

EverServ® PixelPoint®

Mercury PAT

Supported PAT Terminal Hardware: VeriFone VX670/680

Supported PAT Terminal Software: Anywhere, Version 2.0

Functionality effective as of PixelPoint v12.0.9.0+ / PATAgent v12.1.1.0

Publication Details

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Patents

The following patents apply to some areas of functionality within the PixelPoint software suite: Pat. 6,384,850; 6,871,325; 6,982,733; 8,146,077; 8,287,340

Revision History

07/09/2014 - Revision 3

Minor update made.

04/03/2014 - Revision 2

Document revised for Mercury Anywhere 2.0

PATAgent v12.1.1.0 updated to fix issues relating to Mercury Anywhere 2.0 (CR #3655) - If a transaction is canceled by the user on the PAT terminal after the table has been opened or if the transaction on the terminal times out, the POS automatically closes the transaction as "Paid" even though no payment has been made.

10/11/2013 - Revision 1

Includes content updates and miscellaneous information.

05/02/2013 - Revision 0

Initial Release

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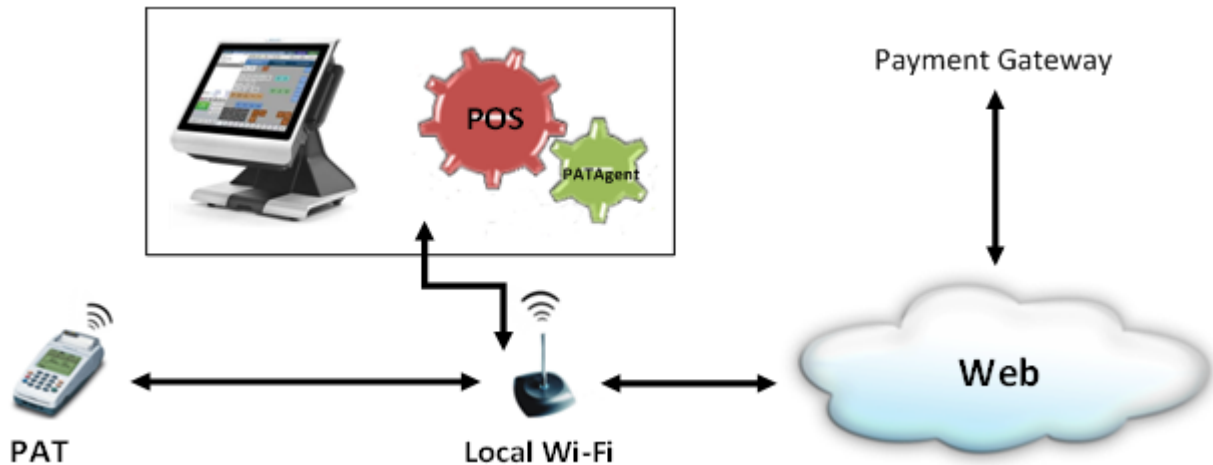
Overview

Pixel PAT Server

Pixel PAT Server ("PATAgent") is middleware that provides services between PixelPoint POS and Mercury PAT VX670/680 wireless terminals.

The Mercury Pay-At-Table Device ("PAT Terminal") does not need a POS Authorizing System in-place to perform a payment cycle. The PAT Terminals are able to retrieve order amounts from the POS, accept payment options from the customer (by cash, credit, debit, or gift card), and then, for payments that require authorization, request approval to the Payment Gateway via the wireless device through the Web.

During a payment cycle, a PAT terminal is bound to the POS table via the login confirmation process. Upon payment approval, the POS is updated, and the table is then closed. The POS is not involved in payment authorization at any point during the interaction with the PAT device.



PAT Solution and Installation Overview/Checklist

To install and configure the PAT solution, the following steps will need to be performed:

PAT TERMINAL (VX670/680) Installation/Configuration

- Connect the terminal to the customer's Wi-Fi network — Performed/assisted by Mercury.
- Configure the Merchant Parameters— Performed by Mercury.
- Configure the terminal for Integrated Pay At Table Mode (e.g. RPOS) — Performed/assisted by Mercury.
- Point the Terminal to the IP Address of where the PixelPoint PATAgent will be installed— Performed by the solution integrator/Partner.
- Open/unblock port 5000 on the router and/or firewall on the establishment's network — Performed by the solution integrator/Partner.

PixelPoint BackOffice Configuration

Performed by the solution integrator/Dealer.

- Create an external Payment Method
- Obtain a list of employee POS logon passwords that will be using the PAT terminal.

PixelPoint PATAgent Installation/Configuration

Performed by the solution integrator/Dealer.

- Install and configure the PixelPoint PATAgent.

Important Notes

The Mercury terminal must NOT be set to operate in **Standalone Mode**, as users will only be asked to authenticate against the POS when the **PromptPOS** configuration option is selected.

It is the responsibility of the Mercury and solution integrator to configure the terminal properly. ParTech will not be able to assist in setting up Mercury PAT services.

Basic PAT/POS Operation

The server logs into a PAT Terminal using a store Server ID followed by the POS login password. The password authenticates against the swipe login configured in PixelPoint BackOffice. The Server then enters the table number of a current open table (opened by that same server) in the POS.

At this point, the POS will transfer the order amount to the PAT terminal. The server then follows the prompts on the PAT Terminal, and in conjunction with the customer, performs a payment (credit/debit/gift, or CASH if performing a split payment and if at least one of the customers is paying by credit/debit/gift).

If a full payment is successful (i.e. authorized), the PAT terminal updates the POS and the table is closed. If the payment is unsuccessful or if an outstanding balance is still owed, the table remains open until the order amount is paid in full.

PAT Terminal (VX670/680) Configuration

Step 1 - Wi-Fi Setup and Merchant Configuration

Merchant configuration and device connectivity at the establishment will be assisted by Mercury. You will therefore need to coordinate this effort with them prior to going onsite.

Important: Do not proceed to the next section until the VX670/680 terminal is successfully connected to the network and has been properly configured by Mercury. Contact Mercury for any issues regarding PAT terminal connectivity, functionality, or merchant setup.

Step 2 - PAT Terminal Configuration for PixelPoint

Network Security Settings

- Port 5000 must be open on the network to allow the PAT Terminal to communicate with the PixelPoint PATAgent.

Configuring the PATAgent IP Address on the PAT Terminal

Once Mercury has finished configuring the Merchant parameters, you will need to configure the PAT terminal to point to the IP address where Pixel PATAgent will be running. This is configured in two places on the PAT Terminal - "Anywhere/RPOS" and "PAT RPOS/Setup". The following explains how to do so.

Note: Refer to the detailed documentation provided by Mercury for complete instructions on how to configure the VX670/680 (as well as for additional PAT terminal functionality and operation procedures not covered in this document), or contact Mercury support if required.

Also note: If you have more than one terminal, the instructions that follow will need to be performed on ALL PAT terminals.

For PAT RPOS/Setup

1. On the PAT Terminal, hit the * button to return to the main menu.
2. Press the number "2" key. This will take you to the PAT RPOS menu.
3. Go into the **Setup** menu.
4. Go into **RPOS Config**.
5. Select **Edit** and then enter the IP address of the POS Server where the Pixel PAT Agent is running. Then press the OK button.
6. Exit when finished, and then proceed to the second set of RPOS configuration steps below.

For Anywhere/RPOS

1. On the PAT Terminal, hit the * button to return to the main menu.
2. Press the **Anywhere** Function Key.
3. Scroll down and go into the **Admin** menu.
4. Scroll down and go into **Setup** menu.

5. Scroll down again and go into the **RPOS** menu.
6. Hit **Next** until you see "RPOS IP Addr".
7. Hit **Edit** and enter the IP address of the POS Server (same IP address as entered above). Then press the OK button.
8. Exit when finished. The terminal will restart.

The PAT terminal is now ready to communicate with a properly configured and running PixelPoint PAT Agent and POS.

Important: Before continuing, make sure that the VX670 has also been configured for "PromptPOS" in Anywhere>Setup>Terminal>Server Mode.

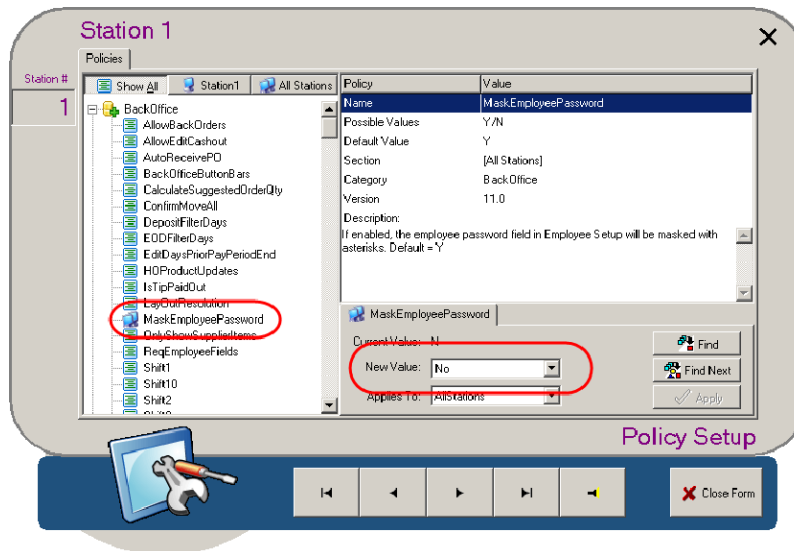
Step 3 - Finding Server Passwords for the PAT Terminal

In order to have Server Authentication with the POS system, the login credentials on the PAT terminal must match the employee login credentials configured in PixelPoint POS.

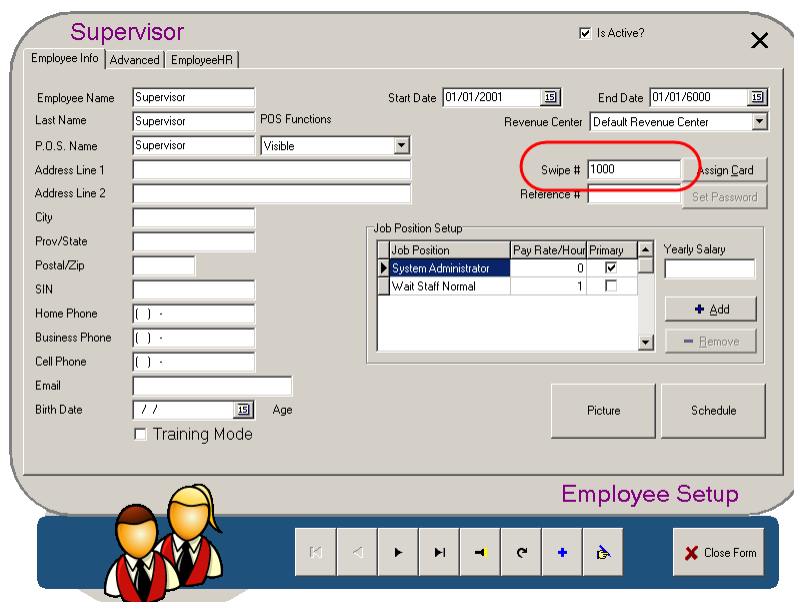
Obtaining POS Employee Passwords:

Use the following steps to obtain the employee "Swipe #'s" (configured in BackOffice) that will be using the Pay-At-Table device:

1. By default, employee passwords are encrypted in the POS. Go into BackOffice Policy Setup and set the *MaskEmployeePassword* policy to "No".



2. Go into BackOffice Employee Setup and select the employee that will be using the PAT Terminal.
3. Record the employee swipe # from the **Swipe #** field. For example, the employee named "Supervisor" shown below has the password "1000".



4. Repeat this process for ALL employees that will be using the PAT Terminal. When finished, return to BackOffice Policy Setup and set the *MaskEmployeePassword* policy

back to "Yes" to encrypt the passwords again.

Important Note

When logging onto a PAT Terminal, the terminal will request a "Server ID", and then a password. The Terminal "Server ID" is up to the establishment, and can be any two-digit number. It does not have to correlate to any particular employee in the POS. It is only the password entered in the following request that must match the employee logon in the POS.

BackOffice Setup

Payment Method Setup

In order for the PAT Terminal and PATAgent to interface with the POS, you will need to create an "External Payment Method" in BackOffice>Payment Method Setup as shown below.

The screenshot shows the "Mercury PAT External" window in the BackOffice software. The window has a title bar with "Mercury PAT External" and a close button. Below the title bar, there are tabs for "Method of Payment", "Advanced", and "Payment Denominations". The "Method of Payment" tab is selected. The "Description" field contains "Mercury PAT External". There are checkboxes for "Is Currency?" and "Min. Security Required". Below these, there are input fields for "Exchange Rate" (set to 1), "# of Decimals" (set to 2), and "% Emp Tip Surcharge (3=3%)" (set to 3%). A "Select" section contains several radio button options: "No Authorization", "Member/VIP Auth.", "Credit Card Auth.", "Front Desk Auth.", "Debit Card", "Custom", "Gift Card (third party)", and "External Authorization". The "External Authorization" option is selected and circled in red. To the right of the "Select" section is a "Payment Options" section with several checkboxes: "Sale Auth (No PreAuth)" (checked), "Disable Cash Drawer Opening", "Allow Retip" (checked), "Force Tender Settlement" (checked), "Show Calculated Tendered Amt." (checked), "Is Bank Deposit Item (non-EFT)", and "Ask For Cashback". At the bottom of the window, there is a "Card Prefixes" input field, a "(Picture)" button, a "Load Image" button, and a "Clear" button. Below the window, there is a "Methods of Payment Setup" section with a graphic of a POS terminal and a set of navigation buttons (back, forward, search, etc.) and a "Close Form" button.

Note: The External Payment Method for PAT must be set up in BackOffice in advance of PATAgent installation and configuration described in the section that follows.

PATAgent

POS Configuration

The PATAgent must be deployed on a POS Station that has been configured as "ActiveServer". To configure a station as "ActiveServer", open Pixel32.ini (located in C:\PixelPOS) and add the following line under the section labeled [STATION X], where "X" is the POS Server:

```
[STATION1]
ACTIVESERVER=Y
```

Important: The POS on the station selected as ActiveServer must always be running. The PATAgent will not be able to start if the station is turned off or if the POS is not running.

PATAgent Installation

To install the PATAgent:

1. Copy the Pixel PATAgent.exe file to the "C:\PixelPOS" folder.
2. Create a shortcut to PATAgent.exe on the Desktop and in the Windows Startup folder.

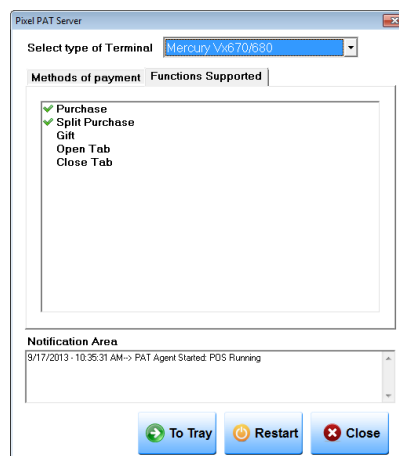
PATAgent Configuration

To configure the PATAgent:

1. Start the POS and then the PATAgent via the PATAgent shortcut on the Desktop. The POS must be running in the background the first time that PATAgent is configured. A mouse and keyboard will be required to get to the desktop and start the PATAgent.
2. Double-click on the PATAgent icon in the System Tray to open the configuration window.

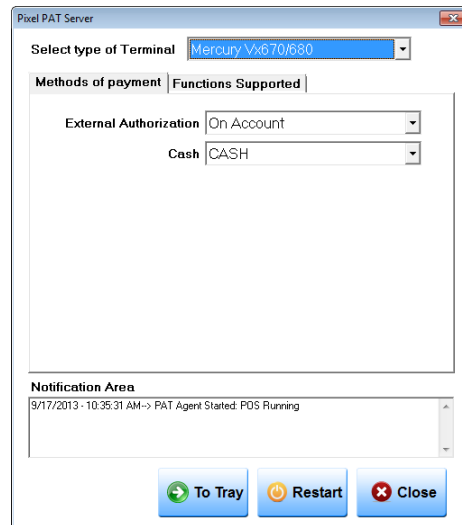


3. Select "Mercury VX670/680" from the connection drop down box. This setting enables PATAgent to interact with any terminal of this type that is properly configured.



4. The PAT terminal accepts payments for cash, credit, debit, and gift cards. On the POS side, two pay methods should be defined - one as CASH ("No Authorization"), and the other as "External Authorization" (for Credit/Debit/Gift, which was created above in Payment Method Setup).

In the **Methods of Payment for:** section, select the payment methods you have configured in BackOffice for External Authorization and CASH. One of each must be selected.



6. Close and then restart PATAgent. This will save configuration changes to PATAgent.ini in the "C:\PixelPOS" folder.

When PATAgent restarts, it will be used by the POS to communicate with a properly configured PAT Terminal.

Note: PATAgent log files are stored in "C:\PixelPOS\debug\PixelPATServer".

Notification Area

The Notification Area provides information about the connection status between the POS and the PATAgent. Transaction details can be found in the date-stamped.log file located in the "C:\PixelPOS\Debug\PixelPATServer" folder.

PAT/POS Operation

Basic Operation

When logging into a PAT terminal, employees must provide their PAT Terminal Server ID (assigned by the establishment) and their POS login code. The server must then enter a table number, possibly followed by a seat number. See terminal options below.

When Seat Mode = Off: The PAT Terminal requests a table number and retrieves the amount. If the provided table is split into various bills, the PAT terminal retrieves all of the seats and shows the amounts one by one.

When Seat Mode = On: The PAT Terminal requests a table number and then a seat number. The PAT terminal then retrieves the amount pertaining to the table and seat provided.

If the proper amount for that table is retrieved, the server follows the prompts on the PAT terminal until the transaction is finalized, after which the POS table will be closed. If the terminal does not return the expected amount, then the server has entered the wrong table number. The server, at this point point, should therefore cancel the transaction and try again.

Purchase/Split Purchase

The Mercury PAT terminal can only interact with the POS through the following menu options:

- Purchase
- Split Purchase

Note: Gift Card, List Check, Open Tab, Close Tab, Voids/Returns, Review Tab, and Check Number functions on the PAT terminal are NOT supported.

Purchase is used when a customer wishes to make a payment "in-full" using an accepted Credit, Debit or Gift Card.

Split Purchase is used when customers at the table wish to split the tab. After the server logs into the PAT terminal and retrieves the table information (amount owing), the device will ask each customer, in-turn, for the amount that they would like to pay and then request a form of payment. After each payment is made, the PAT Terminal will present a "balance owing" amount on the terminal display. At this point, the server presents the PAT Terminal to the next customer (and so on) until the balance is paid in full.

Batch Settlement

Batch settlement for transactions done through the PAT terminal must be performed via the PAT terminal itself. Refer to Mercury's documentation to learn how this is done. "Pay-At-Table" Batch settlement is not reflected in the POS in any way.

Note: If using a tethered payment system (via PixelAuthManager and/or RemoteDevice, for example), you must still perform a Batch Settlement through normal Manager Functions in the POS to settle-out the tethered payment system.

Miscellaneous Notes

- The employee must be logged into the POS and have a table opened in their login name before they are able to log into the PAT terminal.
- Employees can only open their own tables.
- Opening up a table via the PAT Terminal will not be allowed if the table is opened in the POS – table will be locked. Close the table and then retry processing the payment via the PAT terminal.
- After a FULL payment has been authorized and the transaction on the PAT terminal is completed, there could be up to a 30 second delay before the POS table layout form is refreshed and the table display shows it as Closed.
- If using a CASH payment (only available in the *Split Purchase* Function), at least one person at the table must use an *Authorization* form of payment.
- If the PAT Terminal runs out of paper during a "Split Purchase" transaction, the terminal aborts Split Purchase mode right after the payment is made (the payment is recorded in the POS, but table will still be open with the correct outstanding balance). To complete the Split Purchase (if there are additional customers who still need to pay), replace the paper and reenter Split Purchase mode. Then complete the transaction as normal. If there is only one customer who still needs to pay, a single "Purchase" transaction will suffice.

Notes