

PixelPoint[®]

SagePay Integration

Publication Details

Copyright

Copyright © ParTech, Inc. 2018. All Rights Reserved. This product and related documentation are protected by copyright and are distributed under licenses restricting their use, copying, distribution, and decompilation. No part of this product or related documentation may be reproduced in any form by any means without prior written authorization of PAR and any requisite licensors.

Trademarks

PixelPoint, ParTech, and their respective logos are all trademarks of PAR Technology Corporation.

PAR may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document.

Except as expressly provided in any written license agreement from PAR, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

Microsoft® and Window s® are registered trademarks of Microsoft Corporation in the United States and/ or other countries. Other product names may be trademarks or registered trademarks of their respective companies and are hereby acknowledged.

Disclaimer

PAR has thoroughly reviewed this document and believes it to be reliable. However, this document is provided for informational purposes only and PAR makes no warranties, either expressed or implied, in this document. Information in this document is subject to change without notice. Risk of use and responsibility for the results of use of this document lie with the user.

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

04/11/2017 – Initial Release

07/11/20018 – Revision 1

Updated functionality to suppress SagePay GUI and Payment Approval dialog box in POS.

Table of Contents

Overview.....	4
POS Configuration	5
PIN Pad Configuration	8
Printer Configuration	9
Gratuuity (Tips).....	11
Refunds	12
Performing Transactions	13
Sales	13
Cash Back	14
Refunds	15
Voids	15
Settlements	16

Overview

This document explains the installation and functionality of SagePay payment software with the PixelPoint POS.

Requirements

- PixelPoint POS v 12.3.16 or higher
- PixelPoint SagePay UK module (#46)
- .NET Framework v 4.6.1
- SagePay software
 - Installed in the default location *C:\SagePay\Guardian*
 - Refer to SagePay Guardian documentation for installation instructions
- SagePay.dll v 12.3.16.4
 - Copied into *C:\PixelPOS\DLLS*
 - Copied into *C:\PixelServer\DLLS* if using PixelPoint 2017
 - DLL provided by PixelPoint
- PixelWrapper.exe
 - Copied into *C:\SagePay\Guardian\Bin*

Supported Functions

- Sales (credit and debit)
- Tip (functionality available within the POS)
- Refund
- Void
- Settlement
- Cash back

POS Configuration

Starting in BackOffice (SystemSet):

1. Navigate to Administrator> Policy Setup.
2. Activate the policy UseCustomPayment by setting it to Yes.
3. Exit the Policy Setup window.
4. Navigate to Administrator>Payment Method Setup.
5. Create a new method of payment.

SagePay ☒ Is Active? X

Method of Payment | Advanced | Payment Denominations

Report Category: Default Report Category Setup

Description: SagePay ☐ Is Currency? Min. Security Required: [dropdown]

Exchange Rate: 1 # of Decimals: 2 % Emp Tip Surcharge (3=3%): [dropdown]

Select:

- ☐ No Authorization
- ☐ Member/VIP Auth.
- ☐ Credit Card Auth.
- ☐ Front Desk Auth.
- ☐ Debit Card
- ☒ Custom
- ☐ Gift Card (third party)
- ☐ External Authorization

Payment Options:

- ☒ Sale Auth (No PreAuth)
- ☐ Disable Cash Drawer Opening
- ☐ Allow Retip
- ☐ Force Tender Settlement
- ☐ Show Calculated Tendered Amt.
- ☐ Is Bank Deposit Item (non-EFT)
- ☐ Ask For Cashback

Card Prefixes: [text field] (Picture) Load Image Clear

Methods of Payment Setup

Navigation: [back] [forward] [cancel] [OK] [Close Form]

6. Enter SagePay as the Description.
7. Set the payment type to Custom.
8. Check the box Sale Auth (No PreAuth).

9. Click the Advanced tab.

SagePay ☒ Is Active? X

Method of Payment | **Advanced** | Payment Denominations

Accounting Code

Tip Accounting Code

Custom DLL
 Browse Setup

Cash Change Processing
Provide change in the current payment method

☐ Print Customer Authorization Slip with Transaction Receipt
☐ ...and also when receipt is reprinted

☒ Do not print Customer Authorization Slip

Min Value ... Max Value ...

☐ Always Print on Receipt
☐ Do not ask for swipe
☐ Do not ask for Expiry Date
☐ Ask for CVV on manual entry
☐ Applies to internal member gift cards only
☐ Do not show in POS payment list
☐ Prompt for Payment Note
☒ Allow Voids
☐ Do not show in Gift Card list

Printed Card Number Format
Default

Methods of Payment Setup

Navigation buttons: Back, Forward, Home, Search, Add, Remove, Close Form

10. Check the box Allow Voids.

11. Uncheck the box Do not show in POS payment list.

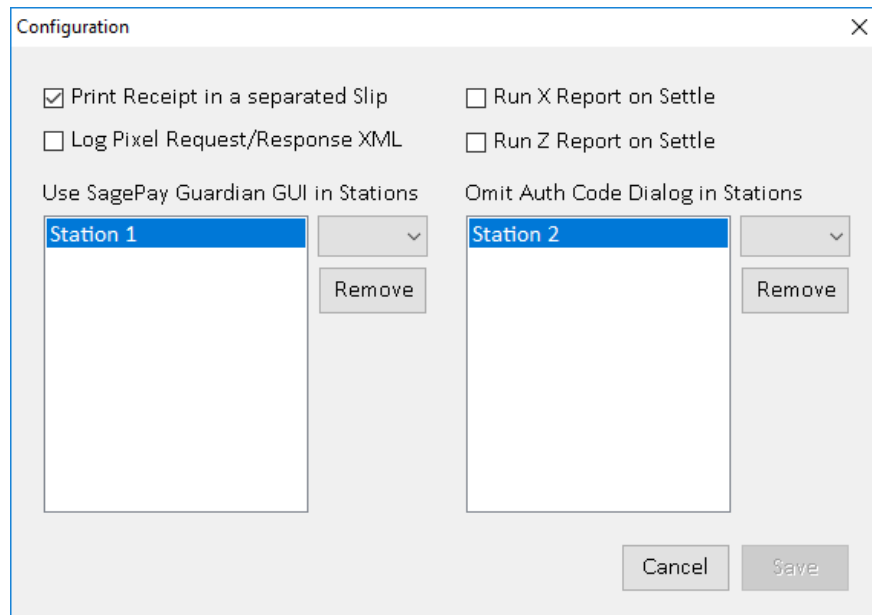
12. Click the Browse button in the Custom DLL section.

13. Navigate to *C:\PixelPOS\DLLS* and load the file *SagePay.dll*.

14. Click the Setup button in the Custom DLL section. The DLL will attempt to load the users SagePay configuration information if the SagePay software was installed in the default location. If the configuration information cannot be located by the DLL, the message "SagePay deployment could not be found" will be displayed.

- The DLL searches for the SagePay XML file *GuardianConfig.xml* located in *C:\SagePay\Guardian\Config\GuardianConfig.xml*.

15. A dialogue box opens:



16. Check the corresponding boxes to enable each of the following functions:

- Print Receipt in a Separated Slip: Prints the SagePay receipt on a separate slip from the POS receipt.
- Log Pixel Request/Response XML: Creates an XML log of all requests and responses sent and received from the POS. It is recommended that this option be checked when this integration is first used in case of any issues. Exceptions will always be logged. Logs are saved in *C:\PixelPOS\Interface\SagePay*.
- Run X Report on Settle: A request for an X Report will be sent to SagePay when settlement has finished on the POS side.
- Run Z Report on Settle: A request for a Z Report will be sent to SagePay when settlement has finished on the POS side.

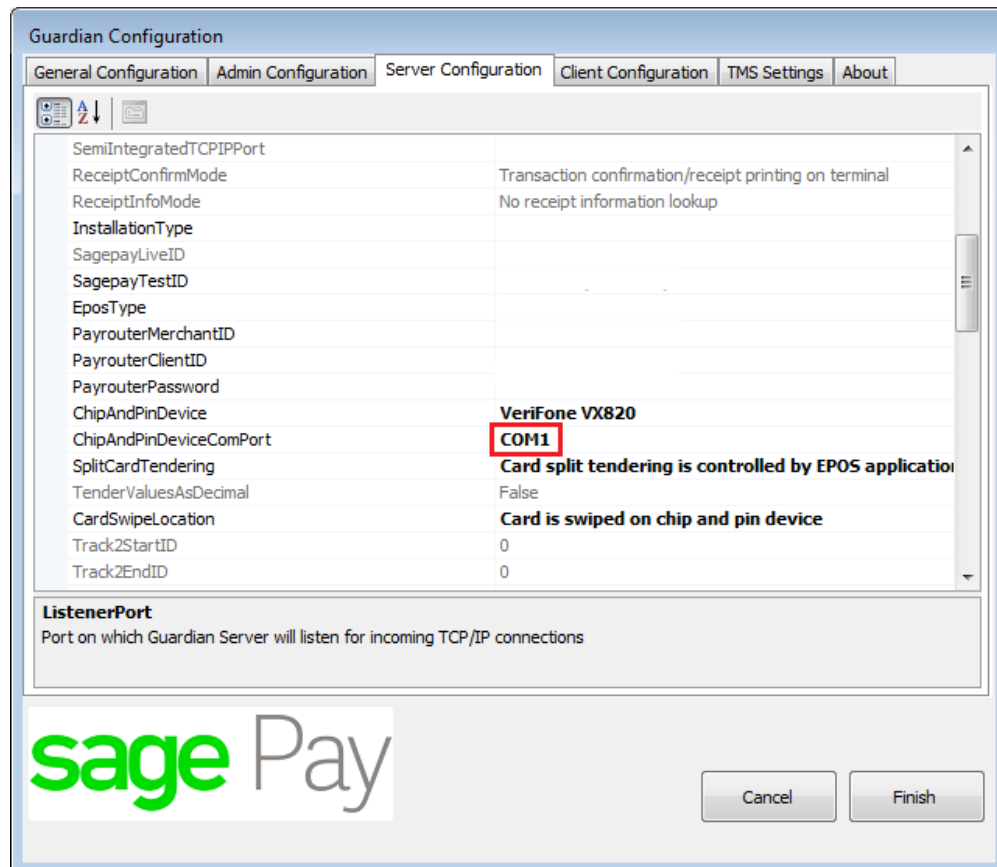
17. The two fields Use SagePay Guardian GUI and Omit Auth Code Dialog can be used to suppress the GUI and Payment Approval dialog boxes from appearing on the POS screen. This can be useful for kiosks or other customer-facing POS configurations.

- Use the left box to choose which stations should display the SagePay GUI.
- Use the right box to choose which stations should suppress the Payment Approval (Auth Code) dialog box.

18. Click Save.

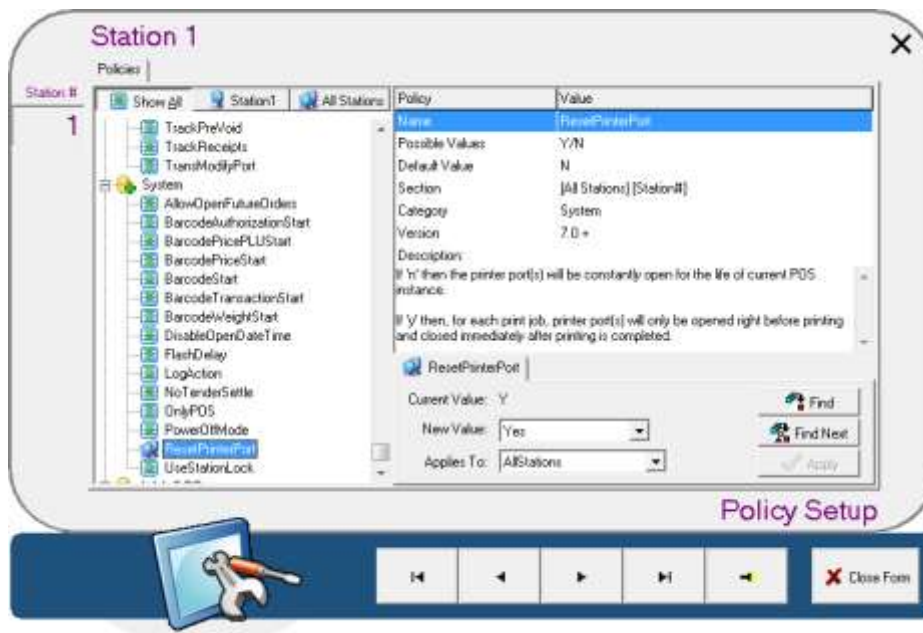
PIN Pad Configuration

Connect the PIN Pad device to the terminal. Note the COM Port the device is connected to and confirm that the appropriate COM Port is selected in the Guardian Configuration software. The below example uses COM Port 1.

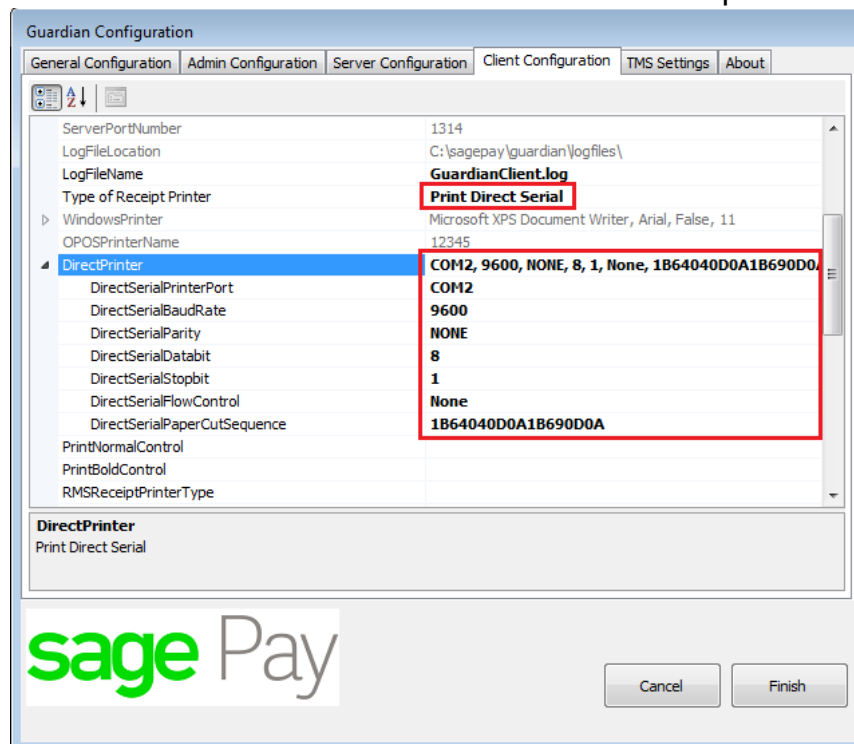


Printer Configuration

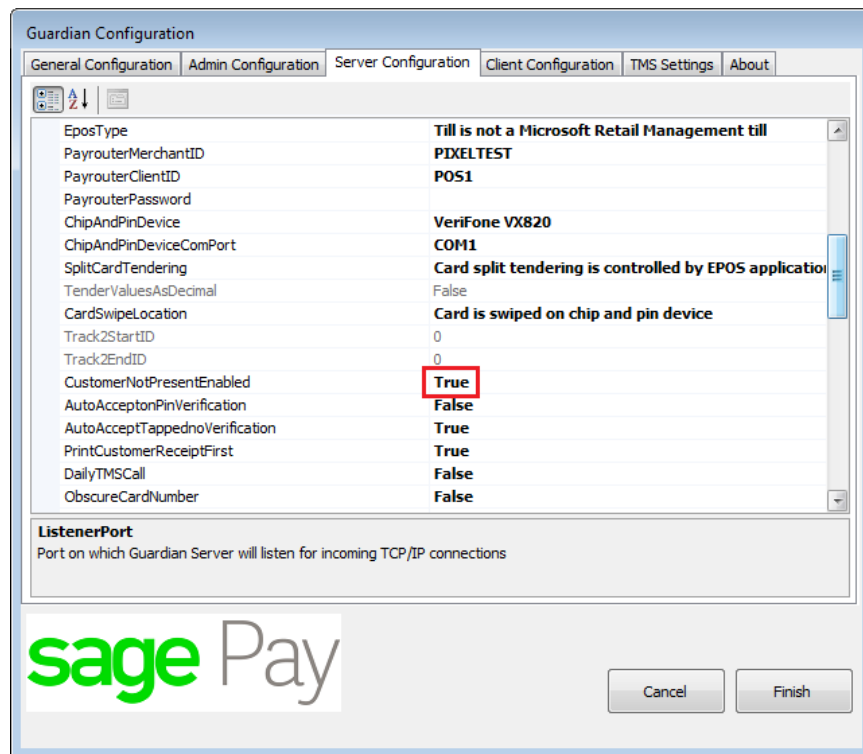
1. Activate the policy ResetPrinterPort by setting it to Yes.



2. Ensure the printer is connected to the terminal and is online. Note the COM Port that the printer is connected to.
3. Open the Guardian Configuration software.
4. In the Client Configuration tab, enter the configuration information to match the entries shown in red in the below example.



5. Select the Server Configuration tab.
6. Set MakeReceiptsAvailabletoClient to False.
7. Set CustomerNotPresentEnabled to True.

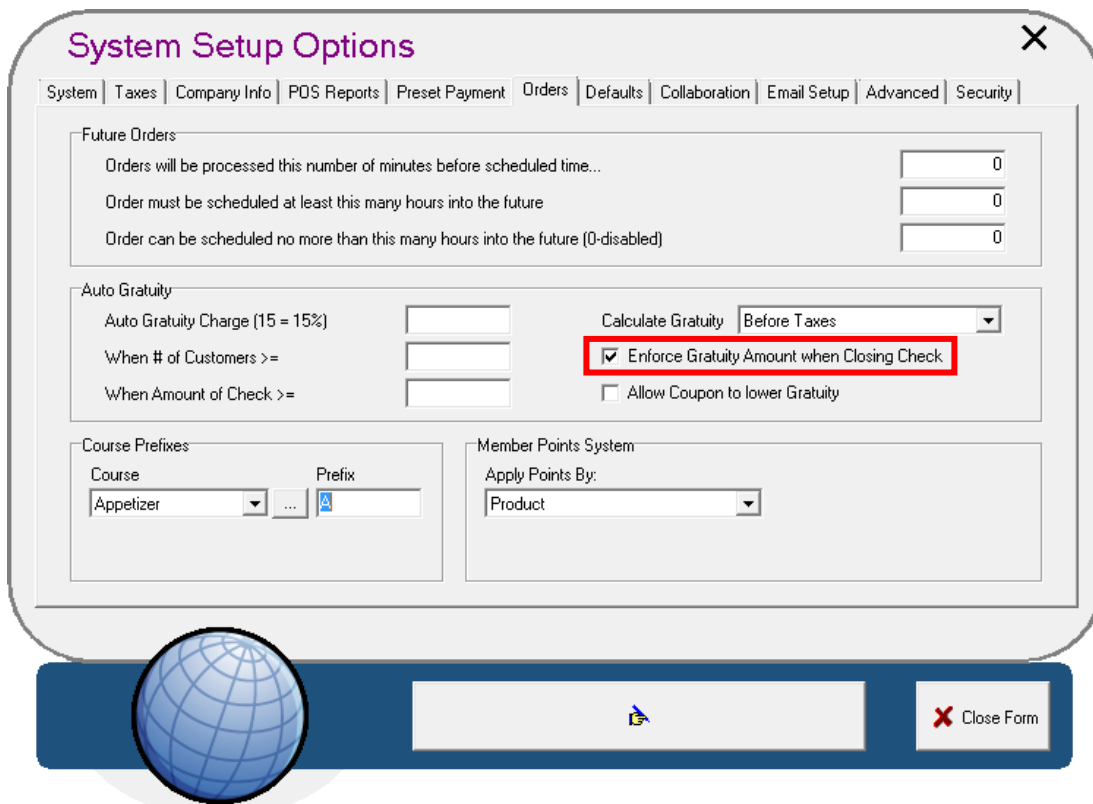


8. Click Finish.

Gratuity (Tips)

SagePay will not prompt for tips on the pin pad, so any gratuity must be charged by the POS. In order to allow for a tip to be added to a transaction, a function button must be added (if not already present) to the finish form. To allow for tips:

1. Navigate to BackOffice>Administrator>System Setup.
2. Select the Orders tab.



The screenshot shows the 'System Setup Options' dialog box with the 'Orders' tab selected. The 'Auto Gratuity' section is highlighted with a red box, showing the 'Enforce Gratuity Amount when Closing Check' checkbox checked. The 'Calculate Gratuity' dropdown is set to 'Before Taxes'. The 'Allow Coupon to lower Gratuity' checkbox is unchecked. The 'Future Orders' section has three input fields for scheduled time, all set to 0. The 'Course Prefixes' section has a dropdown for 'Course' set to 'Appetizer' and a 'Prefix' field. The 'Member Points System' section has a dropdown for 'Apply Points By' set to 'Product'. The dialog box has a blue header bar with a globe icon and a 'Close Form' button.

System Setup Options

System | Taxes | Company Info | POS Reports | Preset Payment | **Orders** | Defaults | Collaboration | Email Setup | Advanced | Security

Future Orders

Orders will be processed this number of minutes before scheduled time... 0

Order must be scheduled at least this many hours into the future 0

Order can be scheduled no more than this many hours into the future (0-disabled) 0

Auto Gratuity

Auto Gratuity Charge (15 = 15%) []

When # of Customers >= []

When Amount of Check >= []

Calculate Gratuity Before Taxes

☒ Enforce Gratuity Amount when Closing Check

☐ Allow Coupon to lower Gratuity

Course Prefixes

Course Prefix

Appetizer []

Member Points System

Apply Points By:

Product []

Close Form

3. Check the box Enforce Gratuity Amount when Closing Check.
4. Exit the form.

To add the buttons:

1. Navigate to BackOffice>Administrator>Form Designer and load the finish form that is in use.

2. Create a new TPixelFunction button.
3. Set the property FunctionType to ftOrder.
4. Set the property FunctionName to Charge Gratuity.
5. Set the Caption to whatever text you would like the button to display.
6. Save the changes to the form.

PixelFunctionBtn4 : TPixelFunctionBtn	
>> AllowAllUp	<input type="checkbox"/> False
AutoRollup	<input type="checkbox"/> False
AutoRollupParent	<input type="checkbox"/> False
BevelWidth	2
ButtonImage	[bVisible,bTransparent]
ButtonLayout	pbsImageCenter
ButtonOffset	(TOffset)
ButtonSchedule	(TButtonSchedule)
ButtonStyle	pbsImageButton
Caption	Charge Gratuity
Color	\$00DD89B9
ComboGrid	
CustomCaption	<input type="checkbox"/> False
DbGlyph	(None)
DisabledAlpha	<input checked="" type="checkbox"/> True
DisabledColor	clNone
Down	<input type="checkbox"/> False
Enabled	<input checked="" type="checkbox"/> True
Font	(TFont)
FrameColor	cWindowFrame
FunctionID	31
FunctionName	Charge Gratuity
FunctionType	ftOrder
GroupIndex	0
Height	58
HideDisabled	<input type="checkbox"/> False
Hint	

Refunds

In order to allow for refunds to be processed through SagePay, a new button is required on the order form, if not already present.

To add the button:

1. Navigate to BackOffice>Administrator>Form Designer.
2. Add a new TPixelFunction button.
3. Set the property FunctionType to ftOrder.
4. Set the property FunctionName to Return Entire Transaction.
5. Set the Caption to whatever text you would like the button to display.

PixelFunctionBtn6 : TPixelFunctionBtn	
>> AllowAllUp	<input type="checkbox"/> False
AutoRollup	<input type="checkbox"/> False
AutoRollupParent	<input type="checkbox"/> False
BevelWidth	2
ButtonImage	[bVisible,bTransparent]
ButtonLayout	pbsImageCenter
ButtonOffset	(TOffset)
ButtonSchedule	(TButtonSchedule)
ButtonStyle	pbsImageButton
Caption	Return Entire Transaction
Color	\$00DD89B9
ComboGrid	
CustomCaption	<input type="checkbox"/> False
DbGlyph	(None)
DisabledAlpha	<input checked="" type="checkbox"/> True
DisabledColor	clNone
Down	<input type="checkbox"/> False
Enabled	<input checked="" type="checkbox"/> True
Font	(TFont)
FrameColor	cWindowFrame
FunctionID	81
FunctionName	Return Entire Transaction
FunctionType	ftOrder
GroupIndex	0
Height	58
HideDisabled	<input type="checkbox"/> False
Hint	

Performing Transactions

Sales

To process a transaction using SagePay:

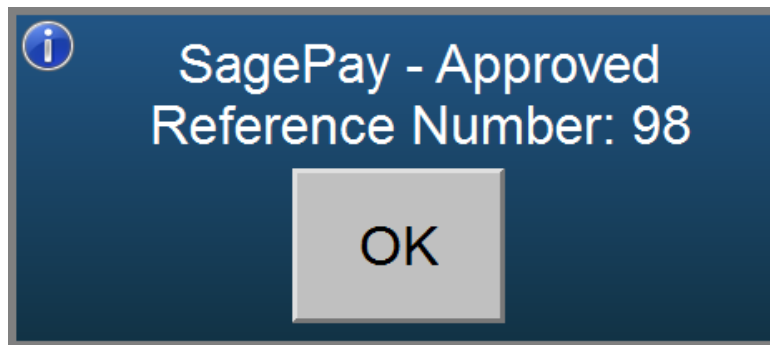
1. Create an order and proceed to the Finish form.
2. Select SagePay as the payment method.
3. The SagePay window will open over the POS.



4. Follow the steps on the pin pad to complete the transaction.
5. Once authorised, the SagePay window will display a confirmation message.

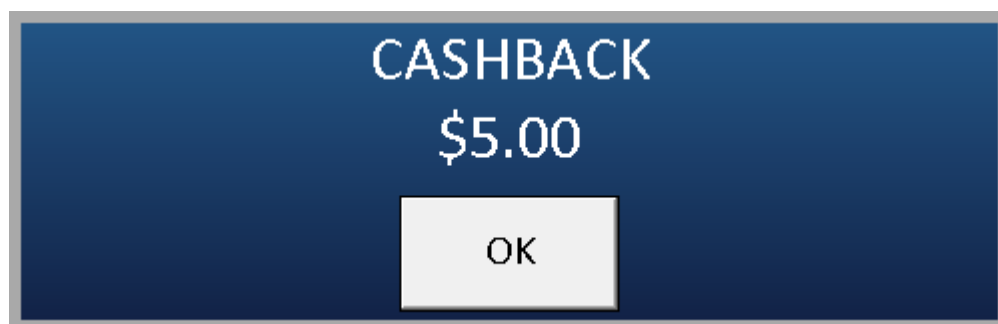


6. The POS will then display an approval message and reference number.



Cash Back

SagePay has the ability to offer customers cash back on their transactions. This function is handled entirely on the SagePay side, prompting users directly on the pin pad if the feature has been enabled by the merchant. If a customer has requested cash back on a transaction, the POS will display a message once the transaction has been approved confirming the amount of cash back the customer should receive.



Refunds

To refund a transaction:

1. Navigate to the order form.
2. Select the Return Entire Transaction button (the button name may vary depending on the text entered in the Caption field when creating the button in the form designer).
3. Enter the PixelPoint transaction number. This is NOT the reference number sent back by SagePay, but the PixelPoint transaction number that can be found in the Transaction Viewer.
4. The Finish form will open with the transaction information displayed.

The screenshot displays the POS interface for processing a refund. The top left shows the order list with two items: '-1 Test Product (\$5.00)' and '-1 Test Prod 2 (\$4.50)'. Below this, the 'Net Total' is '\$9.50' and the 'Final Total' is '\$9.50'. The 'Amount Due' is prominently displayed as '\$9.50'. A large numeric keypad is centered on the screen. To the right of the keypad is a vertical stack of payment method buttons: CASH, VISA, MasterCard, Amex, Discover Card, On Account, Debit, SagePay, and Apply CASH. At the bottom of the main interface area are buttons for 'Dine-IN', 'No Tax', and 'Next \$'. The bottom status bar indicates '# of Cust. 1', 'Time Seat: 10:50:33 AM', and 'Server: Supervisor'. A bottom navigation bar contains icons for Logout, Q#1, Help, Print Receipt, Coupons, Gift Card, and Leave.

5. Select SagePay and Apply the payment. The pin pad will read Refund instead of Sale.
6. Have the customer proceed through the steps on the pin pad to complete the refund.

Voids

Void transactions are performed as per the normal POS process, through the Transaction Manager.

Settlements

When a settlement request is sent from the POS to SagePay, the settlement will be processed according to the configuration selected during the SagePay DLL setup. To settle all charges:

1. Open the Transaction Manager.
2. Click Settle all Charges/END OF DAY. A request to settle is sent to SagePay.
3. When a response is received, and POS will display an approval message showing confirmation that any requested reports were completed.

