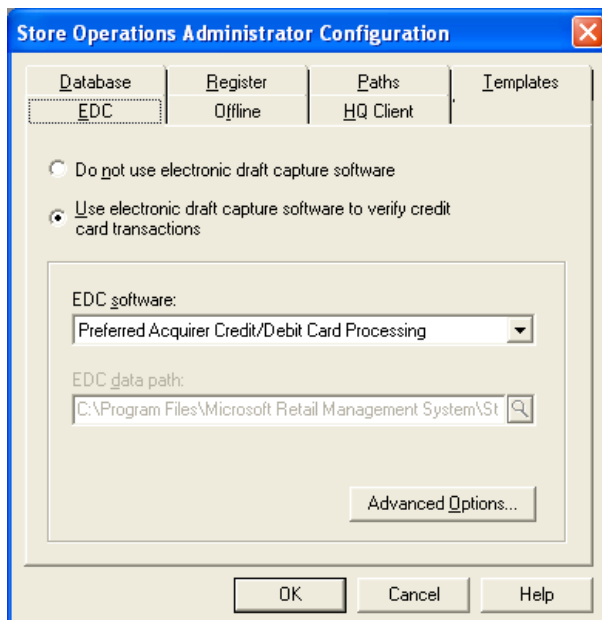
## Installation Options

1. Manual installation for credit.
2. Automated installation for credit, gift and receipt generation.

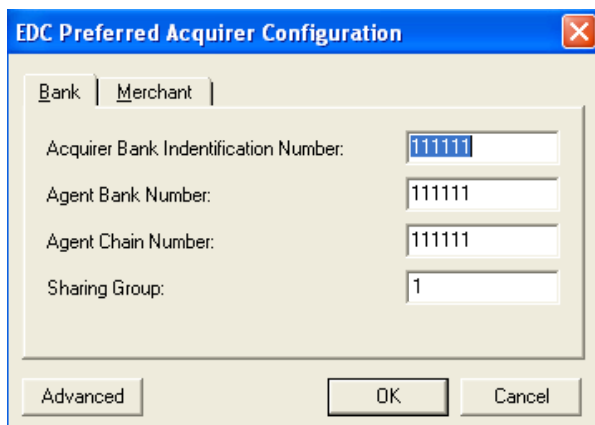
# Mercury Payment Systems RMS Integrated Install Options

## Option 1. Manual Installation for Credit/Debit

- 1 Go to the RMS Store Operations Administrator. Go to File > Configuration and select the EDC tab. Select "Use electronic draft capture software to verify credit card transactions."
- 2 Select "Preferred Acquirer Credit/Debit Card Processing" in the EDC software drop down list.

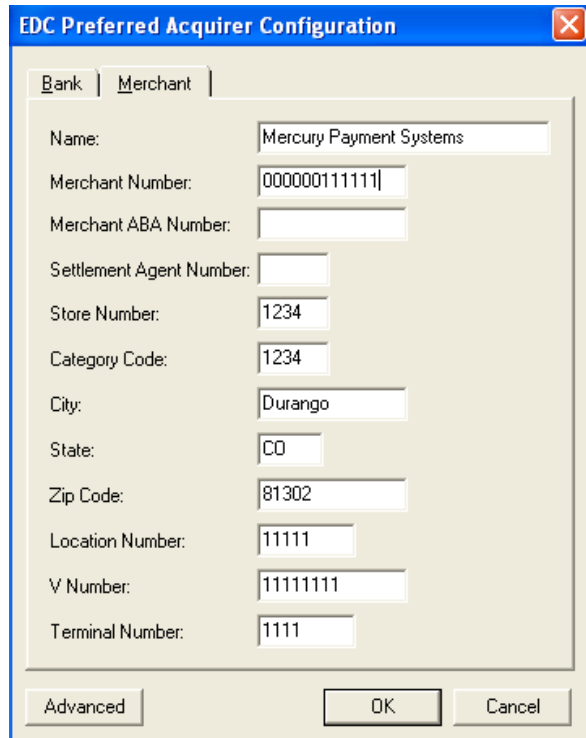


- 3 Click on the Advanced Options button and fill out the Acquirer Bank Identification Number, Agent Bank Number, Agent Chain Number and Sharing Group. These fields are not used by Mercury, but are required by RMS. You can use filler values, such as "111111."



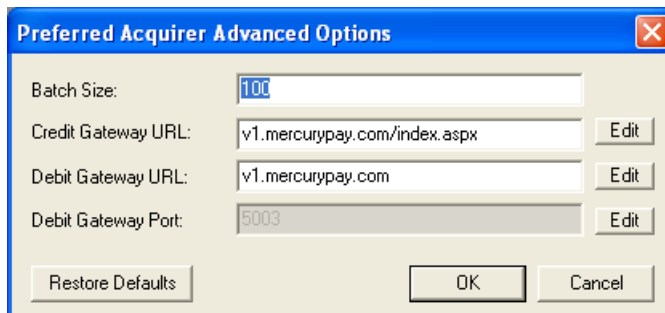
- 4 Click on the Merchant Tab and fill out your Name (company name), Merchant Number (precede your Mercury Payment Systems Merchant ID with leading zeroes), Store Number, Category Code, City, State, Zip Code, Location Number, V Number, and Terminal Number.

Only the Merchant Number field is used by Mercury, but RMS requires they all be completed. For those fields for which you do not have a value, such as V Number, you can use filler values, such as "11111111."



The screenshot shows a dialog box titled "EDC Preferred Acquirer Configuration" with a blue header and a close button (X) in the top right corner. Below the title bar are two tabs: "Bank" and "Merchant", with "Merchant" selected. The dialog contains several text input fields with the following values: Name: Mercury Payment Systems; Merchant Number: 000000111111; Merchant ABA Number: (empty); Settlement Agent Number: (empty); Store Number: 1234; Category Code: 1234; City: Durango; State: CO; Zip Code: 81302; Location Number: 11111; V Number: 11111111; Terminal Number: 1111. At the bottom of the dialog are three buttons: "Advanced" (disabled), "OK", and "Cancel".

- 5 Click on the Advanced button in the lower left corner of the EDC Preferred Acquirer Configuration.



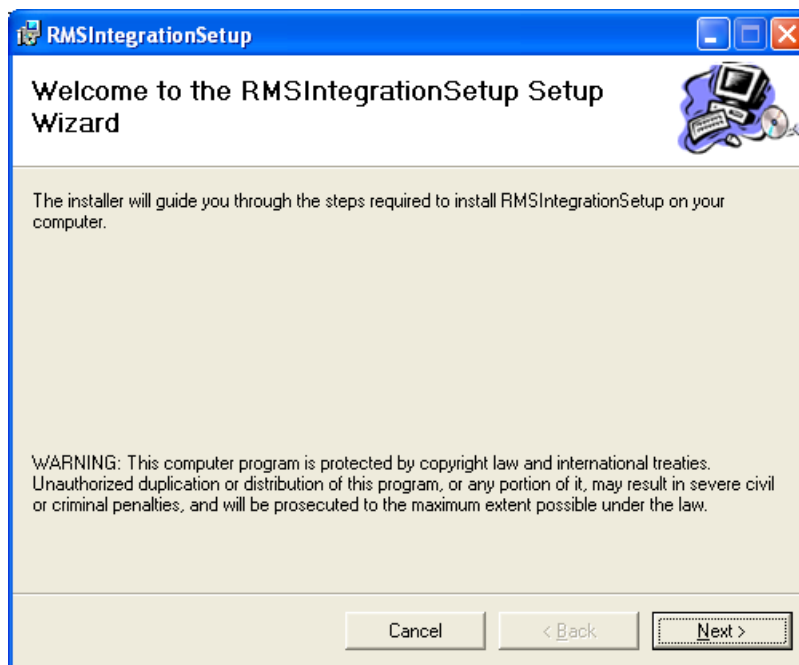
The screenshot shows a dialog box titled "Preferred Acquirer Advanced Options" with a blue header and a close button (X) in the top right corner. Below the title bar are four text input fields, each with an "Edit" button to its right: Batch Size: 100; Credit Gateway URL: v1.mercurypay.com/index.aspx; Debit Gateway URL: v1.mercurypay.com; Debit Gateway Port: 5003. At the bottom of the dialog are three buttons: "Restore Defaults", "OK", and "Cancel".

- 1) Click the Edit button to the right of the Credit Gateway URL. Enter "v1.mercurypay.com/index.aspx."
- 2) Click the Edit button to the right of the Debit Gateway URL. Enter "v1.MercuryPay.com."
- 3) Click the OK button and then click the OK button again on the next two forms to save the settings.

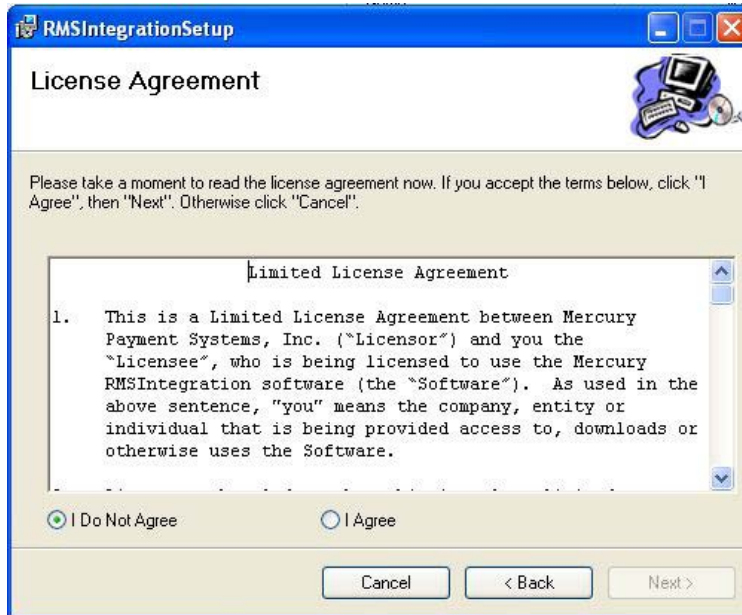
Go to page 13 for further instructions.

## Option 2. Automated Installation for Credit, Gift and Receipt Generation

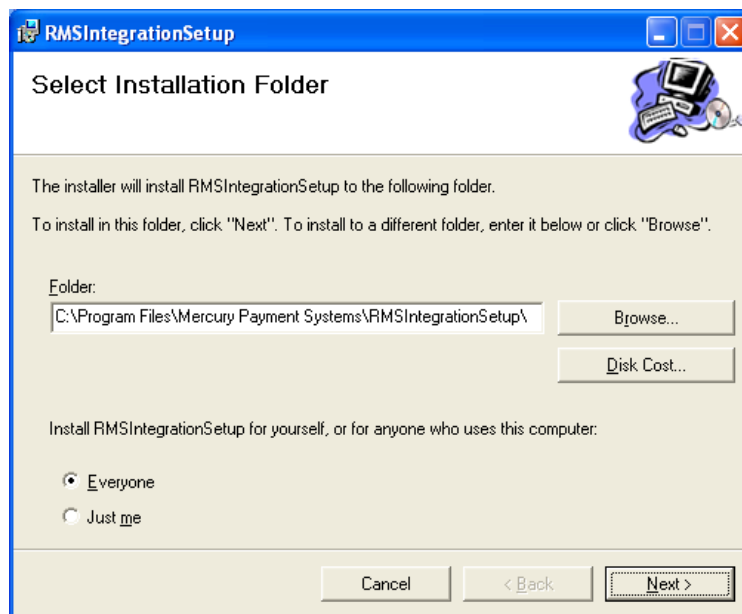
- 1 The MercuryGift™ interface utilizes HookType 15, Parameter 1. Other add-in software should not interfere with the gift interface and the gift interface should not interfere with other add-in software. The only conflict that may occur is if one add-in needs transaction data that was modified by a previous add-in.
- 2 Download the Mercury RMS installer from <http://www.MercuryPay.com/resources/RMSIntegrationSetUp.msi> While logged in with administrator access, run installation program 'RMSIntegrationSetUp.msi' and click Next. (If your computer does not contain the correct version of the Microsoft.Net Framework, setup will not continue and you will be redirected to a Microsoft site in order to download this version first. You will then need to rerun the installation program to continue.)



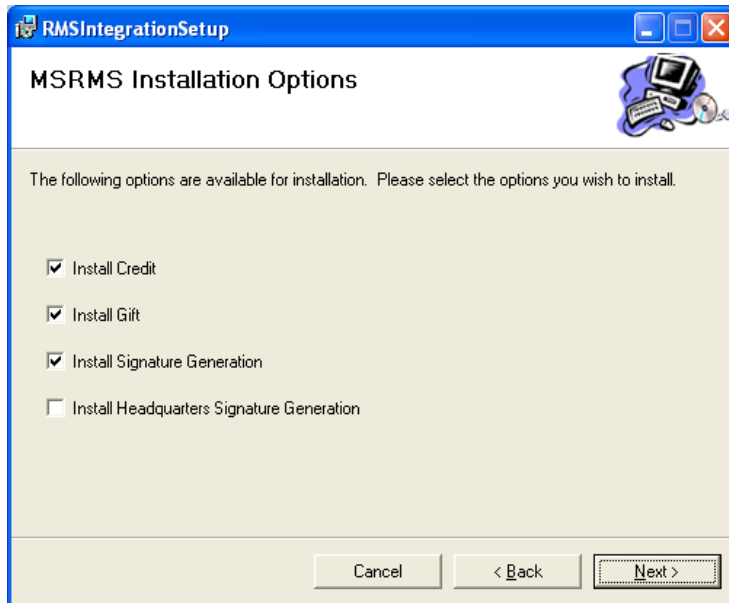
- 3 Please read the Software License Agreement and, if you agree, select the "I agree option", then continue by pressing Next.



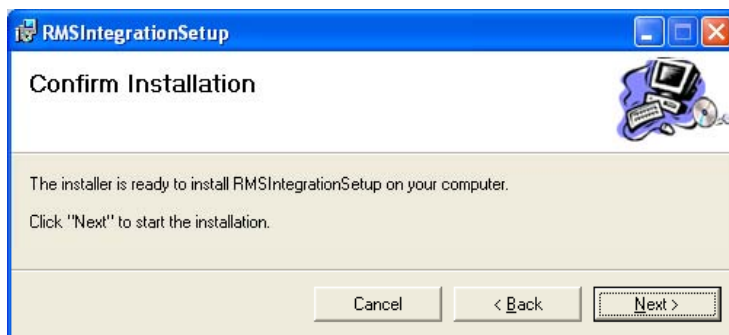
- 4 This form allows you to choose the installation location of the RMS components. In most cases the default values will be fine. Press the Next button to continue.



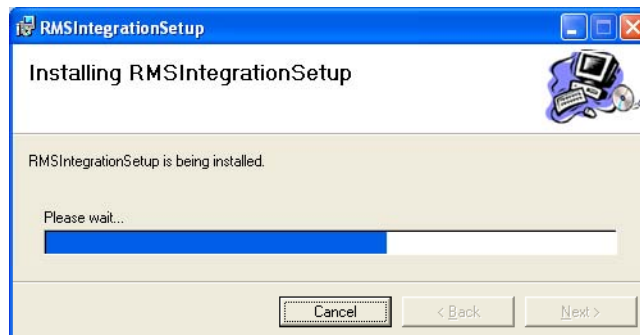
- 5 This form allows you to select the components you wish to install on the current computer. Please select the options you would like and then press the Next button. See Receipt Generation Application User Guide for more details on the last two options.



- 6 At this point the setup application has enough information to install the RMS components. Please press the Next button to continue.



- 7 Setup now shows a progress bar as the installation process proceeds.



- 8 A box will display for you to enter your Mercury Payment Systems provided variables. You should have been given a Merchant ID. Enter the merchant ID number into the first field provided. This field is required, but a leading 0 is not. DSI Client servers should be entered as g1.mercurypay.com;g2.backuppay.com.

The next three fields allow you to customize your Gift Card Item description. The default values, if left blank are shown on the frame. These values must correlate with the Item Descriptions set up within your Microsoft RMS Store Operations Manager. There should be a line item for your Gift Card purchases and the description must match this entry exactly (case sensitive). Same applies for your Gift Card Reload line item and your Gift Card Tender Type description. You can always change these values later if desired so for now leave blank to default to pre-set values. Leave the checkbox checked for First Time Install as this allows for full installation. This option is explained under "Changing MPS Setup." You can also click on the question mark in the upper right corner and click on a box you want more information on and a detailed message will be displayed.

**Merchant Gift Card Set-Up**

The following information is required to process your Gift Cards correctly.

Merchant ID:

DSIClient Servers:

Gift Card Item Description:  
(leave blank for default of 'Gift Card')

Gift Card Reload Item Description:  
(leave blank for default of 'Gift Card Reload')

Gift Card Tender Description:  
(leave blank for default of 'Gift Card')

First Time Install

- 9 Setup has completed successfully. Please press the Close button.

**RMSIntegrationSetup**

**Installation Complete**

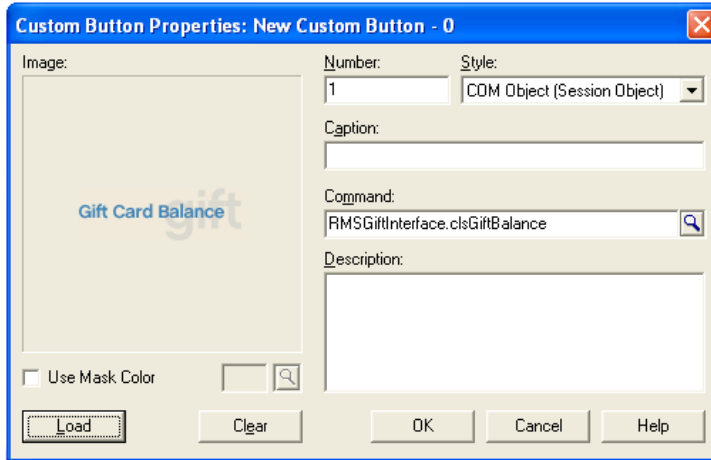
RMSIntegrationSetup has been successfully installed.  
Click "Close" to exit.

Please use Windows Update to check for any critical updates to the .NET Framework.

# Adding Custom Buttons

## GIFT CARD BALANCES

This is an optional button that will allow for retrieving Gift Card balances by swiping a Gift Card. Start the Store Operations Manager. Go to Database > Registers > Custom POS Buttons. Click New to add a new button.

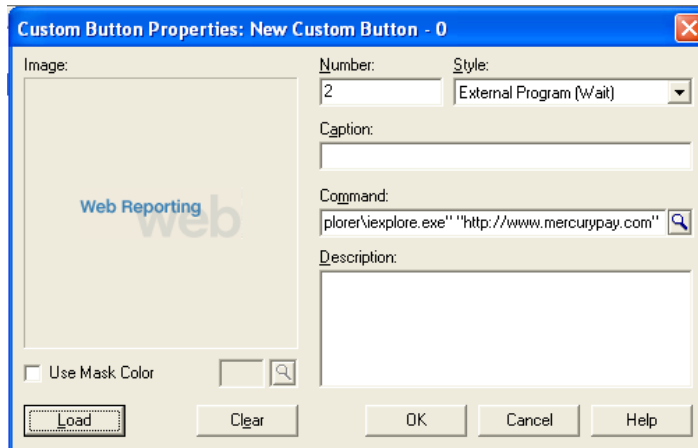


Fill in the following values:

- 1) Style: COM Object (Session Object)
- 2) Caption: {blank}
- 3) Command: RMSGiftInterface.clsGiftBalance
- 4) Click Load. Select "GiftCard.gif" and click Open.
- 5) Click OK.

## WEB REPORTING LOGIN PAGE

This is an optional button that will allow for opening Mercury Payment Systems Web Reporting directly to the Login Page. Click New a second time.

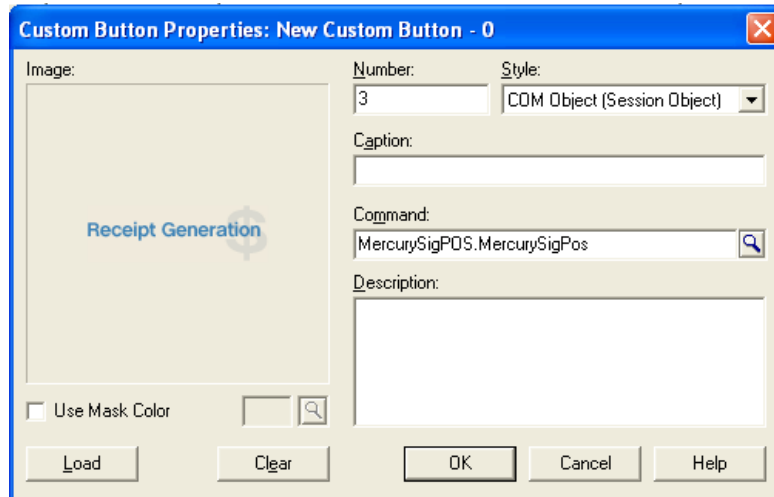


Fill in the following values:

- 1) Style: External Program (Wait)
- 2) Caption: {blank}
- 3) Command: Path to Internet Explorer and Mercury's Website. Default:  
"C:\Program Files\Internet Explorer\ie.exe" "http://www.mercurypay.com/mps\_custportal"
- 4) Click Load. Select "WebRep.gif" and click open.
- 5) Click OK.

## RECEIPT GENERATION TOOL

This is an optional button that will allow for opening the Mercury Payment Systems' Receipt Generation Tool. Click New to add a new button.



Fill in the following values:

- 1) Style: COM Object(Session Object)
- 2) Caption: {blank}
- 3) Command: MercurySigPOS.MercurySigPOS
- 4) Click Load. Select "receipt.gif" and click Open.
- 5) Click OK.

For additional information on the use of the Receipt Generation Tool, please see the Receipt Generation Application User Guide on page 17.

# Adding an Inventory Item

## ADD GIFT CARDS AS A STANDARD ITEM

In Store Operations Manager, go to Database > Items.

Click New to add a new Inventory Item. Add the following items:

The screenshot shows the 'Item Properties: Gift Card - 10000' dialog box. The 'General' tab is selected, displaying the following fields and values:

- Item lookup code: GC
- Description: Gift Card
- Item type: Standard
- Price: \$0.00
- Cost: \$0.000
- Profit Margin: N/A
- Barcode: NONE

The 'Options' tab is also visible, showing a 'Must enter price at the POS' checkbox. The 'Substitutes' tab is also visible, showing a table with columns for 'Type' and 'Item Lookup Code', with a '<None>' entry.

- 1) Select the type of item to create on pop-up: Standard Item
- 2) Item lookup code: Make this what ever makes the most sense to your operations for gift card purchases
- 3) Description: This is what the installation referred to in the "Changing MPS Setup" section. If you left the field blank, this must be "Gift Card" (case sensitive). You can make this whatever makes the most sense to you for gift card purchases, however, you will have to make the changes described in the "Changing MPS Setup" section also.
- 4) Item type: Standard
- 5) On Options Tab, enable "Must enter price at the POS".
- 6) On Inventory Tab, fill in the number of flexible value gift cards available.

## ADD GIFT CARD RELOAD AS A NON-INVENTORY ITEM

In Store Operations Manager, go to Database > Items.  
Click New to add a new Inventory Item. Add the following items:

**Item Properties: Gift Card Reload - 100001**

Aliases	Substitutes	Special	Serial	Kit	Options
General	Inventory	Suppliers	Pricing	Discounts	Commission

Item lookup code:  Item type:

Description:  Member of:

Type	Item Lookup Code
	<None>

Extended description:

Sub Description 1:

Sub Description 2:

Sub Description 3:

Barcode:

Department:

Category:

Item tag:

Price:

Cost:

Profit Margin:

- 1) Select the type of item to create on pop-up: Standard Item
- 2) Item lookup code: Make this what ever makes the most sense to your operations for gift card reloads
- 3) Description: This is what the installation referred to in the "Changing MPS Setup" section. If you left the field blank, this must be "Gift Card Reload" (case sensitive). You can make this whatever makes the most sense to you for gift card reloads, however, you will have to make the changes described in the "Changing MPS Setup" section also.
- 4) Item type: Non-Inventory
- 5) On Options Tab, enable "Must enter price at the POS."

# Adding Tender Types

## SET UP TENDER TYPES

### CREDIT CARD

In Store Operations Manager, go to Database > Tender Types > Click New to add a new Tender Type for credit cards (or select the existing credit card tender type and click on the Properties button). Add the following items:

The screenshot shows the 'Tender Type Properties: Credit Card - CD' dialog box with the 'General' tab selected. The 'General Settings' section includes: Description: Credit Card; Tender code: CD; Tender type: Credit Card (dropdown); Currency: Default Currency (dropdown); and a 'Denominations...' button. The 'Register Settings' section includes: Display order: 1; Scan code: 0; Bound to value: \$0.00; Prevent cashier overtendering: checked; Pop cash drawer: checked; Require signature: unchecked; Allow multiple entries: unchecked; and a note: '(Extra lines will be added on the tender screen when a partial amount is entered)'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

- 1) Description: Make this whatever makes the most sense to you for payments received with credit cards.
- 2) Tender Code: Make this what ever makes the most sense to your operations for payments by credit cards.
- 3) Tender Type: Credit Card.
- 4) Select the Verification tab: Check the box "Perform verification via EDC."

The screenshot shows the 'Tender Type Properties: Credit Card - CD' dialog box with the 'Verification' tab selected. The 'Validation Text' section has a checkbox for 'Print the following lines of text on tendered currency:' and three empty text boxes for 'Validation Line 1:', 'Validation Line 2:', and 'Validation Line 3:'. The 'Check Verification' section has three radio buttons: 'Do not perform verification of account information.' (selected), 'Open: Accept checks not listed in the database.', and 'Closed: Only accept checks listed in the database.'. The 'Tender Verification' section includes: 'Validation Mask:' (empty); 'Maximum amount:' \$0.00; 'Debit Surcharge:' \$0.00; 'Support Cash Back' (unchecked); 'Cash Back Limit:' \$0.00; and 'Cash Back Fee:' \$0.00. The 'Electronic Draft Capture' section has a checked checkbox for 'Perform verification via EDC'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

## DEBIT CARDS

Click New to add a new Tender Type for debit cards (or select the existing Debit Card tender type and click on the Properties button). Add the following items:

The screenshot shows a dialog box titled "Tender Type Properties: New Tender". It has two tabs: "General" and "Verification". The "General" tab is active. It is divided into two main sections: "General Settings" and "Register Settings".

**General Settings:**

- Description: Debit Card
- Tender code: DC
- Tender type: Debit Card
- Currency: Default Currency

**Register Settings:**

- Display order: [Empty field]
- Scan code: [Empty field]
- Round to value: \$0.00
- Prevent cashier overtendering:
- Pop cash drawer:
- Require signature:
- Allow multiple entries:

Below the checkboxes, there is a note: "(Extra lines will be added on the tender screen when a partial amount is entered)".

At the bottom of the "General Settings" section, there is a button labeled "Depominations...".

At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Help".

- 1) Description: Make this whatever makes the most sense to you for payments received with debit cards.
- 2) Tender Code: Make this what ever makes the most sense to your operations for payments by debit cards.
- 3) Tender Type: Debit Card.
- 4) Select the Verification tab: you will notice that the "Perform verification via EDC" is already checked for this tender type.

In Store Operations Manager, go to Database > Tender Types.  
Click New to add a new Tender Type for Gift Cards. Add the following items:

**Tender Type Properties: Gift Card - GC**

General | Verification

General Settings

Description: Gift Card

Tender code: GC

Tender type: Credit Card

Currency: Default Currency

Register Settings

Display order: 4

Scan code: 0

Round to value: \$0.00

Prevent cashier overtendering:

Pop cash drawer:

Require signature:

Allow multiple entries:

(Extra lines will be added on the tender screen when a partial amount is entered)

Depominations...

OK Cancel Help

- 1) Description: This is what the installation referred to in the "Changing MPS Setup". If you left the field blank, this must be "Gift Card" (case sensitive). You can make this whatever makes the most sense to you for payments received with gift card's, however, you will have to make the changes described in the "Changing MPS Setup" section also.
- 2) Tender Code: Make this what ever makes the most sense to your operations for gift card payments.
- 3) Tender Type: Credit Card.
- 4) Select the Verification tab: Check the box "Perform verification via EDC."

# Changing MPS Setup

A program has been installed under C:\Program Files\Mercury Payment Systems\RMSIntegrationSetup called "RMSMPSReg.exe." Execute this program and you will get the configuration form that you used during installation. **IMPORTANT NOTE: If simply changing some of your description titles, uncheck the "First Time Install" checkbox so that it will not attempt to do a full install. This will prevent the application from adding more hooks into the RMS Registry.**

**Merchant Gift Card Set-Up**

The following information is required to process your Gift Cards correctly.

Merchant ID:

DSIClient Servers:

Gift Card Item Description:   
(leave blank for default of 'Gift Card')

Gift Card Reload Item Description:   
(leave blank for default of 'Gift Card Reload')

Gift Card Tender Description:   
(leave blank for default of 'Gift Card')

First Time Install

# Receipt Generation Application



The receipt generation application was developed by Mercury Payment Systems to generate receipts that print store identifying information, transaction identifying information, and the customer's signature. This application generates a receipt that can be used in the chargeback/retrieval process.

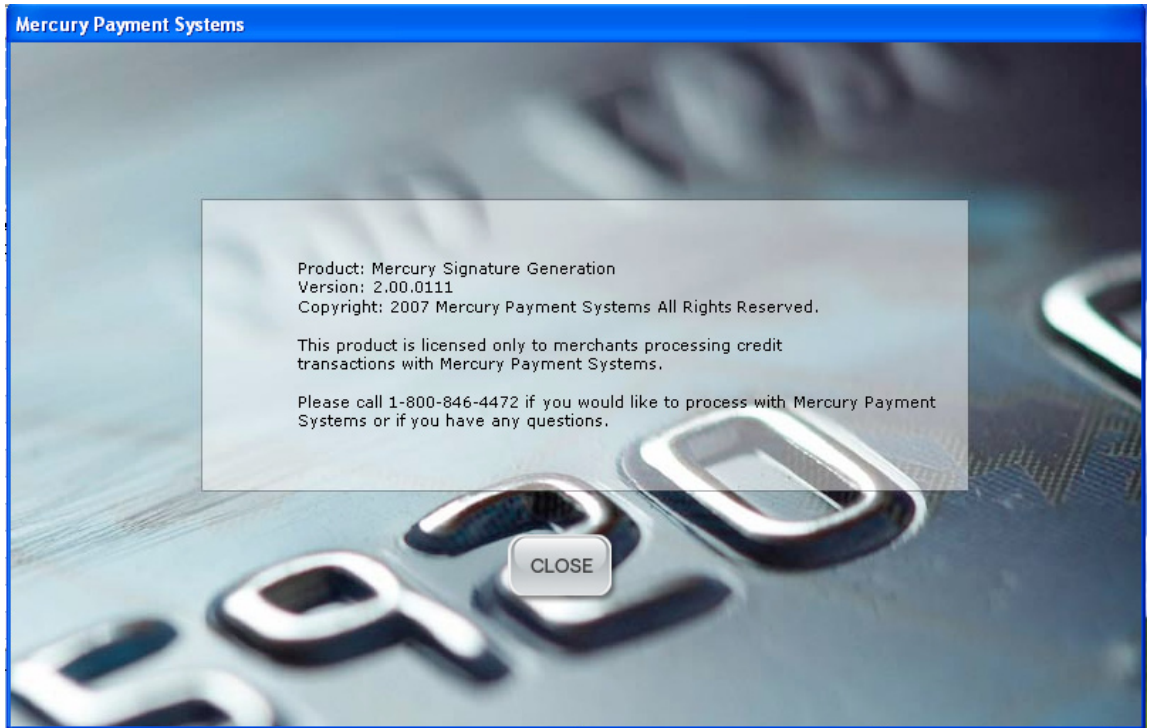
The receipt generation application can be executed from within the RMS POS or as a standalone application designed to use in conjunction with Microsoft Headquarters® multi-store business operations utility.

## The options include:

1. Install **"Signature Generation"** application that executes using the local data base connected to the RMS POS.
2. Install **Headquarters "Signature Generation"** application that executes by requesting a specific store database

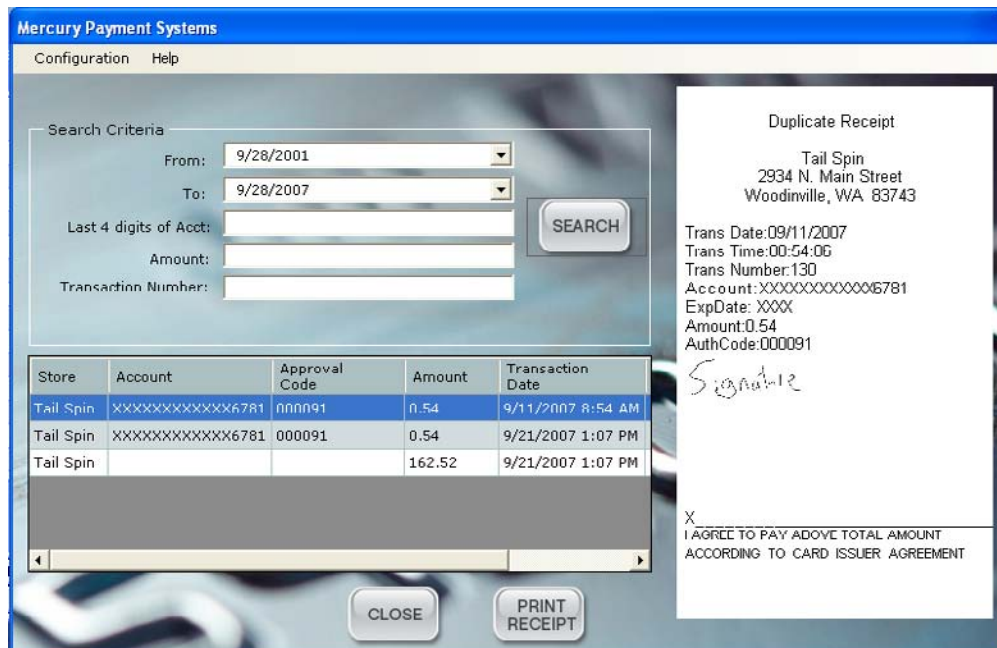


A splash screen displays information about the receipt generation application. This screen contains Mercury Payment Systems' phone number if you need to contact Mercury for technical support. Press the "close" button to view the main application.



The main application provides the user with the following features:

1. Search Criteria – use these fields to narrow down the number of transactions returned when searching for a specific transaction. The available fields are:
  - a. From Date – search from this date forward.
  - b. To Date – search from this date backward.
  - c. Last 4 digits of Account Number – search for the last 4 digits of a credit card number.
  - d. Amount – search for the amount of the transaction.
  - e. Transaction Number – search for the number assigned to this transaction by RMS.
2. The Configuration Menu
  - a. Use OPOS Printer – when checked, this toggle option will print to the currently configured RMS OPOS printer. When this option is not checked, the user will be able to print the receipt to a configured windows printer.
  - b. Show All Transactions – when this option is selected, and the user presses the “search” button, all transactions meeting the selected criteria will be displayed in the transaction grid. If this option is not selected only those transactions captured with a customer signature will be displayed in the transaction grid.
3. Help
  - a. About – information about this application, version info, copyright notice, and Mercury Payment Systems’ phone number for technical support.
4. Search Button – press this button to search for transactions.
5. Transaction Grid – lists the transactions that met the criteria when the “search” button was pressed.
6. Close Button – closes the application.
7. Print Receipt Button – prints the receipt image to the currently active RMS printer or a windows printer.
8. Receipt Image – the image of the currently selected transaction displays in the transaction grid.
  - a. If you select a transaction in the transaction grid that does not have a corresponding signature, the receipt image will display “No Signature On File.”



## Using the Receipt Generation Tool from outside of Microsoft RMS POS



If the Headquarters Receipt Generation option has been selected the receipt generation tool can also be used outside of the RMS POS.

The actual use of the application is the same with the added feature of being able to search by Store. This search criteria was added to make it easier to use the application from a RMS Headquarters installation.

The following information will need to be configured by your network administrator or POS reseller. Open the Configuration menu and select “Database Configuration.”

**Mercury Payment Systems**

Server: (local)

DB Connection

Use Windows Authentication

Use Sql Server Authentication

User name: user

Password:

Database: rmsdatabase

OK Cancel Test Connection

1. Enter the name of the database server you wish to access. In an established networked Headquarters environment, this would be the main HQ server. In a non-Headquarter's environment, this would be the server where the database is located.
2. Select whether or not to use windows authentication or sql server based on the original administrative set up and password protection of the system.
3. Enter the username that will connect to the database.
4. Enter the password needed to connect to the database if you selected sql server authentication.
5. Finally enter the database name.
6. Press “Test Connection” and if the test is successful press the “OK” button. If the connection failed check the configuration data entered until the test is successful.
7. Pressing the “OK” button will close the configuration form and save the configuration information.
8. Pressing the “Cancel” button will close the configuration form without saving information.

The actual Receipt Generation Form has already been discussed. With the standalone version there are a few minor differences:

1. Pressing "Print Receipt" will always open the windows print dialog.
2. The additional Store search criteria.
3. The Database Configuration Dialog in the Configuration menu.

The screenshot shows the Mercury Payment Systems interface. At the top, there are menu options for "Configuration" and "Help". Below this is a "Search Criteria" section with several input fields: "From:" (9/28/2001), "To:" (9/28/2007), "Last 4 digits of Acct:", "Amount:", "Transaction Number:", and "Store:" (All Stores). A "SEARCH" button is located to the right of these fields. Below the search criteria is a table with the following data:

Store	Account	Approval Code	Amount	Transaction Date	Trans Num
Store 3			30.5600	9/11/2002 1:15 PM	1
Store 3	XXXXXX9348		162.5200	9/11/2002 1:24 PM	2
Store 3			28.1500	9/11/2002 1:30 PM	3
Store 3			14.0800	9/11/2002 1:30 PM	4
Store 2			86.4800	9/11/2002 1:35 PM	1
Store 1			70.0000	9/11/2002 1:37 PM	1

At the bottom of the interface are "CLOSE" and "PRINT RECEIPT" buttons. On the right side, there is a receipt preview area with the following text:

Duplicate Receipt  
 Store 3  
 3394 2nd Ave.  
 Fargo, ND 94932  
 Trans Date:09/11/2002  
 Trans Time:01:15:23  
 Trans Number:1  
 Account:  
 ExpDate: XXXX  
 Amount:30.5600  
 AuthCode:  
 No Signature On File  
 X  
 I AGREE TO PAY ABOVE TOTAL AMOUNT  
 ACCORDING TO CARD ISSUER AGREEMENT



MercuryPay.com  
(800) 846-4472, ext.1818

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