

CONNECTED PAYMENTS

RESELLER TRAINING



Connected Payments 101

RETAIL GLOBAL PAYMENTS GROUP

AGENDA

- INTRODUCTION & OVERVIEW
- SOFTWARE INSTALLATION
- TRANSACTION SEARCH
- REPORTS
- STORE MONITORING
- USER MANAGEMENT
- SERVER UPGRADES, MAINTENANCE,
AND CONTACT INFO

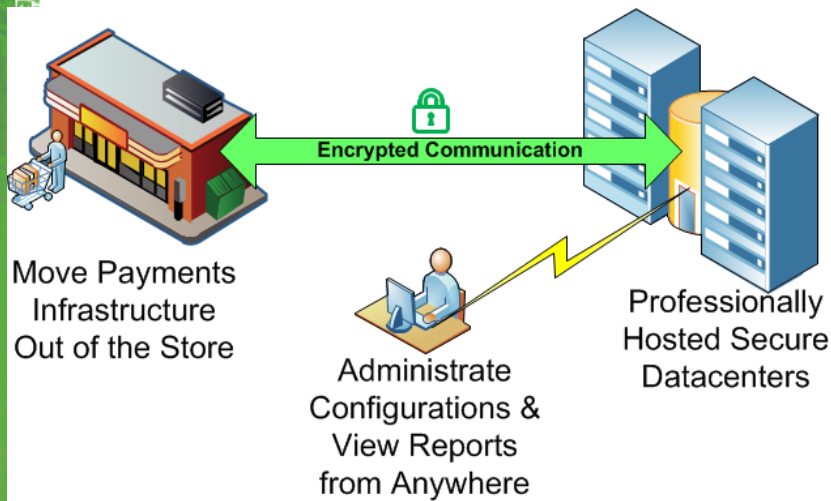


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Introduction & Overview



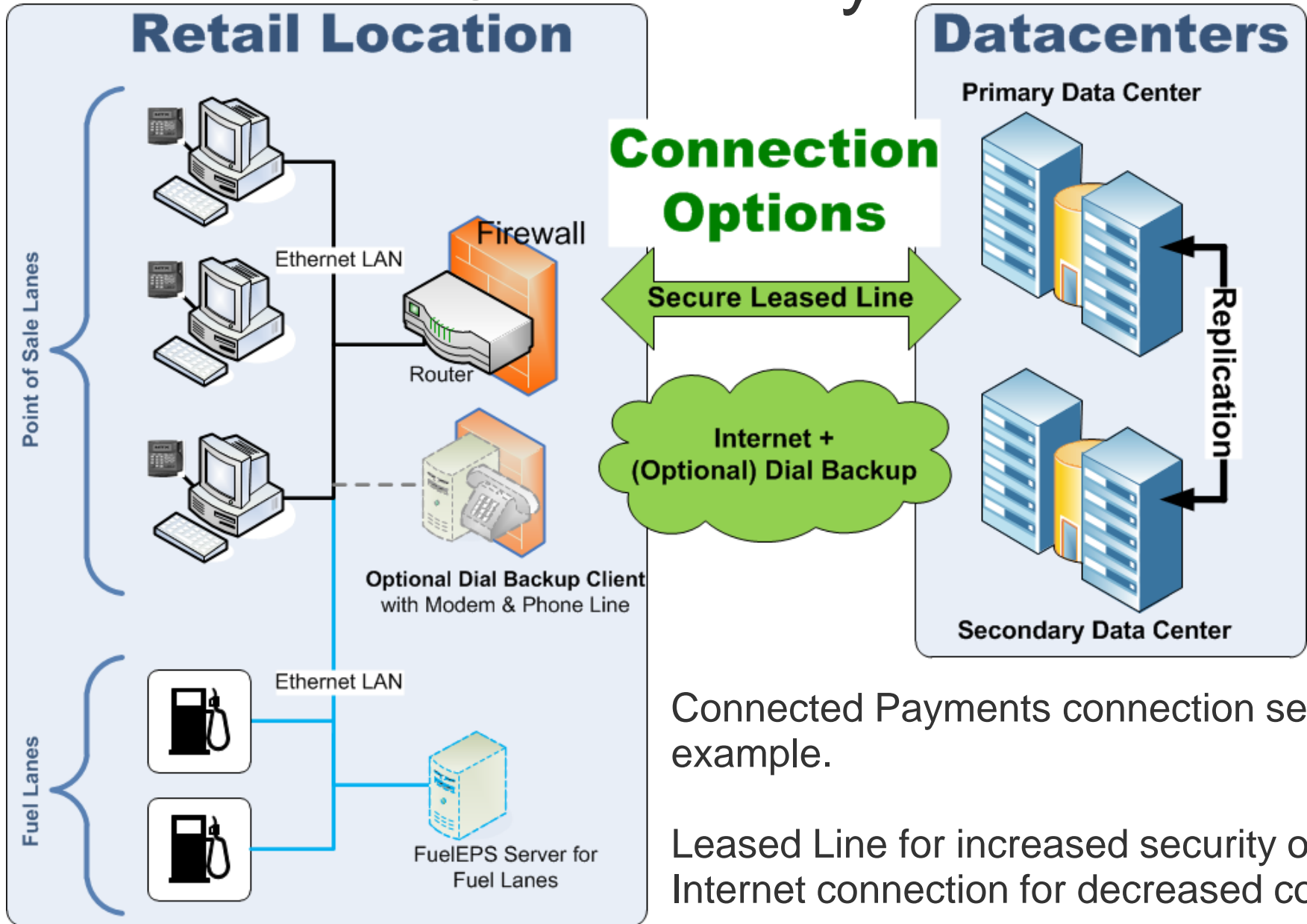
Connected Payments is a service operated by Retailix Global Payments.

Connected Payments provides direct connection to POS lanes, allowing much of the payments processing infrastructure to be moved out of the store and into professionally hosted data centers.

Highlights:

- Centralized enterprise reporting service
- Centralized configuration management
- Reliability: 2 professional data centers, dial backup connectivity
- PCI compliance
- Receipt & Signature Storage service
- Debit BIN file update service
- Scalability – Single store installs to chain-wide connections

Connectivity



Connected Payments connection setup example.

Leased Line for increased security or Internet connection for decreased cost.

Hardware System Requirements

POS Lane Hardware Requirements

- ✓ Pentium III (Intel or compatible) 500 MHz processor (1 GHz or faster recommended)
- ✓ 256 MB of RAM (512 MB or more recommended)
- ✓ 200 Mb free drive space

OpenEPS installs at each POS lane to drive the payments process and to provide connectivity between the POS lane, the PINpad terminal and the Connected Payments Datacenters.

- ◆ OpenEPS system requirements are exceptionally light!

FuelEPS/Dial Backup Requirements

- ◆ Dial Backup software must be run on a separate computer from either the POS lanes or the FuelEPS software.
- ◆ FuelEPS must be run on a separate computer from either the POS lanes or the Dial Backup software.

Software (Operating System) Requirements

PCI Requires the latest Security Patches be installed for your OS!

- ❖ Operating systems that are beyond the supported lifetime and are no longer receiving security updates must NOT be used.

Supported Windows OS

- ✓ POS Ready 2009
- ✓ POS Ready 7
- ✓ Windows 7 Enterprise
- ✓ Windows 8.1 Enterprise LTSB
- ✓ Windows 10 Enterprise LTSB

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Web Portal Login

The ServerEPS Web Portal provides access to all Connected Payments configuration and reporting options.

- Go To: WWW.ServerEPS.com
- Select Web Services



The screenshot shows the 'ServerEPS Login' page. The title 'ServerEPS Login' is centered at the top. On the left side, there is an icon of a server tower with a red padlock in front of it. To the right of the icon are three input fields: 'UserName:', 'Company:', and 'Password:'. Below these fields is a 'Login' button. The background is a dark blue color with a pattern of faint, light blue icons.

Login with your Username, Company Number, and Password

Dashboard



Welcome
ServerEPS Dashboard

Help | My Account | Logout

Home | Transaction Search | Reports | Management | Monitoring | Administration

Home

59:12

Welcome

ServerEPS Version 2.26 is live!

We, at Retail Global Payments are always working diligently to evolve our products in order to provide the best payments interface in the industry. We believe that the updates and new functionality included in this release will greatly enhance your retailer experience!

For more information on our 2.26 release, please review our release notes available on our customer service page.

Web Services Dashboard

- Transaction Search
- Reports
- Management
 - Key Management
 - Voucher Management
- Monitoring
 - Store Status
 - Systems Status
 - Connectivity Test
- Administration
 - Store Configuration
 - Stores and Store Group
 - User Management

Dashboard



Welcome
ServerEPS Dashboard

Help ▾ | My Account ▾ | Logout

Home | Transaction Search | Reports | Management ▾ | Monitoring ▾ | Administration ▾

Home

59:12

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Help

Provides access to the Customer Service & Terms and Conditions pages
Customer Service page provides documentation and downloads

Download the documentation and install package for your POS lanes from the Customer Service page.

Installation Downloads

Home X Customer Service X 59:51

ServerEPS Dashboard Customer Service

General

User Guides

- [PCI Assessment Guide](#) - ServerEPS PCI Assessment Guide
- [PCI Implementation Guide](#) - ServerEPS PCI Implementation Guide
- [Install guide](#) - Installation and Configuration guide.
- [Users Guide](#) - Users guide.
- [WinEPS and OpenEPS Direct Terminal Procedures](#) - WinEPS and OpenEPS Direct Terminal Procedures guide.
- [eWIC Approved Product List Client Users Guide](#) - eWIC Approved Product List Client Users Guide.
- [Dial Backup Client Installation and Configuration Guide](#) - Installation and Configuration Guide for the Dial Backu

ServerEPS Installation Packages

- [Certificate Update .Bat Update Package - SSL .Bat Certificate Update Package](#)
- [Certificate Update Package](#) - SSL Certificate Update Package
- [Virtual Terminal](#) - ServerEPS Virtual Terminal Installation Package
- [ServerEPS Installation](#) - ServerEPS Lane Installation Package
- [ServerEPS Dial Backup Client](#) - ServerEPS Dial Backup Installation Package (NOTE: This Client is only compatible with OpenEPS versions 826.3 and above. Please contact customer support before installing)
- [ServerEPS Prerequisites](#) - ServerEPS Prerequisite Installation Package
- [ServerEPS Linux Shared Objects](#) - ServerEPS Shared Object Lane Modules
- [APL Client Installation](#) - eWIC Approved Product List Retrieval Application
- [FuelEPS Installation](#) - ServerEPS Fuel Client Application
- [Equinox PIN Pad Loading Guide](#)

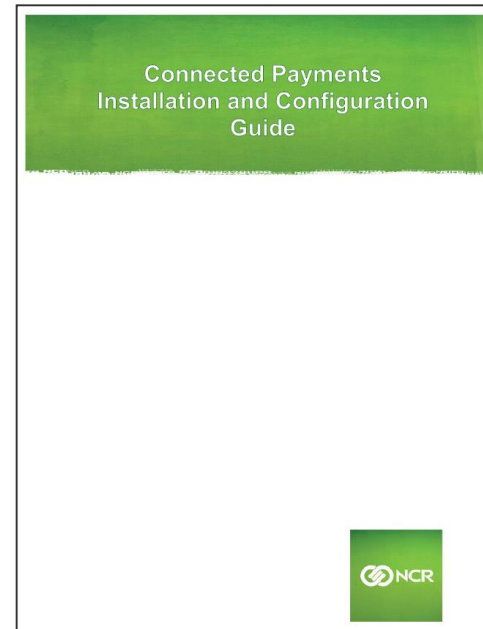
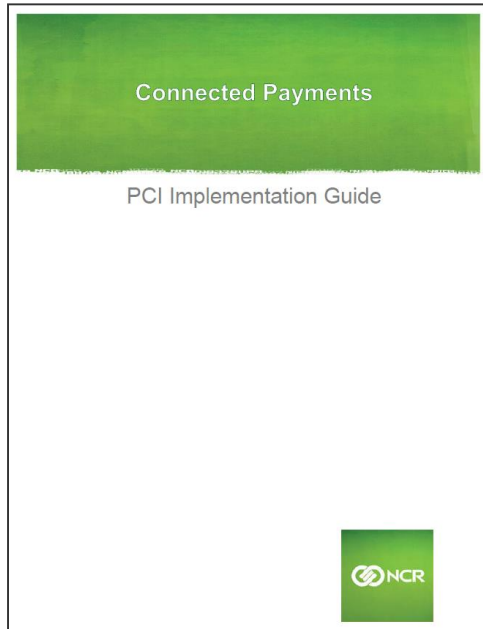
Downloads
Download and review the PCI Implementation guide, and the Install Guide.

Download the ServerEPS Installation package.
This is the package that will be installed on each POS lane

Installation Steps

OpenEPS Installation

Review the PCI Implementation guide, to ensure that your payments environment is PCI compliant.



Follow the steps outlined in the Installation and Configuration Guide to successfully install OpenEPS at each POS lane.

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Dashboard



Welcome
ServerEPS Dashboard

Help My Account Logout

Custom Change Password

Customer Service

ServerEPS Dashboard Customer Service

Release Notes

Customer Service

Release Notes

[Release Notes v2.26](#) - Release Notes for version 2.26

[Release Notes v2.23](#) - Release Notes for version 2.23

[Release Notes v2.22](#) - Release Notes for version 2.22

[Release Notes v2.20 Patch Release](#) - Release Notes for version 2.20 Patch Release

[Release Notes v2.20](#) - Release Notes for version 2.20

OpenEPS Release Notes

[OpenEPS Release Notes](#) - OpenEPS Release Notes (Updated for Version 828.1)

User Guides

[PCI Assessment Guide](#) - ServerEPS PCI Assessment Guide

[PCI Implementation Guide](#) - ServerEPS PCI Implementation Guide

[Install guide](#) - Installation and Configuration guide.

[Using Guide](#) - Users guide.

[WinEPS and OpenEPS Direct Terminal Procedures](#) - WinEPS and OpenEPS Direct Terminal Procedures guide.

[CWS Approved Product List Client Users Guide](#) - CWS Approved Product List Client Users Guide.

[Dial Backup Client Installation and Configuration Guide](#) - Installation and Configuration Guide for the Dial Backup Client

[ServerEPS Installation Packages](#)

[Certificate Update .Bat Update Package - SSL .Bat Certificate Update Package](#)

[Certificate Update Package - SSL Certificate Update Package](#)

[WinEPS Terminal ServerEPS Virtual Terminal Installation Package](#)

[ServerEPS Installation](#) - ServerEPS Lane Installation Package

[ServerEPS Dial Backup Client](#) - ServerEPS Dial Backup Installation Package (**NOTE: This Client is only compatible with OpenEPS versions 826.3 and above. Please contact customer support before installing**)

[ServerEPS Prerequisites](#) - ServerEPS Prerequisite Installation Package

[ServerEPS Linux Shared Objects](#) - ServerEPS Shared Object Lane Modules

[CWS Client Installation](#) - CWS Approved Product List Retailer Application

[FuelEPS Installation](#) - ServerEPS Fuel Client Application

[Equinox PIN Pad Loading Guide](#)

Provides access to the Customer Service & Terms and Conditions pages
Customer Service page provides documentation and downloads

Terms and Conditions page displays the initially agree-to terms.

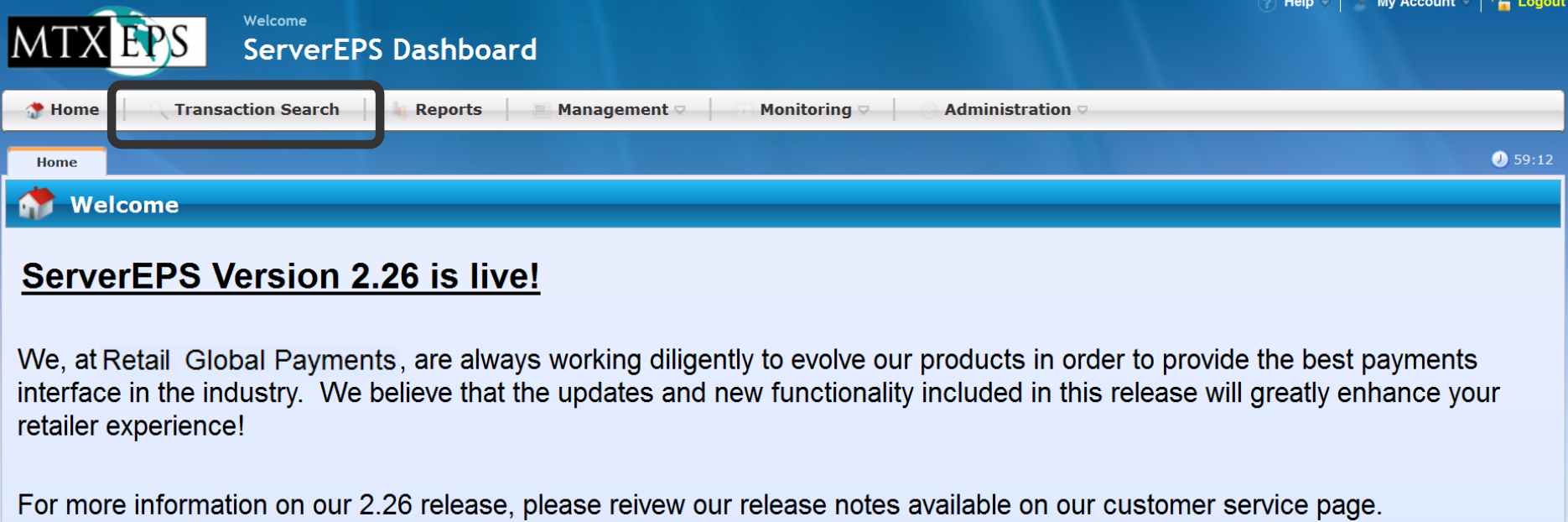
My Account

Allows you to view your own profile, change your password and see your login history.

Logout

Exit from the Dashboard, returns to login screen.

Transaction Search



The screenshot shows the MTX EPS ServerEPS Dashboard. The top navigation bar includes links for Home, Transaction Search (highlighted with a red box), Reports, Management, Monitoring, and Administration. The main content area features a blue header with a 'Welcome' message and a prominent announcement: **ServerEPS Version 2.26 is live!**. Below this, a paragraph states: 'We, at Retail Global Payments, are always working diligently to evolve our products in order to provide the best payments interface in the industry. We believe that the updates and new functionality included in this release will greatly enhance your retailer experience!'. A final line of text reads: 'For more information on our 2.26 release, please review our release notes available on our customer service page.'

The Transaction Search option allows a user to look up individual or groups of transactions that match a set of search parameters.

It is often used to locate a given transaction and review the signature capture associated with that transaction.

Use Transaction Search when you know information about a transaction or transactions you wish to review. If you would like a comprehensive report of all transactions, use the Reports option instead.

Transaction Search – Configure a



Search

MTXEPS Test Certification Transaction Search

Search Criteria: New Search

Store(s): and/or

Date(s):

Group	All Stores
4	Store(s)
1	Store 1
2	Store 2
3	Store 3
4	Store 4

Use the Store Selection drop down to select which store or stores you may search using the search calendar. You may expand the Advanced Search Option section by selecting the double down-arrow of the search criteria to further limit the search.

Advanced Search Options

Cashier:	<input type="text"/>	Pin Pad Serial:	<input type="text"/>
Department:	<input type="text"/>	Approved:	<input type="text"/>
User:	<input type="text"/>	Offline:	<input type="text"/>
PO #:	<input type="text"/>	Reversal:	<input type="text"/>
Auth Code:	<input type="text"/>	Response Code:	<input type="text"/>
Comments:	<input type="text"/>		

You can also type in the store number.

Display Search Results

Search results are displayed in a sortable list format.

You may enter criteria to sort by at the top of each column, and the listing will be automatically updated to display only results that match your entered information.

Search Criteria: Edit Previous Search Search Results: 6033 Record(s)

Search Results Hide Details Export Print

Local Date & Time	UTC	Store #	Lane	Reversal	Tender	Transaction	Seq #	Account	Trans Amt	Approved	Auth Code	Flags	Settled
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16542	510510...5100	\$1,126.45	\$1,126.45	315211	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16541	510510...5100	\$1,126.44	\$1,126.44	190759	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16540	510510...5100	\$1,126.43	\$1,126.43	985180	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16539	510510...5100	\$1,126.42	\$1,126.42	583372	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16538	510510...5100	\$1,126.41	\$1,126.41	014270	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16537	510510...5100	\$1,126.40	\$1,126.40	753553	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16536	510510...5100	\$1,126.39	\$1,126.39	003278	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16535	510510...5100	\$1,126.38	\$1,126.38	153347	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16534	510510...5100	\$1,126.37	\$1,126.37	086934	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16533	510510...5100	\$1,126.36	\$1,126.36	113957	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16532	510510...5100	\$1,126.35	\$1,126.35	142876	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16531	510510...5100	\$1,126.34	\$1,126.34	406102	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16530	510510...5100	\$1,126.33	\$1,126.33	932118	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16529	510510...5100	\$1,126.32	\$1,126.32	838225	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16528	510510...5100	\$1,126.31	\$1,126.31	029194	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16527	510510...5100	\$1,126.30	\$1,126.30	664863	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16526	510510...5100	\$1,126.29	\$1,126.29	546232	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16525	510510...5100	\$1,126.28	\$1,126.28	227191	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16524	510510...5100	\$1,126.27	\$1,126.27	816347	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16523	510510...5100	\$1,126.26	\$1,126.26	190608	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16522	510510...5100	\$1,126.25	\$1,126.25	689404	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16521	510510...5100	\$1,126.24	\$1,126.24	902495	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16520	510510...5100	\$1,126.23	\$1,126.23	124694	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16519	510510...5100	\$1,126.22	\$1,126.22	176844	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16518	510510...5100	\$1,126.21	\$1,126.21	468882	m	No

Pages (242 Total): 1 2 3 4 5 Advanced Export/Print...

Print Your Search Results

The selected report will be displayed in a new tab.



Search Criteria: Edit Previous Search Search Results: 6033 Record(s)

Search Results Hide Details Export Print

Local Date & Time	UTC	Store #	Lane	Reversal	Tender	Transaction	Seq #	Account	Trans Amt	Approved	Auth Code	Flags	Settled
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6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16541	510510...5100	\$1,126.44	\$1,126.44	190759	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16540	510510...5100	\$1,126.43	\$1,126.43	985180	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16539	510510...5100	\$1,126.42	\$1,126.42	583372	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16538	510510...5100	\$1,126.41	\$1,126.41	014270	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16537	510510...5100	\$1,126.40	\$1,126.40	753553	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16536	510510...5100	\$1,126.39	\$1,126.39	003278	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16535	510510...5100	\$1,126.38	\$1,126.38	153347	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16534	510510...5100	\$1,126.37	\$1,126.37	086934	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16533	510510...5100	\$1,126.36	\$1,126.36	113957	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16532	510510...5100	\$1,126.35	\$1,126.35	142876	m	No
6/25/2013 7:07 AM	6/25/2013 02:07 PM	1	01		Credit	Purchase	16531	510510...5100	\$1,126.34	\$1,126.34	406102	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16530	510510...5100	\$1,126.33	\$1,126.33	932118	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16529	510510...5100	\$1,126.32	\$1,126.32	838225	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16528	510510...5100	\$1,126.31	\$1,126.31	029194	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16527	510510...5100	\$1,126.30	\$1,126.30	664863	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16526	510510...5100	\$1,126.29	\$1,126.29	546232	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16525	510510...5100	\$1,126.28	\$1,126.28	227191	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16524	510510...5100	\$1,126.27	\$1,126.27	816347	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16523	510510...5100	\$1,126.26	\$1,126.26	190608	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16522	510510...5100	\$1,126.25	\$1,126.25	689404	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16521	510510...5100	\$1,126.24	\$1,126.24	902495	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16520	510510...5100	\$1,126.23	\$1,126.23	124694	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16519	510510...5100	\$1,126.22	\$1,126.22	176844	m	No
6/25/2013 7:06 AM	6/25/2013 02:06 PM	1	01		Credit	Purchase	16518	510510...5100	\$1,126.21	\$1,126.21	468882	m	No

Pages (242 Total): 1 2 3 4 5 **Advanced Export/Print...**

You may Print or Export the results using the report controls.

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Configuring your Reports

You may run a report using the default options, or you may specify a Date or Date Range and Store / Store Group selections.

Approved Transactions Log (TRN01)

Date Selection

- Search Current Transactions
- Search Date Range:
11/03/2014 - 11/06/2014

Store Selection

- Search All Stores
- Specify Stores to Search:
Configure Selected Items...

Report Configuration

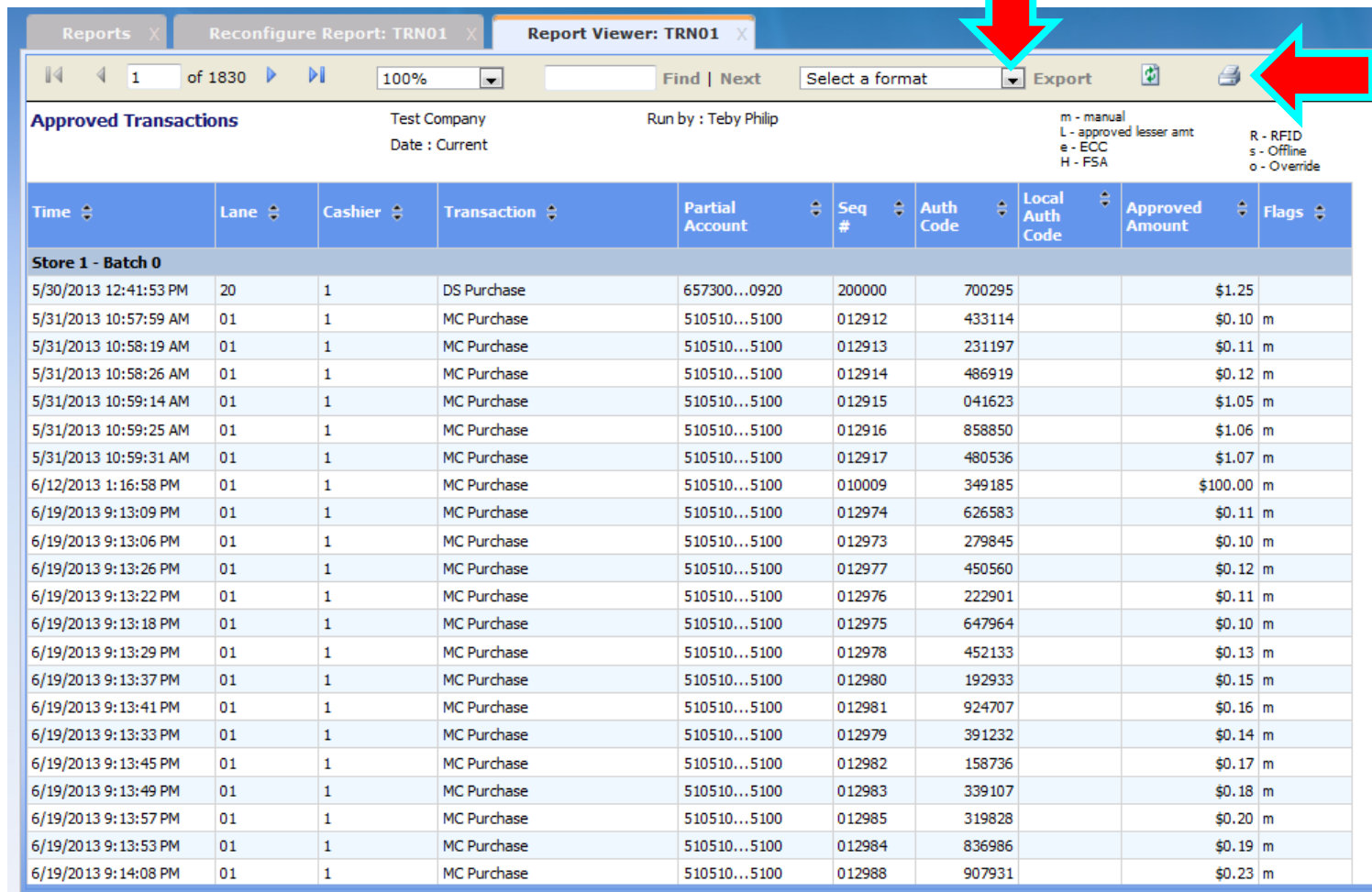
- Date Range: 11/03/2014 - 11/06/2014
- Selected Stores and Store Groups:
 - 1 - Store 1
 - 3 - Store 3

Generate Report **Cancel**

Click the Generate Report Button to create the selected report.

Results from your Report Generation

The selected report will be displayed in a new tab.



The screenshot shows a web-based report viewer interface. At the top, there are three tabs: 'Reports', 'Reconfigure Report: TRN01', and 'Report Viewer: TRN01'. Below the tabs is a navigation bar with a back button, a page indicator '1 of 1830', a zoom level of '100%', a search box with 'Find | Next', a 'Select a format' dropdown menu, and an 'Export' button. To the right of the 'Export' button are icons for 'Print' and 'Refresh'. Two red arrows point to the 'Export' button and the 'Print' icon. Below the navigation bar, the report title is 'Approved Transactions'. To the right of the title, it says 'Test Company', 'Run by : Teby Philip', and 'Date : Current'. There are also some status indicators: 'm - manual', 'L - approved lesser amt', 'e - ECC', 'H - FSA', 'R - RFID', 's - Offline', and 'o - Override'. The main part of the screenshot is a table with the following columns: Time, Lane, Cashier, Transaction, Partial Account, Seq #, Auth Code, Local Auth Code, Approved Amount, and Flags. The table contains 20 rows of transaction data, all of which are 'MC Purchase' transactions. The first row is for 'Store 1 - Batch 0' and has a time of '5/30/2013 12:41:53 PM'. The other rows range from '5/31/2013 10:57:59 AM' to '6/19/2013 9:14:08 PM'. The 'Approved Amount' column shows values ranging from '\$0.10' to '\$100.00'. The 'Flags' column shows 'm' for most transactions and 'o' for one transaction on '6/12/2013 1:16:58 PM'.

Time	Lane	Cashier	Transaction	Partial Account	Seq #	Auth Code	Local Auth Code	Approved Amount	Flags
Store 1 - Batch 0									
5/30/2013 12:41:53 PM	20	1	DS Purchase	657300...0920	200000	700295		\$1.25	
5/31/2013 10:57:59 AM	01	1	MC Purchase	510510...5100	012912	433114		\$0.10	m
5/31/2013 10:58:19 AM	01	1	MC Purchase	510510...5100	012913	231197		\$0.11	m
5/31/2013 10:58:26 AM	01	1	MC Purchase	510510...5100	012914	486919		\$0.12	m
5/31/2013 10:59:14 AM	01	1	MC Purchase	510510...5100	012915	041623		\$1.05	m
5/31/2013 10:59:25 AM	01	1	MC Purchase	510510...5100	012916	858850		\$1.06	m
5/31/2013 10:59:31 AM	01	1	MC Purchase	510510...5100	012917	480536		\$1.07	m
6/12/2013 1:16:58 PM	01	1	MC Purchase	510510...5100	010009	349185		\$100.00	m
6/19/2013 9:13:09 PM	01	1	MC Purchase	510510...5100	012974	626583		\$0.11	m
6/19/2013 9:13:06 PM	01	1	MC Purchase	510510...5100	012973	279845		\$0.10	m
6/19/2013 9:13:26 PM	01	1	MC Purchase	510510...5100	012977	450560		\$0.12	m
6/19/2013 9:13:22 PM	01	1	MC Purchase	510510...5100	012976	222901		\$0.11	m
6/19/2013 9:13:18 PM	01	1	MC Purchase	510510...5100	012975	647964		\$0.10	m
6/19/2013 9:13:29 PM	01	1	MC Purchase	510510...5100	012978	452133		\$0.13	m
6/19/2013 9:13:37 PM	01	1	MC Purchase	510510...5100	012980	192933		\$0.15	m
6/19/2013 9:13:41 PM	01	1	MC Purchase	510510...5100	012981	924707		\$0.16	m
6/19/2013 9:13:33 PM	01	1	MC Purchase	510510...5100	012979	391232		\$0.14	m
6/19/2013 9:13:45 PM	01	1	MC Purchase	510510...5100	012982	158736		\$0.17	m
6/19/2013 9:13:49 PM	01	1	MC Purchase	510510...5100	012983	339107		\$0.18	m
6/19/2013 9:13:57 PM	01	1	MC Purchase	510510...5100	012985	319828		\$0.20	m
6/19/2013 9:13:53 PM	01	1	MC Purchase	510510...5100	012984	836986		\$0.19	m
6/19/2013 9:14:08 PM	01	1	MC Purchase	510510...5100	012988	907931		\$0.23	m

You may Print or Export the report using the report controls.

Schedule Reports to be Emailed

Reports may be scheduled to automatically email at the end of each business day.

Report Description	Code	Scheduled
Host Settlement Report	HST01	
Host Settlement Exceptions	HST02	
Offline Approved Transactions	OFL01	
Offline Declined Transactions	OFL02	
Offline Pending Report	OFL10	
Offline Final Disposition Report	OFL11	
Store Sales Summary	SSR01	
Store Sales Summary by Store and Cashier	SSR03	
Store Sales Summary by Store	SSR04	
Abandoned Transactions Log	SSR05	
Store Sales Summary by Card Name	SSR06	
Approved Transactions Log	TRN01	
Declined Transactions Log	TRN02	No

Select the Schedule Reports Tab to see what reports are currently scheduled.

Host Settlement Exceptions (HST02)

Schedule Selection

- Don't Email Report
- Email Report Automatically To:
ExampleEmail@Example.Com

Format Selection

- PDF
- Excel

Store Selection

- Search All Stores
- Specify Stores to Search...

Report Configuration

- Don't Email Automatically
- PDF Format
- Include All Stores

Save Configuration Cancel

Click a report and the scheduling configuration page will be displayed

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Overview of Company/Store offline &

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Transaction Search', 'Reports', 'Management', 'Monitoring', and 'Administration'. The 'Monitoring' menu is open, showing 'Store Status', 'System Status', and 'Connectivity Test'. Below the navigation bar, a blue banner reads 'Welcome Michael Murphy of MTXEPS Test Certification'. A news item is displayed: '11/06/2014: ServerEPS Version 2.26 is live!'. The text below the news item states: 'We, at Retail Global Payments, are always working diligently to evolve our products in order to provide the best payments interface in the industry. We believe that the updates and new functionality included in this release will greatly enhance your retailer experience!'. Below this, it says: 'For more information on our 2.26 release, please reivew our release notes available at the following link: [Connected Payments 2.26 Release Notes](#)'.

Store Status allows monitoring the current state of stores and lanes, providing information on the health status of lanes, the amount of offline pending transactions and other alerts.

Snapshot of TORs and Offline

Home x Store Status x

Test Company Store Status Monitoring

Store Monitoring Dashboard Processed at 10:42 PM on 6/19/2013

Find a Store

Browse all Stores... Search:

Configuration

Launch Monitoring Configuration... View Alert Descriptions...

Store Status Counts

Healthy: 2 Information: 0
Warning: 0 Unknown: 31
Critical: 124

Transactions Pending on Lanes

File	Count	Amount
Offline	4	\$35.68
TOR	20	\$425.76
Signature	16	

Company Alerts

- Company has 10 pending signature uploads.
- Company has \$425.76 in pending TOR transactions.
- Company has 20 pending TOR transactions.

Store and Lane Alerts

- 700 Lanes with Status Message Lapse alerts.
- 68 Lanes with Expired OpenEPS Encryption Key alerts.
- Lanes with Lost Pin Pad Encryption Key alerts.
- 1 Lanes with Available Drive Space alerts.
- 2 Lanes and 2 Lanes with TOR Transactions Total Amount alerts.
- 1 Store and 3 Lanes with TOR Transaction Count alerts.
- 1 Store and 2 Lanes with Signature Upload Count alerts.
- 143 Lanes with Pin Pad Change alerts.
- 118 Lanes with Module Mismatch alerts.
- 2 Lanes with Offline Transaction Count alerts.
- 31 Stores with Silent Store alerts.

Store Status Monitoring provides Company-wide alerts along with store and lane alerts.

The Transactions Pending section indicates outstanding TORs, Offlines, and Signatures that have yet to be processed up to the data center.

Pin pad change history allows review of PIN Pad serial numbers.

Search options can be used to look only at particular locations.

Status indicators, alerts and counts are clickable links that take you directly to the detail screen

Browsing Alerts

Browsing: Critical Stores Close Window

Listing Description Find a Store (2 Found)

Showing all Stores in Company 777 - MTXEPS Test Certification with Critical status. Showing: All Results

Search:

Expand All Collapse All

Store 2 2 Lanes

Store 1 1 Lane

Store Overview

Transactions Pending on Lanes

File	Count	Amount
Offline	0	\$0.00
TOR	0	\$0.00
Signature	0	

Lane Alerts

1 Lane with Status Message Lapse alerts.

Lane 1 Overview 7/6/2009 4:34 PM Cancel

Transactions Pending on Lanes Transactions Pending on Server *COMING SOON*

Pending Offlines: 0 Pending Offlines: n/a

Pending TORs: 0 Pending TORs: n/a

Pending Signatures: 0

Lane Details

Type: OpenEPS TCP/IP Config Files: TermConfig 41

Drives: C: 103.55 GB of 149.00 GB available (69.50%) CardProcessingProfiles 1.0

DLLs: MTX_POS.dll 825.3.0.2 OS Version: Windows XP

MTX_EPS.dll 825.2.0.646 POS Version: 825.2.0.25

MTX_SE.dll 825.3.0.1 IP Address: 10.250.32.124

Pin Pad: Terminal Type SCAT-MX870

Application Version 0000

Data Version 0000

Lane Alerts

1 Lane hasn't sent a status update in 5 years. Ignore

Selecting a link will open a browsing page that lists the lanes which triggered the selected alert.

Select the [+] button to expand a store to show the lanes affected within that store.

Select the [+] button next to a lane within a store to view the details of that lane.

The “Cancel” icon causes the alert to be placed on the Ignore List, and it will no longer display the ignored alert in the alert list.

Monitoring Configuration

In addition to the Monitoring Service, the Alerting Service allows users to specify their own Warning and Critical thresholds for individual lanes, Stores, and Company-wide.

Home X Store Status X

Test Company Store Status Monitoring

Store Monitoring Dashboard Processed at 12:45 PM on 7/1/2013

Find a Store

[Browse all Stores...](#)

Search:

Configuration

[Launch Monitoring Configuration...](#)

[View Alert Descriptions...](#)

Store Status Counts

Healthy: 2 Information: 0
Warning: 0 Unknown: 31
Critical: 124

Transactions Pending on Lanes

File	Count	Amount
Offline	7	\$72.71
TOR	17	\$138.11
Signature	15	

History and Features

[View Cleared Alert History...](#) [View Pin Pad Change History...](#)

Monitoring Configuration Continued

Store Status Monitoring Alert Configuration Close Window

Lane Store Company **Daily Summary**

? An email will be sent daily with a summary of all active alerts for your company. A different email will be sent to each specific email address configured based on the different types of alerts your company has setup and only if active alerts exist that each particular email address is configured to receive.

Generate At:

Please note that the above time will be applied in the Pacific Timezone.

	Severity	Alert Email Addresses ?
OpenEPS DLL Version Mismatch	Warning	<input type="text"/>
OpenEPS DLL Hash Mismatch	Critical	<input type="text"/>
Pin Pad Change	Warning	<input type="text"/>
Lost Pin Pad Encryption Key	Critical	<input type="text"/>
Expired OpenEPS Encryption Key	Critical	<input type="text"/>

Ignored Lane Configuration No lanes currently ignored.

If you do not want to receive alerts for specific lanes you can add them to the list of Ignored Lanes. For aggregated alerts Ignored Lanes will not be counted at the Store or Company level.

Alerting consists of a type of alert, two levels of thresholds, and the email addresses to send the alert to.

You can manually configure the specific threshold numbers by entering an amount into the textbox.

You may configure one or more email addresses to receive the alert.

The Warning level is less severe than the Critical threshold.

Alerts can be configured by Lane, Store or Company, using the Tabs at the top.

A daily summary report of alerts can be configured to be sent at a predetermined time each day.

Alerting Terminology

Click on the link for 'View Alert Descriptions' under Store Status Configuration to display a list of alert status descriptions.

The screenshot displays a web application interface with the following components:

- Home** and **Store Status** tabs at the top.
- Test Company Store Status Monitoring** header.
- Store Monitoring Dashboard** section, processed at 10:42 PM on 6/19/2013.
- Find a Store** and **Configuration** sub-sections.
- Find a Store** sub-section includes:
 - [Browse all Stores...](#)
 - Search:
- Configuration** sub-section includes:
 - [Launch Monitoring Configuration...](#)
 - [View Alert Descriptions...](#) (highlighted with a red arrow)
- Store Status Monitoring Alert Descriptions** window (Close Window button):
 - Available Drive Space**: Tracks available drive space at all lanes in a company.
 - Expired OpenEPS Encryption Key**: Tracks all lanes in a company that are using an expired OpenEPS encryption key.
 - Lost PIN Pad Encryption Key**: Tracks all PIN Pads in a company that have lost their PIN encryption key.
 - Manual Transaction Percentage**: Tracks the percentage of manual transactions processed at all lanes in a company.
 - Memory Utilization**: Tracks available system memory utilization at all lanes in a company.
 - Merchant Category Code Change**: Tracks changes to Merchant Category Codes configured in a company.
 - Module Hash Mismatch**: Tracks differences in DLL file contents at the lane versus the server.
 - Module Mismatch**: Tracks differences in DLL file versions at the lane versus the server.
 - Offline Transaction Count**: Tracks pending offline transaction counts for a company and all its stores and lanes.
 - Offline Transactions Total Amount**: Tracks pending offline transaction amounts for a company and all its stores and lanes.
 - PAN Hash Seed Change**: Tracks changes to PAN Hash Seed configuration in a company.
 - PIN Pad Change**

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User Management

The screenshot displays the 'User Management' interface for 'MTXEPS Test Certification'. The top navigation bar includes 'Home', 'Transaction Search', 'Reports', 'Management', 'Monitoring', and 'Administration'. The 'Administration' menu is open, showing 'Store Configuration', 'Stores and Store Groups', and 'User Management'. The main content area is titled 'MTXEPS Test Certification User Management' and features a 'Current Users' table and a 'Create New User' form. A red arrow points to the 'cert' user in the table.

User Name	Login
cert	
Certification User	CertUser

1 Page (1 Item)

Create New User

User Information

Login:

Name:

Email:

Phone:

Status: Active Disabled

Permission Level: Administrators

User Password

New Password:

Confirm Password:

User Store Access

Access to all stores and groups

Limited store and group access...

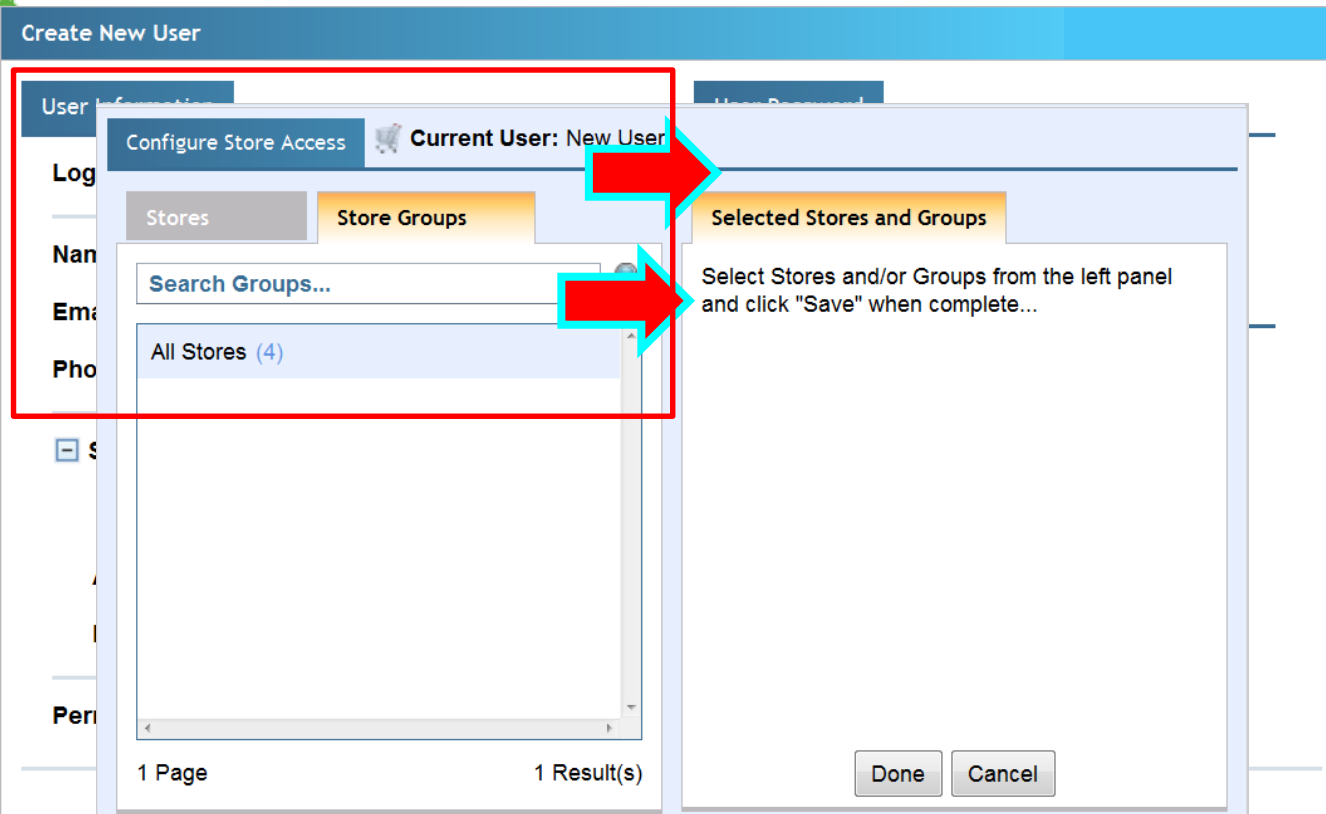
[Configure Store Access...](#)

Selecting User Management for the company you are working for. You may search for a user. Enter the text to search for.

Click on the user to edit that user.

Clicking on the New User button will bring up a similar screen that allows the entry of information for a new user account.

Create a User



Enter the User Name, User Store Access Information, and User Password. Use the Status section to determine when the account will become active and (optionally) when the account will be deactivated. Use the Store tab to select individual stores to grant access to. Enter the password the user will use to initially log into this account. The user will change their password at first login.

User Group Permission Level







The permission level a User Group belongs to controls what Users and User Groups members of a User Group will be able to manage.

Users can manage other users of their level or below. Permission levels are configured on the User Group Management Page.


Edit User Permissions

Home X User Management X

User Management

Current Users  New  Edit Permissions  Export  Print

User Name	Login	Permission Level	Active
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Certification User	CertUser	Configuration	Disabled
Example User	Example	Training	Active
ExportUser	ExportUser	Report Export	Active

1 Page (3 Items)  Options

To create or edit user Permission Levels, click the Edit Permissions button.

Adjust User Group Level

Company Organization Chart

777 - MTXEPS Test Certification

1 Administrators
0 Users
Configure...

2 Configur...
1 User
Configure...

2 Training
1 User
Configu...

3 Report Export
1 User
Configure...

4

What does the level of a User Group influence?

User Groups represent a hierarchy of permissions.

Users in groups can modify and edit users at their same level, or below.

You can move groups up or down in the hierarchy by using the Up or Down arrows.

You can create a new group using the Create button.

You can edit existing groups by using the Configure button.

Create/Configure User Group

The screenshot displays the 'Create New User Group' interface. At the top, the 'Group Information' tab is active, showing a 'Group Name' field with the text 'USER GROUP NAME'. Below this, the 'Users' section has a link to 'Assign users to this group...'. The 'Administration Permissions' section is expanded, showing options like 'User Management', 'Reset Passwords', 'User Store Access Management', 'User Group Management', 'Stores and Store Groups', and 'Store Group Management'. A red arrow points from the 'User Group Management' option to the 'Available Users' list. The 'Available Users' list contains three entries: 'Certification User' (CertUser, Configuration), 'Example User' (Example, Training), and 'ExportUser' (ExportUser, Report Export). The 'Assigned Users' panel is empty, with a prompt to 'Select Users from the left panel and click "Done" when complete...'. The interface includes a search bar, 'Done' and 'Reset' buttons, and a footer with '1 Page' and '3 Results'.

When creating a group, enter the Group Name at the top.

You may assign users to this group here instead of editing the user directly.

Use the Checkboxes to assign permissions to the group members.

Scroll Down for more Permission options.

Save any changes.

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Server Upgrades, Maintenance, and Contact Info

RGP Server Maintenance Windows

- Every Wednesday from 10PM to 2AM PST
- **Do not schedule store installations or upgrades during this time**
- Used for system maintenance and implementing Web Services enhancements
- Transaction processing kept up
- Web Services may be unavailable

On Call Support:

CustomerSupport@Retailix.Com

949-614-1600

Retail Global Payments Group

Helpdesk: (949) 614-1600

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