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TouchNet Marketplace

Point-of-Sale Guide

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Contents

About this Guide

The *Marketplace Point-of-Sale Guide* is for the administrators, merchant managers, and store managers who will maintain Marketplace stores and products for point-of-sale transactions using the Marketplace Operations Center. This guide is also for users who will process transactions using the Marketplace Point-of-Sale application and either mobile or countertop devices.

This guide does not describe all the Operations Center settings for stores and products. The guide only discusses configuration that is specific for Point-of-Sale. For descriptions of basic Marketplace configuration settings, see the *Marketplace User Guide*, which describes how to create stores and products.

To Contact Customer Care

For technical assistance, continuing customer support, or other questions, contact us at:

Telephone:	888-621-4451 or 913-599-6699
E-mail:	CustomerCare@touchnet.com
Web site:	clientcommunity.touchnet.com
Address:	TouchNet Information Systems, Inc. 9801 Renner Blvd., Ste. 150 Lenexa, Kansas 66219

TouchNet Customer Care is available Monday through Friday between 7:00 a.m. and 7:00 p.m. Central Time. Extended support hours are available by agreement with TouchNet.

1.0 About Marketplace Point-of-Sale and TouchNet Safe Commerce™ Technology

Marketplace Point-of-Sale is an extension of TouchNet Marketplace uStores. It uses TouchNet Safe Commerce technology to open the door for mobile, in-person payments that are fully integrated into your core Marketplace platform. It provides you with the ability to expand uStores so that attended payments can be taken anywhere on campus. Marketplace Point-of-Sale also provides a countertop solution.

Point-of-Sale Hardware

For mobile transactions, Marketplace Point-of-Sale works with a handheld payment-card-reader/bar code-scanner/key-pad device—the Ingenico iSMP Companion, the Ingenico iCMP, or the Ingenico iSMP4—and a touchscreen-based, multi-purpose handheld computer using iOS version 11 or later as its operating system—such as the iPod touch, the iPhone, and the iPad. Point-of-Sale sales attendants can easily carry these devices across your campus and take payments wherever customers might be.

A mobile printer (the Epson TM-P60II, the Blue Bamboo PocketPOS™ 25i, or the Star Micronics SM-S230i) can optionally be used for printing receipts (or receipts can be sent by e-mail or text message).

For countertop transactions, Marketplace Point-of-Sale works with a countertop payment-card-reader/key-pad device—the Ingenico iSC250, IDTech SREDKey 2, and the Ingenico Move/5000—and a Windows PC with internet access.

Point-of-Sale Software

For mobile transactions, Marketplace Point-of-Sale uses an application (available as "TouchNet Marketplace" in the Apple Web Store) that must be installed on the iOS device. This application uses TouchNet Safe Commerce technology to provide secure communication between the Ingenico payment device and the iOS device. This application displays Marketplace Point-of-Sale stores and products and uses a shopping cart that is integrated with a checkout process.

For countertop transactions, browser support includes the latest releases of Edge, Firefox, and Chrome. This broadened browser support is only available for schools that use Point-of-Sale Controller (available for download from the TouchNet Client Community). Use of Point-of-Sale Controller requires your Ingenico payment devices have received a firmware update. To get started using Point-of-Sale Controller, contact TouchNet Customer Care so that an implementation plan can be created.

> ***Important!*** Marketplace Point-of-Sale iOS devices must run version 7.7.4 of the TouchNet Marketplace iOS application (aka MPOS Premier). Version 7.7.4 is currently available on the Apple App Store.
>
> If the TouchNet Marketplace iOS application has NOT been upgraded to version 7.7.4, the Point-of-Sale attendant will automatically be prompted that an upgrade is required when they attempt to launch the iOS application. (In addition, the TouchNet Marketplace iOS application requires that the Operating System of your iOS device has been upgraded to iOS 11 or greater.)

Key Features

Here are some of the key features of Marketplace Point-of-Sale:

- Marketplace Point-of-Sale integrates seamlessly with your existing Marketplace application, allowing for integrated reporting, real-time general ledger system updates, a unified product database, and shared inventory.
- Marketplace Point-of-Sale supports Bluefin's PCI-validated P2PE solution (which encrypts cardholder data at the point-of-sale with a PCI-approved P2PE device). Use of Bluefin is recommended but not required for Point-of-Sale customers. The base Marketplace Point-of-Sale solution provides end-to-end encryption (E2EE).
- Marketplace Point-of-Sale is hosted in TouchNet's PCI DSS compliant DataCenter.
- For mobile transactions, Marketplace Point-of-Sale sales attendants can scan printable product bar codes (printed via the Marketplace Operations Center) with the Ingenico iSMP Companion or the Ingenico iSMP4 to add products quickly to a shopping cart. (bar code scanning is not available with the Ingenico iCMP.)
- Marketplace Point-of-Sale Device Manager (part of the Marketplace Operations Center) allows you to manage the handoff of Point-of-Sale payment devices and to record device information and history. Device Manager also allows you to disable and enable each Ingenico device.

The Payment Process

With Marketplace Point-of-Sale, a sales attendant works with the customer to identify a product that the customer would like to purchase (or an event they would like to attend or a donation they would like to make). The attendant locates the product by taking one of the following actions:

- Scanning a bar code,

- Searching for the product using the Point-of-Sale application's product search functionality, or
- Navigating to the product using menus displayed by the Point-of-Sale application.

The sales attendant uses the Marketplace Point-of-Sale application to add the product to the Point-of-Sale shopping cart. When the customer has identified all the products they would like to purchase and these items have been placed in the shopping cart, the sales attendant then initiates the payment process. Point-of-Sale can accept payments with EMV chip cards and magstripe cards (as well an NFC enabled cards). Both payment cards and debit cards can be used with Marketplace Point-of-Sale. (The ability to process a debit card with a PIN entry by the customer requires a separate TouchNet license.)

The sales attendant then works with the customer to complete the payment process. Depending on the card type, the payment may require the customer to sign a signature or enter a PIN (if PIN-entry functionality has been licensed through TouchNet).

After the payment is processed, the sales attendant prints a receipt (or sends a receipt by e-mail or by text message).

Required Configuration

Configuration for Marketplace Point-of-Sale takes place with the Marketplace Operations Center. Most configuration settings are part of the basic configuration required for all Marketplace stores and products (including both Marketplace uStores and Mobile Marketplace). Little needs to be done in the Marketplace Operations Center to make stores and products ready for sale through Marketplace Point-of-Sale except for the following:

- Selecting a Payment Gateway merchant to use for "card present" transactions,
- Enabling Point-of-Sale availability for stores and products,
- Entering a physical address to be used as the tax location for the store's Point-of-Sale transactions, and
- Selecting which payment methods will be available for the store's Point-of-Sale transactions.
- Granting the Point-of-Sale attendant role to one or more users who will be responsible for using the Point-of-Sale application at the site where payments will be taken.

1.1 Getting Started with Card-Not-Present Transactions

NEW FEATURE: You can now use Marketplace Point-of-Sale Countertop to process transactions when the customer is not present, as with mail orders or telephone orders.

Card-not-present transactions can be processed with Marketplace Point-of-Sale Countertop. An attendant can take these payments when the customer provides payment card information, either in written form or over the telephone.

The process for setting up your stores for card-not-present transactions is summarized in this section.

Important! If you take written orders or phone order, please keep in mind PCI DSS regulations, which forbid the storing of personally identifiable information, such as payment card numbers.

Payment Gateway Configuration

The following configuration must be done outside of Marketplace—in your Payment Gateway system:

- A Payment Gateway merchant must be established for use with MOTO transactions. See **"Payment Gateway Merchant Configuration" on page 37**.
- Linked Payment methods for MOTO transactions must be added to a Payment Gateway Host System Account. See **"Host System Account Configuration" on page 38**.

Merchant Configuration

The following configuration must be done in the Marketplace Merchant Settings for each merchant that will accept card-not-present transactions:

- A Host System Account must be chosen for Mail Order/Telephone Order (MOTO) transactions for the Marketplace merchant that will be processing transactions. See **"Merchant Settings" on page 41**.

Payment Settings

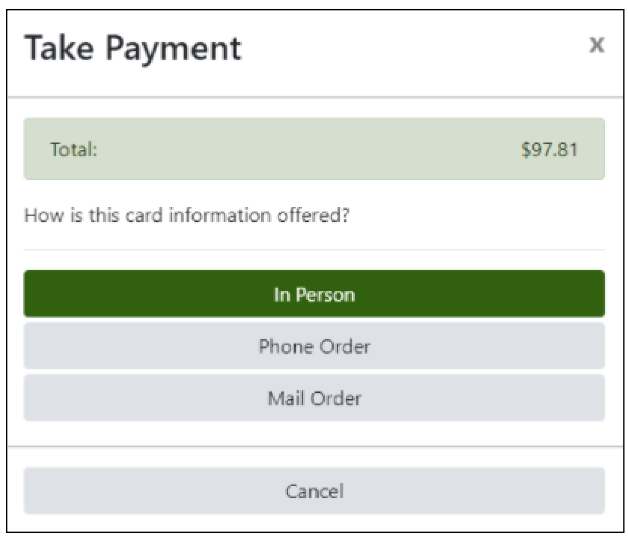
The following configuration must be done to the Store Point-of-Sale Settings for each store that will accept card-not-present transactions

- Payment methods must be chosen for each Marketplace store that will be processing Mail Order/Telephone Order (MOTO) transactions. See **"Store Point-of-Sale Settings" on page 42**.

Taking Payments

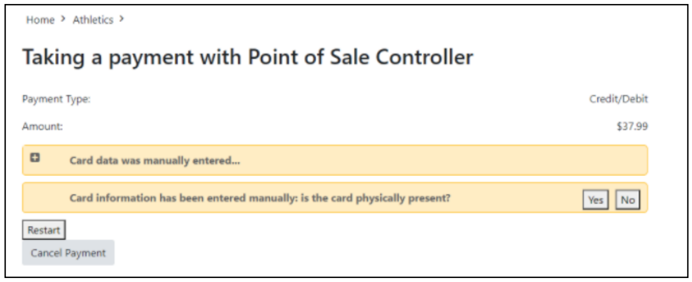
Once the configuration for card-not-present transactions has been completed, your Marketplace attendants will encounter a prompt at the beginning of the payment process when they use Marketplace Point-of-Sale Countertop. This prompt does not appear when Marketplace Point-of-Sale handheld devices are used.

- When initiating a payment, the attendant will be presented with a page to specify if the payment is being taken in person, via mail order, or via telephone order. These options will display on both the countertop device and the handheld devices.



Take Payment with POS Device

- Also, if the attendant is taking an in person payment where the card number has been entered manually on the pinpad device, a new prompt has been added to the payment process to ask whether the card is physically present.



Is Card Physically Present Prompt

- See **"Processing a Payment with Countertop Devices" on page 134**.

2.0 Point-of-Sale Mobile Devices

This section discusses the mobile devices that can be used with Marketplace Point-of-Sale. Marketplace Point-of-Sale works with an Ingenico mobile payment device and an iOS mobile device. Optionally, a printer can also be used.

Note: With Feature Pack 10, Marketplace POS now supports the Ingenico iSMP4 mobile payment device. Please note that this is only for schools that use Global Payments, Heartland Processing, or First Data as their payment processor. Additional processors will be coming in the future. Please contact your Client Success Manager for the latest information about recent processor certifications.

The following table shows the combinations of devices that can be used:

Ingenico Payment Device	Mobile Device	Printer (Optional)
Ingenico iSMP Companion OR Ingenico iCMP	iPhone OR iPad or iPad mini or iPad Pro **Note:** The iOS mobile device must be running iOS version 11 or greater.	Epson TM-P60II OR Blue Bamboo PocketPOS™ P25i OR Star Micronics SM-S230i
Ingenico iSMP4 ***NOTE:*** With Feature Pack 10, this is only for schools using Global Payments, Heart-land, or First Data as their processor.	iPhone OR iPad or iPad mini or iPad Pro **Note:** The iOS mobile device must be running the current iOS version or one version previous.	Epson TM-P60II OR Blue Bamboo PocketPOS™ P25i OR Star Micronics SM-S230i

Note: If a printer is not used, a receipt can be sent to the customer by e-mail or by text message via the Marketplace Point-of-Sale web application.

> ***Important!*** For the Ingenico iSMP Companion, Ingenico iCMP, and Ingenico iSMP4, we recommend you print each Ingenico device's Bluetooth name on a label that you affix to the Ingenico device. By clearly labeling each Ingenico device, you will eliminate any confusion that may result when multiple Ingenico devices in the same area are using Bluetooth connectivity to communicate with iOS devices. Likewise, we recommend you clearly label each iOS device (as well as any printers) with the corresponding Bluetooth name. For more information about Bluetooth names, see **"About Bluetooth Names" on page 58**.

2.1 Ingenico Mobile Payment Devices

Ingenico mobile payment devices are used with iOS mobile devices upon which the Marketplace Point-of-Sale application has been installed. An attendant uses the Marketplace Point-of-Sale application to locate a product and add it to a shopping cart. When a payment is required during the checkout process, the Marketplace Point-of-Sale application communicates with the Ingenico payment device.

The following Ingenico mobile payment devices can currently be used with Marketplace Point-of-Sale:

- Ingenico iSMP Companion - features a bar code reader that can be used with Marketplace Point-of-Sale application to add products to the Point-of-Sale shopping cart.
- Ingenico iCMP
- Ingenico iSMP4 - can accept payments via a magstripe reader and an EMV chip reader. (Note: The iSMP4 can also accept payment with a bar code reader, if you purchased the device with the bar code reader.)

> ***Important!*** Ingenico payment devices must be purchased from TouchNet so that device history can be established and therefore PCI compliancy can be ensured.

Ingenico iSMP Companion

The iSMP Companion has a black-and-white LED display (128 pixels by 64 pixels), a key pad, function keys, and action keys. A payment card reader is built into the side of the Ingenico iSMP Companion, and a bar code reader is built into the top. Plus, it has an EMV chip reader (insertion port) on the bottom edge.

The front and side of the Ingenico iSMP Companion.

The iSMP Companion uses Bluetooth connectivity to communicate with a mobile device running iOS version 11 or greater. The following iOS devices are currently supported for use with the iSMP Companion: iPod, iPhone, iPad, iPad mini, and iPad Pro.

An attendant uses the iOS mobile device for navigating in the Marketplace Point-of-Sale application, adding products to a shopping cart, and initiating the check out process. When a payment is required, the iOS device communicates with the iSMP Companion via a Bluetooth connection. The iSMP Companion is then used by an attendant to accept the customer's payment card information.

Ingenico iCMP

The Ingenico iCMP is a lightweight, pocket-sized payment device that connects to any iOS device via Bluetooth. The iCMP front face has a black-and-white LED display (128 pixels by 64 pixels), a key pad, function keys, and action keys. A payment card reader is built into the top of the Ingenico iCMP.

Note: Unlike the Ingenico iSMP Companion, the Ingenico iCMP does not feature a bar code reader.

After the Marketplace Point-of-Sale application (available via the Apple Web Store) is installed on an iOS device, the Marketplace Point-of-Sale application can communicate with the Ingenico iCMP. The result is a secure means for accepting payment card transactions.

The Ingenico iCMP is thin and lightweight.

An attendant uses the iOS mobile device for navigating in the Marketplace Point-of-Sale application, adding products to a shopping cart, and initiating the check out process. When a payment is required, the iOS device communicates with the Ingenico iCMP via a Bluetooth connection. The Ingenico iCMP is then used by an attendant to accept the customer's payment card information.

Ingenico iSMP4

The Ingenico iSMP4

The Ingenico iSMP4 is an enterprise mobile point of sale device featuring a 2.8" backlit color display. The iSMP4 can accept payments via a magstripe reader, an EMV chip reader, and NFC/contactless. (***Note:*** The iSMP4 can also accept payments with a bar code reader, if you purchased the device with the bar code reader.)

The iSMP4 connects using a variety of options including Wi-F and, Bluetooth to communicate with a mobile device running the current iOS version or one version previous.

An attendant uses the iOS mobile device for navigating in the Marketplace Point-of-Sale application, adding products to a shopping cart, and initiating the check out process. When a payment is required, the iOS device communicates with the iSMP4 via a Bluetooth connection. The iSMP4 is then used by an attendant to accept the customer's payment card information.

General Ingenico Payment Device Information

Turning the Device Power On and Off

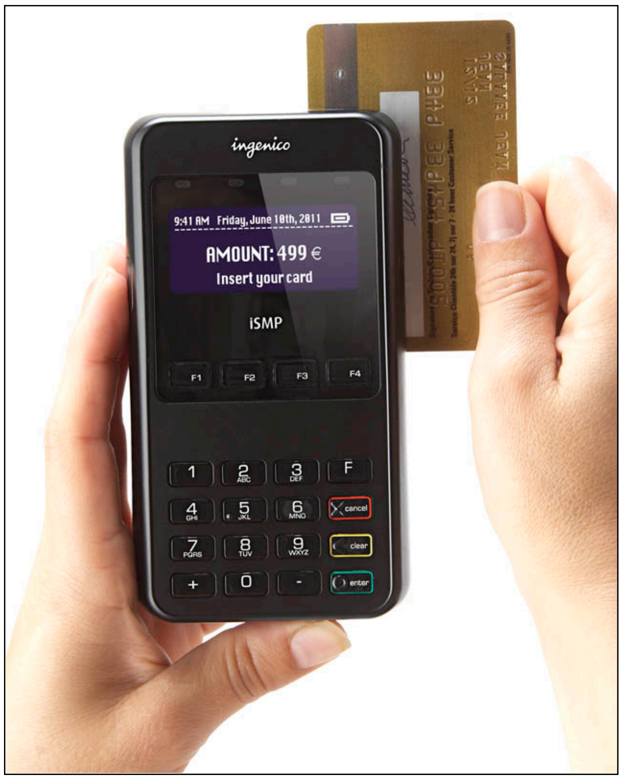
- To power on the **Ingenico iSMP Companion**, press the green key on the bottom right of the key pad.

- To power on the **Ingenico iCMP**, press the small black button on the righthand edge of the device (beside the charging port).
- To power on the **Ingenico iSMP4**, press the green key on the bottom right of the key pad.

To power off any of these Ingenico payment devices, press the # key and the yellow key at the same time.

Establishing Bluetooth Connectivity

To use the Ingenico iSMP Companion, the Ingenico iCMP, or the iSMP4 with an iOS device, you must pair these devices for Bluetooth connectivity. This process is described in **"Establishing Bluetooth Connectivity Between an Ingenico Mobile Device and an iOS Device" on page 53**.



Using the payment card reader.

Using the Magstripe Reader with Payment Cards

To use the magstripe reader with payment cards, hold the Ingenico payment device with the keypad side facing you. Insert a payment card into one end of the reader—with the back of the payment card facing you and the black magstripe placed in the payment card reader (as shown in the photo above). Swipe the card through the payment card reader.

The Ingenico iSMP Companion can be used to scan bar codes.

Using the Bar Code Reader

The Ingenico iSMP Companion and iSMP4 (but not the Ingenico iCMP) includes a bar code reader. The bar code reader becomes active when the bar code icon is selected in the Marketplace Point-of-Sale application (see **"Taking Orders by Scanning bar codes" on page 89**). Then press one of the side buttons on the Ingenico device to emit a red laser beam. This laser beam comes from the top of the Ingenico device. Hold the Ingenico device so that the laser beam can be directed at a bar code.

Ingenico payment devices include an EMV reader.

Using the EMV Reader with Payment Cards

Ingenico payment devices include an EMV reader. To use the EMV reader with payment cards, hold the Ingenico payment device with the keypad side facing you. Insert a payment card into the EMV slot on the bottom of the Ingenico device—with the front of the payment card facing you and the EMV icon on the payment card inserted into the slot (as shown in the photo above). Wait for the device to acknowledge the payment card, and do not remove the card until the device prompts you.

> ***Important!*** EMV support started with Marketplace 6.5 Service Pack 26. Customers who received their Ingenico devices before Marketplace 6.5 Service Pack 26 will need to return their Ingenico devices to TouchNet so that the devices can be upgraded for EMV support. Please contact your TouchNet representative for details regarding an upgrade for your Ingenico payment devices.

Charging and Ingenico Payment Devices

Each Ingenico payment device comes with a charger for plugging the device into an electrical outlet. The Ingenico devices also come with a USB cable. The USB cable can be used for charging the Ingenico devices via a computer USB port.

For More Information on the Ingenico Devices

For more information on the Ingenico payment devices, please see the *Ingenico* user guide for your payment device. This guide is included when you purchase an Ingenico payment device from TouchNet.

2.2 iPhone

The iPhone uses a multi-touch graphical user interface. It can wirelessly connect to the internet via Wi-Fi or a cellular connection.

iPhone

The iPhone allows you to launch applications—such as Marketplace Point-of-Sale—that have been installed via the Apple App Store. After Bluetooth connectivity has been established with the Ingenico iSMP Companion, Ingenico iCMP, or Ingenico iSMP4 transactions can be processed on the iPhone with the Marketplace Point-of-Sale application.

Install Marketplace Point-of-Sale

The Marketplace Point-of-Sale application is available through the Apple App Store. You must download and install this application on the iPhone before it can be used with an Ingenico payment device.

For more information, see **"Installing the Point-of-Sale Application on iOS Mobile Devices" on page 52**.

Wi-Fi and Cellular Connectivity

In order to use the Marketplace Point-of-Sale application, the iPhone must have access to either a Wi-Fi network or a cellular network. To use a Wi-Fi network go into the settings panel on the iPhone and activate Wi-Fi connectivity for the appropriate network.

> ***Important!*** Before you attempt to establish Wi-Fi access on an iPhone, be sure you have contacted the administrator of the Wi-Fi network. The administrator may need to provide you with a network username and a password.

If internet access is not available, you will not be able to login to the Marketplace Point-of-Sale application.

Bluetooth Connectivity

To use an Ingenico payment device with an iOS device, you must pair these devices for Bluetooth connectivity. This process is described in **"Establishing Bluetooth Connectivity Between an Ingenico Mobile Device and an iOS Device" on page 53**.

Bluetooth connectivity is also required in order to print receipts with the Epson TM-P60II mobile printer, the Blue Bamboo PocketPOS 25i mobile printer or the Star Micronics SM-S230i mobile printer. To turn on Bluetooth connectivity, go into the Settings panel on the iPhone, choose the Bluetooth button, and select On. Then select TM-P60II, Blue Bamboo PocketPOS 25i or Star Micronics SM-S230i from the Bluetooth Devices list.

> ***Important!*** In order to print to the Epson TM-P60II, the Blue Bamboo PocketPOS or the Star Micronics SM-S230i, you must also turn on print functionality once you have logged in to the Marketplace Point-of-Sale application. For more information, see **"Turning On Mobile Printing" on page 72**.

For More Information on the iPhone

For more information on the iPhone, please see the *iPhone User Guide*. This guide is available by download from the Apple web site.

2.3 iPad

The iPad is a tablet computer with a multi-touch graphical user interface that can wirelessly connect to the internet via Wi-Fi or a cellular network.

Note: Marketplace Point-of-Sale supports the iPad, the iPad mini, and the iPad Pro. The iOS must be the current version or one version previous. We refer to these devices collectively as iPad in this guide.

iPad

The iPad allows you to launch applications—such as Marketplace Point-of-Sale—that have been installed via the Apple App Store. After Bluetooth connectivity has been established with the Ingenico iSMP Companion, Ingenico iCMP, or Ingenico iSMP4 transactions can be processed on the iPad with the Marketplace Point-of-Sale application.

Install Marketplace Point-of-Sale

The Marketplace Point-of-Sale application is available through the Apple App Store. YYou must download and install this application on the iPad before it can be used with an Ingenico payment device.

For more information, see **"Installing the Point-of-Sale Application on iOS Mobile Devices" on page 52**.

Wi-Fi and Cellular Connectivity

In order to use the Marketplace Point-of-Sale application, the iPad must have access to either a Wi-Fi network or a cellular network. To use a Wi-Fi network go into the settings panel on the iPad and activate Wi-Fi connectivity for the appropriate network.

> ***Important!*** Before you attempt to establish Wi-Fi access on an iPad, be sure you have contacted the administrator of the Wi-Fi network. The administrator may need to provide you with a network username and a password.

If internet access is not available, you will not be able to login to the Marketplace Point-of-Sale application.

Bluetooth Connectivity

To use an Ingenico payment devicewith an iPad, you must pair these devices for Bluetooth connectivity. This process is described in **"Establishing Bluetooth Connectivity Between an Ingenico Mobile Device and an iOS Device" on page 53**.

Bluetooth connectivity is also required in order to print receipts with the Epson TM-P60II mobile printer, the Blue Bamboo PocketPOS 25i mobile printer or the Star Micronics SM-S230i mobile printer. To turn on Bluetooth connectivity, go into the Settings panel on the iPad, choose the Bluetooth button, and select On. Then select TM-P60II, Blue Bamboo PocketPOS 25i or Star Micronics SM-S230i from the Bluetooth Devices list.

> ***Important!*** In order to print to the Epson TM-P60II, the Blue Bamboo PocketPOS 25i or the Star Micronics SM-S230i, you must also turn on print functionality once you have logged in to the Marketplace Point-of-Sale application. For more information, see **"Turning On Mobile Printing" on page 72**.

For More Information on the iPad

For more information on the iPad, please see the *iPad User Guide*. This guide is available by download from the Apple web site.

2.4 Epson TM-P60II Mobile Printer

The Epson TM-P60II device is a wireless mobile printer that supports Bluetooth wireless protocol. It prints receipts on thermal paper. A Marketplace Point-of-Sale attendant can attach this device to their belt (using a belt clip) or place the printer on a nearby flat surface.

The Epson TM-P60II mobile printer works with Marketplace Point-of-Sale.

Unlike the Blue Bamboo PocketPOS P25i printer, the Epson TM-P60II printer prints a bar code on each receipt. This bar code receipt can be scanned to display the order in the Marketplace Point-of-Sale application.

The Epson TM-P60II mobile printer can be purchased from a third-party retailer. This printer is not sold by TouchNet.

Turning the Power On and Off

The power button is located on the front face of the printer, in the control panel. Press the power button to turn the printer on or off.

Pairing With an iOS Mobile Device

Before an iOS mobile device can be used with the Epson TM-P60II mobile printer, it must be paired for Bluetooth connectivity. Use the Bluetooth connectivity settings on the iOS mobile device for pairing these devices.

For More Information on the Epson TM-P60II

For more information on the Epson TM-P60II (including instructions on installing or replacing roll paper and much more), please see the *TM-P60II User's Manual* or the *TM-P60II Technical Reference Guide*. Both guides are available by download from the Epson web site. The *TM-P60II User's Manual* is typically included in the box when you purchase a new TM-P60II.

2.5 Blue Bamboo PocketPOS™ P25i Mobile Printer

The Blue Bamboo PocketPOS P25i device is a wireless mobile printer that supports Bluetooth wireless protocol. It prints receipts on thermal paper. A Marketplace Point-of-Sale attendant can attach this device to their belt (using a belt clip) or place the printer on a nearby flat surface.

The Blue Bamboo PocketPOS P25i mobile printer works with Marketplace Point-of-Sale.

Unlike the Epson TM-P60II printer, the Blue Bamboo PocketPOS P25i printer does not print bar codes on receipts.

The Blue Bamboo PocketPOS P25i can be purchased from either TouchNet or a third-party retailer.

Turning the Power On and Off

The power button is located on the front face of the printer, in the control panel. Press the power button to turn the printer on or off.

Pairing With an iOS Mobile Device

Before an iOS mobile device can be used with the Blue Bamboo PocketPOS P25i mobile printer, it must be paired for Bluetooth connectivity. Use the Bluetooth connectivity settings on the iOS mobile device for pairing these devices.

Note: The PIN for each Blue Bamboo PocketPOS P25i is located below the print paper roll. The paper roll must be removed to view the PIN.

For More Information on the Blue Bamboo PocketPOS™ 25i

For more information on the Blue Bamboo PocketPOS 25i (including instructions on installing or replacing roll paper and much more), please see the *P25 Printer Quick Installation Guide*. This guide is available by download from the Blue Bamboo web site. This guide is also typically included in the box when you purchase a new Blue Bamboo PocketPOS 25i.

2.6 Star Micronics SM-S230i Portable Printer

The Star Micronics SM-S230i device is a wireless mobile printer that supports Bluetooth wireless protocol. It prints receipts on thermal paper. A Marketplace Point-of-Sale attendant can attach this device to their belt (using a belt clip) or place the printer on a nearby flat surface.

The Star Micronics SM-S230i portable printer works with Marketplace Point-of-Sale.

Like the Epson TM-P60II printer, the SM-S230i Portable Printer printer prints a bar code on each receipt. This bar code receipt can be scanned to display the order in the Marketplace Point-of-Sale application.

The Star Micronics SM-S230i can be purchased from either TouchNet or a third-party retailer.

Turning the Power On and Off

The power button is located on the front face of the printer, in the control panel. Press the power button to turn the printer on or off.

Pairing With an iOS Mobile Device

Before an iOS mobile device can be used with the Star Micronics SM-S230i portable printer, it must be paired for Bluetooth connectivity. Use the Bluetooth connectivity settings on the iOS mobile device for pairing these devices.

Note: The default PIN for each Star Micronics SM-S230i is 1234. It is recommended that you change the PIN. Instructions to change the PIN are located in the Star Micronics SM-S230i Hardware Manual.

For More Information on the Star Micronics SM-S230i

For more information on the Star Micronics SM-S230i (including instructions on installing or replacing roll paper and much more), please see the Star Micronics SM-S230i Hardware Manual. This guide is available by download from the Star Micronics web site. A safety instruction sheet is also typically included in the box when you purchase a new Star Micronics SM-S230i.

3.0 Point-of-Sale Countertop Devices

Marketplace supports the use of Point-of-Sale Controller to provide an enhanced solution for taking in-person payments using countertop payment devices. Please note the differences in software requirements when Point-of-Sale Controller is used, as indicated in the tables in this section.

This section discusses the countertop devices that can be used with Marketplace Point-of-Sale and the corresponding software requirements. Those devices are:

- Ingenico iSC250 and iSC Touch 250 Devices
- IDTech SREDKey 2 Device
- Ingenico Move/5000 Device

3.1 Software Requirements

The table in this section describes the software requirements for the specific countertop payment devices.

Software Requirements for Payment Devices

<table>
<tr><th>Payment Device</th><th>Software Requirements</th><th>Printer (Optional)</th></tr>
<tr><td>Ingenico iSC250

AND

Ingenico iSC Touch 250</td><td>Without Point-of-Sale Controller:

• Operating System
• Windows Vista SP2, Windows 7 SP1, 8 or 10.

Java Version

• Java 8 32-bit version (also known as Java Runtime Environment 8).

Browser

• Internet Explorer 11

Note: Neither Firefox nor Chrome support the required Java plug-in. In addition, Microsoft Edge does not support this Java plug-in.</td><td>Any Windows-capable printer

Note: If a printer is not used, a receipt can be sent to the customer by e-mail or by text message via the Marketplace Point-of-Sale web application.</td></tr>
</table>

<table>
<tr><th>Payment Device</th><th>Software Requirements</th><th>Printer (Optional)</th></tr>
<tr><td>Ingenico iSC250
AND
Ingenico iSC Touch 250

AND

SREDKey2</td><td>With Point-of-Sale Controller:
● Operating System
● Windows Vista SP2, Windows 7 SP1, 8 or 10.

Java Version
● Java 8 32-bit version (also known as Java Runtime Environment 8), included with the installer for POS Controller.

Browser
● The latest versions of Microsoft Edge, Firefox and Chrome.</td><td>Any Windows-capable printer

Note: If a printer is not used, a receipt can be sent to the customer by e-mail or by text message via the Marketplace Point-of-Sale web application.</td></tr>
<tr><td>Ingenico Move/5000</td><td>With Point-of-Sale Controller:
● Operating System
● Windows Vista SP2, Windows 7 SP1, 8 or 10.

Java Version
● Java 8 32-bit version (also known as Java Runtime Environment 8), included with the installer for POS Controller.

Browser
● The latest versions of Microsoft Edge, Firefox and Chrome.</td><td>Any Windows-capable printer

Note: If a printer is not used, a receipt can be sent to the customer by e-mail or by text message via the Marketplace Point-of-Sale web application. The Move/5000 can also print receipts directly from its own built-in printer.</td></tr>
</table>

Table last updated 1/30/2023

About bar code Scanners

If a bar code scanner is connected to the PC that is being used with the Marketplace Point-of-Sale web application, then that bar code scanner can be used to automate the product search process by scanning a bar code printed from the Marketplace Operations Center. It can also be used to scan Point-of-Sale printed receipts when an attendant needs to view the Order Details—as is necessary when a customer asks for a refund.

Checking the Version of Java

You can check which version of Java is installed by opening the Java Control Panel, which can be accessed from the Windows Control Panel. On the Java Control Panel, you can select the About button to view the version of Java. For more detailed information, select the Java tab and select the View button to open the Java Runtime Environment Settings panel, which shows the paths to the installed version of Java and allows each Java installation to be Enabled or Disabled. On this panel, the Java version number is displayed in this format: **1.8.0_161** or **1.8.0_162**. If this version of Java is not installed, you must install it. Java can be downloaded from the Oracle web site:

http://www.oracle.com/technetwork/java/javase/downloads/index.html

Note: Some schools may have policies in place that prevent the downloading and/or the installation of the required version of Java. In this situation, we strongly recommend you contact your IT department for assistance.

About Java

With the planned changes announced by Oracle regarding versioning and support, TouchNet will re-distribute Java that will be licensed and fully supported under a licensing agreement between Global Payments and Oracle. Below are a few key points:

- We will redistribute Java 1.8, which is a long-term-stable release, supported by Oracle through March of 2022.
- This release includes coverage of security patches for 1.8.
- The distributed JREs will be licensed and fully supported via the agreement between Global and Oracle.
- Our future plans involve working toward support of the latest long-term support release (e.g. Java 11).

Pop-Up Blockers

If a pop-up blocker is installed for your browser, it must be configured to allow pop-up windows for the internet domain used by the Marketplace Point-of-Sale web application.

3.2 Ingenico Devices for Countertop Payments

The Ingenico iSC250, Ingenico iSC Touch 250, and Move/5000 are countertop payment terminals that can be used with Marketplace Point-of-Sale.

The Ingenico iSC250 payment terminal and the Move/5000 must be connected to a PC running Windows. The attendant uses the Marketplace Point-of-Sale application on a PC to locate a product and add it to a shopping cart.

Ingenico iSC250

The Ingenico iSC250 features a keypad, an LED display, a stylus, a magstripe reader, and a chip reader for EMV-enabled payment cards.

Ingenico Move/5000

The Ingenico Move/5000

The Move/5000 features a large 3.5 inch color touchscreen, chip reader, magstripe and bar code scanner. The Move/5000 supports all forms of electronic payments including EMV chip & pin, chip & sign, magstripe, and NFC/ contactless.

The Move/5000 uses the Telium TETRA operation system. The Move/5000 connects via USB to a PC or Laptop, as a desktop/non-portable solution, with the most advanced and secure payment capabilities.

General Ingenico Payment Device Information

Taking a Payment

When a payment is required, the Marketplace Point-of-Sale application communicates with the Ingenico iSC250 payment device and the Move/5000 . (Note: When this guide says "iSC250" it means both the iSC250 and the iSC Touch 250.) The customer then uses the Ingenico iSC250 or the Move/5000 for inserting their payment card in the EMV chip reader, swiping their payment card through the magstripe reader, or tapping their NFC-enabled payment card. The iSC250 device has an LED display that can be used with the attached stylus for recording on-screen selections, as well as for recording the customer's signature. The device also has a keypad that can be used for entering a payment card PIN. Manual entry payment card transactions are also supported.

The Move/5000 is a touchscreen display device that the customer can use to touch the screen to make selections and enter their signature. The Move/5000 also has a keypad that can be used for entering a payment card PIN. Manual entry payment card transaction are also supported.

> ***Important!*** Ingenico payment devices must be purchased from TouchNet so that device history can be established and therefore PCI compliancy can be ensured.

Connecting the iSC250 and the Move/5000

You can plug in the USB cable (provided) to the device and to the PC workstation. Once the payment device is connected to the PC, it will automatically receive power and be ready to communicate with the PC for accepting transactions.

You can restart the device by pressing the Clear key and the [-] minus key simultaneously. The device can also be restarted by disconnecting and reconnecting the cable.

> ***Important!*** We strongly recommend connecting the USB cable directly to a USB port on the workstation computer. Do NOT use a USB hub or splitter.

Using the Magstripe Reader with Payment Cards

The iSC250 and Move/5000 device's magnetic stripe reader (MSR) includes two MSR heads, facing both left and right. As a result, as long as cards are inserted with the magstripe down, the payment card's magstripe can face either left or right. In addition, the card can be swiped either from back to front or front to back.

The Ingenico iSC250 accepts EMV-enabled payment cards

The Move/5000 accepts EMV-enabled payment cards

Using the EMV Chip Reader with Payment Cards

The iSC250 and Move/5000 payment devices includes an EMV chip reader. To use the EMV chip reader with payment cards, the customer should insert a payment card into the EMV slot on the lower edge of the Ingenico device (below the keypad)—with the front of the payment card facing up and the EMV icon on the payment card inserted into the slot. The attendant should instruct the customer to wait for the device to acknowledge the payment card and to not remove the card until the device prompts them to do so.

Using NFC-Enabled Payment Cards

The iSC250 and Move/5000 device can read NFC-enabled payment cards that have been tapped against the device's display.

For More Information on the Ingenico Devices

For more information on the Ingenico iSC250 payment device, please see the *iSC250 Installation and Quick Reference Guide*. This guide is included when you purchase an Ingenico iSC250 payment device from TouchNet. This guide includes additional information about connecting the stylus, connecting the device to a PC, selecting the device location, and securing the device.

For more information on the Ingenico Move/5000 payment device, please see the Move/5000 Installation and Quick Reference Guide. This guide is included when you purchase an Ingenico Move/5000 payment device from TouchNet.

3.3 SREDKey 2 Device

The SREDKey 2 device by ID TECH is a countertop payment terminal that can be used with Marketplace Point-of-Sale for uStores and uPay for processing mail order and/or telephone order transactions (also known as MOTO transactions).

Important! Currently, the SREDKey 2 device can only be used if your institution is processing payment transactions with Heartland Payment Systems or Global.

These terminals must be connected to a PC running Windows. The user who will process a payment uses a campus application or a TouchNet Ready Partner's application to initiate the transaction and process and launch a uPay or uStore site that have been enabled for Marketplace Point-of-Sale.

The SREDKey 2 device features a keypad and an LED display. (The magstripe reader is not active with Marketplace Point-of-Sale.)

When a payment is required, the Marketplace Point-of-Sale for uStores or uPay communicates with the SREDKey 2 payment device. The user taking the payment then uses the keypad on the SREDKey 2 device for manually entering the payment card information.

Important! SREDKey payment devices are offered by BlueFin, however they must be purchased from TouchNet so that device history can be established and therefore PCI compliance can be ensured.

Please note, the SREDKey2 is not supported on TouchNet's encryption and must be on our Validated P2PE program via BlueFin. Contact TouchNet sales support for assistance.

Connecting the SREDKey Device

You must plug in the USB cable (provided with the SREDKey 2 device) to the SREDKey 2 device and to the PC workstation.

Important! We strongly recommend connecting the USB cable directly to a USB port on the workstation computer. Do NOT use a USB hub or splitter.

MOTO Transactions vs. Card-Present Transactions

The SREDKey 2 device can only be used for processing MOTO transactions, and therefore the magstripe card reader has been disabled. For MOTO transactions, the payment card information is provided either by mail or by telephone. MOTO transactions require the use of Payment Gateway host system account that is specifically configured for MOTO transactions.

For More Information on the SREDKey Devices

For more information on the SREDKey 2 payment device, please see the *SREDKey QuickStart Manual* and the *SREDKey User Manual*. These guides can be downloaded from the ID TECH web site: www.idtechproducts.com

4.0 Getting Started

This section provides brief summaries of the main steps for Point-of-Sale configuration. These steps involve configuration in Payment Gateway and configuration in the Marketplace Operations Center. In addition, if a mobile iOS device will be used, the Marketplace Point-of-Sale application must be installed on that device. (If the Ingenico iSMP Companion or the Ingenico iCMP payment devices will be used, Bluetooth connectivity must be configured with the iOS device.)

4.1 About Payments

The accepted payment methods for each store in Marketplace Point-of-Sale depend on how the store has been configured (as well as the configuration for the Payment Gateway merchant used by that store). Ideally, the store manager will have handed off the following information to the Point-of-Sale attendant:

- a list of the accepted payment methods,
- instructions on whether debit cards can be processed with PIN entry by the customer (requires licensing of TouchNet's debit card module),
- instructions on whether EMV chip cards should be processed by inserting the cards in the Ingenico payment device's EMV chip reader or by swiping these cards through the magstripe reader,
- instructions on whether cash and check transactions can be accepted,
- instructions on establishing Bluetooth connectivity, including the names of the Ingenico payment devices and the iOS devices.

Should You Insert or Swipe an EMV Card?

In order for Marketplace Point-of-Sale to support EMV transactions in which the payment card is inserted in the EMV chip reader of the Ingenico payment device, your institution's payment card processor must have certified TouchNet's EMV solution. If you are unsure whether your institution's payment card processor has certified TouchNet's EMV solution, your Marketplace administrator should contact your TouchNet representative.

Make Sure the Attendant Understands How to Identify EMV Cards and How to Process Payments

It is very important that the store manager describes to each attendant how to identify EMV chip cards and how to process payments. A payment card with an EMV chip looks like this:

An EMV chip card.

An EMV card is easily identified by the small chip on the front of the card. This chip is in approximately the same position regardless of the card type: American Express, Discover, MasterCard, Visa, etc.

If your Ingenico payment devices have been updgraded for EMV functionality, the store manager will need to hand off the following information to the Point-of-Sale attendant:

- how to identify an EMV chip card,
- how to process an EMV chip card by inserting it in the EMV card slot of the Ingenico payment device (or by requesting the customer insert the card), and
- how many times an EMV chip card must be retried (when the payment device fails to read the EMV chip) before the fallback method of swiping can be used (depends on the regulations of your institution's payment card processor).

Make Sure the Attendant Understands Whether Card-Not-Present Transactions Can be Accepted

Marketplace stores can be configured to accept card-not-present transactions for mail orders and phone orders. This transaction can only be accepted when Marketplace Point-of-Sale Countertop is used. When this configuration is enabled, an additional prompt appears during the checkout process. This prompt asks, "Is the customer physically present?" The attendant must respond either Yes or No. If the attendant responds with Yes, then the transaction will proceed with the selection of the payment type. However, if the attendant responds with No, then the transaction will proceed with the entry of the payment card number by the attendant, which the customer provides over the telephone or written on a mail order.

4.2 Payment Gateway Configuration

Transactions that are processed when a payment card is physically present at the time of the transaction (as with Point-of-Sale) are processed differently by Payment Gateway than transactions in which the payment card is not present (as with uStores).

Therefore, additional configuration in Payment Gateway is required for Marketplace Point-of-Sale. The following configuration must be done for each Marketplace merchant.

Payment Gateway Merchant Configuration

A Payment Gateway Credit Card Merchant must be available that has been configured for "Inline payment card [RETAIL]", and if such a Payment Gateway Credit Card Merchant does NOT exist, one must be created.

To add a Payment Gateway merchant for Point-of-Sale, a Payment Gateway administrator must follow these instructions:

1. Log in to U.Commerce Central.
2. In U.Commerce Central's top navigation bar, navigate to **Applications > Payment Gateway**. Payment Gateway then opens.
3. In the left navigation menu of Payment Gateway, go to **Payment Processing Setup > Credit Card > Merchant Configuration > Add Merchant**. The Add Merchant - Credit Card page appears.
4. For regular Point-of-Sale transactions in which the customer is present with a payment card, the "PAYSIM - Target Market Type" field must say "RETAIL".

   For mail order or telephone order transactions (with Point-of-Sale) in which the customer is NOT present, the "PAYSIM - Target Market Type" field must say "MOTO".

For complete instructions on setting up a new Payment Gateway Credit Card Merchant, see the *Payment Gateway Business User's Guide*. In addition, contact the bank that handles the payment card processing to determine the processor identifier (Merchant ID) used by the bank. Also confirm the other merchant configuration settings with the bank.

Host System Account Configuration

Next, a host system account must be established with linked payment methods—that use a Payment Gateway merchant with the "Target Payment Type" of RETAIL.

To configure a host system account for Point-of-Sale, a Payment Gateway administrator must follow these instructions:

1. Log in to U.Commerce Central.
2. In U.Commerce Central's top navigation bar, navigate to **Applications > Payment Gateway**. Payment Gateway then opens.
3. In the left navigation menu of Payment Gateway, go to **Commerce Configuration > Host Systems**. The Host Systems page appears.
4. Select View/Edit Accounts button for the Marketplace host system. The Host Systems Account page appears.
5. In the Add Host System Account section, enter a name for the new host system account. We recommended including "POS" as part of this name so that the host system account can be easily identified. Then click the Add button. The new host system account will now appear in the Host System Accounts section of this same page.
6. Select the Link Payment Methods button for this new host system account. The Link Payment Methods page appears.
7. For each payment method that will be available for Point-of-Sale transactions (including cash transactions and paper check transactions), choose a payment method from the Payment Method dropdown list.

> ***Important!*** When you set up a payment method for paper check transactions, you must choose "4 - Paper Check" from the Payment Method dropdown list.

8. From the TPG Merchant dropdown list, choose the Payment Gateway merchant that you created as described in **"Payment Gateway Merchant Configuration" on page 37**.

   Note: For cash and check payment methods, select None because these payments do not go through Payment Gateway.

9. In the Host Payment Method ID field, enter a code for how the payment should be reported to your general ledger ledger system. Contact your general ledger administrator for the applicable codes.
10. Complete the other fields as appropriate. For complete instructions on linking payment methods, see the *Payment Gateway Business User's Guide*.
11. Select the Add button.

12 Repeat Steps 7 through 10 for each payment method that will be used with Point-of-Sale.

> ***Important!*** If mail order or telephone order transactions will also be accepted, be sure to also set up a host system account with linked payment methods that use a Payment Gateway merchant with the "Target Payment Type" of MOTO.

4.3 Using the Marketplace Operations Center

The following sections describe the configuration needed for Marketplace Point-of-Sale within the Marketplace Operations Center.

This section provides brief instructions intended to help you get going with Point-of-Sale as soon as possible. For comprehensive descriptions of all Point-of-Sale configuration, see **"Point-of-Sale Configuration in the Marketplace Operations Center" on page 169**.

> ***Important!*** If changes take place in the Operations Center, those changes will not be seen in a current active session of thePoint-of-Sale application. To see these changes, the Point-of-Sale attendant must log out and log in.

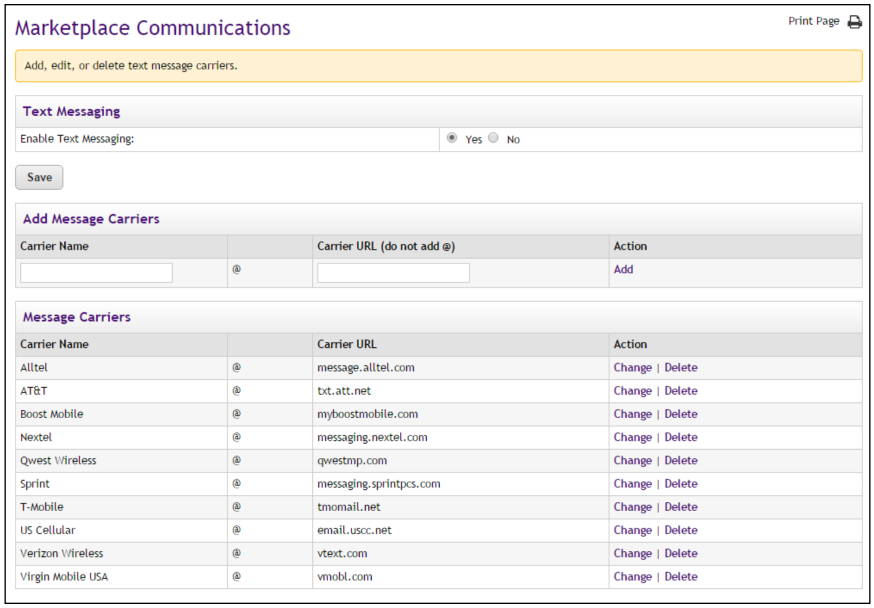
Text Messaging

Administrators must set up the basic configuration for text messaging by entering the carrier names and the carrier URLs. This information is maintained on the Text Messaging page.

This confirmation is not specific to Point-of-Sale: This configuration is used by Marketplace uStores and Mobile Marketplace, as well as Point-of-Sale. If your school already uses uStores, this configuration may already have been completed.

> ***Important!*** If text messaging configuration has NOT been completed (as described in this section), Point-of-Sale attendants will not be able to send text message confirmation messages.

To view the text messaging settings, go to **Marketplace Home > System Administration > Settings > Communications**. The Marketplace Communications page then opens.



The Text Messaging page is used to set up text messaging carriers.

In order for text messaging to be available to customers, an administrator must select Yes for "Enable text message alerts" and configure the carriers.

Note: The Point-of-Sale application uses a standardized format for text messages. Unlike Marketplace uStores, in which store managers can choose which information to include in text messages, the Point-of-Sale application uses a standardized format for all stores. Therefore, the text messaging configuration available in store-level settings on the Marketplace Operations Center does not apply to Point-of-Sale.

To Add a New Text Message Carrier

To add a new message carrier, you must enter a carrier name in the Carrier Name text box and a carrier URL in the Carrier URL box. Then select the Add link.

For example to add Verizon Wireless for text messaging, you might enter **Verizon** in the Carrier Name text box (this name is displayed to customers when they select their text messaging carrier in their user profile) and **vtext.com** for the Carrier URL.

To Edit an Existing Message Carrier

To edit an existing text message carrier, click the Change link for the corresponding carrier. Once you click this link, the Carrier Name and Carrier URL fields become editable. Enter your changes and then click the Save Changes link.

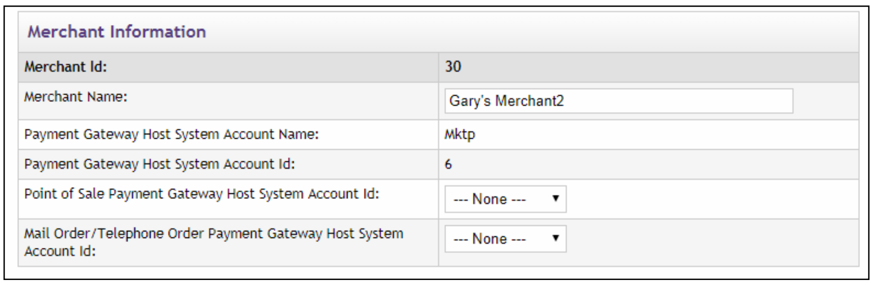
To Delete an Existing Text Message Carrier

To delete an existing text message carrier, simply click the Delete link for the corresponding carrier.

Merchant Settings

Before a store can use Point-of-Sale, its Marketplace merchant must be configured for the Payment Gateway host system account that has been configured for "card present" transactions. After the host system account has been configured, as described in **"Payment Gateway Configuration" on page 37**, a user with the merchant manager user role must go to the Merchant Settings page in the Marketplace Operations Center.

Navigate to Marketplace Home > [merchant name] > Settings


Merchant Information

Merchant Id:	30
Merchant Name:	Gary's Merchant2
Payment Gateway Host System Account Name:	Mktp
Payment Gateway Host System Account Id:	6
Point of Sale Payment Gateway Host System Account Id:	--- None ---
Mail Order/Telephone Order Payment Gateway Host System Account Id:	--- None ---

The Merchant Settings page shows the Payment Gateway host system accounts used by the merchant's stores.

The selection from the Point-of-Sale Payment Gateway Host System Account ID field must be different than the value displayed in the Payment Gateway Host System Account Name field.

uStores, regular uPay, and Mobile all use the host system account specified with the Payment Gateway Host System Account Name field; and all transactions processed with this host system account are "card not present" transactions (referred to as "ECOMM" in Payment Gateway). In contrast, Point-of-Sale only uses "card present" transactions (except for MOTO transactions, as described below), so a different host system accounts must be maintained for Point-of-Sale transactions (referred to as "RETAIL" in Payment Gateway).

Orders can also be optionally accepted by mail order and/or telephone calls as "card no present" transactions (referred to as "MOTO" in Payment Gateway). To allow for mail order and telephone orders to be accepted, you must select a host system account from the "Mail Order/Telephone Order Payment Gateway Host System Account ID field.

This configuration must be done just once for each Marketplace merchant.

> ***Important!*** You must select a host system account on the Merchant Settings page before you can enable a store for Point-of-Sale.

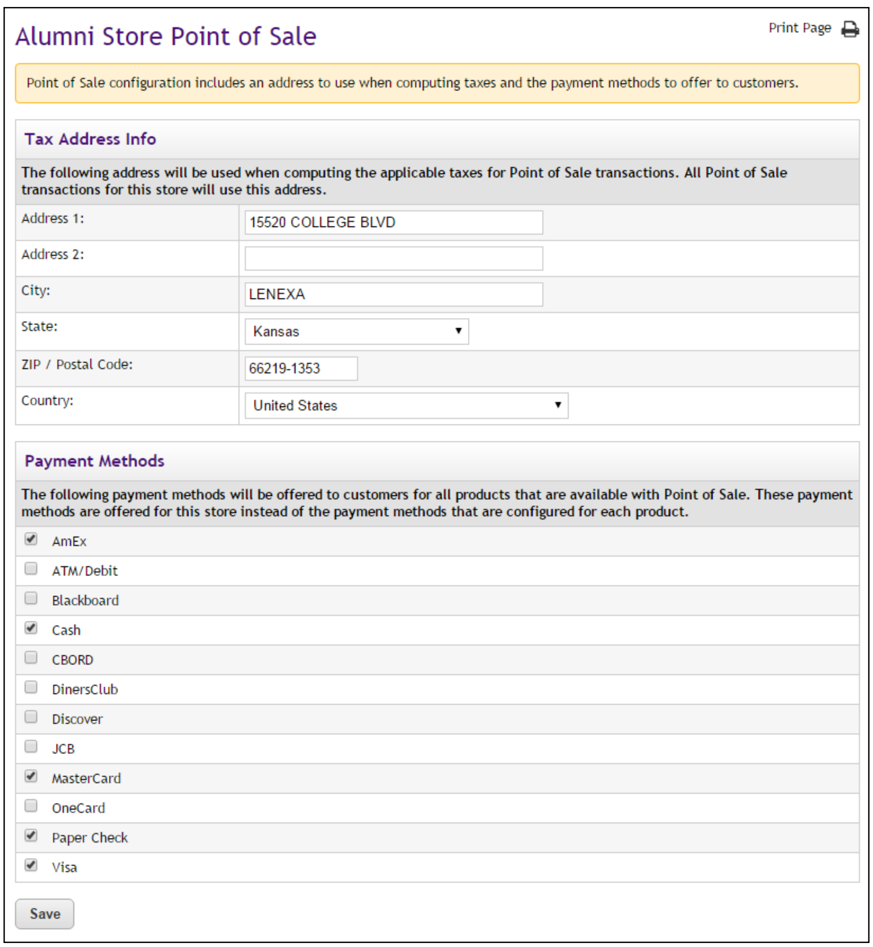
Store Point-of-Sale Settings

The Store Point-of-Sale page contains two sets of fields:

- **Tax Address Info**—These fields contain the default address that will be used when computing taxes for Point-of-Sale transactions. Be sure to keep this address up-to-date with the location where transactions will be processed so that taxes will be correctly assessed. This address should be the location where transactions will be processed with the Point-of-Sale devices.
- **Payment Methods**—Instead of using the payment methods selected in the product configuration (like uStores and Mobile Marketplace), Point-of-Sale uses payment methods configured on the Store Point-of-Sale page.

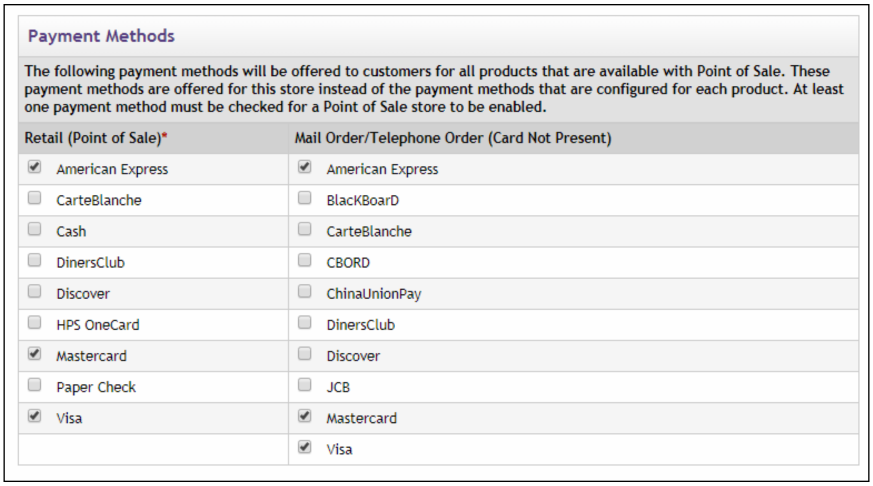
Follow these steps for configuring the Store Point-of-Sale settings:

1 Navigate to **Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Point-of-Sale**. The Store Point-of-Sale page appears.



Point-of-Sale stores have their own address and payment methods.

If the merchant has been configured to accept mail orders and telephone orders as "card not present" transactions on the Merchant Settings page, then the Payment Methods table contains two columns.


Payment Methods

The following payment methods will be offered to customers for all products that are available with Point of Sale. These payment methods are offered for this store instead of the payment methods that are configured for each product. At least one payment method must be checked for a Point of Sale store to be enabled.

Retail (Point of Sale)*	Mail Order/Telephone Order (Card Not Present)
☑ American Express	☑ American Express
☐ CarteBlanche	☐ BlacKBoarD
☐ Cash	☐ CarteBlanche
☐ DinersClub	☐ CBORD
☐ Discover	☐ ChinaUnionPay
☐ HPS OneCard	☐ DinersClub
☑ Mastercard	☐ Discover
☐ Paper Check	☐ JCB
☑ Visa	☑ Mastercard
	☑ Visa

Point-of-Sale stores have their own address and payment methods.

2 Enter a default address in the Tax Address Info section. This address will be used when computing taxes for Point-of-Sale transactions.

> ***Important!*** To ensure taxes are being assessed correctly, be sure to keep this address up to date with the location where transactions will be processed with the Point-of-Sale devices.

3 Select the checkbox for each payment method that should be available with Point-of-Sale. These payment methods will be offered for this store instead of the payment methods that are configured for each product.

If two columns appear in the Payment Methods table, the left column contains the available payment methods for regular Point-of-Sale transactions in which the customer is present, and the right column contains the payment methods to accept for Point-of-Sale "card not present" transactions that are taken by mail order or telephone.

Be sure to select the checkboxes for all transaction types that should be available, and then click the Save button.

Note: If you would like to offer customers both signature (credit) and PIN-entry (debit) options when they use a debit card, be sure to select ATM/Debit as an allowed payment method. If ATM/Debit is not listed, contact your Payment Gateway administrator. If you do not choose ATM/Debit as a payment method (or this option is not available), debit cards can only be processed with a customer signature (which may result in your payment card processor assessing a higher transaction fee).

4 Click the Save button.

For more information, see "Store Point-of-Sale Settings" on page 175.

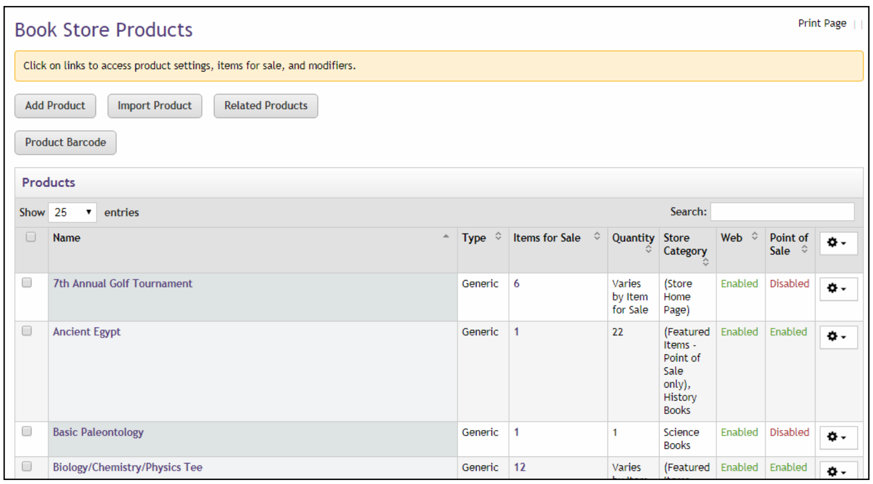
> ***Important!*** You must assign a tax address and one or more Point-of-Sale payment methods before you can enable a store for Point-of-Sale.

Featured Items Category

The Featured Items product category is only for use by Marketplace Point-of-Sale. We recommend you assign key, high-volume products to the Featured Items category. By taking this action, users with the Point-of-Sale devices will be able to easily locate the main products that your store is selling.

Use these steps to assign products to the Featured Items category:

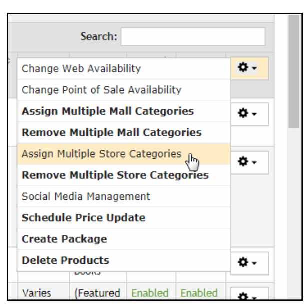
1 Navigate to **Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Products**. The Store Products page appears.



The Store Products page.

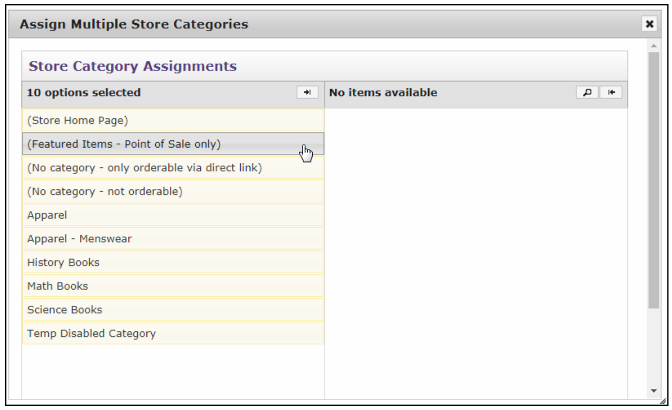
2 Select the checkbox for each product that you would like to add to the Featured Items Category.

3 Mouse over the Gear icon *in the column header*. A flyout menu appears.



The Gear flyout menu.

4 Select "Assign Multiple Store Categories" from the flyout menu. The Assign Multiple Store Categories window appears.



The Assign Multiple Store Categories window.

5 Select Featured Items in the left column. It will then move to the right column.

6 Scroll to the bottom of the Assign Multiple Store Categories window and select the Save button.

For more information, see **"Product Categories" on page 182**.

Enable Products

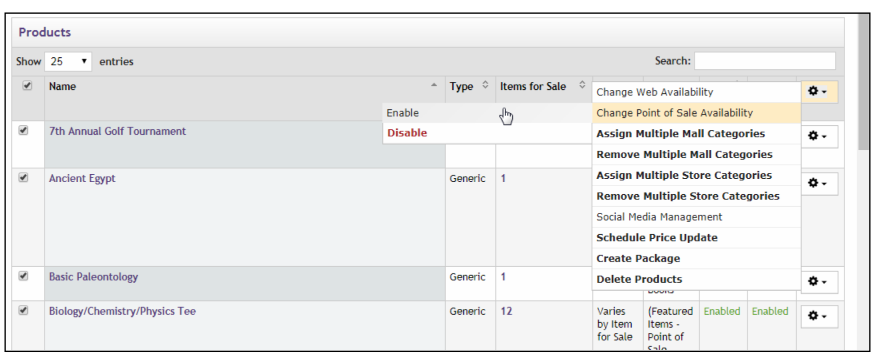
By default, products are initially disabled in Marketplace Point-of-Sale. (The disable/enable product status settings are separate for uStores, Mobile, and Point-of-Sale.) After the product configuration for a product has been completed, you are ready to enable the product.

To enable products for Point-of-Sale, follow these instructions:

1 Navigate to **Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Products**. The Store Products page appears.

2 Select the checkbox for each product that should be available through Point-of-Sale.

3 Mouse over the Gear icon *in the column header*. A flyout menu will appear.



When you mouse over the Gear icon, a flyout menu appears.

4 Select **Change Point-of-Sale Availability > Enable** from the flyout menu.

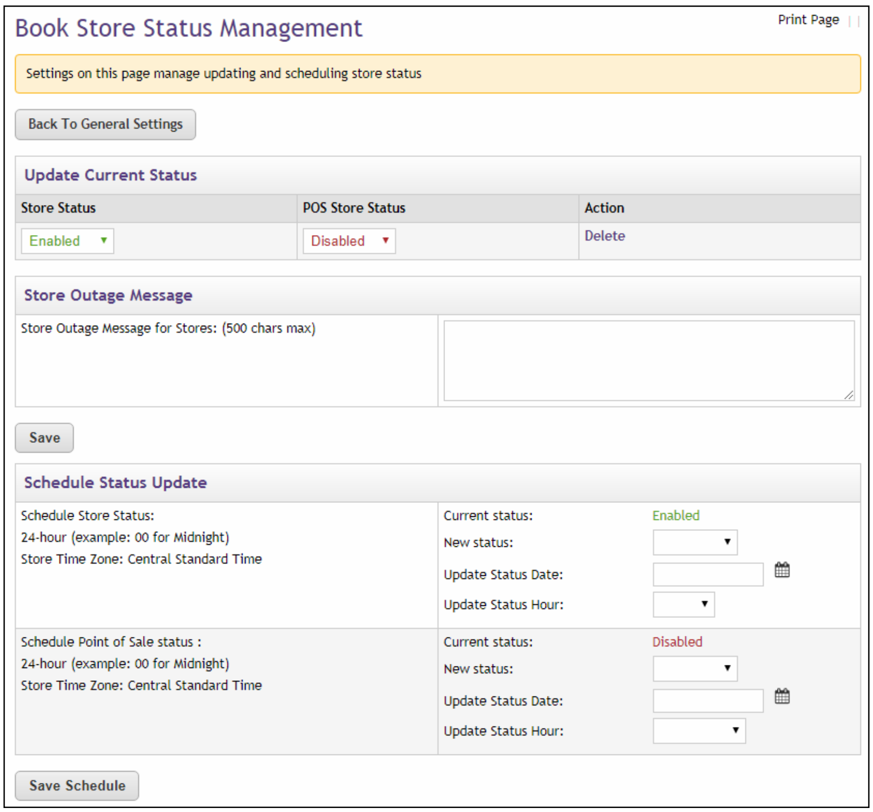
For more information, see "Managing Products" on page 179.

Enable Your Store

By default, stores are initially disabled in Marketplace Point-of-Sale. (The disable/enable settings are separate for uStores and Point-of-Sale.) After the configuration for a store has been completed, you are ready to enable the store.

Follow these instructions to enable a store:

1 Navigate to **Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Status Management**. The Store Status Management page appears.



The Store Status Management page.

2 To make the store immediately available, choose ENABLED from the POS Store Status dropdown list in the Update Current Status section. (You can also make a store immediately available by navigating to the Marketplace home page and choosing Change Point of Sale Availability > Available from the Gear flyout menu for the desired store.)

OR

To schedule when the store will be available, find the "Schedule Point-of-Sale status" fields in the Schedule Status Update section. Then choose ENABLED from the New Status dropdown list. Click the calendar icon in the "Update Status Date" field and select the desired date from the calendar widget. Click the clock icon to select the desired time from the dropdown list.

Then click the Save Schedule button.

For more information, see **"Store Status Management" on page 173**.

> ***Important!*** In order to enable a store for Point-of-Sale, you must have assigned a tax address and one or more Point-of-Sale payment methods. These values must be set as described on **"Store Point-of-Sale Settings" on page 42**. In addition, you must have selected a host system account, as described in **"Merchant Settings" on page 41**.

About Bar Codes

The Marketplace Operations Center allows a store manager or merchant manager to print a list of all the product bar codes for the store (for those products that are available with Point-of-Sale). Point-of-Sale attendants can use this list of bar codes when a customer wants to purchase a specific product. The attendant then refers to the printed bar codes list and scans the corresponding product bar code.

To print a list of product bar codes for a store ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Products

On the Products page, select the Product bar code button. A pop-up window will appear. A PDF will be generated and appear in the browser window. This PDF will contain bar codes for all products for this store that have a current Point-of-Sale status of Available/ENABLED.

Union Donation (2537016)

100000000039

Union Donation Again (2865677)

100000000108

Union Donation Too (3423664)

100000000064

Union Event (5006037)

100000000060

Union Event Too (5581700)

100000000063

Sample bar codes.

Use your browser controls to print the bar code list. The list can then be made available to Point-of-Sale attendants, who can post the bar code list at the sales location or otherwise ensure the bar code list is within easy reach.

When a customer asks to purchase a product, the attendant can use a bar code scanner (such as the bar code scanner built into the Ingenico iSMP Companion) to scan the bar code and initiate the product search process.

Note: The Ingenico iSMP Companion will only read bar codes that have been generated for Point-of-Sale with the Marketplace Operations Center. The Ingenico iCMP does not have a bar code reader.

For more information about using the Ingenico iSMP Companion to scan bar codes, see **"Taking Orders by Scanning bar codes" on page 89**.

About Point-of-Sale User Roles

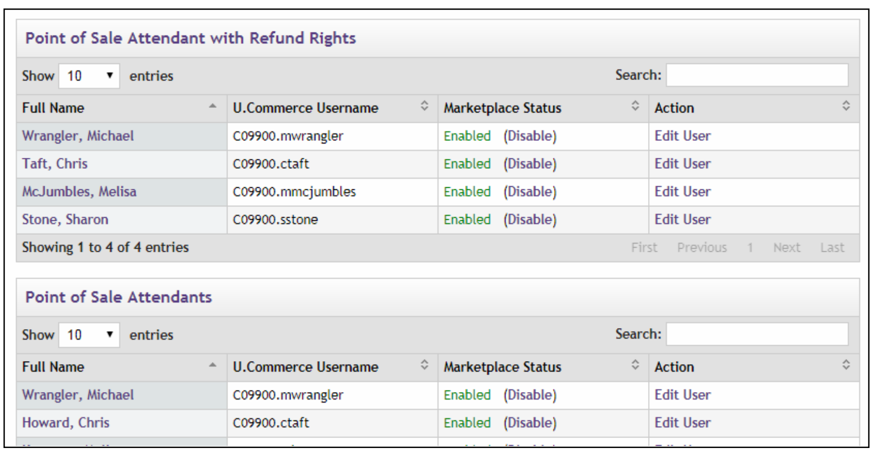
Two user roles are available for Point-of-Sale users: Point-of-Sale attendant and Point-of-Sale attendant refunder. For a user to log in to the Point-of-Sale application, the user must have been granted the Point-of-Sale attendant role. This role allows the user to process transactions. If the user also needs the ability to refund orders, the user must have been granted both the Point-of-Sale attendant role and the Point-of-Sale attendant refunder user role. (The Point-of-Sale attendant refunder role *alone* does not allow the user to log in to the Point-of-Sale application.)

Note: Before a user can be assigned a Point-of-Sale user role, the user must have been created within the U.Commerce Central User Management application.

> ***Important!*** Make sure you have assigned the Point-of-Sale Attendant user role to the users who will be using the Point-of-Sale devices. Only users who have been assigned the Point-of-Sale Attendant role can log in to the Marketplace Point-of-Sale web application to process transactions.

To assign a Point-of-Sale user role, a merchant manager or store manager must follow these instructions:

1. Navigate to **Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Users**. The Users page then appears. This page lists all user roles for the store, including both the Point-of-Sale attendant user role and the Point-of-Sale attendant refunder user role.

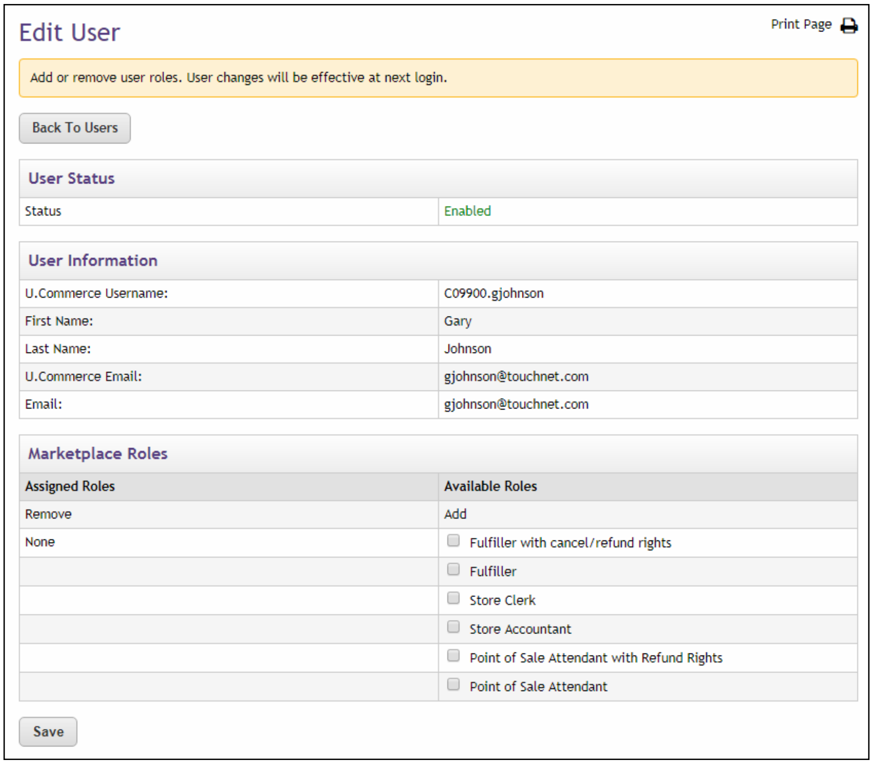


The Users page lists all Point-of-Sale attendants for the store. In this example, three users have been granted the Point-of-Sale attendant user role and one user has been granted the Point-of-Sale attendant refunder user role.

2. For any user displayed on the Users page, click the Edit User link in the Action column. The Edit User page appears.

   OR (*If the user you would like to give the Point-of-Sale attendant user role is not listed ...*)

Select the View U.Commerce Users button (near the top of the page) to view a list of all the available users, and then for one of these users, select Edit User link in the Action column. The Edit User page appears.



For a user to process transactions with Marketplace Point-of-Sale, that user must be assigned the Point-of-Sale attendant role.

3 In the Available Roles column, select the Point-of-Sale Attendant checkbox and then click the Save button.

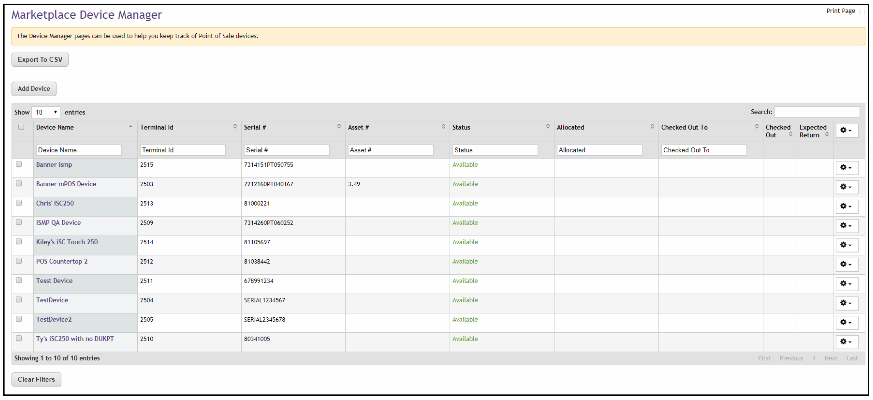
4 In addition, for each location in which Marketplace Point-of-Sale will be used to process transactions, at least one user should be granted the Point-of-Sale attendant refunder role so that refunds can be processed directly at the point of sale. This step is optional. Refunds can also be processed via the Operations Center by a store fulfiller with cancel/refund rights. (For more information about refunding with the Point-of-Sale application, see **"Order Search & Refunds" on page 155**.)

About Device Manager

Device Manager allows you to keep track of who is responsible for each device. You are not required to use Device Manager, but it does provide important functionality that you can use for checking out and checking in devices (as well as other functionality). In order to start taking transactions, you should check out Point-of-Sale devices to the users who will be processing these transactions.

An administrator, merchant manager, or store manager can use Device Manager to checkout a device by following these instructions:

1 Navigate to **Marketplace Home > Device Manager**. The main Device Manager page then appears.



The Marketplace Device Manager page.

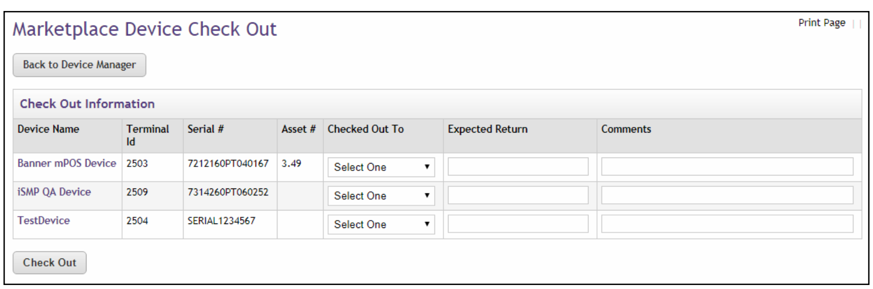
Note: All your Ingenico payment devices automatically appear in Device Manager. Any other devices (such as an Epson TM-P60II printer, a Blue Bamboo PocketPOS P25i, or an iOS device) must be added by the school.

2 Find the device that you would like to check out and review the status of this device. The device must have a status of Available.

3 Mouse over the Gear icon for the desired device and choose Check Out Device from the flyout menu. The Marketplace Device Check Out page appears.

OR

Select the checkbox beside the names of multiple devices and then mouse over the Gear icon *in the header row*. Choose Check Out Multiple Devices from the flyout menu. The Marketplace Device Check Out page appears.



The Marketplace Device Check Out page.

4 Choose a Point-of-Sale Attendant from the Checked Out To dropdown list. If more than one device is being assigned, be sure to choose a Point-of-Sale Attendant for each device.

Note: In the dropdown list, administrators will see all Point-of-Sale Attendants for all the stores. Merchant managers will see all Point-of-Sale Attendants for the stores that they serve as a merchant manager. Store managers will see all Point-of-Sale Attendants for the stores that they serve as store manager.

5. Enter an Expected Return Date
6. (Optional) Enter Comments.
7. Click the Check Out button.

After completing this process, be sure to hand off the device(s) to the assigned attendant(s) or otherwise make the device(s) available to the attendant(s).

For more information about using "Device Manager," see **"Device Manager" on page 188**.

4.4 Installing the Point-of-Sale Application on iOS Mobile Devices

The Marketplace Point-of-Sale application is available through the Apple App Store. For mobile transactions, you must download and install this application on each iOS device that will be used with Marketplace Point-of-Sale. This application must be installed in order for the iOS device to communicate with an Ingenico payment device.

To install the Marketplace Point-of-Sale application on an iOS mobile device ...

1. Ensure the iOS device is connected to a Wi-Fi network, or ensure the iOS device has a cellular connection.
2. Press the Home button once on the iOS device. This button is located below the display. The iOS home screen is displayed.
3. Touch the App Store icon. The Apple App Store opens.

   Note: You will need to create an account at the Apple App Store. We recommend you use the same account for installing the Marketplace Point-of-Sale application on all the iOS devices that will be used with Point-of-Sale. Be sure to sign out of the Apple App Store after you install the application on each iOS device. This will allow you to reuse the same account.

4. Touch the Search button in the bottom navigation menu of the Apple App Store application. The search bar and the keypad appear.
5. Enter **TouchNet Marketplace** in the search field and touch the Search button. The TouchNet Marketplace application appears in the search results.

6. Select the **TouchNet Marketplace** application.
7. Tap the Cloud/Download button.

The application will be downloaded and installed. Afterwards, the application icon will be displayed on the iOS home screen. The label below the icon will say **MPOS Premier**. You can tap this icon to launch the Marketplace Point-of-Sale application.

> ***Important!*** We strongly recommend that you run the most recent version of the TouchNet Marketplace iOS application (aka MPOS Premier) on your iOS devices.
>
> If the TouchNet Marketplace iOS application has NOT been upgraded to the most recent version, the Point-of-Sale attendant will automatically be prompted that an upgrade is required when they attempt to launch the iOS application. (In addition, the TouchNet Marketplace iOS application requires that the Operating System of your iOS device has been upgraded to iOS 11 or greater.)

4.5 Establishing Bluetooth Connectivity Between an Ingenico Mobile Device and an iOS Device

To use the Ingenico iSMP Companion or the Ingenico iCMP with an iOS device, you must pair these devices for Bluetooth connectivity. Bluetooth connectivity allows these devices to communicate and work together during the Marketplace Point-of-Sale payment process.

> ***Important!*** You must pair your Ingencio mobile payment device with an iOS device *before* you launch the Marketplace Point-of-Sale application.

Note: The instructions in this section may not apply to Ingenico devices purchased from TouchNet prior to November 16, 2015. If your institution's Ingenico devices were purchased prior to this date (or if your Ingenico devices to not behave as described in this section), please contact your TouchNet representative.

Bluetooth Pairing

If an Ingencio mobile device is not currently paired with an iOS device, the “BT Pairing Required” menu will automatically be displayed when the Ingenico device is turned on.

This menu allows you to initiate Bluetooth pairing.

If the “BT Pairing Required” menu appears, follow these steps to pair the Ingenico device with an iOS device:

1 On the Ingenico device …

Press F1 to select “IOS.”

A scroll box will then appear that lists all the Bluetooth devices in the vicinity.

This scroll box allows you to select which iOS device to use.

2 On the iOS device …

Turn on Bluetooth Connectivity (Settings > Bluetooth > On).

It will help if you know the name of the iOS device (Settings > General > About > Name). If necessary, you may want to edit the name of the iOS device so that the name is unique and easy to identify.

3 Using the scroll box on the Ingenico device …

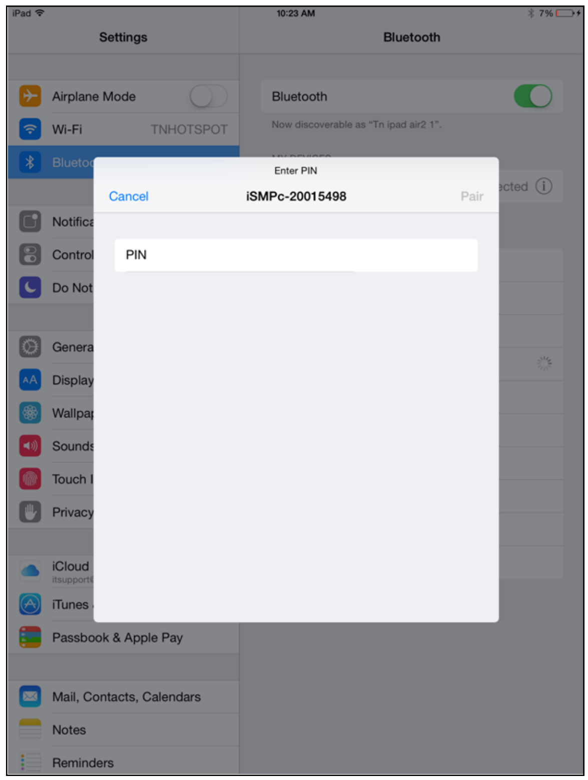
Press the F2 key to scroll down (and the F3 key to scroll up), until your target iOS device is highlighted.

4 Press the Green key.

A message will now appear on the Ingenico device that identifies the Bluetooth name of the Ingenico device and provides a PIN number.

This panel shows the PIN number for Bluetooth pairing.

Soon afterwards, a prompt will appear on the iOS device, asking for a PIN number entry.



The Enter Pin panel on an iPad.

Notice this panel includes the Bluetooth name of the Ingenico device that is attempting to connect to the iOS device. For more information about Bluetooth names, see **"About Bluetooth Names" on page 58**.

Note: In some situations—such as during the first time that you pair an Ingenico device with an iOS device—the Ingenico device name may temporarily receive an unexpected name (such as "Cordless Phone") on the Bluetooth panel of the iOS device; however, if you proceed and pair the devices, the name will typically change to the expected name (i.e., to the name displayed on the BT Pairing panel of the Ingenico device).

5 Enter the PIN number displayed on the Ingenico device in the PIN field on the iOS device, and then press Pair on the iOS device.

The devices are now paired.

The Ingenico device will now show as “Connected” in the “My Devices” section of the iOS device’s Bluetooth panel.

And “Marketplace POS” will appear on the Ingenico device’s display.

Once Bluetooth pairing has been established, the "Marketplace POS" panel appears on the Ingenico device.

Removing a Paired Device

If the “BT Pairing Required” menu does not automatically appear when the Ingenico mobile device is started—if instead “Marketplace POS” is displayed on the Ingenico display panel when it is turned on—then the device has already been paired to an iOS device. It will continue to assume it is paired until you remove the pairing. To remove the paired device, follow the instructions below, based on the type of device.

iSMP4 Device

1 Power off the iSMP4 device

- press and hold the side power button

or

- simulatneously press the # and YELLOW button)

2 During the boot cycle, you should see a screen that contains information similar to the following.

```
Copyright (c) 1993-2020, Ingenico Application and Unit Versions ...
Program: Retail Base
Version: 23.50.6.0005
Telium SDK: 9.32.3 PatchY
SM Ver: 4.1.7
EFT Prog: 0000
EFT Parm: 0000
Injected Serial No:
XXXXXXXXXXXXXX
Host: Bluetooth, iOS mode
```

3 When this screen appears, enter 2634 and press the GREEN button.

4 You should see the following prompt: "Press F for Menu", press the F key.

5 You should see a screen menu similar to the following.

```
0-TELIUM MANAGER
1-SECURITY_APP
2-TSA
3-TDA
4-CAV-DEV
5-BLUETOOTH
6-PINPAD_AGENT
7-HOME SCREEN
```

Note: Navigate the menu using the F2 (scroll down), F3 (scroll up), the GREEN, YELLOW, and RED buttons for selecting and backing out of menus.

6 Navigate to BLUETOOTH, press the GREEN button.

7 Navigate to Paired devices, press the GREEN button.

8 Navigate to the paired device, press the GREEN button.

9 Navigate to REMOVE, press the GREEN button.

10 Power off the iSMP4 device (see above).

11 Power on the iSMP4 device (see above).

12 The "BT Pairing Required" menu appears once the device restarted. You can go to **"BluetoothPairing" on page 53** to pair the Ingenico device with an iOS device.

iCMP and iSMP Devices

Press the F key four times within two seconds.

The “BT Pairing Required” menu appears. You can go to **"BluetoothPairing" on page 53** to pair the Ingenico device with an iOS device.

Note: If an Ingenico device is paired to an iOS device and subsequently the pairing is removed on the iOS device, the Ingenico device will attempt to reconnect to the iOS device—and the PIN prompt panel will appear on the iOS device—but the Ingenico device will not display a PIN number at this time. In this situation, you must remove pairing *on the Ingenico device*, as described above. Then, Bluetooth connectivity can be established as described in **"BluetoothPairing" on page 53**.

Re-Connecting Devices

If you have previously paired an Ingenico mobile device and an iOS device, these devices will automatically be re-paired whenever they are both turned on (and Bluetooth is set to On for the iOS device)—as long as these devices are within Bluetooth range (typically no more than 30 feet). Bluetooth connectivity is always turned on for Ingenico devices.

If you do not want these two devices to be connected—or if you do not know which iOS device the Ingenico device is connected to—you can remove the pairing by following the instructions in **"Removing a Paired Device" on page 57**.

About Bluetooth Names

If multiple Ingenico mobile devices and iOS devices will be used in the same area, you must pay attention to the names of the devices.

You can find the iOS device name by navigating to the following location on the iOS device: Settings > General > About > Name. This name will appear on the Ingenico device during the pairing process. See Step 1 of **"BluetoothPairing" on page 53**.

The Bluetooth name of the Ingenico device is displayed when you attempt to connect the Ingenico device to an iOS device, as described in Step 4 of **"BluetoothPairing" on page 53**.

This panel shows the Bluetooth name used by the Ingenico device.

This Bluetooth name will also be displayed on the Bluetooth panel of any iOS device in the vicinity for which Bluetooth has been turned on.

> ***Important!*** We recommend you print the Ingenico device's Bluetooth name on a label that you affix to the Ingenico device. By clearly labeling each Ingenico device, you will eliminate any confusion that may result when multiple Ingenico devices are used in the same area. Likewise, we recommend you clearly label each iOS device with its Bluetooth name, as well as any printers.

4.6 Final Preparation

After you have completed configuration for a store, products, and users in the Marketplace Operations Center, there are several additional things that must be done in preparation for taking payments:

- **Ensure the devices have been fully charged**—Ensure the Ingenico mobile payment devices and the iOS mobile devices (and printers, if applicable) have all been fully charged. Also, as necessary, assign charging units for each device.
- **Ensure Wi-Fi connectivity is available**—Only necessary for iOS devices that do not have cellular access. For example, some iPods and iPads may not have cellular access. In order for iOS mobile devices to access the internet and process transactions, Wi-Fi connectivity must be available in the area where the Point-of-Sale attendants will be taking payments or the iOS device must otherwise have cellular access. Contact campus IT to determine if Wi-Fi connectivity is available in the projected sales area, and ensure the Point-of-Sale attendants have the name of the Wi-Fi network and login credentials.
- **Ensure the printers have paper**—If the Point-of-Sale attendants will be giving customers the option of receiving a printed receipt at the

transaction site, you should either make sure the printer has sufficient paper or provide additional printer paper rolls.

- **Ensure the Point-of-Sale attendant has received login credentials for U.Commerce**—Before transaction can be processed with the Marketplace Point-of-Sale application, the attendant must log in using their U.Commerce login credentials. If the user is a new U.Commerce user, make sure the user has received their U.Commerce login credentials.
- **Handoff instructions for pairing Ingenico mobile payment devices and iOS devices**—If the Ingenico iSMP Companion or the Ingenico iCMP will be used, make sure the attendants have received instructions for establishing Bluetooth connectivity with iOS devices.
- **Handoff the product bar codes to the attendant**—By using printed product bar codes, attendants can quickly add products to the Marketplace Point-of-Sale shopping cart. Be sure to print the bar codes and make them available to the attendant(s).
- **Provide list of allowed payment methods to the attendant**—The attendant will need to know which payment methods the store is configured to accept. Provide the attendant with a list of the accepted payment cards and instructions on whether debit cards can be processed with PIN input from the customer.
- **Provide instructions on how to process EMV cards**—Be sure the attendants know whether EMV cards should be inserted in the EMV chip reader on the Ingenico devices or whether these cards should be swiped in the magstripe reader.

5.0 Using Marketplace Point-of-Sale

This section describes how to process transactions using the Marketplace Point-of-Sale application. This section is written for Point-of-Sale attendants. For instructions on configuring stores and products, see **"Using the Marketplace Operations Center" on page 39**.

5.1 Turning On Devices and Preparing to Log In

The following instructions describe the process of turning on Point-of-Sale devices and preparing to log in.

> ***Important!*** The following steps must be performed before you attempt to launch the Point-of-Sale application. If you have already attempted to launch the Point-of-Sale application, you must close the Point-of-Sale application before turning on an Ingenico payment device. If you do not follow these instructions, the Ingenico payment device may not be able to communicate with the Point-of-Sale application.

1. Turn on the Ingenico payment device.
2. Turn on the iOS device
3. Connect to a Wi-Fi network with the iOS mobile device. If you use an iOS device with a cellular plan, a Wi-Fi network is not required. In order to use the Marketplace Point-of-Sale application, the iOS device must have internet access at the location where transactions will be processed.

> ***Important!*** If you will be using a Wi-Fi network, be sure you have communicated with the Wi-Fi administrator and acquired the name of the Wi-Fi network, a username, and a password. Be sure you understand how to log in.

4. If you plan to print receipts, turn on the printer.
5. If you plan to print receipts, you must pair the printer with the iOS device for Bluetooth connectivity.

5.2 Choosing an Environment

TouchNet provides two environments for installations of Marketplace: test and production. These environments can be selected by using the Settings panel on the iOS device.

A visual reminder of the active environment appears when you navigate to the log in page for the Point-of-Sale application: for the test environment, a bright red border is wrapped around the pages.

> ***Important!*** Before you start processing transactions with the Point-of-Sale application, be sure you are using the correct environment. If you process transactions on the test environment, the payment cards will not be charged. However, if you process transaction on the production environment, the payment cards *will* be charged.

To choose an environment, follow these instructions:

1 Navigate to the Settings panel for the iOS device.

2 Select "MPOS" or "MPOS Premier". The MPOS settings panel is displayed.

The MPOS settings panel.

3 Tap the Environment button. The Environment panel then appears.

4 Tap one of the environment options. The following options are available:

- **Production**—The production environment is used for processing real transactions.
- **Test**—The test environment can be used for testing the Point-of-Sale application. Any transactions processed with the test environment are not presented for payment to payment card processors.

After you have completed these steps for choosing an environment, you can log in to the Point-of-Sale application, as described in **"Logging In" on page 63**.

5.3 Logging In

This section describes the process of launching the Point-of-Sale web application and logging in.

> ***Important!*** Before a user can login, the user must have been granted the Point-of-Sale attendant role by a Marketplace administrator, chief administrator, merchant manager, or store manager. For more information, see **"Point-of-Sale Users" on page 177**.

Launch the Point-of-Sale Application

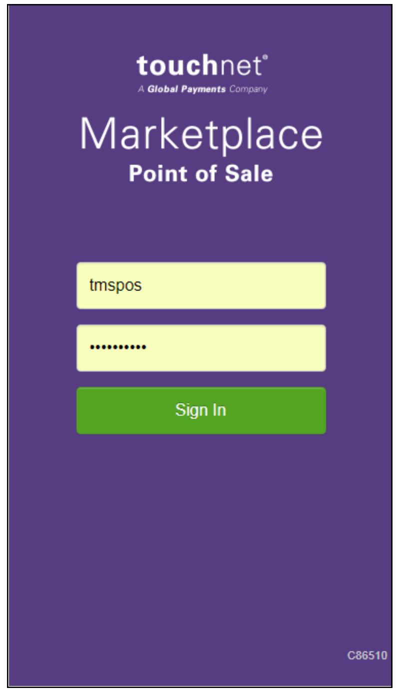
To open the Point-of-Sale application, follow these instructions:

1 Touch the Point-of-Sale icon on the iOS device's home screen. (The name "MPOS" or "MPOS Premier" appears below the icon.)

The iPod home screen.

Note: The location of the Point-of-Sale icon on the iOS device's home screen depends on how the device has been configured. The Point-of-Sale icon may appear with all the other application icons, or it may be docked at the bottom of the home page—as in the screenshot above.

The Point-of-Sale log in page then appears.



The Marketplace Point-of-Sale login page.

2 Enter your user ID and password and press the Sign In button.

Note: Unlike the U.Commerce Central login page, the User ID field of the Marketplace Point-of-Sale login page does not require a realm. For example, if you log into U.Commerce Central as T0001.jdoe (and **T0001** is your realm and **jdoe** is your username), you should only enter **jdoe** in the User ID field of the Point-of-Sale login page.

If the User ID and password that you entered is valid, the Point-of-Sale home page then appears.

Launching the Application for the First Time

When you launch the Point-of-Sale application for the first time, you may encounter a Device Restarting message. Typically, this message appears for only a few seconds and then goes away. You can then restart the Point-of-Sale application.

If this process does not complete successfully, you should follow the instructions in **"Device Maintenance and Troubleshooting" on page 205**

5.4 About the Interface

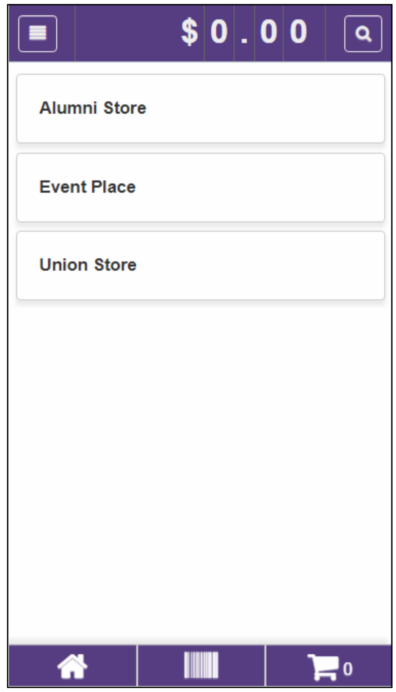
The Marketplace Point-of-Sale application is built with responsive design, which means it will work on mobile iOS devices (such as an iPod or an iPad), as well as on PCs running Windows.The application resizes gracefully for the screen size of each device. However, depending on the available display space, the Point-of-Sale application will look slightly different.

The following sections describe the interface for the Marketplace Point-of-Sale application. These sections include descriptions of the major differences between how the interface looks on an iPod (or an iPhone) versus an iPad. These sections also include discussions of differences in how the Marketplace Point-of-Sale application works with PCs running Windows.

> ***Important!*** In this guide, the sample screens are primarily from the iPod display, but please keep in mind that the Marketplace Point-of-Sale application looks very similar (but wider) on both the iPad display and on the monitors of PCs running Windows.

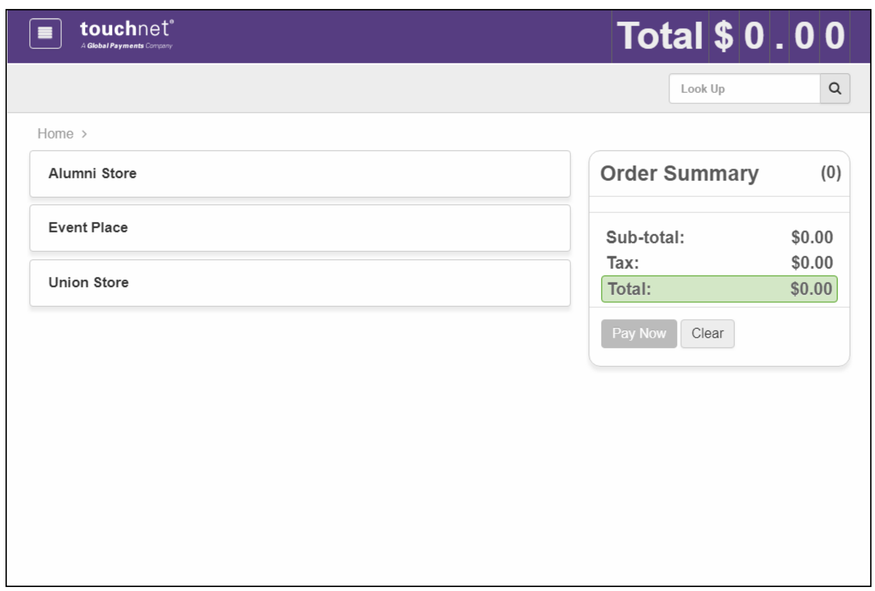
About the Home Page

After you log in, the Point-of-Sale home page is displayed. The Point-of-Sale home page displays links to all stores for which the user has been granted the Point-of-Sale attendant user role. In the following example—which shows how the home page looks on an iPod and an iPad—the user has access to two stores: 1) Event Place and 2) Union Store.



The Point-of-Sale home page on an iPod.

And on the iPad and PCs running Windows, the home page looks like this:



When Point-of-Sale appears on an iPad, the Order Summary section is included.

For devices with a display large enough to accommodate the Order Summary section, this section appears on the right side of the screen, and it appears throughout the shopping process. In contrast, the iPod and the iPhone do not have sufficient display area for displaying the Order Summary, so it is not displayed until the attendant navigates to the shopping cart. In addition, the search field is always displayed on the iPad display (and on PCs running Windows), whereas you must first touch the search icon in the header of the iPod or iPhone display before the search entry field appears.

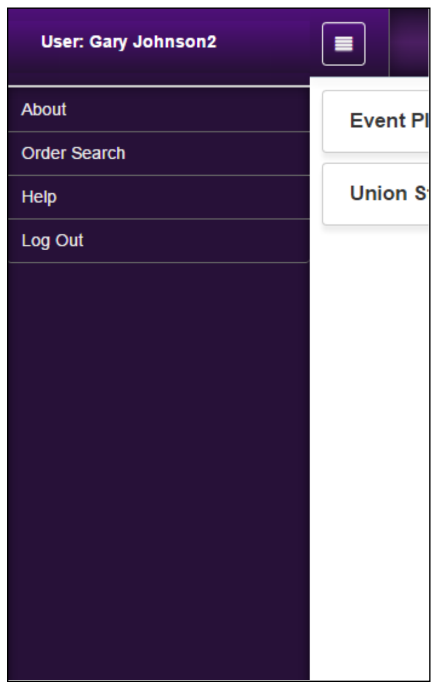
About the Interface: Top Bar

The horizontal bar at the top of the Point-of-Sale interface provides the dollar amount of the items that have been added to the cart. As each item is added to the cart of the same customer, the dollar amount is updated.

The top bar of Marketplace Point-of-Sale.

The top bar also provides the following functionality:

- **Menu button**—Touch the menu button on the left side of the top bar and a menu appears. Additional information can be displayed by touching the menu buttons.



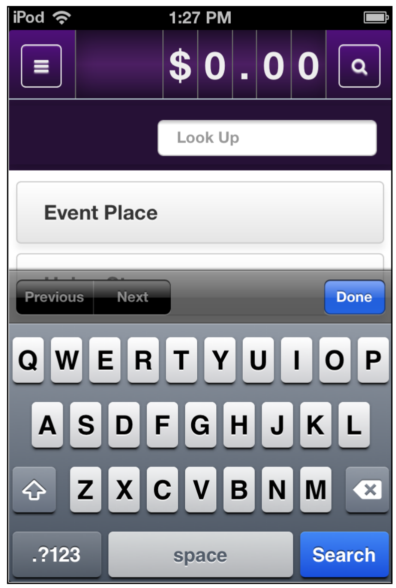
The left slide out menu.

  - **About**—Touch the About button to display the About page. This page shows the version number of the Point-of-Sale application. It also displays the session ID number. Knowing the session ID number may be valuable when troubleshooting.
  - **Order Search**—Touch the Order Search button to display the Order Search page. For more information about using this page, see "Order Search & Refunds" on page 155
  - **Help**—Touch the Help button to launch the help system for the Point-of-Sale application. This help system will launch in a

separate browser window. After you are done with the help system, you will need to close this window to return to the Point-of-Sale application.

- **Log Out**—Touch the Log Out button to log out of Marketplace Point-of-Sale. Once the user has logged out, only the log in page will be displayed on the device until this user, or another user with the Point-of-Sale attendant role, logs in.

- **Search button**—On an iPod or iPhone, touch the magnifying glass button to search for a product. The Look Up field then appears. Touch the Look Up field to activate the iOS keypad display.



Using the iPod touch keypad with the Look Up field.

Enter a product name (or a portion of a product name), a stock number, or a bar code number. Then touch the Search button. The search results are then displayed. Touch any displayed product in the search results to navigate to the Product Details page. For more information, see **"Taking Orders by Searching for a Product" on page 99**.

On an iPad display (and on countertop PCs), the Search button does not appear in the top bar. Instead, search functionality appears in the gray bar immediately below the top bar.

About the Interface: Bottom Navigation Bar

The Point-of-Sale application includes a bottom navigation bar when viewed on an iPod or iPhone. This bar contains a Home button, a Scan button, and a Cart button. (On an iPad and PCs, the Point-of-Sale application does not display a bottom navigation bar.)

The bottom navigation bar of Marketplace Point-of-Sale.

- **Home button**—Touch the Home page to return to the Marketplace Point-of-Sale home page.

  Note: On an iPad and PCs, you can navigate to the home page by touching the Home link in the breadcrumbs.

- **Scan button**—Touch the Scan button to initiate the scanning process. The scanning process is used to read bar codes with the Ingenico iSMP Companion. These devices have a built-in scanner. When the scan button is touched in Marketplace Point-of-Sale, the scanner is activated. When a bar code is successfully scanned, the item will be added to the customer's cart. For more information, see **"Taking Orders by Scanning bar codes" on page 89**.

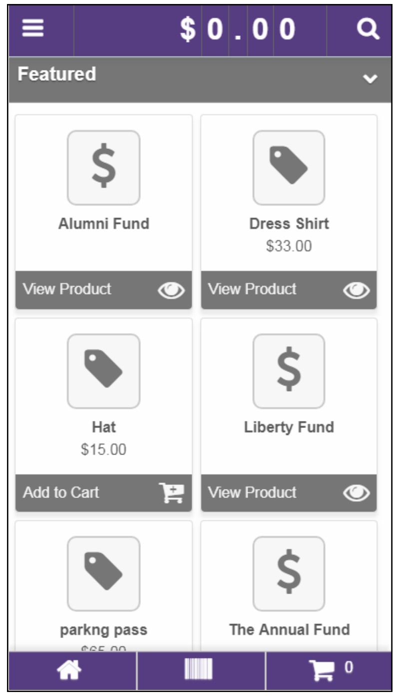
  Note: On an iPad, the Scan button appears to the right of the Search field. On a PC, no Scan button appears, but if a scanner is hooked up to the PC, the scanner is always available for providing input on the selected field.

- **Cart button**—The total number of items in the customer's cart is displayed to the right of the Cart icon. Touch the button with the shopping cart icon to navigate to the Order Summary page for the customer. This page shows all the items that have been added to the customer's cart. From the Order Summary page, the checkout process can be initiated.

  Note: On an iPad or PC, the cart is always displayed as the Order Summary.

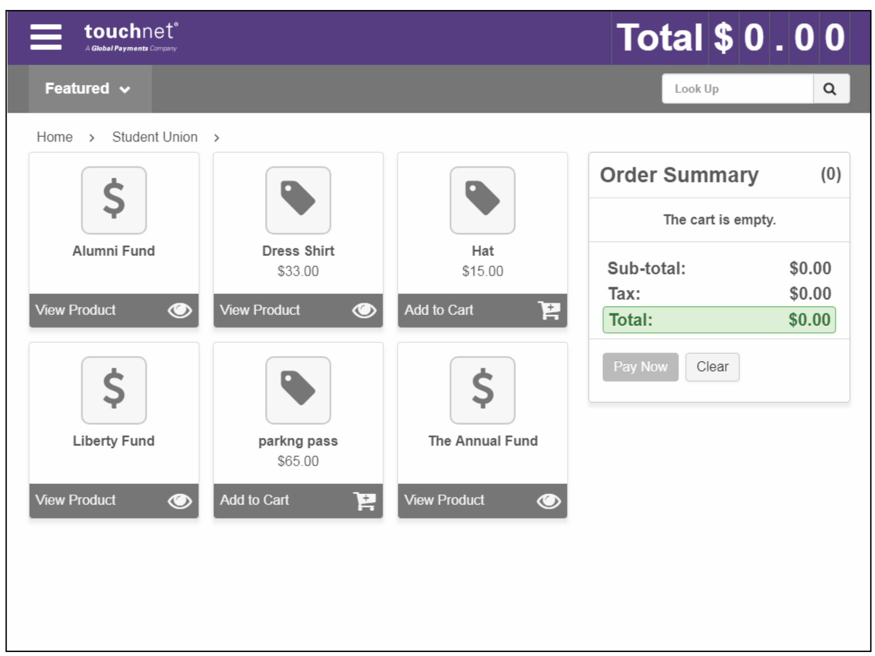
About the Store Home Page

When you navigate to a store in the Point-of-Sale application, the Featured category is shown by default. In the following example, the store's Featured category contains three products and these products are displayed in the thumbnail display.



The Point-of-Sale store home page on an iPod.

And on iPads and PCs, the Featured category for the store home page looks like this when the thumbnail display is used:

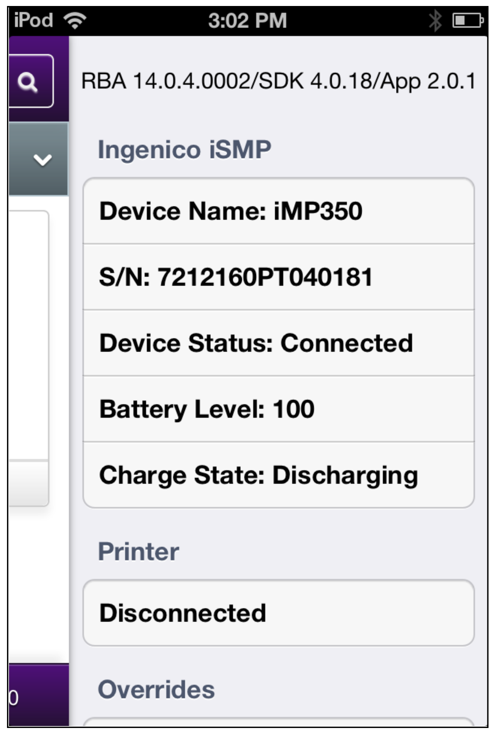


When Point-of-Sale appears on an iPad, the Order Summary is included.

As described in **"About the Home Page" on page 65**, the Order Summary section appears on the right side of the screen for iPad devices and PCs, and it appears throughout the shopping process. In contrast, the iPod and the iPhone do not have sufficient display area for displaying the Order Summary, so it is not displayed until the attendant navigates to the shopping cart. In addition, the search field is always displayed on the display for iPads and PCs, whereas you must first touch the search icon in the header of the iPod or iPhone display before the search entry field appears.

The iOS Pull Out Menu

The iOS interface also contains a pull out menu on the right side. To access this menu, swipe your finger across the iOS display, from the right side of the Marketplace Point-of-Sale interface to the left. The iOS pull out menu will then appear.



The right side slide out menu.

This menu provides the following information and functionality:

- **[version numbers]**—The top line (immediately below the Wi-Fi indicator, time, and battery indicator) contains software and firmware version numbers. The RBA number is the firmware version used by the Ingenico device. The SDK is the Software Development Kit version number. And the App number is the version number for the Marketplace Point-of-Sale application. If you call TouchNet for support with Point-of-Sale, you may need these version numbers.
- **Device Name**—The model number of the Ingenico device, typically iMP350 for the Ingenico iSMP (which is shorthand for Ingenico iSMP 350) and iCM122 for the Ingenico iCMP.
- **S/N**—The Ingenico assigned serial number.

- **Device Status**—The device status as reported by the Ingenico device. Typically, this field typically says "Connected."
- **Battery Level**—The percentage of the remaining battery level for the Ingenico device.
- **Charge State**—If the device is currently being charged, this field will say "Charging". Otherwise, this field will say "Discharging".
- **Printer**—If the iOS device has been paired for Bluetooth connectivity with a printer, this field will say "Connected," and if the button is touched, a window will display the printer name. If no printer has been paired with the iOS device, this field will say "Disconnected."
- **Overrides**—This field always says "Reset." You can touch this button to reset the connection between the iOS device and the Ingenico payment device: the Point-of-Sale log in page will then appear.

Turning On Mobile Printing

This section applies if you will use an Epson TM-P60II, Blue Bamboo PocketPOS P25i, or a Star Micronics SM-S230i for printing receipts with mobile devices. If you will not use any of these printers for mobile printing, skip to the next section.

To turn on printing, you must first pair the printer with the iOS device, as described in **"Point-of-Sale Mobile Devices" on page 9**.

Then follow these steps to turn on printing for the Point-of-Sale application ...

1. Swipe your finger across the iOS display, from the right side of the Marketplace Point-of-Sale interface to the left. The iOS pull out menu will then appear.

The right side slide out menu.

2 In the Printer section, touch the Disconnected button once. The Printer list appears.

Note: If the Printer button says Connected, the printer is already connected to the Marketplace Point-of-Sale application.

3 Select the printer name.

The Marketplace Point-of-Sale application can now print receipts.

6.0 Point of Sale Session Settings

The previous release of Marketplace Point of Sale introduced a new POS Supervisor role. In this new release, the role of POS Supervisor has been enhanced with even more configurable features along with the ability to manage open and closed sessions. The Point of Sale Session Settings allow for the configuration of cashiering session settings for all attendants and the management of open cashiering sessions.

Users with the Chief Administrator, Administrator and the new POS Supervisor roles will have access to the Point of Sale Session Settings menu option.

There are two tabs on the Point of Sale Session Settings page:

- Attendant Management Settings
- Attendant Sessions

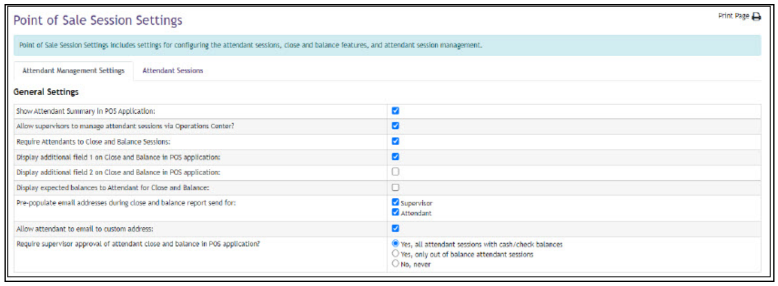
6.1 Attendant Management Settings

Settings on the Attendant Management Settings page control how the Attendant Summary (or Close and Balance) feature will be applied in the MPOS application. The POS Supervisor may turn on the Attendant Summary feature for all users in the general settings section. If a selected user should be exempt from this feature it can be turned off/on in the POS Attendant Settings section.

Supervisors are able to manage attendant sessions via the Operations center. This setting, when enabled, will allow Supervisors to see Attendant Session History, Attendant Balances for open sessions, Reprint or Resend Session Reports or to even close (or close & balance) an Attendant from the Operations Center. This setting will be defaulted off.

Selecting the "Pre-populate email addresses during close and balance report send for" option allows attendants to email to a custom address. These revised settings allow the POS Supervisor to designate who should receive a Close Report (POS Supervisor(s), Attendant or both). Additionally, these settings control whether an email entry field should be available to the Attendant to send to a custom email address. These settings will be defaulted to Attendant only.

The new "Require supervisor approval of attendant close and balance in POS application" setting allows for supervisor approval of a session as the Attendant is closing and balancing. If enabled, a POS Supervisor will have to enter their ID and password into the Attendant's session for it to close. This setting will be defaulted off.

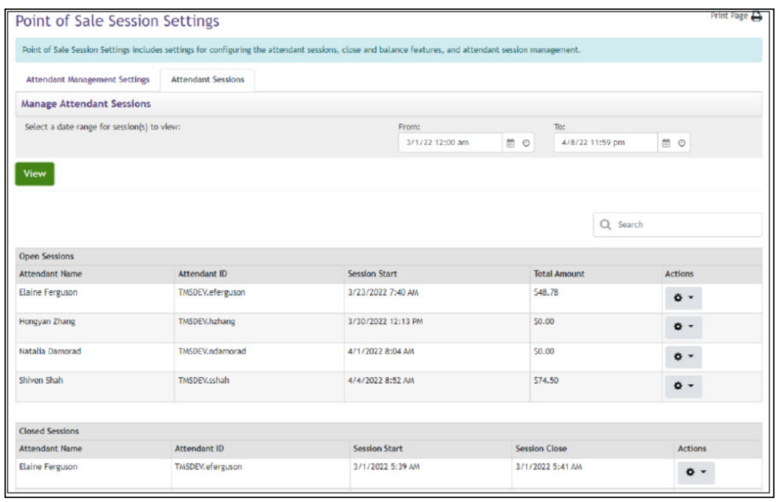


The Attendant Management Settings page

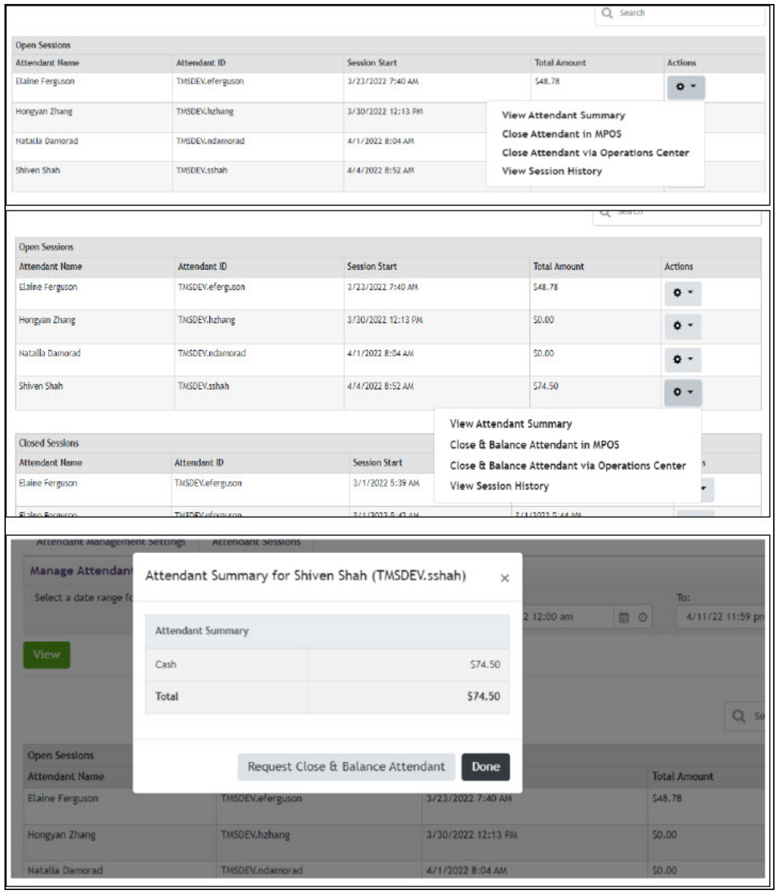
6.2 Attendant Sessions

This tab allows a POS Supervisor to query open attendant sessions for balances. This tab also allows POS Supervisors to request an attendant close and balance a cashiering session.

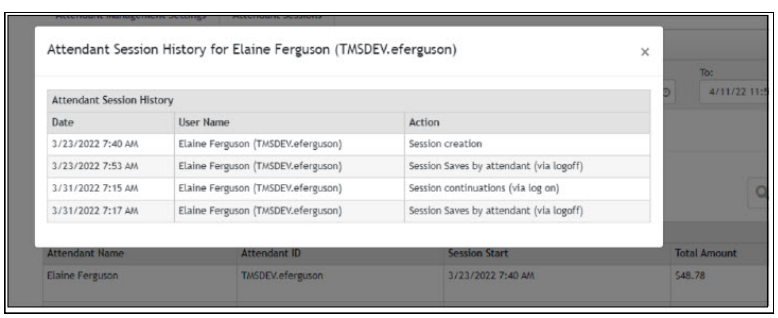
From the Attendant Sessions tab, the POS Supervisor can see both open and closed attendant sessions for the specified timeframe.



For open sessions, if the POS Supervisor is able to manage sessions from the Operations Center, a Supervisor will have options to view the current balances from the Operations Center. This option is available when the attendant summary feature is enabled. The modal will need to be refreshed to get updated balances.

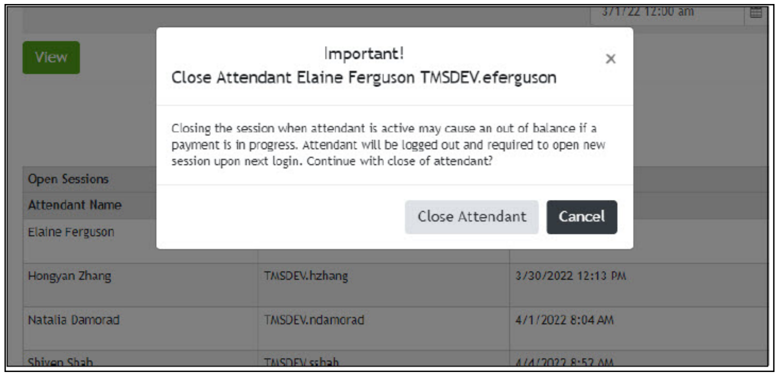


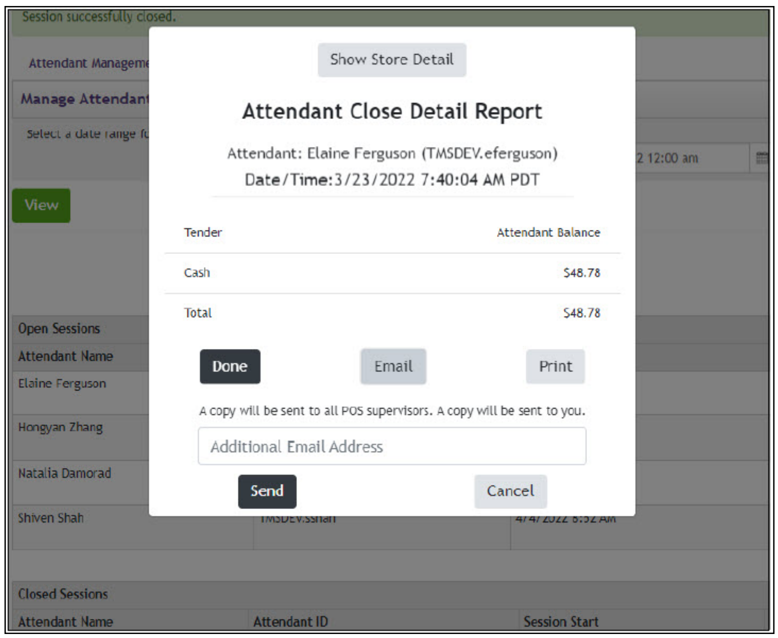
The "View Session History" modal will provide a summary of the actions completed on the session and when.

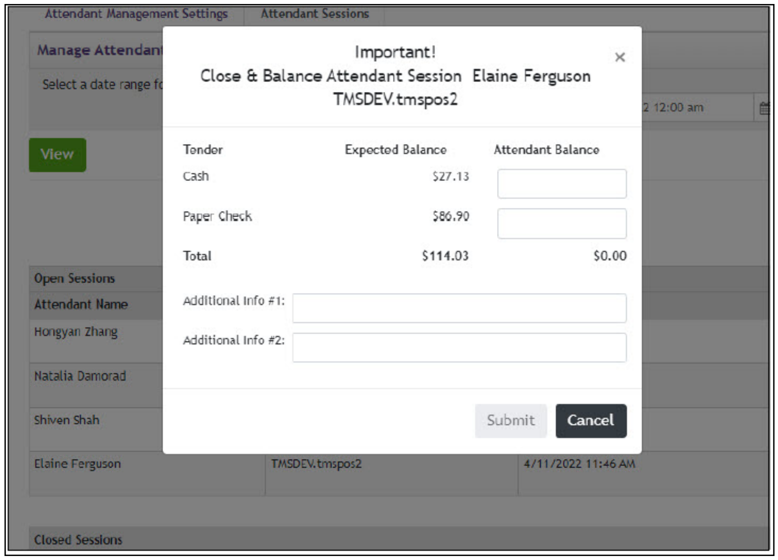


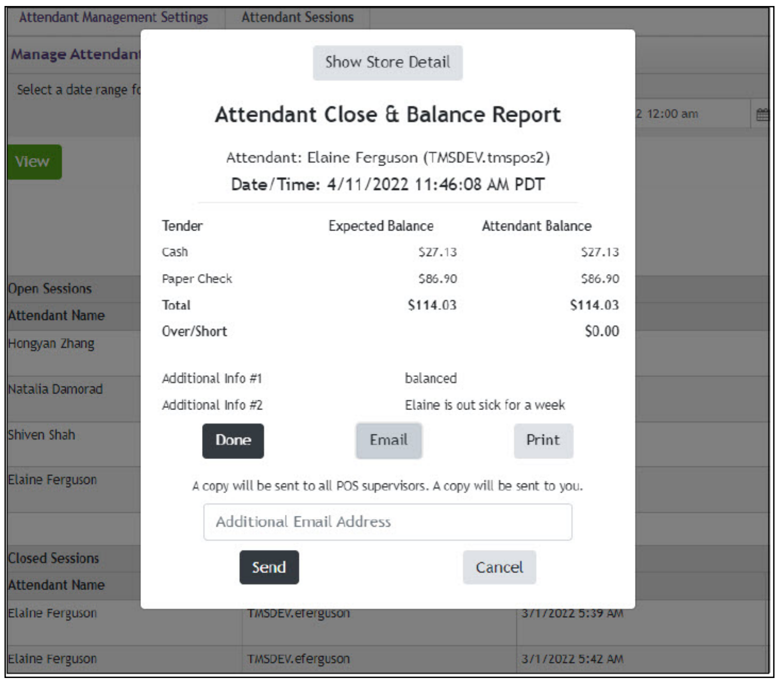
The "Close (or Close and Balance) Attendant" feature allows the POS Supervisor to request the attendant to close (or close and balance) their session. The Attendant will be prompted to do so upon next keystroke in the MPOS application (or at the completion of a pinpad transaction).

The "Close (or Close and Balance) Attendant via Operations Center" workflow option allows the POS Supervisor to close the session on behalf of the attendant via Operations Center. If an attendant is active (and in the middle of a pinpad transaction), this action could cause an out-of-balance to be encountered. TouchNet recommends that this action should only be taken when the attendant is not active in the MPOS application.

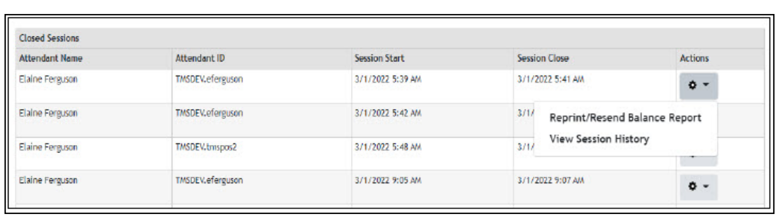




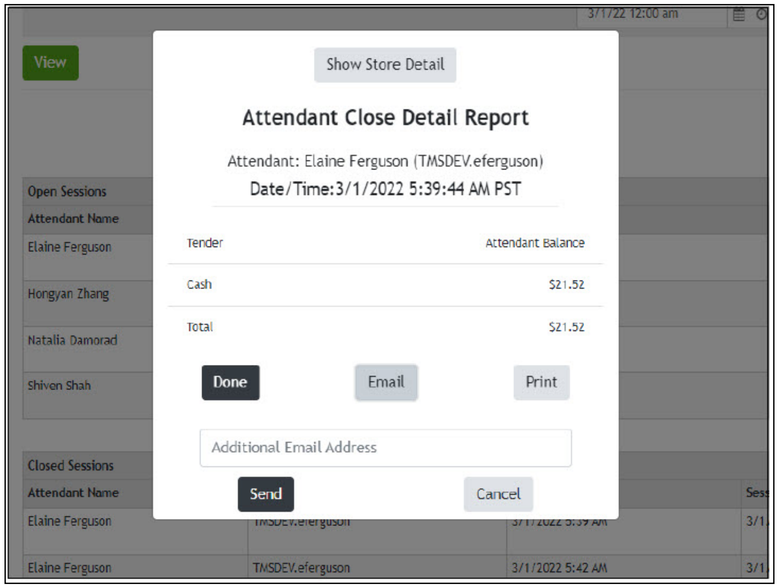




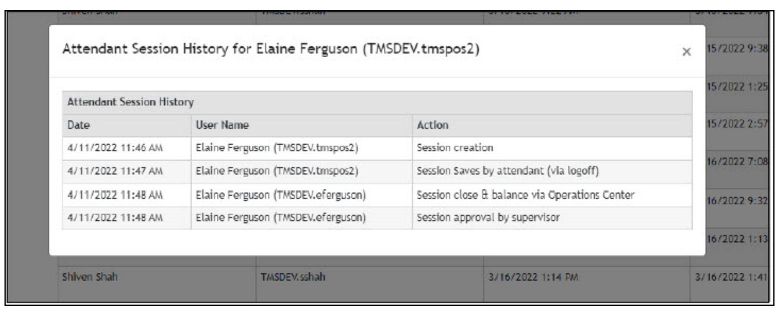
For closed sessions, if the POS Supervisor is able to reprint or resend the balancing reports or to view session history from the Operations Center:



With the "Reprint/Resend Balance report" feature, the POS Supervisor can enter an email address to send the report to or select to print to a local network printer.

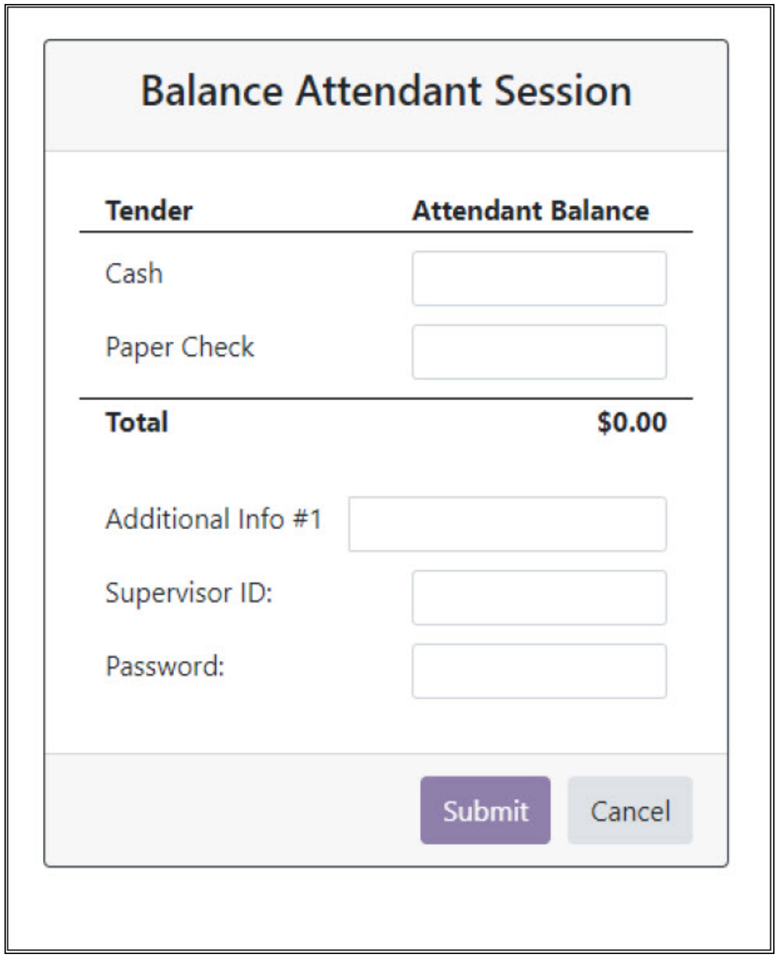


The "View Session History" modal will provide a summary of the actions completed on the session and when.

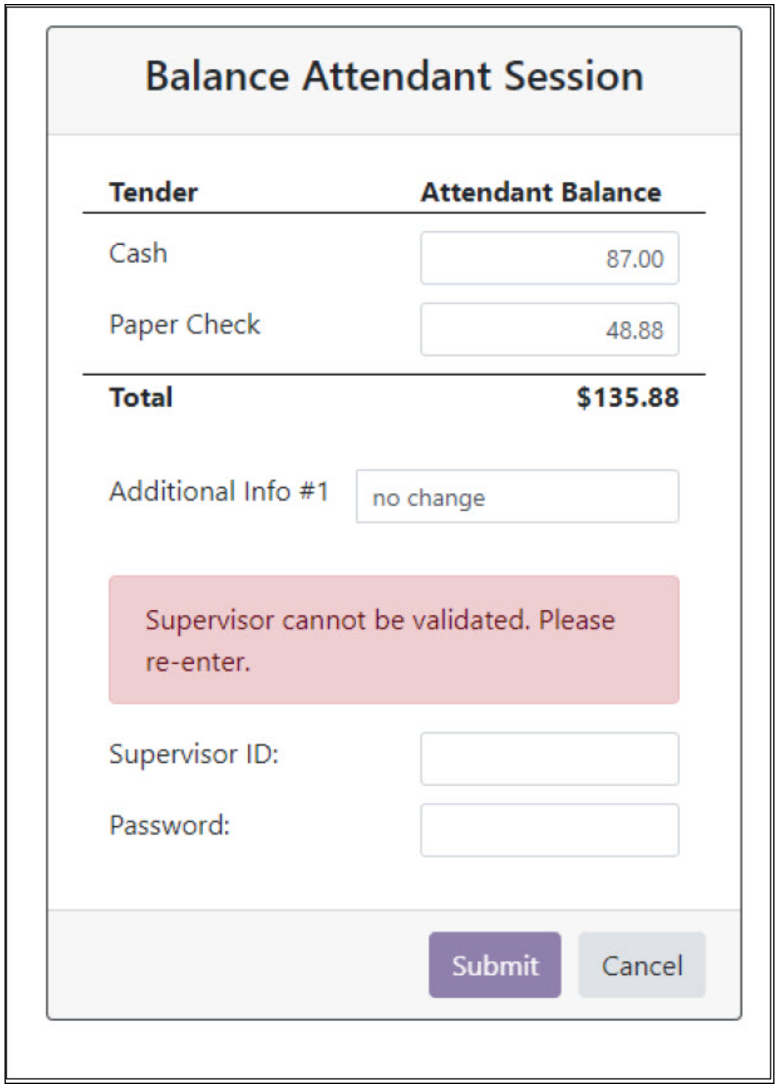


This feature allows a university to require supervisor approval of attendant sessions. Supervisors can choose to approve all sessions with cash/check balances, out of balance sessions or no sessions. When this feature is enabled and the Attendant is closing and balancing their session, the modal will be updated to show entry fields for Supervisor ID and password. This ID/password combination will be authenticated and checked to ensure the ID has proper authority (Chief Administrator, Administrator, or POS Supervisor roles). If an Attendant also has an Administrator role, this step will be skipped.

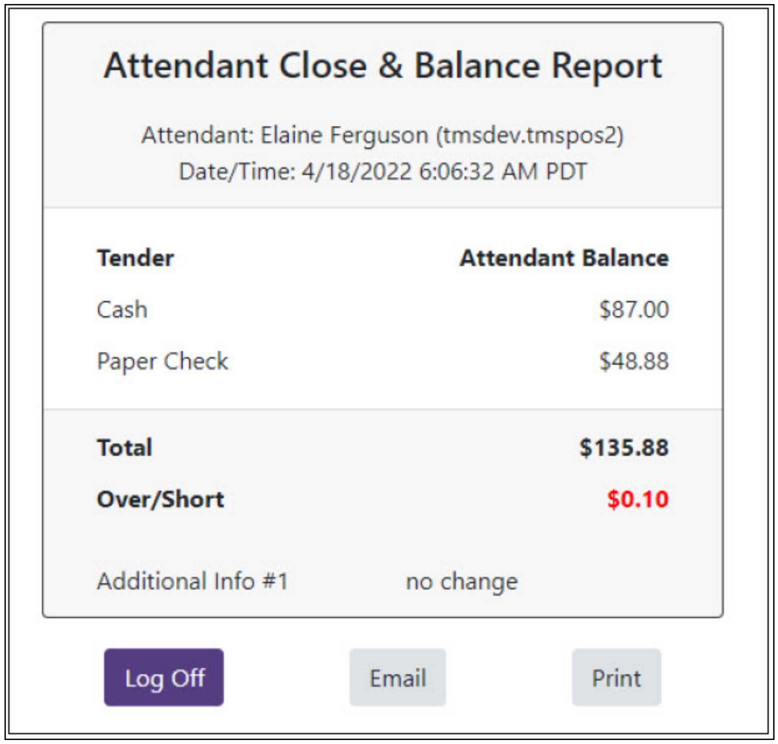
The Attendant Session History will be updated with a line item for supervisor approval when this feature is enabled and the supervisor has successfully approved a close & balance.

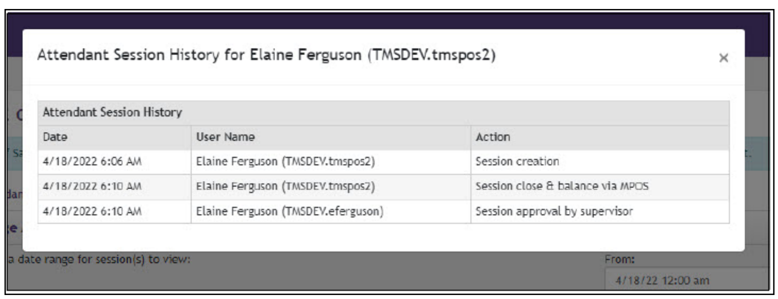


Close and Balance with Supervisor Approval



Supervisor Error

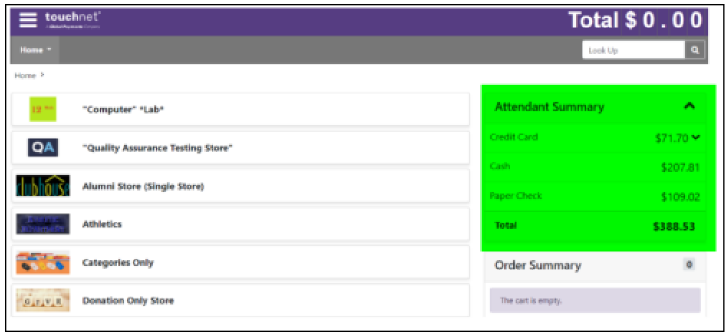




Session History with Supervisor Approval

Show Attendant Summary in POS Application Setting

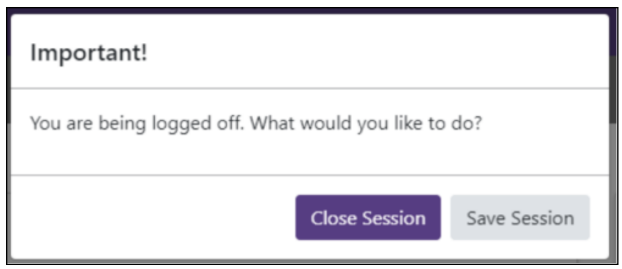
When the "Show Attendant Summary in POS Application" option is selected (turned on) for an attendant, a closed Atendant Summary section will appear in the upper right corner of the Countertop page or can be accessed via the cash register icon in the Handheld application. The Attendant Summary will have revenue by payment method for that cashiering session. The MPOS application will record totals by payment method and store as transactions are completed for use in the attendant summary.



The Attendant Summary

If an attendant times out of a cashiering session the summary detail will be saved and the user will be prompted to rejoin (or close) the session upon their next login.

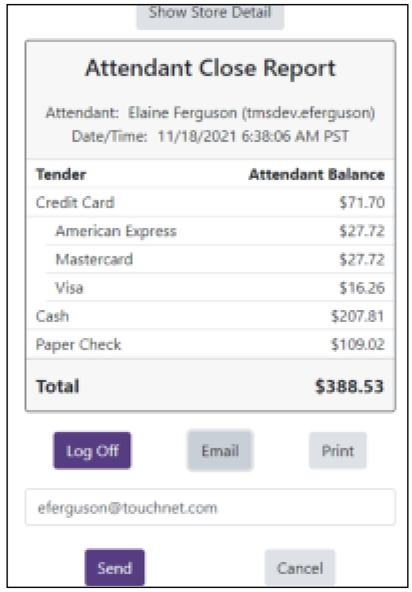
When an attendant logs out they will be prompted to either close or save the session for later use.



Attendant Session log off confirmation message

Attendant Closes Cashiering Session

When an attendant chooses to close a cashiering session they will be presented with a report of the revenues accumulated during that session. The attendant will be able to email or print the report. If “Allow Attendant to email copies during Close and Balance” is turned on, the attendant will be able to send additional copies to different email addresses (Supervisors, etc). If using a handheld device with a receipt printer, the report will print to the receipt printer. Otherwise the report will print to the local network printer associated with the device. Emailed reports look similar to the ones printed or displayed in the application.

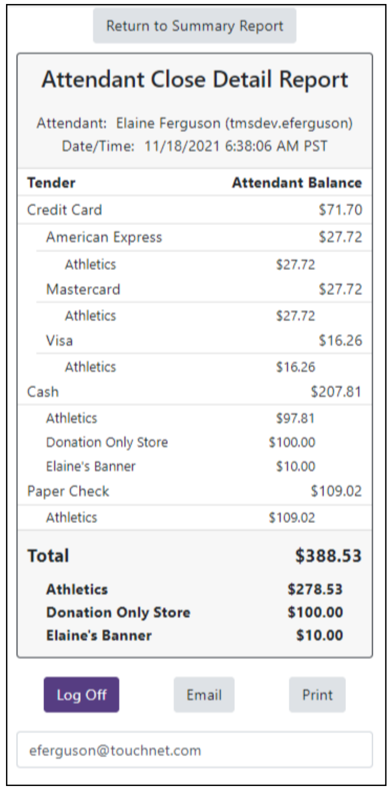


Attendant Close Report

A POS Supervisor may also prompt an attendant to close their session from the Point of Sale Sessions Settings > Attendant Sessions tab. In this scenario the attendant will be prompted to close the session (and log off) upon their next keystroke in MPOS. If the attendant is in the middle of a pinpad transaction they will be able to complete it before closing the session.

Displaying the Attendant Close Detail Report

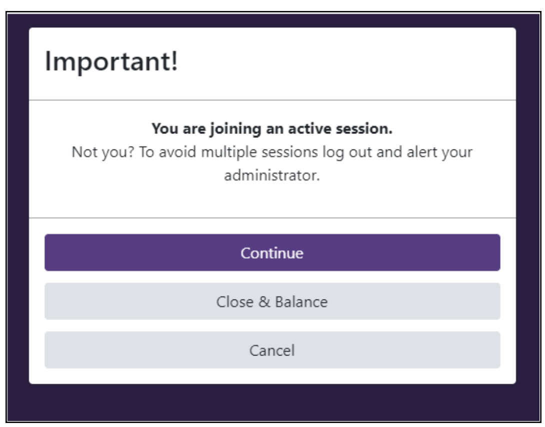
If an attendant has taken payments for multiple stores during the cashiering session they may choose to display the detail report, with revenue broken out by payment method and store, as opposed to the summary report.



Attendant Close Detail Report

Attendant Logs In

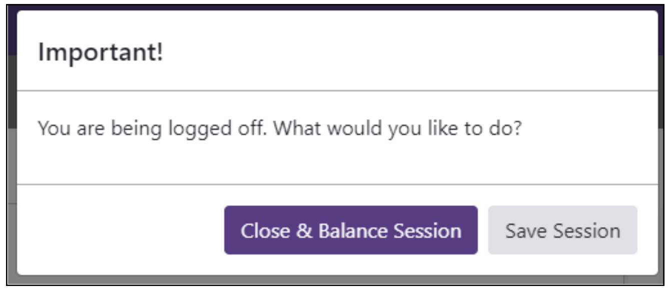
Similar to the Attendant Summary feature, when an Attendant logs in the application will check for an open session. If one is found the attendant will be prompted to rejoin the session, close and balance the session or cancel their log in.



Attendant Close and Balance Log in

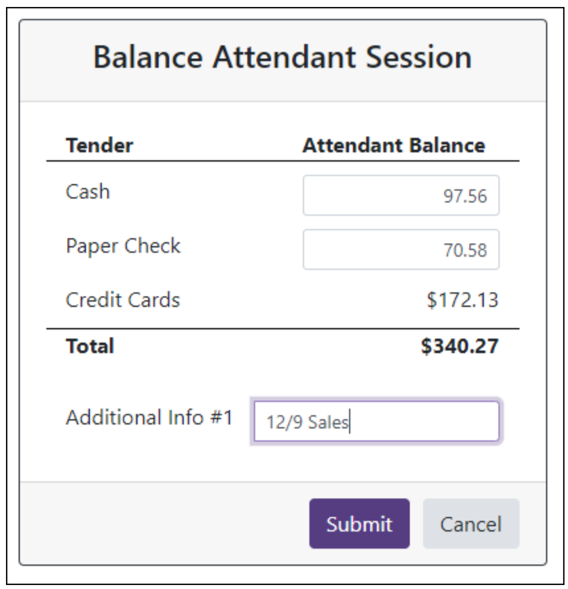
After logging in there are no changes to the user display (unless Attendant Summary is also turned on) until logoff. The MPOS application is recording totals by payment method and store as transactions are completed for use in closing and balancing the cashiering session. If an Attendant times out of a cashiering session the summary detail will be saved and the user will be prompted to rejoin (or close and balance) the session upon their next login.

When an Attendant logs out they will be prompted to either close and balance or save the session for later use.



Attendant Close and Balance Log off message

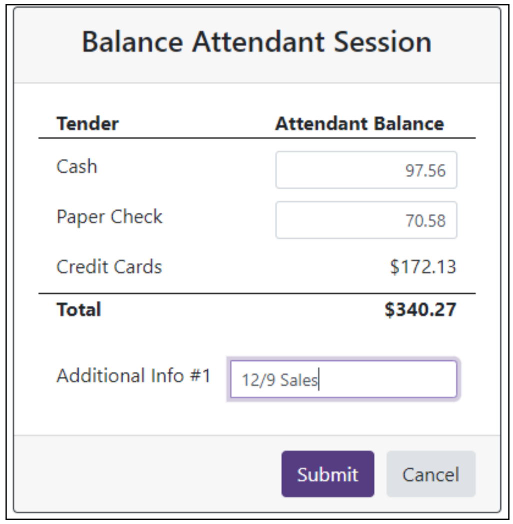
Based upon the configurations the Expected Balance, Additional Field 1 and Additional Field 2 data will or will not display.



The Balance Attendant Session report

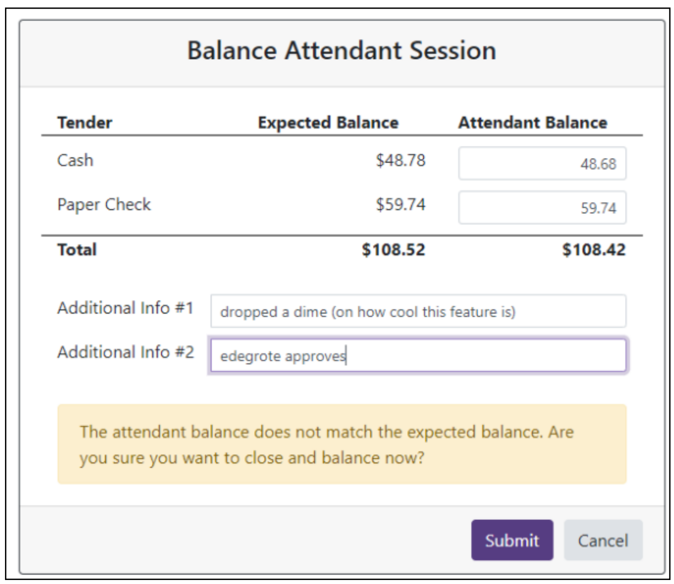
Attendant Closes Cashiering Session

When an Attendant chooses to close a cashiering session, they will be presented with a Close and Balance view where they can enter the total of cash and paper checks taken during the session.



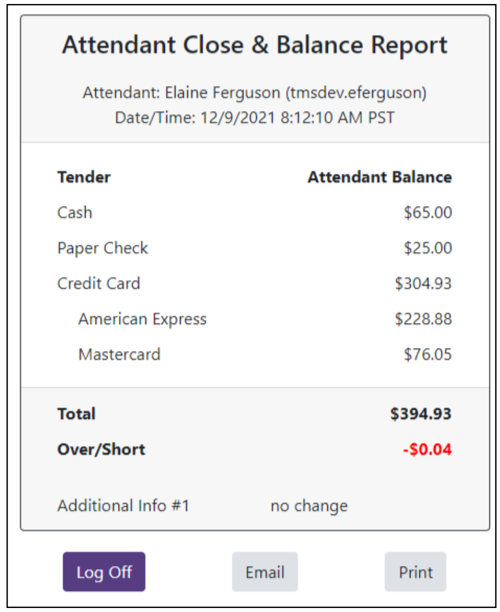
Balance Attendant Session Report

If out of balance upon submission, the MPOS application will prompt the attendant to correct or submit.



Attendant May Enter Cash and Check Amounts if Out of Balance

If no cash or checks have been taken during the cashiering session the Attendant will be taken directly to the Close and Balance Report. The Close and Balance report will display the revenues accumulated during that session, expected balances and additional input fields (if configured) and overage/shortage. The Attendant will be able to email or print the report.



Attendant Close and Balance Report

Note: If using a handheld device with a receipt printer, the report will print to the receipt printer. Otherwise the report will print to the local network printer associated with the device. Emailed reports look similar to the ones printed or displayed in the application.

Note: The countertop version of MPOS can use a receipt printer (attached via POSC). The Epson T88V printer and the Move/5000 integrated printers are supported (when Point of Sale Controller is in use). Existing functionality that allows a receipt to be printed to a local network printer is still available. On the MPOS receipt page the application will check to determine if a printer is available via POSC. If there is a receipt printer attached to the station then clicking the print button will send a receipt to that printer. If there is not a receipt printer attached to the station then clicking the print button will send a receipt to the local network printer.

Attendant Taken Payments For Multiple Stores

If an Attendant has taken payments for multiple stores during the cashiering session they may choose to display the detail report, with revenue broken out by payment method and store, as opposed to the summary report.

6.3 Taking Orders by Scanning bar codes

Once a Marketplace store manager has printed bar codes for products in a store, a Point-of-Sale attendant can use the scanning ability of the Ingenico iSMP Companion to scan bar codes and quickly add products to the Point-of-Sale shopping cart. A scanner can also be used with PCs; however, these scanners are not part of the Ingenico hardware and must be acquired separately.

Note: The Ingenico iCMP does not support scanning bar codes.

Scan Mode for iOS Devices

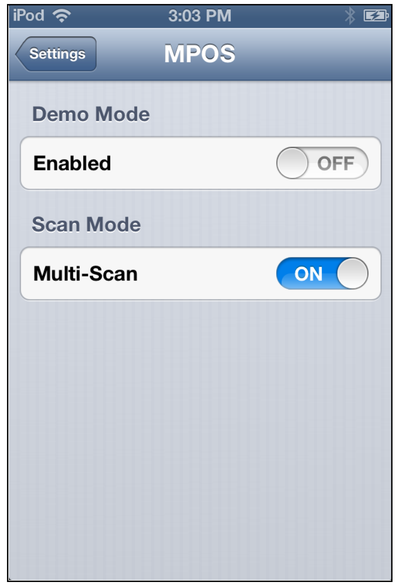
Before you scan bar codes with an Ingenico payment device that is connected to an iOS device, you should consider which scan mode to use. Marketplace Point-of-Sale provides two scanning modes:

- **Multi-Scan On**—This scan mode allows you to scan multiple products and add these products to the shopping cart. When you are done scanning, you must manually exit the scanning process.
- **Multi-Scan Off**—This scan mode allows you to scan a single product, add the item to the cart, automatically exit the scanning process, and go to the cart.

To select the scan mode ...

1. Press the Home button once on the iOS device.

   The iOS home screen is then displayed.
2. Touch the Settings icon.
3. Touch the MPOS button. The MPOS panel is displayed.



The MPOS settings panel on an iPod touch.

4 Tap the Multi-Scan On/Off button until the desired state is selected.

Note: The instructions in **"How to Scan Product Bar Codes Using Ingenico Devices" on page 90** assume that Multi-Scan is turned On.

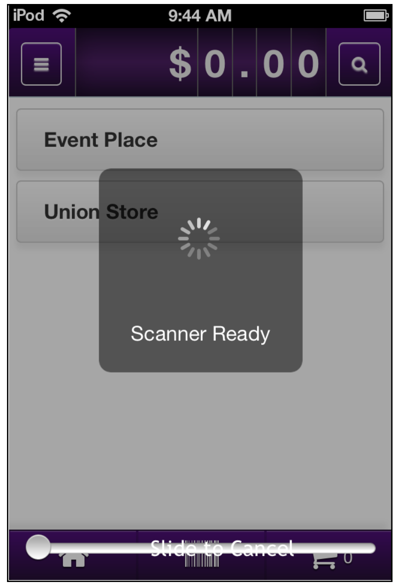
How to Scan Product Bar Codes Using Ingenico Devices

Follow these instructions to find a product by scanning a Marketplace Point-of-Sale bar code with an Ingenico payment device:

Note: Only items from the same store may be purchased at the same time (i.e., using the same shopping cart).

1 When a customer has identified a product that they wish to buy (or a donation that they wish to make), touch the Scan button in the bottom navigation bar of the Marketplace Point-of-Sale application. (On an iPad, the Scan button is instead located to the right of the search field.)

The Scanner Ready window appears. You can now start scanning bar codes.



The Scanner Ready panel.

2 Point the top of the Ingenico iSMP Companion at a Marketplace product bar code.

Note: bar codes for all products in a store can be printed from the Store Products page in the Marketplace Operations Center. For more information, see **"Managing Products" on page 179**.

3 Press the scanner activation key on either side of the Ingenico iSMP Companion.

When the activation key is pressed, the Ingenico iSMP Companion emits a wide, red laser beam.

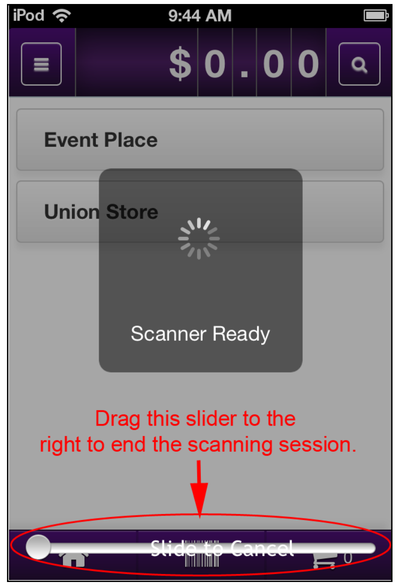
4 Adjust the Ingenico iSMP Companion in relation to the product bar code so that the red laser covers the entire width of the bar code.

Continue to scan the bar code until the Ingenico device beeps. The beep indicates the bar code has been successfully read.

Note: If you do not immediately hear a beep, try varying the angle of the Ingenico device to the bar code or the distance between the Ingenico device and the bar code.

5 If the customer has identified additional products that they would like to buy, repeats steps 2 through 4 for each product.

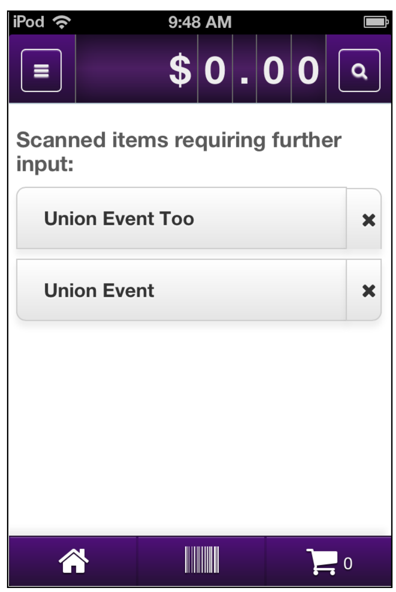
6 After you have scanned all the items that the customer would like to purchase, slide the scanner bar to the right. The Scanner Ready page will go away.



Use this slider to stop scanning.

7 If any of the products are donation products or if the products have modifiers, then additional selections or entries must be made before that product can be placed in the cart—otherwise, the product immediately goes into the customer's cart.

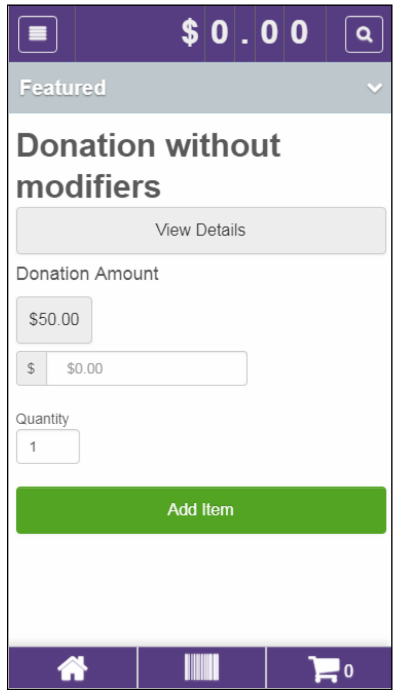
Any scanned products that require additional selections or entries appear on the Scan Results page:



Select each product and complete the required selections and entries.

If this page does not appear (the scanned products are not donations and have no modifiers), go to Step 8. If this page does appear, take the following actions as appropriate for each item that appears on the Scan Results page:

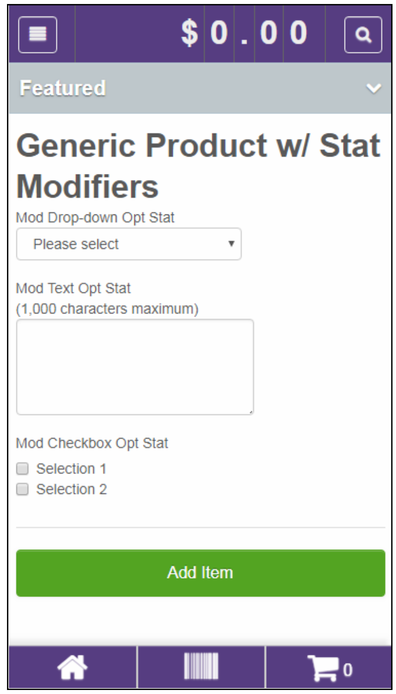
If the product is a donation ...
The Product Detail page appears so that a donation amount can be entered or selected (depending on how the donation product has been configured).



Select a donation amount.

Select a donation amount or enter a donation amount (depending on the product configuration) and touch the Add Item button.

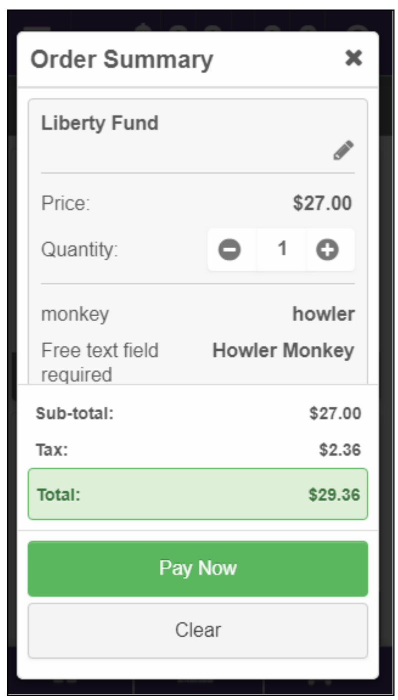
If the product has modifiers ...
The Modifier Selection page appears.



Select modifiers.

Complete the modifiers fields and touch the Add Item button. In order to select/enter modifier values, you must work with the customer and give them the modifier questions and available selections.

8 Review the Order Summary page with the customer.



Order Summary page.

If any of the scanned products require additional actions (i.e., require modifier or donation selections), the Scanned Items button appears on the Order Summary page. You MUST select the Scanned Items button and complete the outstanding actions before you can proceed with the order.

9 Take one of the following actions as appropriate for the situation:

If the customer would like to purchase an additional product ...
Select the Add New button to return to step 1 and add another item to the customer's cart.

OR

If the customer would like to change the order quantity for an item in the cart ...
Select the Pencil icon to the left of a product name. The quantity field then becomes editable. Touch the Quantity field and enter a new quantity. Then select the Update button. (If the product has dynamic modifiers, you cannot modify the quantity ordered. You can only update the chosen modifiers.) (And then repeat Step 9 for any remaining items on the Order Summary page.)

OR

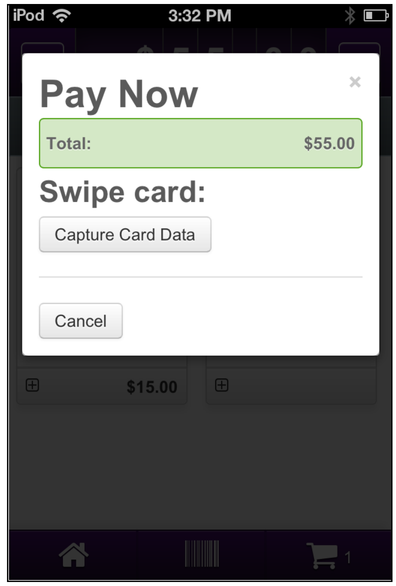
If the customer would like to remove an item in the cart ...
Select the Pencil icon to the left of a product name. Then select the Remove button. (And then repeat Step 9 for any remaining items on the Order Summary page.)

OR

If the customer would like to remove all items from their cart ...
Touch the Clear button. All products in the cart will be removed.

OR

If the customer is ready to pay ...
Select the Pay Now button to begin the payment process. The Pay Now page appears.



The Pay Now page.

Proceed to **" Processing a Payment" on page 108**.

> ***Important!*** Avoid any lengthy delays once you have added items to the cart. After 15 minutes of inactivity, the Point-of-Sale application will automatically terminate the session.

How to Scan Product Bar Codes When Using Countertop Devices

Follow these instructions to find a product by scanning a Marketplace Point-of-Sale bar code with a scanner that is connected to a PC:

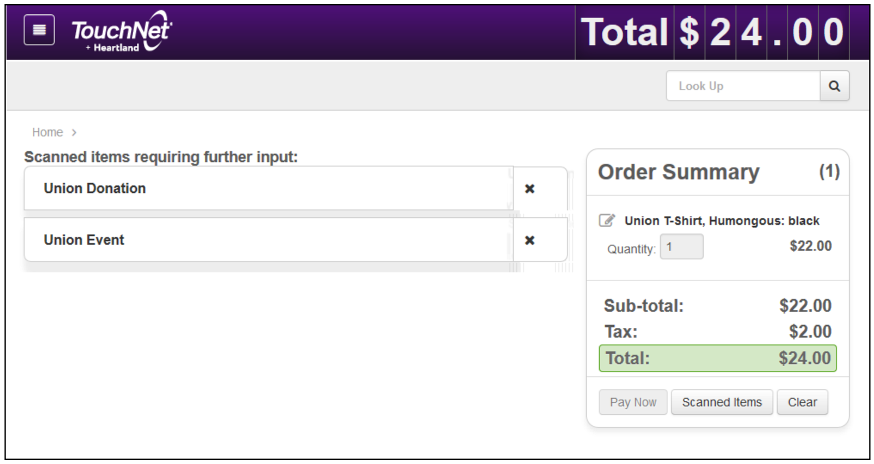
Note: Only items from the same store may be purchased at the same time (i.e., using the same shopping cart).

1 When a customer has identified a product that they wish to buy (or a donation that they wish to make), point the scanner at a Marketplace product bar code and press the activation key.

   Note: bar codes for all products in a store can be printed from the Store Products page in the Marketplace Operations Center. For more information, see **"Managing Products" on page 179**.

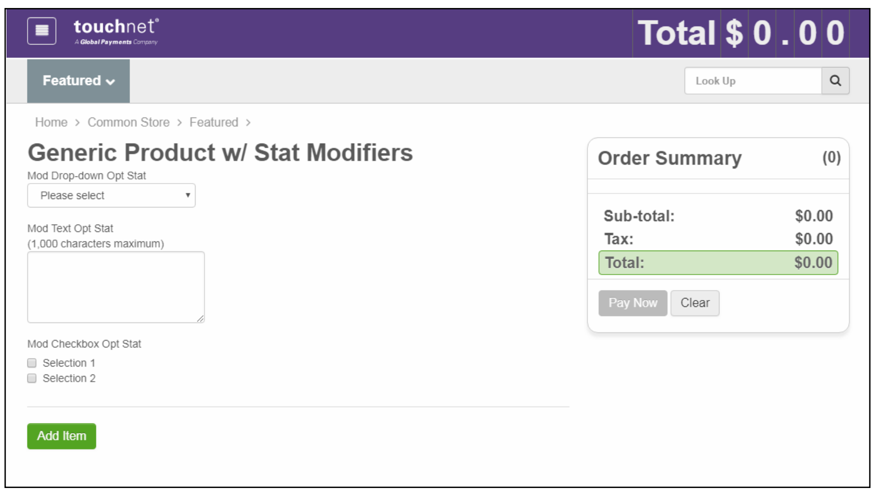
   If the product is not a donation and it has no modifiers ...
   The matching product automatically appears in the Order Summary. Go to Step 3.

   If the product is a donation product or it has modifiers ...
   The scanned item(s) will appear in a list of scanned items that require further action. Go to Step 2.



Scanned items that require action appear in a list.

2 The attendant must select and resolve each item (one by one) that appears in the "Scanned items requiring further input" list. The Pay Now button in the Order Summary is not available until the scanned items have been resolved.

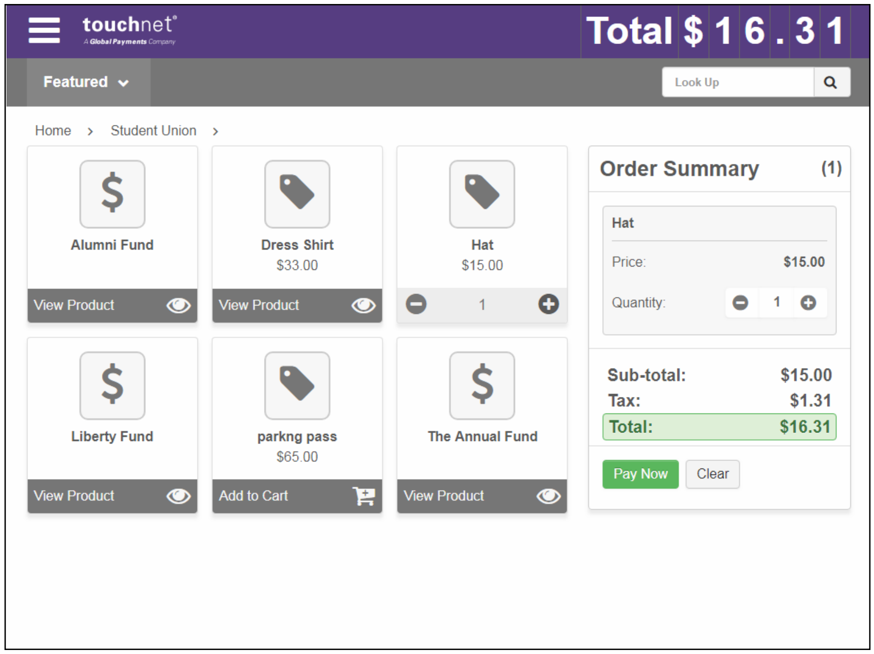


This item includes modifiers that must be selected/entered.

The attendant must review each item with the customer and determine the appropriate selections/entries.

As each item is resolved, it is removed from the "Scanned items requiring further input" list and instead appears in the Order Summary. The attendant can select the Scanned Items button in the Order Summary to return to the "Scanned items requiring further input" list.

After all items have been resolved, the Pay Now button in the Order Summary can be selected (and the Scanned Items button goes away).



Items added to the cart appear in the Order Summary.

3 Review the Order Summary with the customer and then take one of the following actions as appropriate for the situation:

If the customer would like to purchase an additional product ...
Return to Step 1 and scan another product bar code.

OR

If the customer would like to change the order quantity for an item in the cart ...
Select the Pencil icon to the left of a product name. The quantity field then becomes editable. Select the Quantity field and enter a new quantity. Then select the Update button. (If the product has dynamic modifiers, you cannot modify the quantity ordered. You can only update the chosen modifiers.) (And then repeat Step 3 for any remaining items in the Order Summary.)

OR

If the customer would like to remove an item from the cart ...
Select the Pencil icon to the left of a product name. Then select the Remove button. (And then repeat Step 3 for any remaining items in the Order Summary.)

OR

If the customer would like to remove all items from their cart ...
Select the Clear button in the Order Summary. All products in the cart will be removed.

OR

If the customer is ready to pay ...
Select the Pay Now button to begin the payment process.

Proceed to **"Processing a Payment with Countertop Devices" on page 134**.

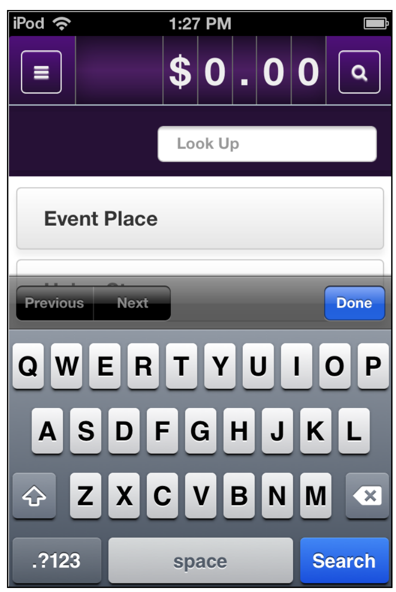
> ***Important!*** Avoid any lengthy delays once you have added items to the cart. After 15 minutes of inactivity, the Point-of-Sale application will automatically terminate the session.

6.4 Taking Orders by Searching for a Product

Follow these instructions to find a product by entering a search criteria:

Note: Only items from the same store may be purchased in the same order.

1. When a customer has identified a product that they wish to buy (or a donation that they wish to make), touch the magnifying glass icon in the top bar. The Look Up field then appears. (On an iPad or a PC, the search field is always visible. Skip to Step 2.)
2. Select the Look Up field. For iOS devices, the iOS keypad then appears.

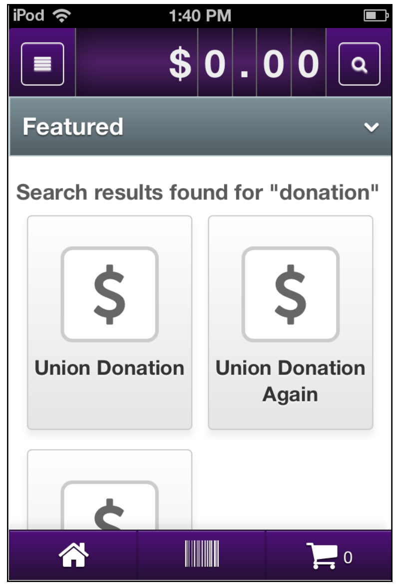


The Look Up field and iPod touch keypad.

3. Enter a search criteria and select the Search button. Accepted search criteria:
   - Product names (partial values can be entered).
   - Stock numbers (full stock number must be entered).
   - bar code numbers (full bar code number must be entered).

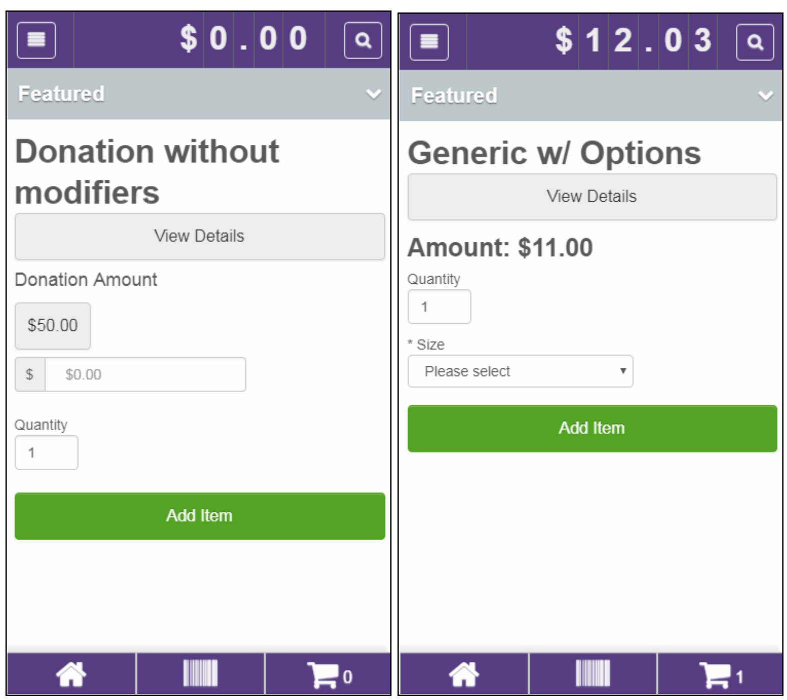
The search results page then appears.

Note: If you search by entering a bar code, the matching product is automatically added to the cart.



The Search Results page when "donation" is entered as the search criteria.

4 Select the product that the customer desires. The Product Detail page then appears.



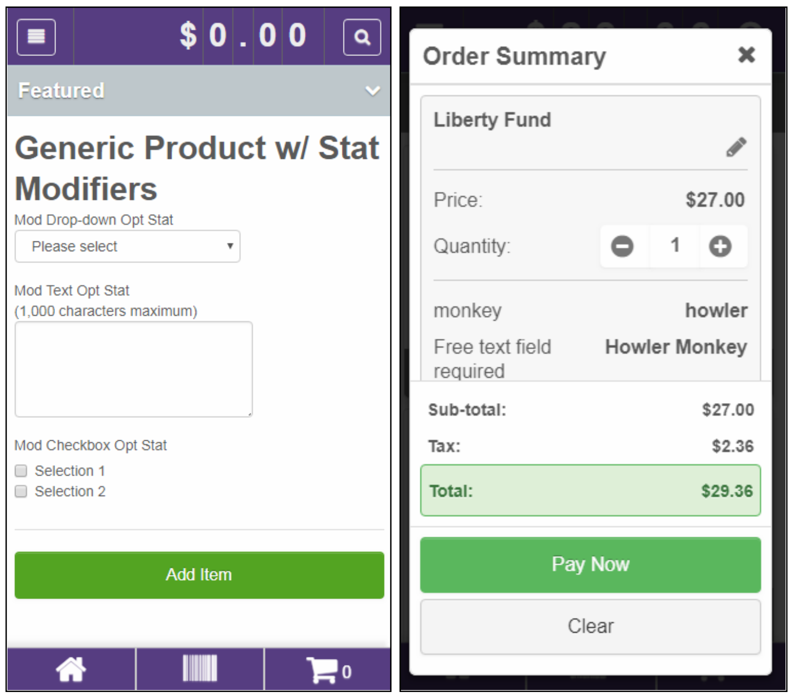
Left: The Product Detail page for a donation product. Notice the donation amount fields. Right: The Product Detail page for a product with a size *option available via a dropdown menu.*

If the product is a donation product, the donation amount fields will appear. If the product has options (such as color or size), the option selection menus will appear.

You can select the View Details button on the Product Detail page to view a product description.

5 Select option values (if applicable), select or enter a donation amount (if applicable), enter item quantity (if applicable), and then select the Add item button.

If the product has modifiers, the Modifier Selection page appears. Go to Step 6. If the product does not have modifiers, the product is added to the cart and appears in the Order Summary. Go to Step 7.



Left: The Modifer Selection page. Right: The Order Summary page.

6 Select modifier values and then select the Add Item button. The Order Summary page appears.

In order to select/enter modifier values, you must work with the customer and give them the modifier questions and available selections.

7 Review the Order Summary with the customer and then take one of the following actions as appropriate for the situation:

If the customer would like to purchase an additional product ... Select the Add New button to return to step 1 and add another item to the customer's cart.

OR

If the customer would like to change the order quantity for an item in the cart ...
Select the Pencil icon to the left of a product name. The quantity field then becomes editable. Select the Quantity field and enter a new quantity. Then select the Update button. (If the product has dynamic modifiers, you cannot modify the quantity ordered. You can only update the chosen modifiers.) (And then repeat Step 7 for any remaining items in the Order Summary.)

OR

If the customer would like to remove an item in the cart ...
Select the Pencil icon to the left of a product name. Then select the Remove button. (And then repeat Step 7 for any remaining items in the Order Summary.)

OR

If the customer would like to remove all items from their cart ...
Select the Clear button. All products in the cart will be removed.

OR

If the customer is ready to pay ...
Select the Pay Now button to begin the payment process.

Proceed to **" Processing a Payment" on page 108**.

Important! Avoid any lengthy delays once you have added items to the cart. After 15 minutes of inactivity, the Point-of-Sale application will automatically terminate the session.

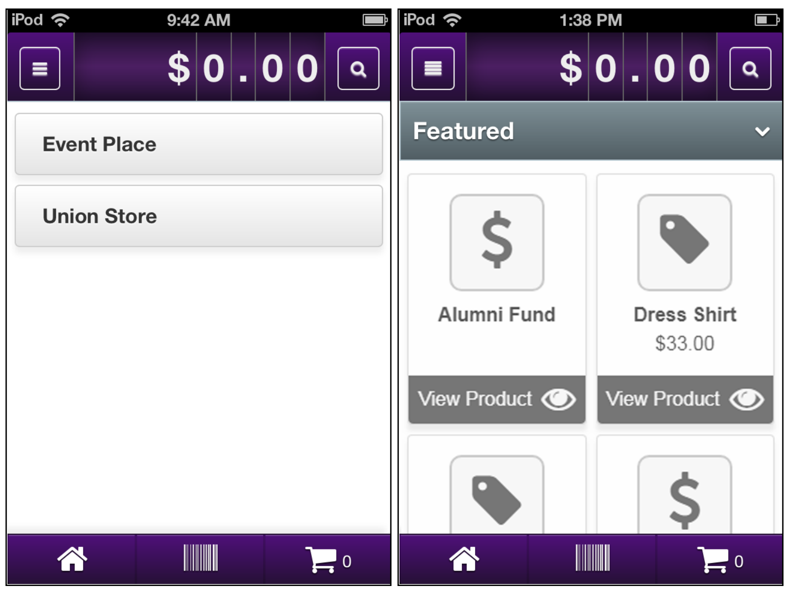
6.5 Taking Orders by Browsing for Products

Follow these instructions to find a product by browsing via store pages and category pages:

Note: Only items from the same store may be purchased in the same order.

1 When a customer has identified a product that they wish to buy (or a donation that they wish to make), navigate to the store by choosing the store name from the Marketplace Point-of-Sale home page.

   Note: On iOS devices, you can navigate to the Point-of-Sale home page by selecting the Home icon in the bottom navigation bar. On PCs, use the Home link in the breadcrumbs.

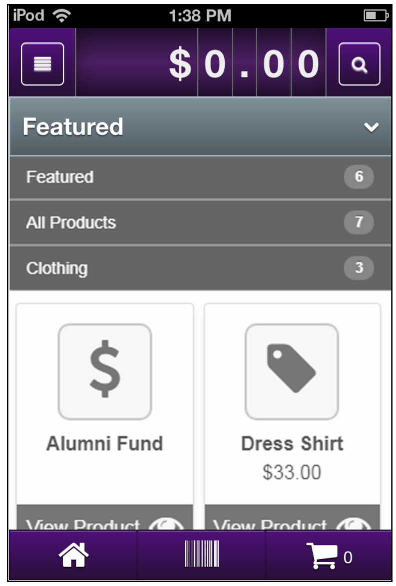


Left: The Point-of-Sale Home page with links to two stores.
Right: A store home page with the Featured category displayed.

   The Point-of-Sale home page displays links to all stores for which the user has been granted the Point-of-Sale attendant user role. In the above example, the user has access to two stores: 1) Event Place and 2) Union Store.

   When you choose a store, the Store Home page will load and the Featured category will be displayed.

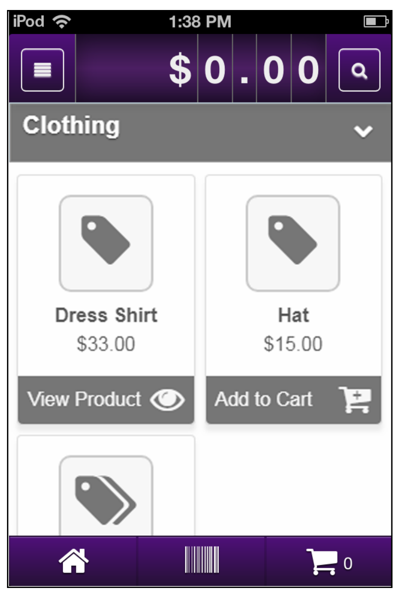
2 The Featured category is displayed by default. If you would like to display a different store category, select the gray bar that says Featured when the store initially loads. The Store Category dropdown menu will then be displayed.



The Store Category dropdown menu.

All categories configured for the store will appear in this dropdown list.

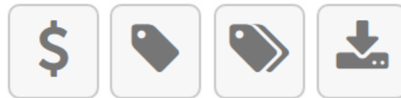
3 Select the desired product category. The selected category name will now appear in the gray bar, and thumbnails for products in that category will now be displayed.



The Clothing category is displayed.

In the above example, "Clothing" was chosen from the category dropdown menu, which displayed the product thumbnails for the Clothing category.

Four types of product thumbnail images are used.



The dollar sign thumbnail icon represents a donation product.

A single tag thumbnail icon represents a generic product.

A double tag thumbnail icon represents a packaged product.

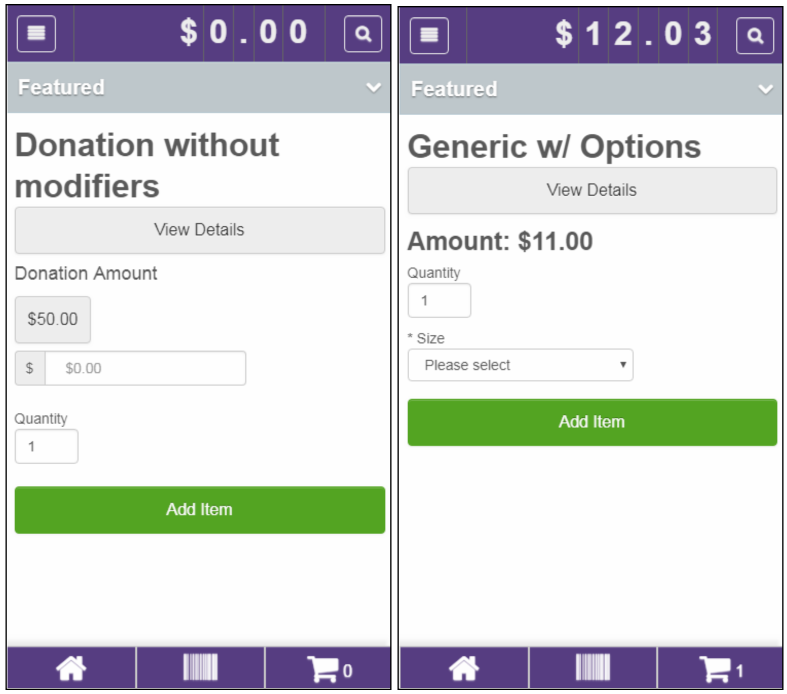
A download thumbnail icon represents a digital product.

Plus, the bottom bar of each product pod provides additional functionality.

The bar with the Add to Cart icon appears for generic products (or digital products) that have neither options nor modifiers. By selecting this icon, The attendant can immediately add the product to their cart. Once the product has been added to the cart, the bar changes so the attendant can easily change the quantity ordered.

The bar with the View Product icon appears for products that have options or modifiers. In addition, all Donation products have the View Product icon so the donation amount can be entered or selcted. By selecting the View Product icon, the attendant can view the Product Details page.

4 Select the product thumbnail that the customer would like to purchase. The Product Detail page will be displayed.



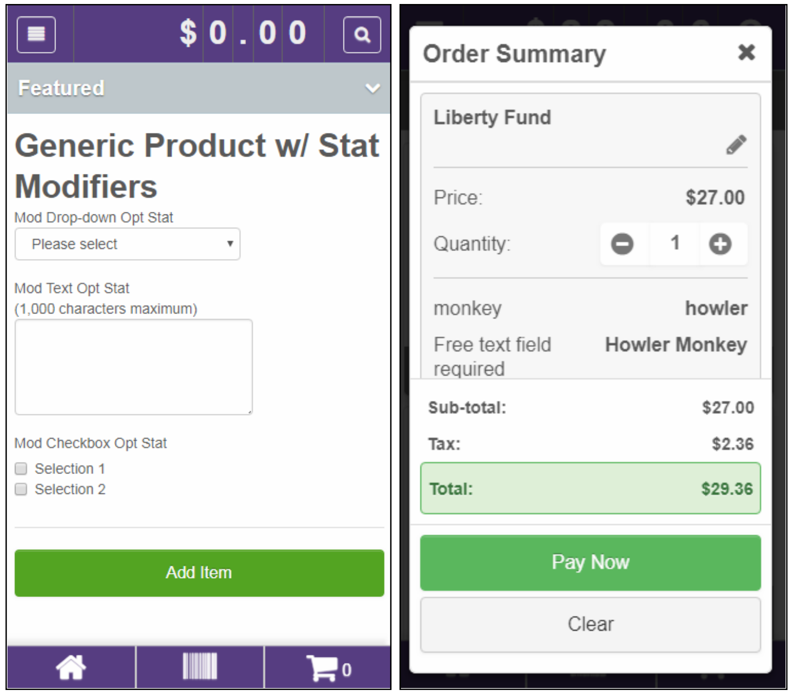
Left: The Product Detail page for a donation product. Notice the donation amount fields. Right: The Product Detail page for a product with a size option available via a dropdown menu.

If product is a donation product, the donation amount fields will appear. If the product has options (such as color or size), the option selection menus will appear.

You can select the View Details button on the Product Detail page to view a product description.

5 Select option values (if applicable), select or enter a donation amount (if applicable), enter item quantity (if applicable), and then select the Add item button.

If the product has modifiers, the Modifier Selection page appears. Go to Step 6. If the product does not have modifiers, the product is added to the cart and appears in the Order Summary. Go to Step 7.



Left: The Modifier Selection page. Right: The Order Summary page.

6 Select modifier values and then select the Add Item button. The Order Summary page appears.

In order to select/enter modifier values, you must work with the customer and give them the modifier questions and available selections.

7 Review the Order Summary with the customer and then take one of the following actions as appropriate for the situation:

If the customer would like to purchase an additional product ...
Select the Add New button to return to step 1 and add another item to the customer's cart.

OR

If the customer would like to change the order quantity for an item in the cart ...
Select the Pencil icon to the left of a product name. The quantity field then becomes editable. Touch the Quantity field and enter a new quantity. Then select the Update button. (If the product has dynamic modifiers, you cannot modify the quantity ordered. You can only update the chosen modifiers.) (And then repeat Step 9 for any remaining items on the Order Summary page.)

OR

If the customer would like to remove an item in the cart ...
Select the Pencil icon to the left of a product name. Then select the

Remove button. (And then repeat Step 7 for any remaining items on the Order Summary page.)

OR

If the customer would like to remove all items from their cart ...
Touch the Clear button. All products in the cart will be removed.

OR

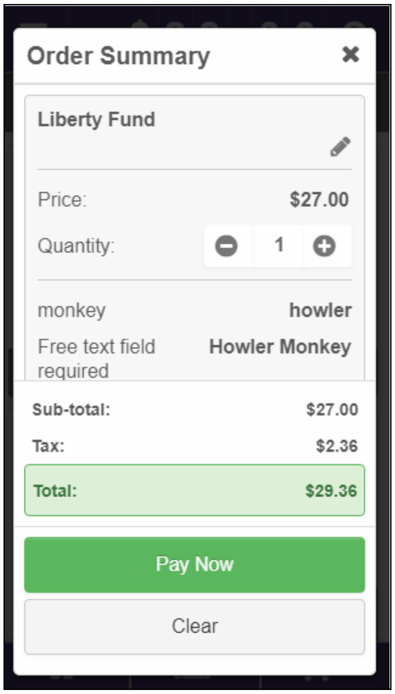
If the customer is ready to pay ...
Select the Pay Now button to begin the payment process. The Pay Now page appears.

Proceed to **" Processing a Payment" on page 108**.

> ***Important!*** Avoid any lengthy delays once you have added items to the cart. After 15 minutes of inactivity, the Point-of-Sale application will automatically terminate the session.

6.6 Processing a Payment

After products have been added to the cart for the customer, you can process the customer's payment by starting at the Order Summary. (On an iPad, the Order Summary appears as part of all pages in the Marketplace Point-of-Sale application.)



The Order Summary page.

If you are using an iPod or iPhone and are not already on the Order Summary page, you can navigate to this page by touching the Cart icon in the bottom navigation bar.

The Cart icon is in the bottom navigation bar.

From the Order Summary, you can press the Pay Now button to start the payment process. All payments must be done with payment cards.

The Marketplace Point-of-Sale application (and for mobile devices, the display on the Ingenico payment device) will lead you through the process. So pay close attention to the prompts. The prompts will identify the appropriate actions that must be taken. If you are using a mobile device, be sure to watch the iOS device display *and* the Ingenico device's LCD display panel for instructions on how payments must be completed.

Payment Methods

Marketplace Point-of-Sale and Ingenico payment devices support the following methods for taking payments:

- swiping payment cards via magstripe readers,
- inserting EMV cards into EMV card readers,
- tapping NFC cards against the display panel of the Ingenico payment device, and
- accepting cash and paper checks.

About EMV Cards

If an EMV card is swiped through the magstripe reader, the attendant will typically be prompted to insert the card instead in the EMV card reader. When EMV cards are used for payments, the Ingenico payment device will not typically allow the magstripe reader to be used *unless* the EMV card reader has first failed to read the EMV chip. After a pre-determined number of attempts (typically three) have failed in the EMV reader, the Ingenico payment device will allow the magstripe reader to be used as the fallback method (or the attendant may instead manually enter the payment card information on the Ingenico payment device).

Depending on store/merchant configuration, EMV may not be available. In addition, your Ingenico payment devices may need to be upgraded in order to support EMV cards. If EMV is not available on the payment device, attendants can swipe EMV cards through the magstripe reader on the Ingenico payment device.

> ***Important!*** Before you start taking payments, be sure you understand whether your store and its payment devices have been configured/upgraded to support EMV cards. For information on EMV cards, contact your store manager or your Marketplace administrator. This information will have a major impact on how you take payments.

Note: In order to accept EMV cards, the Ingenico payment device must be running RBA version 14.0.4 or greater. To determine the RBA version, launch the Point-of-Sale application and pull out the right side menu. At the very top of this menu, the "RBA" number will be displayed.

About NFC Cards

If a customer presents a card with the Near Field Communication symbol, the customer can simply tap the card against the display panel of the Ingenico payment device. This process is very similiar to swiping a payment card through the magstripe reader.

About Cash and Checks

If the Payment Gateway Host System Account used by the Marketplace merchant has been configured with a payment method for cash and a payment method for checks, then these payment methods are available for Point-of-Sale.

Is it an EMV Chip Card?

For Ingenico payment devices that have been updated to support EMV payments, the decision about how to process a payment card depends on whether the card includes an EMV chip. A payment card with an EMV chip looks like this:

An EMV chip card.

An EMV card can be easily identified by the small chip on the front of the card. This chip is in approximately the same position regardless of the card type: American Express, Discover, MasterCard, Visa, etc.

Is it an NFC Enabled Card?

For Ingenico payment devices that have been updated to support NFC transactions, payment cards with the NFC symbol can be used to initiate a payment by simply tapping the card against the display panel area of the Ingenico payment device.

The NFC symbol.

An NFC card can be easily identified by the NFC symbol on the face of the card. The position of the NFC symbol may vary depending on the payment card type. The logo symbol may also vary.

Card-Not-Present Transactions

Marketplace uPay sites can be configured to accept card-not-present transactions for mail orders and phone orders. When this configuration is enabled, an additional prompt appears during the payment process. This prompt asks, "Is the customer physically present?" The attendant must respond either Yes or No. If the attendant responds with Yes, then the transaction will proceed with the selection of the payment type. However, if the attendant responds with No, then the transaction will proceed with the entry of the payment card number by the attendant, which the customer provides over the telephone or written on a mail order.

6.7 Processing Payments with Mobile Devices

This section describes how to process payments using mobile devices with the Marketplace Point-of-Sale application.

For an overview of payment methods, see **" Processing a Payment" on page 108**.

For information about using countertop devices, see **"Processing a Payment with Countertop Devices" on page 134**.

Inserting EMV Chip Cards in Mobile Devices

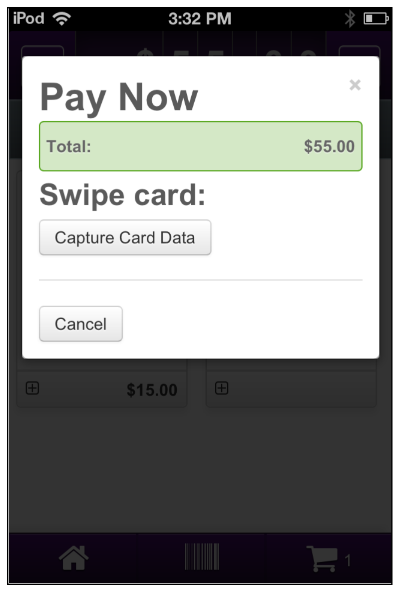
The following instructions describe how to process a payment when a customer presents an EMV chip card and the attendant is using a mobile payment device. These instructions assume you have placed an item in the cart and the Order Summary is displayed. These instructions also assume the attendant has identified the customer's payment card as an EMV chip card.

1. Select the Pay Now button in the Order Summary section to begin the payment process.

   A Take Payment prompt will appear that asks your to select the payment type (only configured payment types appear).

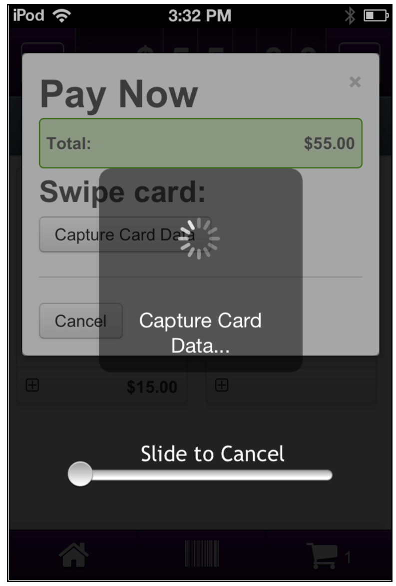
2. The attendant must ask the customer which payment type they will be using. In this example, we will assume the customer would like to pay with a payment card that is an EMV chip card. So the attendant selects the Credit Card button.

   The Pay Now page appears.



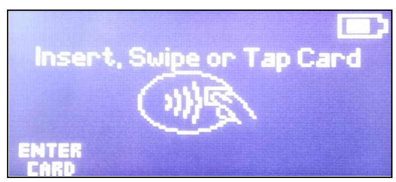
The Pay Now page.

3. Press the Capture Card Data button and ask the customer for their payment card. The Capture Card Data overlay panel appears.



The Capture Card Data overlay panel.

When the Capture Card Data overlay panel appears, "Insert, Swipe or Tap Card" appears on the display panel of the Ingenico payment device.



4 Insert the customer's payment card into the Ingenico device's EMV card reader on the bottom of the device (or have the customer insert their own payment card). The front of the payment card and the front of the Ingenico payment device should both be facing the attendant (or the customer), with the EMV chip portion of the card inserted within the reader.

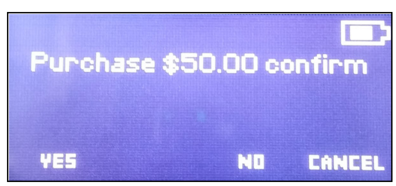
Using the EMV card reader.

The following message then appears on the Ingenico payment device's display panel: " Please wait... Do not remove the card."

This message is typically followed by a message displaying the payment type.

Important! Leave the EMV card in the reader until you are prompted to remove the card. If you remove the card too soon, the transaction will not complete successfully.

5 ***If the card was successfully read ...***
The Ingenico payment device will ask the customer to confirm the amount of the transaction. Hand off the Ingenico payment device to the customer so that the customer can make a choice.



The customer presses F1 for YES (or F3 for NO or F4 for CANCEL).

Go to Step 5.

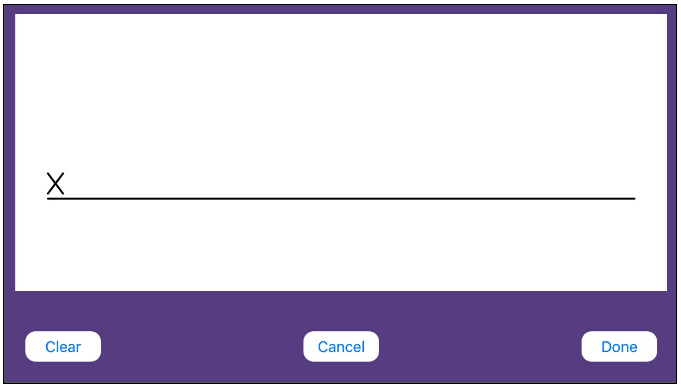
Note: Depending on the configuration of the customer's payment card, an additional prompt may appear in which the customer must select an account. This prompt typically appears for payment cards that support multiple accounts.

If the card was not successfully read or the payment card was not valid ...
An error message will appear on the iOS device. Here are messages that may appear:

- **Unable to authorize.**—The expiration date for the payment card may have passed.
- **Card type is not accepted.**—The store is not configured to accept this type of payment card.
- **Bad Read. Try Again.**—The payment card did not pass through the card reader as expected. Retry the card.

6 The Ingenico payment device will either ask for the customer to sign their signature or ask for the customer to enter their PIN.

If the Ingenico payment device asks for the customer's signature ...
A "Card Accepted" message will appear on the Ingenico payment device's panel. Also, a signature panel will appear on the iOS device.



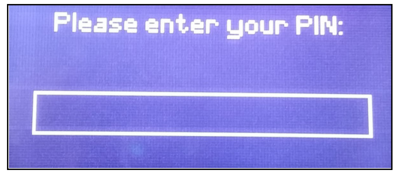
The Signature page.

Instruct the customer to use their finger to sign their name on the signature panel and then press the Done button. The Receipt page then appears. Go to Step 6.

If the customer makes an error during the signature, they can press the Clear button to erase their entry on the Signature page. Then they can again try to sign their name.

If the customer would like to cancel the transaction at this time, the customer can touch the Cancel button.

If the Ingenico payment device asks for the customer's PIN ...
A prompt asking for the customer's PIN will appear on the display panel of the Ingenico payment device. If the customer is not already holding the Ingenico payment device, pass the device to the customer.



Instruct the customer to use the keypad on the Ingenico device to enter their PIN and then to press the green key.

The customer can press the yellow key to backspace and the red key to cancel the payment.

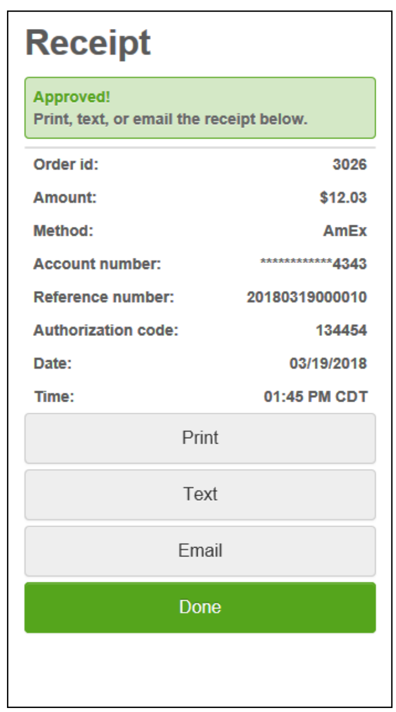
After the customer enters their PIN and presses the green key, take the device from the customer. Go to Step 6.

If the customer enters an incorrect PIN, the message "Incorrect PIN" appears on the display panel of the Ingenico payment device. The customer will be given additional opportunities to enter a correct PIN. After four failures, the message "Unable to Complete Transaction" will appear on the iOS device.

Note: The required validation method (signature vs. PIN) is determined by the payment card's configuration. The customer cannot choose which validation method to use.

7 The attendant takes the device back from the customer.

If the signature or PIN was accepted ...
The Ingenico payment device confirms that that payment was accepted and then the Receipt page is displayed on the iOS device.



The Receipt page.

You can now remove the payment card from the EMV card reader and hand the payment card back to the customer. Proceed to **"Providing Receipts to Customers" on page 146**.

If the signature or PIN was not accepted ...
An error message will appear on the iOS device. Here are messages that may appear:

- **Unable to complete transaction.**—The communication between the Ingenico payment device and the iOS device failed for an unspecified reason.
- **Card has declined this transaction.**—This message typically appears if the PIN number entry was not valid and the customer exceeded the number of allowed entry attempts.

Swiping Payment Cards on Mobile Devices

The following instructions describe how to process a payment when a customer presents a magstripe card and the attendant is using a mobile payment device. If the payment card has an EMV chip—and your Ingenico devices support EMV payments—then you must instead process the payment by inserting the card into the EMV card reader: Go to **"Inserting EMV Chip Cards in Mobile Devices" on page 112**. If you swipe an EMV card instead of inserting it, the Ingenico payment device will typically display the "Insert card in chip reader" prompt.

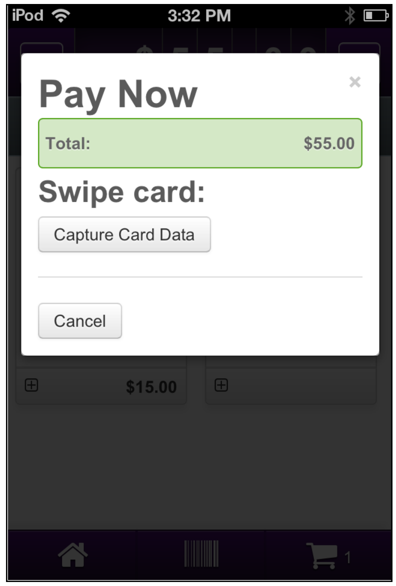
The following instructions assume you have placed an item in the cart and the Order Summary is displayed. These instructions also assume the attendant has determined the customer's payment card is not an EMV chip card.

1. Select the Pay Now button in the Order Summary section to begin the payment process.

   A Take Payment prompt will appear that asks your to select the payment type (only configured payment types appear).

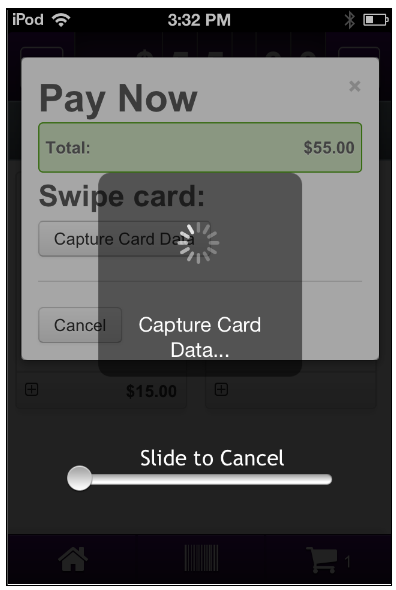
2. The attendant must ask the customer which payment type they will be using. In this example, we will assume the customer would like to pay with a payment card that is not an EMV chip card. So the attendant selects the Credit Card button.

   The Pay Now page appears.



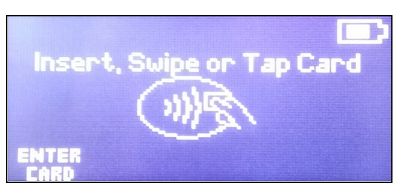
The Pay Now page.

3 Press the Capture Card Data button and ask the customer for their payment card. The Capture Card Data overlay panel appears.



The Capture Card Data overlay panel.

When the Capture Card Data overlay panel appears, "Insert, Swipe or Tap Card" appears on the display panel of the Ingenico payment device.



4 Take the payment card from the customer, and then swipe the card by inserting it into the Ingenico device's payment card reader and pulling the card through the reader in a single, quick stroke.

Using the payment card reader.

Be sure the payment card's magstripe runs through the reader, and be sure the back of the card (with the magnetic stripe) faces the Ingenico device's keypad side.

If the card was successfully read and the payment card was valid ...
A "Card accepted" message briefly appears on the Ingenico display. What happens next depends on the payment card configuration and store/merchant configuration (e.g., whether the payment card is a payment card or a debit card and whether the store is configured to allow PIN entry with debit cards).

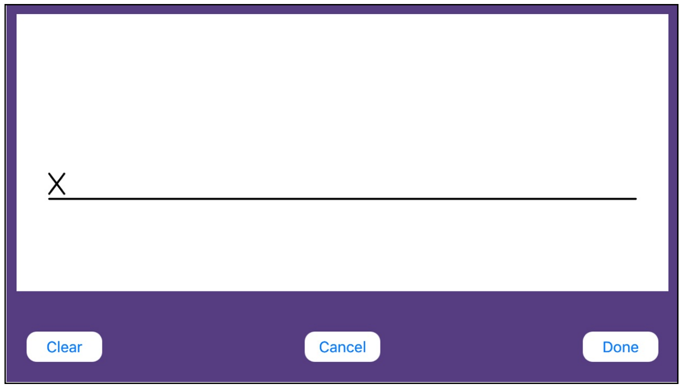
- **A signature panel appears on the iOS device**—A customer signature is required. Go to Step 4.
- **A PIN entry field appears on the Ingenico payment device**—The customer must enter the PIN for the payment card. Go to Step 4.

If the card was not successfully read or the payment card was not valid ...
An error message will appear on the iOS device. Here are messages that may appear:

- **Unable to authorize.**—The expiration date for the payment card may have passed.

- **Card type is not accepted.**—The store is not configured to accept this type of payment card.
- **Bad Read. Try Again.**—The payment card did not pass through the card reader as expected. Retry the card, using a single, quick stroke through the Ingenico card reader.

5 ***If the signature panel appears ...***
When the Signature panel appears, hand off the iOS device to the customer.



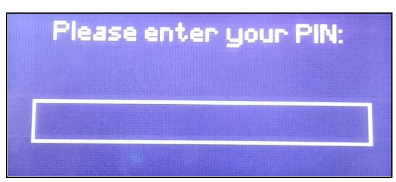
The Signature page.

The customer now uses their finger to sign their name on the Signature page and then presses the Done button. The Receipt page then appears. Go to Step 5.

If the customer makes an error during the signature, they can press the Clear button to erase their entry on the Signature page. Then they can again try to sign their name.

If the customer would like to cancel the transaction at this time, the customer can touch the Cancel button.

If the Ingenico payment device asks for the customer's PIN ...
A prompt asking for the customer's PIN will appear on the display panel of the Ingenico payment device. If the customer is not already holding the Ingenico payment device, pass the device to the customer.



Instruct the customer to use the keypad on the Ingenico device to enter their PIN and then to press the green key.

The customer can press the yellow key to backspace and the red key to cancel the payment.

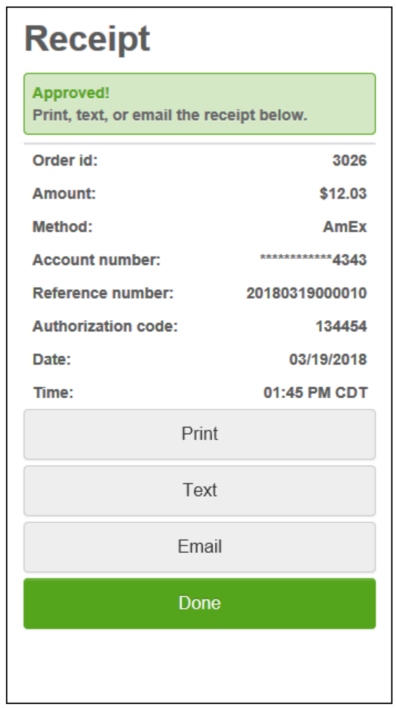
After the customer enters their PIN and presses the green key, take the device from the customer. Go to Step 5.

If the customer enters an incorrect PIN, the message "Incorrect PIN" appears on the display panel of the Ingenico payment device. The customer will be given additional opportunities to enter a correct PIN. After four failures, the message "Unable to Complete Transaction" will appear on the iOS device.

Note: If the customer says they would prefer to use their debit card as a payment card, tell the customer to press the red button on the Ingenico payment device. The signature panel is then displayed on the iOS device.

6 After the customer signs their signature or enters their PIN, the attendant takes the device back from the customer.

If the signature or PIN was accepted ...
The message Payment Accepted appears on the Ingenico payment device and the Receipt page is now displayed on the iOS device.



The Receipt page.

You can now hand the payment card back to the customer. Proceed to **"Providing Receipts to Customers" on page 146**.

If the signature or PIN was not accepted ...
An error message will appear on the iOS device. Here are messages that may appear:

- **Unable to complete transaction.**—The communication between the Ingenico payment device and the iOS device failed for an unspecified reason.
- **Card has declined this transaction.**—This message typically appears if the PIN number entry was not valid and the customer exceeded the number of allowed entry attempts.

Tapping NFC Enabled Cards

The following instructions describe how to process a payment when a customer would like to use an NFC enabled card.

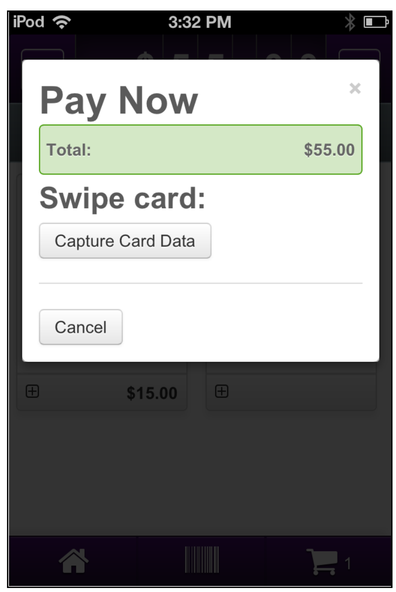
The following instructions assume you have placed an item in the cart and the Order Summary is displayed. These instructions also assume the attendant has determined the customer's payment card is not an EMV chip card.

1 Select the Pay Now button in the Order Summary section to begin the payment process.

A Take Payment prompt will appear that asks for the payment card type: Campus Card or Credit Card. If the Campus Card option has not been configured, only "Credit Card" card will appear as an option.

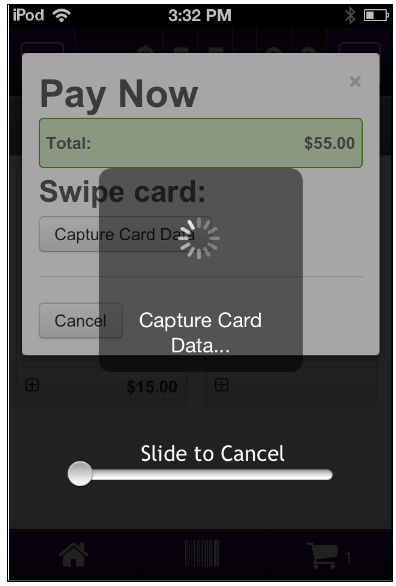
2 The attendant must ask the customer which payment type they will be using. In this example, we will assume the customer would like to pay with a payment card that is NFC enabled. So the attendant selects the Credit Card button.

The Pay Now page appears.



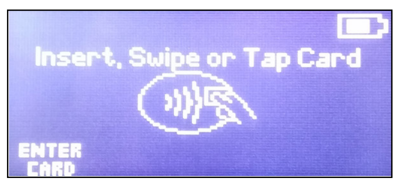
The Pay Now page.

3 Press the Capture Card Data button and ask the customer for their payment card. The Capture Card Data overlay panel appears.



The Capture Card Data overlay panel.

When the Capture Card Data overlay panel appears, "Insert, Swipe or Tap Card" appears on the display panel of the Ingenico payment device.



4 Hold the Ingenico payment device and instruct the customer to tap their payment card against the display panel.

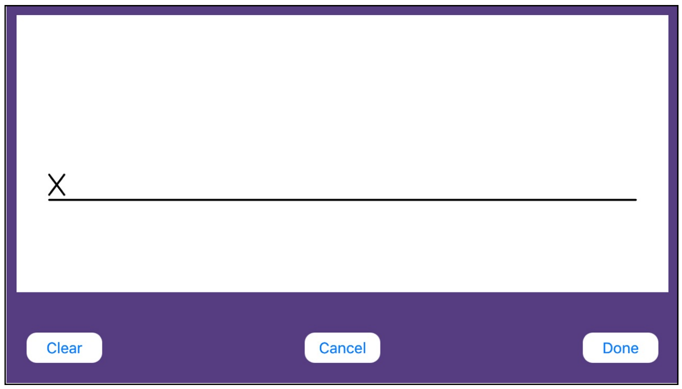
If the card was successfully read and the payment card was valid ...
A "Card accepted" message briefly appears on the Ingenico display. What happens next depends on the payment card configuration and store/merchant configuration (e.g., whether the payment card is a payment card or a debit card and whether the store is configured to allow PIN entry with debit cards).

- **A signature panel appears on the iOS device**—A customer signature is required. Go to Step 4.
- **A PIN entry field appears on the Ingenico payment device**—The customer must enter the PIN for the payment card. Go to Step 4.

If the card was not successfully read or the payment card was not valid ...
An error message will appear on the iOS device. Here are messages that may appear:

- **Unable to authorize.**—The expiration date for the payment card may have passed.
- **Card type is not accepted.**—The store is not configured to accept this type of payment card.
- **Bad Read. Try Again.**—The payment card did not pass through the card reader as expected. Retry the card.

5 ***If the signature panel appears ...***
When the Signature panel appears, hand off the iOS device to the customer.



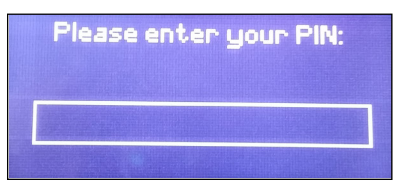
The Signature page.

The customer now uses their finger to sign their name on the Signature page and then presses the Done button. The Receipt page then appears. Go to Step 5.

If the customer makes an error during the signature, they can press the Clear button to erase their entry on the Signature page. Then they can again try to sign their name.

If the customer would like to cancel the transaction at this time, the customer can touch the Cancel button.

If the Ingenico payment device asks for the customer's PIN ...
A prompt asking for the customer's PIN will appear on the display panel of the Ingenico payment device. If the customer is not already holding the Ingenico payment device, pass the device to the customer.



Instruct the customer to use the keypad on the Ingenico device to enter their PIN and then to press the green key.

The customer can press the yellow key to backspace and the red key to cancel the payment.

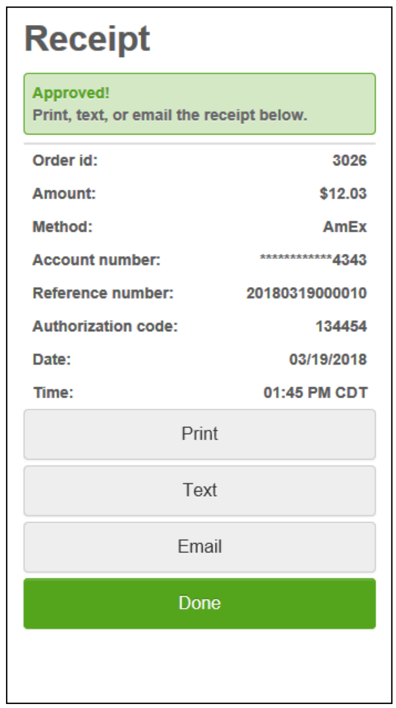
After the customer enters their PIN and presses the green key, take the device from the customer. Go to Step 5.

If the customer enters an incorrect PIN, the message "Incorrect PIN" appears on the display panel of the Ingenico payment device. The customer will be given additional opportunities to enter a correct PIN. After four failures, the message "Unable to Complete Transaction" will appear on the iOS device.

Note: If the customer says they would prefer to use their debit card as a payment card, tell the customer to press the red button on the Ingenico payment device. The signature panel is then displayed on the iOS device.

6 After the customer signs their signature or enters their PIN, the attendant takes the device back from the customer.

If the signature or PIN was accepted ...
The message Payment Accepted appears on the Ingenico payment device and the Receipt page is now displayed on the iOS device.



The Receipt page.

You can now hand the payment card back to the customer. Proceed to **"Providing Receipts to Customers" on page 146**.

If the signature or PIN was not accepted ...
An error message will appear on the iOS device. Here are messages that may appear:

- **Unable to complete transaction.**—The communication between the Ingenico payment device and the iOS device failed for an unspecified reason.
- **Card has declined this transaction.**—This message typically appears if the PIN number entry was not valid and the customer exceeded the number of allowed entry attempts.

Manually Entering Payment Card Data

The following instructions describe how to process a payment by manually entering payment card data.

If the payment card has an EMV chip—and your Ingenico devices support EMV payments—then you must instead process the payment by inserting the card into the EMV card reader: Go to **"Inserting EMV Chip Cards in Mobile Devices" on page 112**. Attendants can only manually enter card data for an EMV card if the EMV card reader failed three attempts to read the EMV chip.

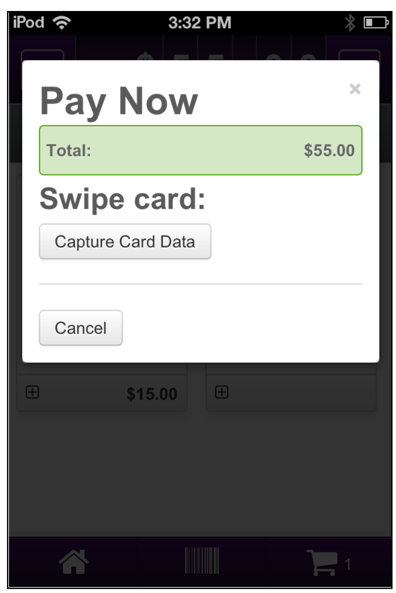
The following instructions assume you have placed an item in the cart and the Order Summary is displayed.

1. Select the Pay Now button in the Order Summary section to begin the payment process.

   A Take Payment prompt will appear that asks for the payment card type: Campus Card or Credit Card. If the Campus Card option has not been configured, only "Credit Card" card will appear as an option.

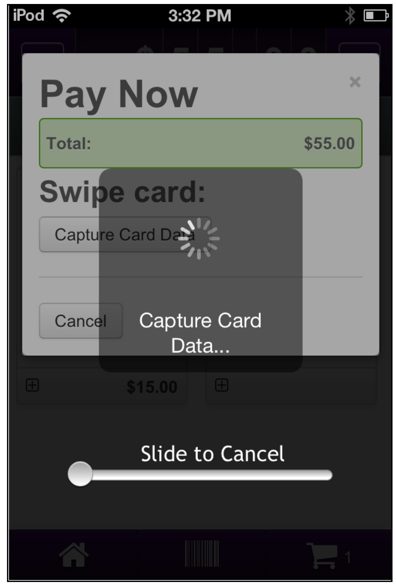
2. The attendant must ask the customer which payment type they will be using. In this example, we will assume the customer would like to pay with a payment card. So the attendant selects the Credit Card button.

   The Pay Now page appears.



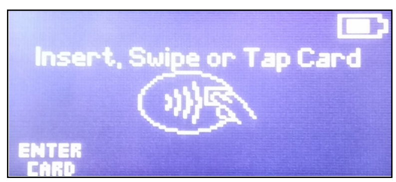
The Pay Now page.

3 Press the Capture Card Data button and ask the customer for their payment card. The Capture Card Data overlay panel appears.



The Capture Card Data overlay panel.

When the Capture Card Data overlay panel appears, "Insert, Swipe or Tap Card" appears on the display panel of the Ingenico payment device.



4 When "Insert, Swipe or Tap Card" appears, press F1 on the Ingenico payment device.

Panels will now appear on the Ingenico LCD display for entering payment card data.

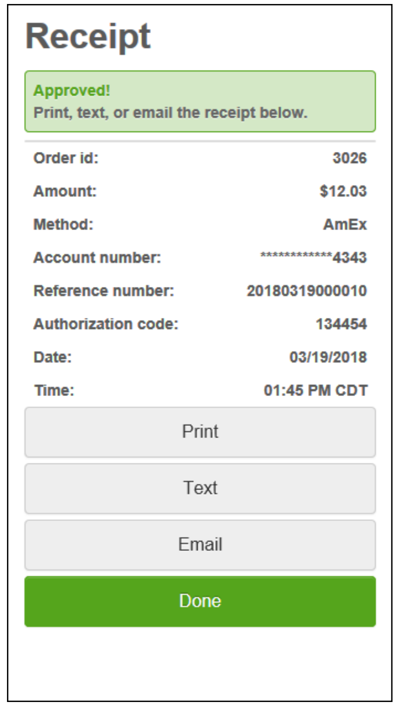
5 First, the "Enter Card Number" prompt appears. Enter the card number and press the green key on the Ingenico payment device.

6 Then, the "Enter Expiration Date" prompt appears. Enter the expiration date and press the green key on the Ingenico payment device.

7 Finally, the "Enter CVV or CID from card" prompt appears. Enter the CVV or CID printed on the payment card and press the green key on the Ingenico payment device.

Note: Press the green key on the Ingenico device to confirm each entry. Press the yellow key to backspace. Press the red key to cancel manual entry.

8 **If the card data was accepted ...**
The message Payment Accepted appears on the Ingenico payment device and the Receipt page is now displayed on the iOS device.



The Receipt page.

You can now hand the payment card back to the customer. Proceed to **"Providing Receipts to Customers" on page 146**.

If the card data was not accepted ...
An error message will appear on the iOS device. Here are messages that may appear:

- **Unable to authorize.**—The expiration date for the payment card may have passed.
- **Card type is not accepted.**—The store is not configured to accept this type of payment card.
- **Card type not accepted by store.**—The store is not configured to accept this type of payment card.

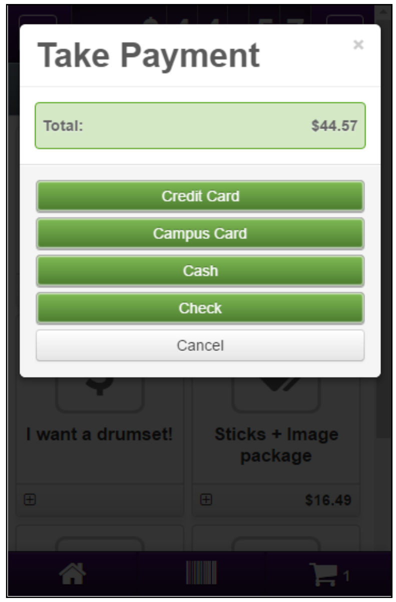
Processing Cash Payments

The following instructions describe how to process a cash payment. This process does not use an Ingenico payment device and is completely handled with the Point-of-Sale application.

The following instructions assume you have placed an item in the cart and the Order Summary is displayed.

1 Select the Pay Now button in the Order Summary section to begin the payment process.

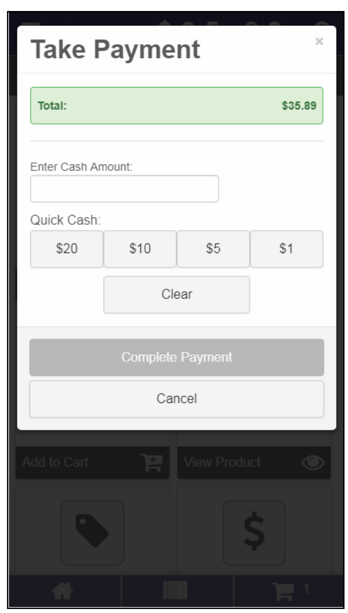
A Take Payment prompt will appear that asks your to select the payment type (only configured payment types appear).



The Take Payment page.

2 The attendant must ask the customer which payment type they will be using. In this example, we will assume the customer would like to pay with cash. So the attendant selects the Cash button.

The Enter Cash Amount field then appears.



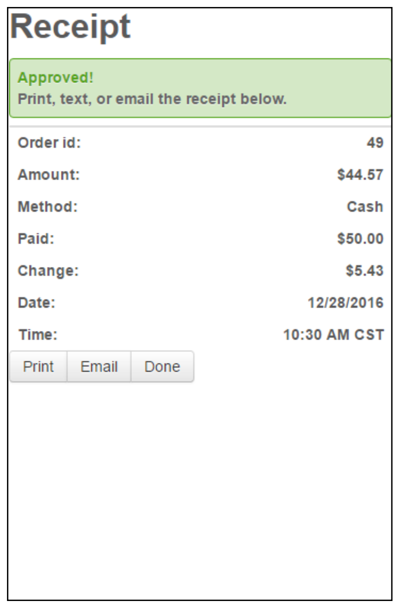
The Enter Cash Amount prompt.

3. Enter the amount of cash that the customer hands to you. For example, if the total amount due is $44.57 and the customer hands you two $20 bills and one $10 bill, enter $50 in the Enter Cash Amount field.

   You may also use the Quick Cash buttons to enter the cash amount. Select the corresponding buttons for each bill received. The button amounts selected will be added together and appear in the Enter Cash Amount field. For example, if the total amount due is $44.57 and the customer hands you two $20 bills and one $10 bill, select the the $20 button twice and the $10 button once. $50 will then appear as the amount received in the Enter Cash Amount field.

   Then select the Complete Payment button.

   Subsequently, the Receipt page appears, and it shows how much change to give the customer.



The Receipt page.

4. Give the customer the amount of change displayed in the Change field of the Receipt page. In the example described in Step 3, you would now give the customer $5.43 in change.
5. Proceed to **"Providing Receipts to Customers" on page 146**.

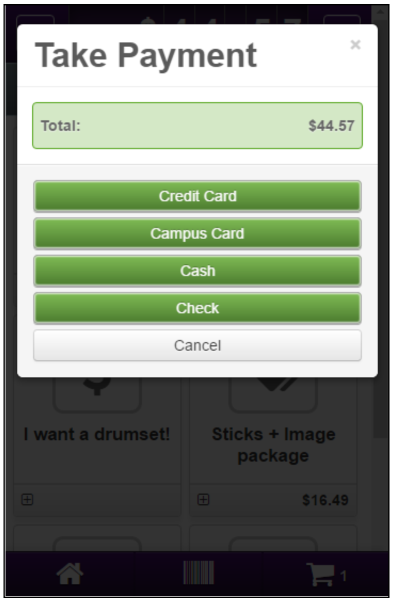
Processing Check Payments

The following instructions describe how to process a check payment. This process does not use an Ingenico payment device and is completely handled with the Point-of-Sale application.

The following instructions assume you have placed an item in the cart and the Order Summary is displayed.

1 Select the Pay Now button in the Order Summary section to begin the payment process.

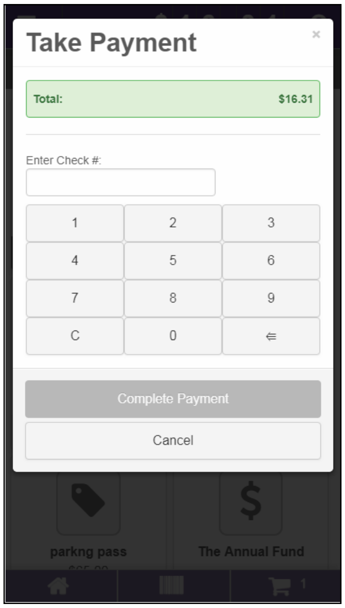
A Take Payment prompt will appear that asks your to select the payment type (only configured payment types appear).



The Take Payment page.

2 The attendant must ask the customer which payment type they will be using. In this example, we will assume the customer would like to pay by check. So the attendant selects the Check button.

The Enter Check # field then appears.

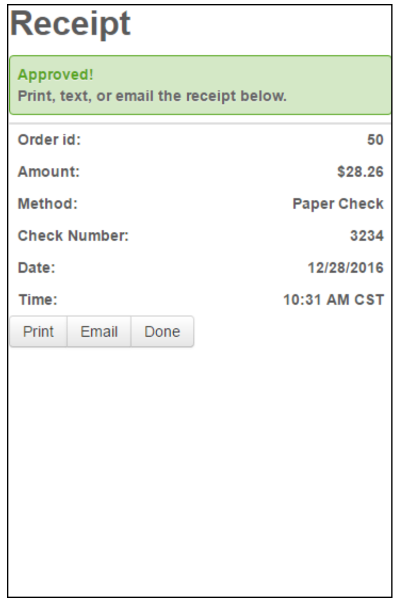


The Enter Check # prompt.

3. Enter the check number printed on the customer's check. A keypad is displayed so that you can easily select the corresponding numbers.

   Then select the Complete Payment button.

   Subsequently, the Receipt page appears. Notice the Receipt page includes the Check Number.

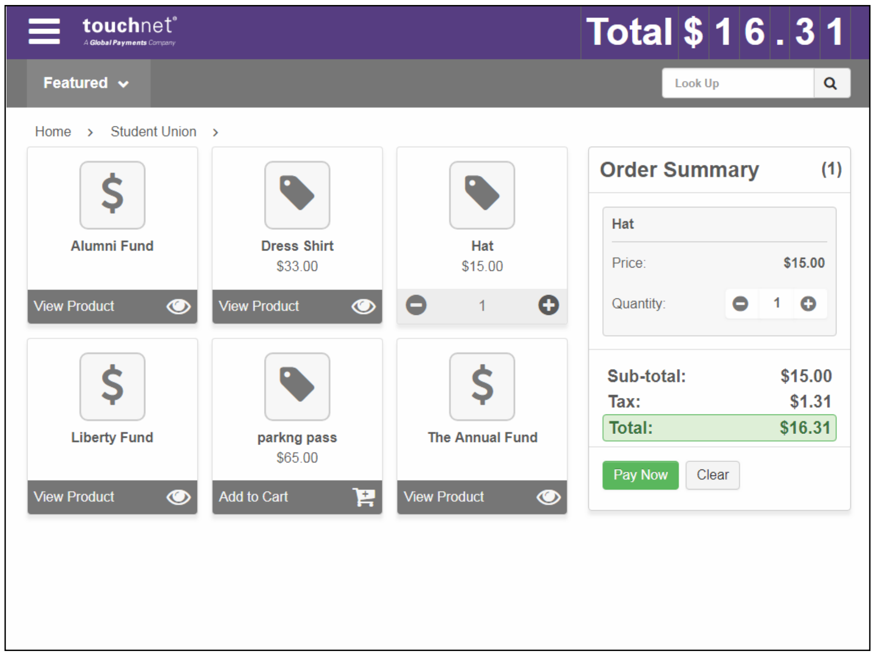


The Receipt page.

4. Proceed to **"Providing Receipts to Customers" on page 146**.

6.8 Processing a Payment with Countertop Devices

The following instructions describe how to process a payment with Marketplace Point-of-Sale countertop devices. (For information about using mobile devices, see **" Processing Payments with Mobile Devices" on page 112**.) These instructions assume the Order Summary shows that you have placed an item in the cart.

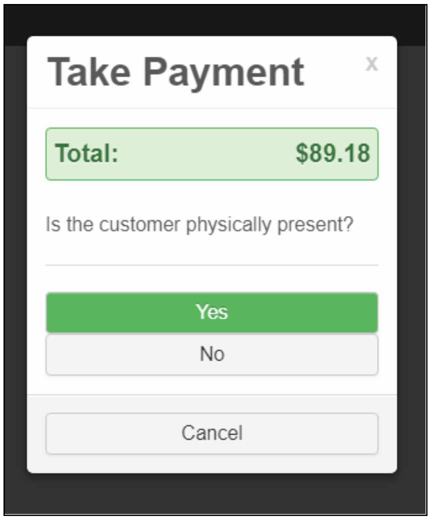


The Pay Now button becomes active when an item is in the cart.

1 Select the Pay Now button in the Order Summary section to begin the payment process.

If card-not-present payment methods have been set up for this store, the following prompt then appears: "Is the customer physically present?" Go to Step 2.

If card-not-present payment methods have NOT been setup for this store, the available payment methods are immediately displayed. Go to Step 3.

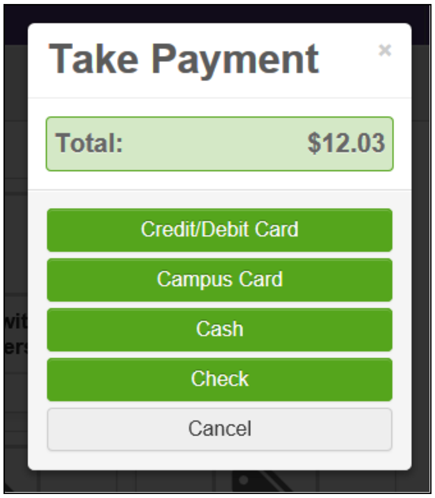


This prompt only appears if card-not-present payment methods have been configured for the store.

2 If the "Is the customer physically present?" prompt appears, you must select either Yes or No.

If the customer is physically present, select "Yes" and go to Step 3.

If the customer is NOT physically present, select "No" and go to **"Processing Card-Not-Present Transactions" on page 143**.



The available payment methods are displayed on this dialog

3 If the customer is physically present, the Take Payment dialog displays the available payment methods. The available payment methods depend on how the store has been configured and may include payment cards, cash, and checks.

The attendant must ask the customer which payment method they would like to use. The attendant then selects the corresponding payment method as displayed in Marketplace Point-of-Sale.

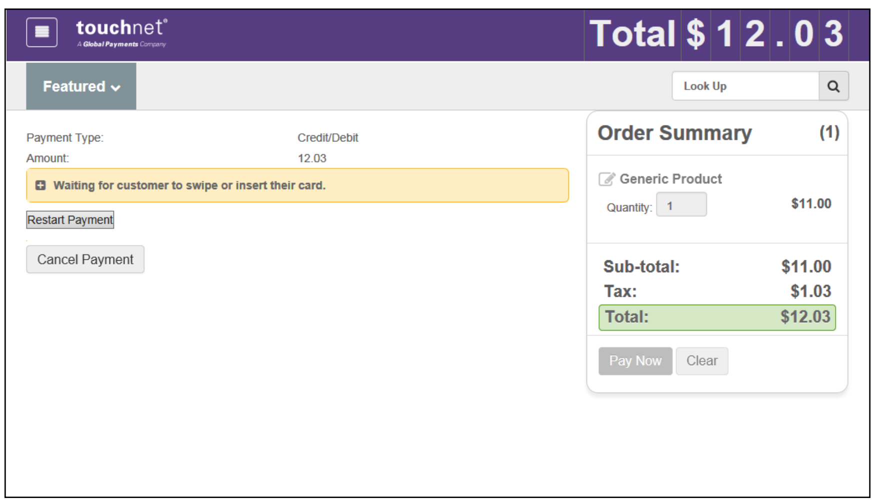
For the remainder of the payment process, see the following sections for the corresponding payments types:

- **Payment Card**—see **"Processing a Payment Card with Countertop Devices" on page 136**
- **Cash**—see **"Processing Cash Payments with Countertop Devices" on page 140**
- **Check**—see **"Processing Check Payments with Countertop Devices" on page 142**

Processing a Payment Card with Countertop Devices

The following instructions describe how to finish processing a payment that was begun with **"Processing a Payment Card with Countertop Devices" on page 1**.

This process begins directly after the attendant has asked the customer which payment type that would like to use, and the customer has said **payment card**. At this point, Marketplace Point-of-Sale has communicated with the countertop payment device and is in the process of handing off the payment process for the customer's input.



The Marketplace Point-of-Sale application is waiting for input from the customer.

Note: The attendant may need to wait briefly while the "Point-of-Sale Client" launches.

Once the payment has been handed off to the countertop payment device, the following process must take place to complete the payment:

1. The Ingenico iSC250 payment device now prompts the customer to "Insert, Swipe or Tap Card."

The customer views the display panel on the Ingenico iSC250.

If necessary, the attendant may instruct the customer to follow the prompts on the payment terminal to complete the transaction. The customer can insert, swipe, or tap their payment card (depending on the features of the card).

Notes on swiping magnetic stripe cards

The customer may swipe their payment card in either direction through the magstripe reader, and the payment card may be facing either left or right (the iSC250 has magstripe reader heads for both directions). However, be sure the customer has placed the card with the magstripe within the reader. For best results, the customer should slide the card with a single continuous motion.

If the customer attempts to swipe an EMV card, they will likely encounter the following message on the Ingenico payment terminal: "Insert card in chip reader." The attendant may need to instruct the customer to use the EMV chip reader instead of the magstripe reader.

Notes on inserting EMV chip cards

The customer must insert the left side of the card—the side with the EMV chip—into the EMV chip reader. The front of the EMV card must be facing up. If necessary, instruct the customer to leave the payment card in the reader until the payment terminal prompts them to remove the card. (Some customers may not realize that they must leave their card in the EMV chip reader until the payment terminal prompts them to remove it.) For more about EMV chip cards, including how to identify an EMV chip card, see **"Is it an EMV Chip Card?" on page 111**.

Notes on tapping NFC-enabled magnetic stripe cards

If the customer has an NFC-enabled magnetic stripe card, it will typically have an NFC symbol on the face of the card. These customers can initiate a payment by tapping their cards against the display panel of the Ingenico iSC250. For more about NFC enabled cards, including how to identify an NFC enabled card, see **"Is it an NFC Enabled Card?" on page 112**.

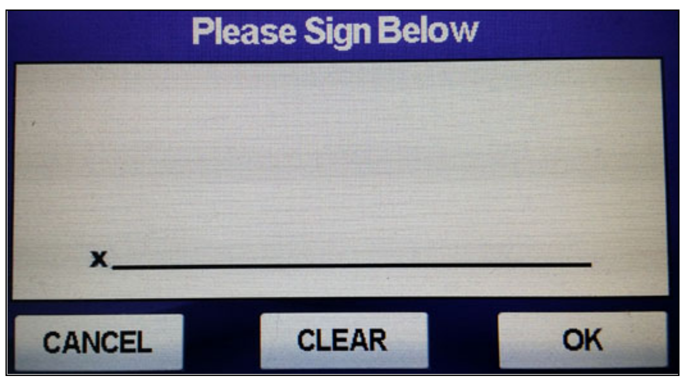
Notes on manually entering payment card numbers

The customer may also touch the Enter Card button in the lower right corner to manually enter their payment card number.

2 The customer must follow the prompts on the payment terminal to complete the payment process. Depending on the features of the card, the transaction may require a signature or a PIN number. The terminal will prompt the customer as necessary.

Notes on signatures

If the customer is required to sign their signature, the attendant may need to encourage the customer to use the stylus. The signature panel requires use of the stylus, for both the signature as well as the OK, Clear, and Cancel buttons.



A stylus must be used with the Ingenico iSC250's signature panel.

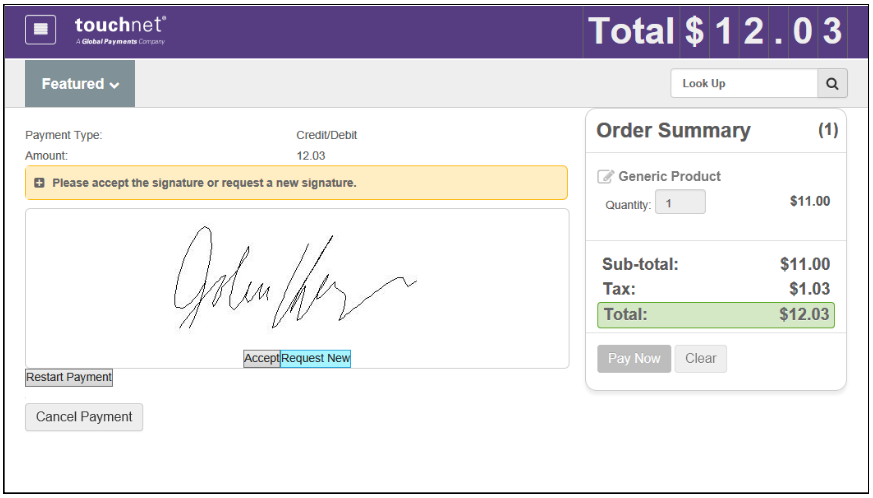
The customer must then confirm the amount by touching the OK button on the Ingenico iSC250 display. If the customer entered a signature, the Marketplace Point-of-Sale application will display this signature. Go to Step 4.

Notes on PIN numbers

If the customer is required to enter a PIN, the customer must then confirm the amount by touching the Yes button on the Ingenico iSC250 display. If the customer entered the correct PIN, the transaction will complete without any additional action by the attendant. The Receipt page will appear. Go to Step 5.

Important! If the customer uses an EMV chip card, watch to make sure the customer leaves the card in the EMV chip reader until the transaction has been completed. If the customer removes the card too soon, the transaction will not complete successfully. The Ingenico iSC250 will prompt the customer to remove their card.

3 The attendant must review the signature entered by the customer and determine if it was properly recorded. The attendant must then either select the Accept button or the Request New button.



The attendant must review the signature entered by the customer.

After the attendant selects the Accept buton, the transaction will complete, and the Receipt page will appear.

4 *If the signature or PIN was accepted ...*
The Ingenico payment device briefly displays an Accepted message. Then the Marketplace Point-of-Sale application displays the Receipt page. Proceed to **"Providing Receipts with Countertop Devices" on page 152**.

The Receipt page.

If the signature or PIN was not accepted ...
An error message will appear in the Marketplace Point-of-Sale application. Here are messages that may appear:

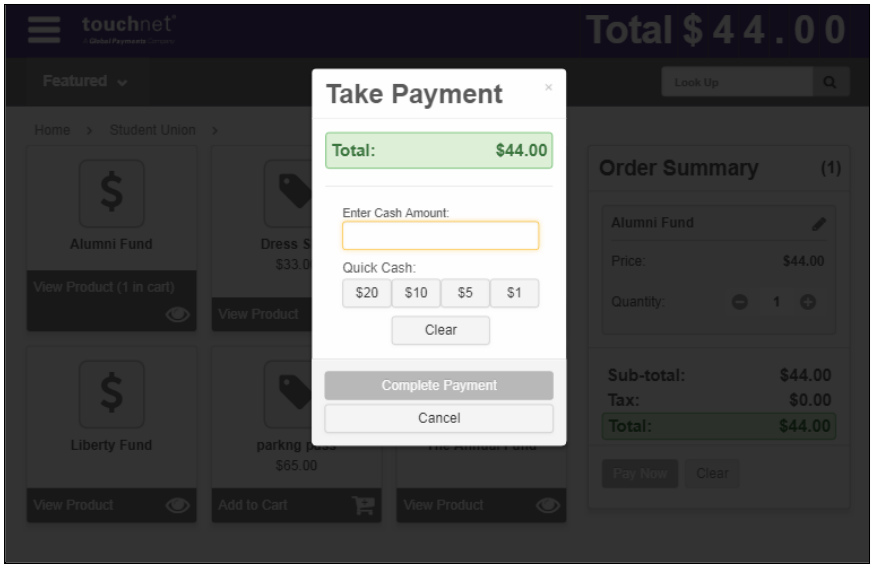
- **Unable to complete transaction.**—The communication between the Ingenico payment device and the Marketplace Point-of-Sale application failed for an unspecified reason.
- **Card has declined this transaction.**—This message typically appears if the PIN number entry was not valid and the customer exceeded the number of allowed entry attempts.

Processing Cash Payments with Countertop Devices

The following instructions describe how to finish processing a payment that was begun with **"Processing a Payment Card with Countertop Devices" on page 1**.

This process begins directly after the attendant has asked the customer which payment type that would like to use, and the customer has said **cash**.

The Enter Cash Amount prompt then appears.



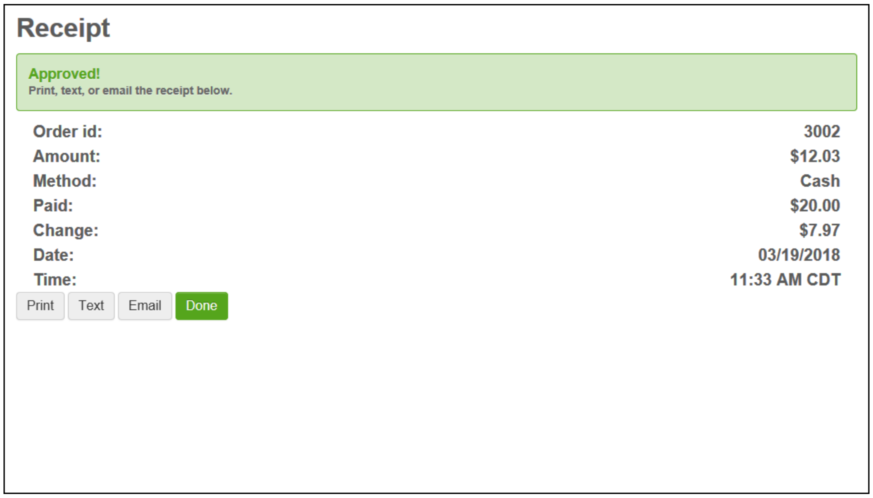
The Enter Cash Amount prompt.

1 Enter the amount of cash that the customer hands to you. For example, if the total amount due is $44.57 and the customer hands you two $20 bills and one $10 bill, enter $50 in the Enter Cash Amount field.

You may also use the Quick Cash buttons to enter the cash amount. Select the corresponding buttons for each bill received. The button amounts selected will be added together and appear in the Enter Cash Amount field. For example, if the total amount due is $44.57 and the customer hands you two $20 bills and one $10 bill, select the the $20 button twice and the $10 button once. $50 will then appear as the amount received in the Enter Cash Amount field.

Then select the Complete Payment button.

Subsequently, the Receipt page appears, and it shows how much change to give the customer.



The receipt for a cash transaction includes the amount of change.

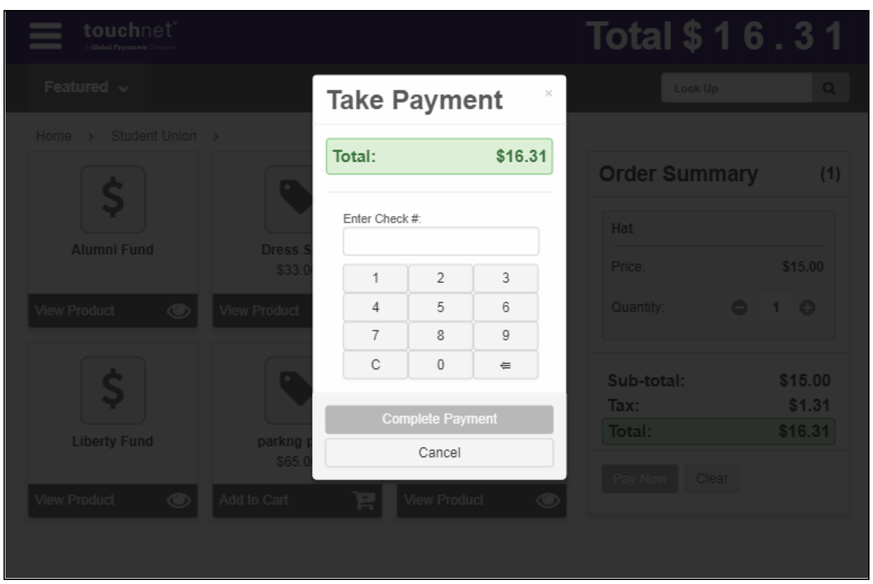
2. Give the customer the amount of change displayed in the Change field of the Receipt page. In the example described in Step 3, you would now give the customer $5.43 in change.
3. Proceed to **"Providing Receipts to Customers" on page 146**.

Processing Check Payments with Countertop Devices

The following instructions describe how to finish processing a payment that was begun with **"Processing a Payment Card with Countertop Devices" on page 1**.

This process begins directly after the attendant has asked the customer which payment type that would like to use, and the customer has said **check**.

The Enter Check # prompt then appears.



The Enter Cash Amount prompt.

1 Enter the check number printed on the customer's check. A keypad is displayed so that you can easily select the corresponding numbers.

Then select the Complete Payment button.

Subsequently, the Receipt page appears. Notice the Receipt page includes the Check Number.

The receipt for a check transaction includes the check number.

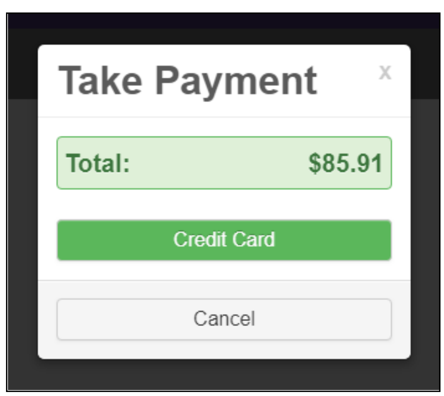
2 Proceed to **"Providing Receipts to Customers" on page 146**.

Processing Card-Not-Present Transactions

The following instructions describe how to finish processing a payment that was begun with **"Processing a Payment Card with Countertop Devices" on page 1**.

This process begins directly after the attendant has recognized that they will be taking a payment when the customer is not physically present. This situation may occur when a customer has reached the attendant by telephone or via a completed form that they mailed.

After the attendant has identified that the customer is not present, the Take Payment panel appears with Credit Card as the only payment option. (Only credit card payments are available with card-not-present transactions.)

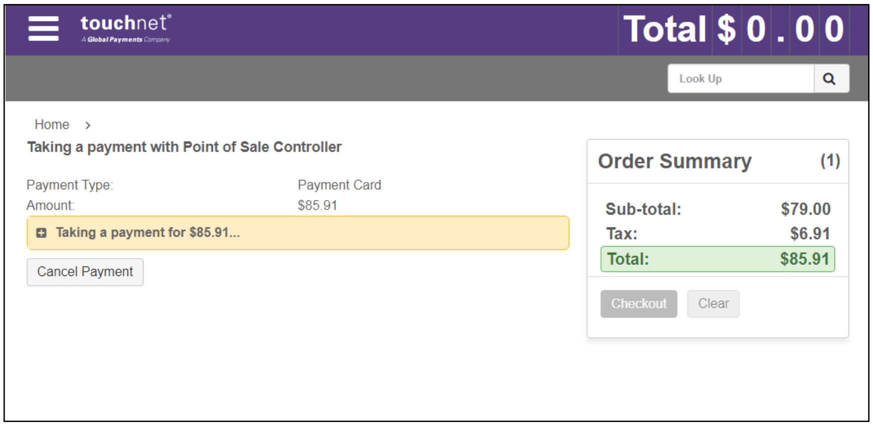


Only credit card payments are available with card-not-present transactions.

Once the card-not-present process has started, the following steps must take place to complete the payment:

1. On the Take Payment dialog, the attendant chooses the Credit Card button.

   The "Taking a payment with Point of Sale Controller" page then appears in the Marketplace Point-of-Sale application.



The Marketplace Point-of-Sale application is waiting for input from the attendant.

   Note: The attendant may need to wait briefly while Point-of-Sale Controller connects to the Ingenico payment device.

   In addition, the Ingenico payment device now prompts the attendant to "Enter Card Number."

The attendant views the display panel on the Ingenico iSC250.

2. The attendant now follows the prompts on the payment terminal to complete the payment process.

   The prompts will always ask for the card number and an expiration date. The prompts may ask for a CVV number as well.

   After the attendant completes the prompts, the transaction will complete, and the Receipt page will appear.

3. *If the card information was accepted ...*
   The Ingenico payment device briefly displays an Accepted message.

Then the Marketplace Point-of-Sale application displays the Receipt page. Proceed to **"Providing Receipts with Countertop Devices" on page 152**.

The Receipt page.

If the signature or PIN was not accepted ...
An error message will appear in the Marketplace Point-of-Sale application. Here are messages that may appear:

- **Unable to complete transaction.**—The communication between the Ingenico payment device and the Marketplace Point-of-Sale application failed for an unspecified reason.
- **Card has declined this transaction.**—This message typically appears if the expiration date or CVV number entry was not valid.

6.9 Providing Receipts to Customers

After the payment process is completed, the attendant can provide the customer with a receipt. This section discusses the various options for receipts that are available from the Marketplace Point-of-Sale application's Receipt page.

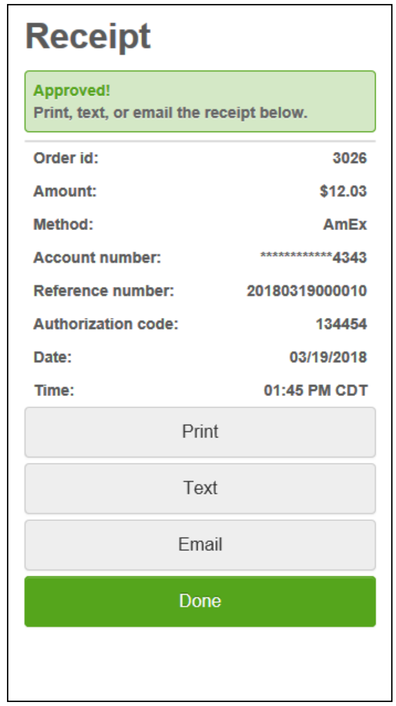
With Feature Pack 8.3, changes were made to the Point of Sale receipts to comply with the latest Global Payments and TSYS requirements.

- For Marketplace Point of Sale, the receipt changes include:
  - Full payment method name displays (i.e., American Express instead of AMEX)
  - MID changed to Merchant Information
  - TID or Terminal ID changed to Dev Information
  - Account Type changes to AID
  - Removed EMV tags: TVR, IAD, TSI, ARC, and CID

Note: If the merchant name and address are not present, those fields will be suppressed on the receipt.

Providing Receipts with Mobile Devices

After the payment process is completed, the attendant can use the Marketplace Point-of-Sale application to provide the customer with a receipt. Receipt options are available from the Point-of-Sale Receipt page.



The Receipt page.

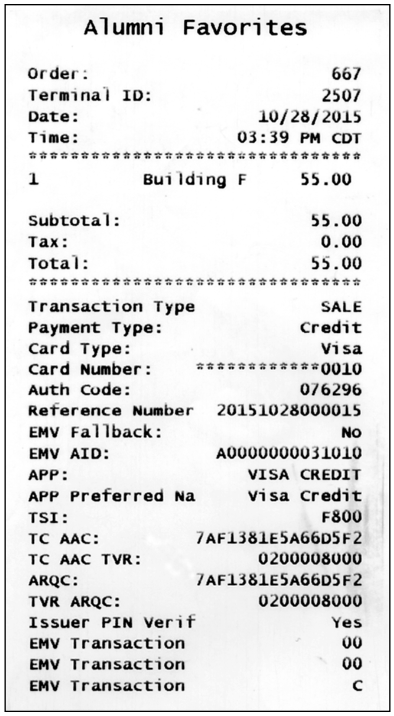
The attendant should ask the customer how they would like to receive a receipt. The following options are available:

- **A printed receipt**.
- **A text message receipt**.
- **An e-mail receipt**.

The attendant should then use the following instructions depending upon the type of receipt that the customer requested (and the types of receipts that the campus supports):

If the customer asks for a printed receipt ...

The attendant presses the Print button on the Receipt page. When the button is pressed, Marketplace Point-of-Sale prints a receipt on the printer that has been paired to the iOS device (using Bluetooth connectivity). The attendant tears off the receipt and hands it to the customer.



Alumni Favorites

Order: 667
Terminal ID: 2507
Date: 10/28/2015
Time: 03:39 PM CDT
****
1 Building F 55.00

Subtotal: 55.00
Tax: 0.00
Total: 55.00
****
Transaction Type SALE
Payment Type: Credit
Card Type: Visa
Card Number: ************0010
Auth Code: 076296
Reference Number 20151028000015
EMV Fallback: No
EMV AID: A0000000031010
APP: VISA CREDIT
APP Preferred Na Visa Credit
TSI: F800
TC AAC: 7AF1381E5A66D5F2
TC AAC TVR: 0200008000
ARQC: 7AF1381E5A66D5F2
TVR ARQC: 0200008000
Issuer PIN Verif Yes
EMV Transaction 00
EMV Transaction 00
EMV Transaction C

Book Store

Order: 1039
Terminal ID: 2513
Date: 10/20/2015
Time: 01:42 PM
----
1 Ancient Egypt 125.00

Subtotal: 125.00
Tax: 10.44
Total: 135.44

Transaction Type: SALE
Payment Type: Credit
Card Type: Visa
Card Number: ************0010
Auth Code: 096203
Reference Number: 20151020000001
EMV Fallback: No
EMV AID: A0000000031010
APP: VISA CREDIT
APP Preferred Name: Visa Credit
TSI: F800
TC AAC: B0FDC16DDDCC5AE3
TC AAC TVR: 0200008000
ARQC: B0FDC16DDDCC5AE3
TVR ARQC: 0200008000
Issuer PIN Verified: Yes
EMV Transaction Type: 00
EMV Transaction Response: 00
EMV Transaction Data Source: C

* 1 0 3 9 *

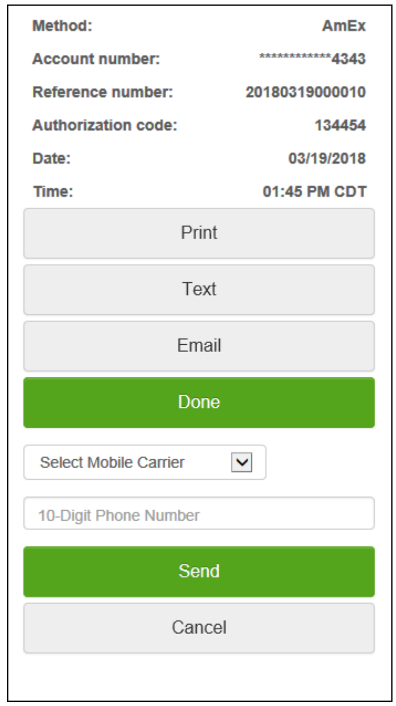
Example receipts: *The left example was printed on a Blue Bamboo PocketPOS P25i. The right example was printed on an Epson TM-P60II. Both receipt examples show extra fields that only appear for EMV transactions. Notice the bar code in the Epson TM-P60II example: the Epson printer is capable of printing bar codes, but the Blue Bamboo printer is not.*

Before receipts can be printed on the Epson TM-P60II or the Blue Bamboo PocketPOS P25i, the following setup must be completed: 1) Bluetooth connectivity must be established between the iOS device and the printer (as described in **"Point-of-Sale Mobile Devices" on page 9**) and 2) printer connectivity must be turned on within the Marketplace Point-of-Sale application (as described in **"Turning On Mobile Printing" on page 72**).

> ***Important!*** Terminal ID is included on printed receipts. Terminal ID can be used to determine which payment device was used to process a transaction. If you need to determine the payment device represented by a particular Terminal ID, contact your Marketplace administrator (who can look up information about the device by using the Device Manager page in the Marketplace Operations Center).

If the customer asks for a text message receipt ...

The attendant presses the Text Message button on the Receipt page. Two additional fields then appear.



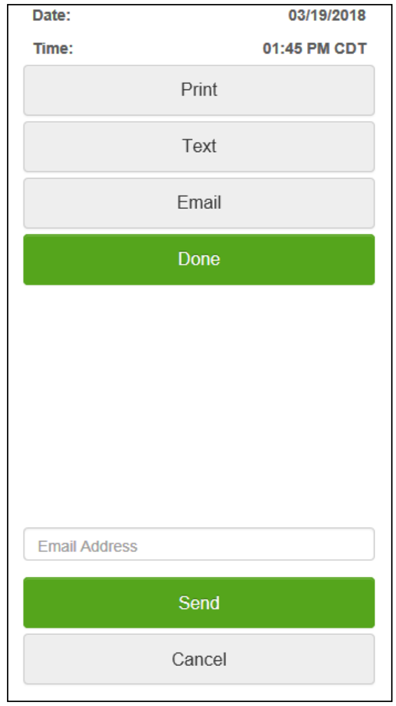
Text message fields on the Receipt page.

Ask the customer for the name of their mobile carrier, and then select this carrier from the Select Mobile Carrier dropdown menu. (In order to appear in this dropdown menu, a mobile carrier must be configured in the Marketplace Operations Center.) Then enter the customer's ten-digit phone number in the 10-Digit Phone Number field. Touch the Send button.

A message then appears on the Point-of-Sale Receipt page, confirming that that the text message was sent. (If the phone number is not formatted correctly, an error message will be displayed.)

If the customer asks for an e-mail message receipt ...

The attendant presses the Email button on the Receipt page. An additional field then appears.



The Email Address field on the Receipt page.

Ask the customer for their e-mail address and enter it in the Email Address field. Touch the Send button. A message then appears confirming that the e-mail message was sent.

Here is a sample e-mail receipt:

You have received this email from MallDevLab@touchnet.com in response to your Order.

Order Receipt

Mall Thank You Statement

Order ID:3910
Terminal Id:2505
Store:Union Store
Date/Time:September 8, 2014 1:32:40 PM CDT
Total:$23.92

Payment Information:
Payment Type:Debit Card
Card Number:************0002
Reference Number:20140908000003
Card Type:Visa

Item	Stock Number	Quantity	Unit Price	Detail Total
Union T-Shirt, Humongous: black	6342846_5	1	$22.00	$22.00
			Subtotal:	$22.00
			Tax:	$1.92
			Total:	$23.92

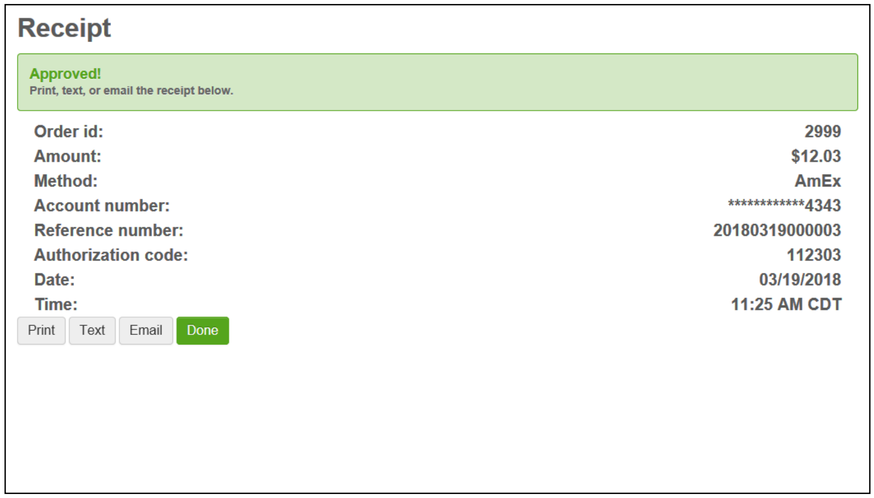
For questions, comments, or Order status, send email to MallDevLab@touchnet.com and refer to Order 3910.

A sample e-mail receipt.

Important! Terminal ID is included on e-mail receipts. Terminal ID can be used to determine which payment device was used to process a transaction. If you need to determine the payment device represented by a particular Terminal ID, contact your Marketplace administrator (who can look up information about the device by using the Device Manager page in the Marketplace Operations Center).

Providing Receipts with Countertop Devices

After the payment process is complete, the attendant can use the Marketplace Point-of-Sale application to provide the customer with a receipt. Receipt options are available from the Point-of-Sale Receipt page.



The Receipt page.

The attendant should ask the customer how they would like to receive a receipt. The following options are available:

- **A printed receipt**.
- **A text message receipt**.
- **An e-mail receipt**.

The attendant should then use the following instructions depending upon the type of receipt that the customer requested (and the types of receipts that the campus supports):

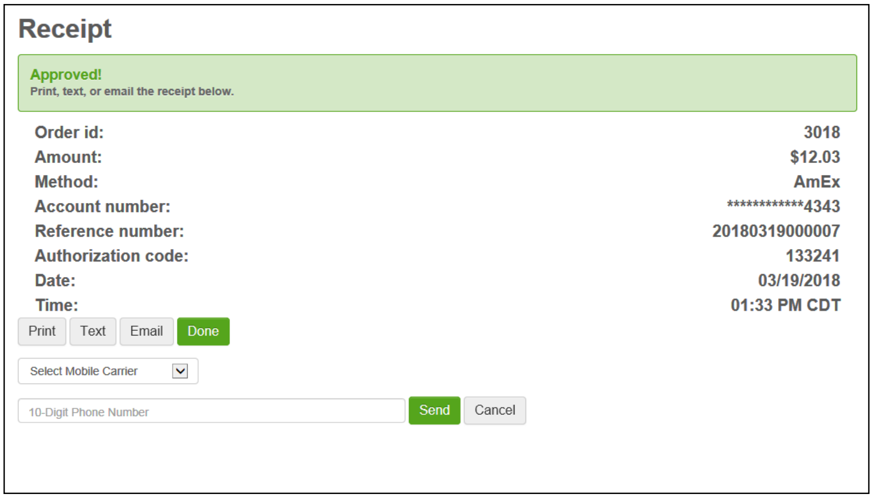
If the customer asks for a printed receipt ...

The attendant selects the Print button on the Receipt page. When the button is selected, Marketplace Point-of-Sale launches the Windows print dialog. The attendant selects the OK button. The receipt then printers. The attendant can hand off the printed receipt to the customer.

> ***Important!*** Terminal ID is included on printed receipts. Terminal ID can be used to determine which payment device was used to process a transaction. If you need to determine the payment device represented by a particular Terminal ID, contact your Marketplace administrator (who can look up information about the device by using the Device Manager page in the Marketplace Operations Center).

If the customer asks for a text message receipt ...

The attendant selects the Text Message button on the Receipt page. Two additional fields then appear.



Text message fields on the Receipt page.

Ask the customer for the name of their mobile carrier, and then select this carrier from the Select Mobile Carrier dropdown menu. (In order to appear in this dropdown menu, a mobile carrier must be configured in the Marketplace Operations Center.) Then enter the customer's ten-digit phone number in the 10-Digit Phone Number field. Select the Send button.

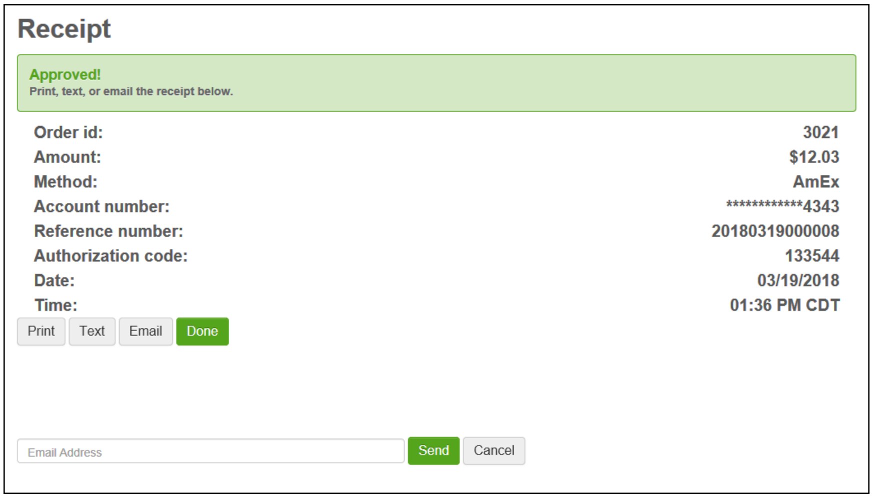
A message then appears on the Point-of-Sale Receipt page, confirming that that the text message was sent. (If the phone number is not formatted correctly, an error message will be displayed.)

Here is a sample text confirmation message:

> ([Order Confirmation]) Order ID: 4593. Reference number: 20160129000000. Total: $32.73.

If the customer asks for an e-mail message receipt ...

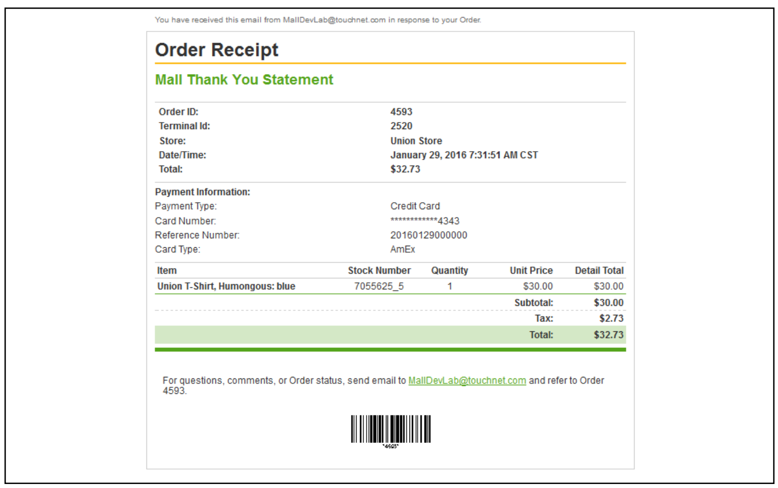
The attendant selects the Email button on the Receipt page. An additional field then appears.



The Email Address field on the Receipt page.

Ask the customer for their e-mail address and enter it in the Email Address field. Select the Send button. A message then appears confirming that the e-mail message was sent.

Here is a sample e-mail receipt:



A sample e-mail receipt.

> ***Important!*** Terminal ID is included on e-mail receipts. Terminal ID can be used to determine which payment device was used to process a transaction. If you need to determine the payment device represented by a particular Terminal ID, contact your Marketplace administrator (who can look up information about the device by using the Device Manager page in the Marketplace Operations Center).

6.10 Order Search & Refunds

The Point-of-Sale application provides order search functionality that allows attendants to locate orders for which payments have already been processed. If necessary, refunds can be processed.

Order search can be initiated when a Point-of-Sale attendant enters an order search criteria manually in the Point-of-Sale application or when a Point-of-Sale attendant scans a bar code that was printed on a Point-of-Sale receipt.

Note: The Epson TM-P60II printer prints bar codes on receipts; however, the Blue Bamboo PocketPOS P25i does not.

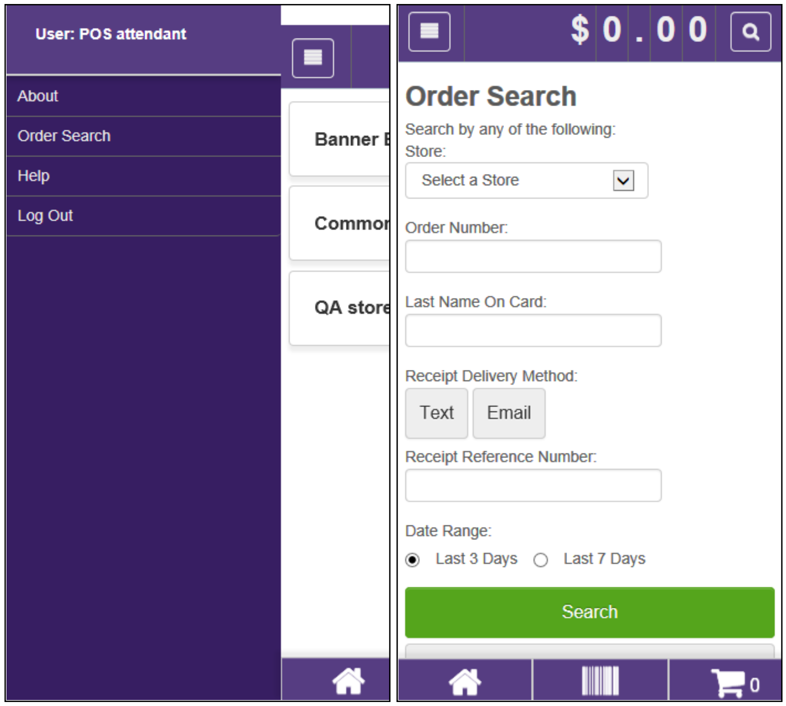
When an order is located, the order details can be viewed. When the order details are viewed, the attendant can choose to refund/return one or more items in the order.

To issue a refund, the user must have the Point-of-Sale attendant user role AND the Point-of-Sale attendant refunder user role. A user does not need the Point-of-Sale attendant refunder role in order to search for an order or to view details for that order. However, to complete the refund process, the user must have the attendant refunder role (or a user with the attendant refunder role must be available to validate the refund request by entering their username and password).

Entering a Search Criteria

Follow these instructions to search for an order by manually entering a search criteria:

1. Tap the menu icon in the upper left corner of the the Point-of-Sale application. The left menu slides out. This menu contains a button for "Order Search."
2. Tap the Order Search button. The Order Search page now appears.



Left: *The Order Search option can be found in the Left Menu.*
Right: *The Order Search page provides several search fields.*

3 Enter a search criteria The following criteria fields are available for order searches:

- **Select a Store** (only appears if the attendant has access to more than one store)
- **Order #**
- **Last Name On Card**
- **Receipt Delivery Method: Text Message** (This search method can only be used if the receipt was delivered via text message.)
- **Receipt Delivery Method: Email** (This search method can only be used if the receipt was delivery via e-mail message.)
- **Receipt Reference #**

Note: Order search supports the use of multiple criteria. It also supports partial entries.

4 Select a date range. The following choices are available:

- **Last 3 days** (default)
- **Last 7 days**

Note: If an order is more than seven days old, it can only be located with the Point-of-Sale application if the customer can provide the order number. Order number searches are not limited by the date range selection.

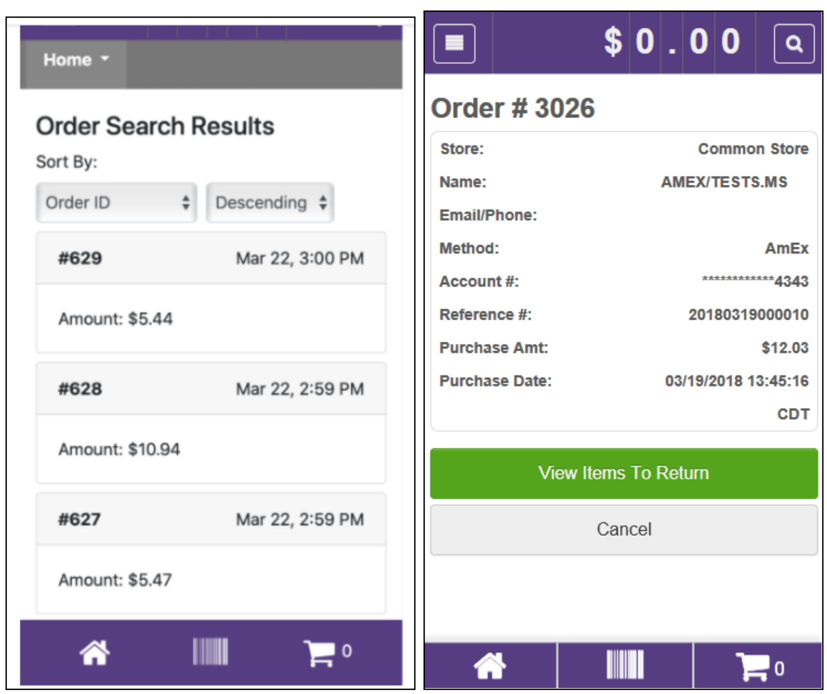
5 Tap the Search button. The Order Search Results page displays.

The newest orders appear at the top of the page. The following order information displays:

- **Order ID**
- **Order date and time** (The date and time the order was taken.)
- **Amount** (The amount displayed represents the amount available for refunds. If a refund has already taken place, this amount represents the total for the order less the amount of the refund.)
- **Name/Email/Phone** (The information displayed in this column depends on how the receipt was delivered to the customer.)

You can sort the displayed orders by tapping the Descending order button. column headers. You can sort by either ascending order or descending order.

Note: The maximum number of orders displayed in the search results is 200.



Left: *The Order Search Results page lists all orders that meet the search criteria.* ***Right:*** *After tapping an order on the Order Search Results page, the Order Details page is displayed.*

6 Tap the desired order. The Order Details page displays.

The following fields display on the Order Details page:

- **Store**
- **Name**
- **Email/Phone** (The information displayed in this field depends on how the receipt was delivered to the customer.)
- **Method**
- **Account #** (The last four digits of the payment card are displayed. The other digits are masked with asterisks.)
- **Reference #**
- **Purchase Amount**
- **Purchase Date** (includes date, time, and time zone)

If a refund/return has been processed for this order, the order information will also include the following information:

- **Return Amount**
- **Return Date** (includes date, time, and time zone)

7 If the customer would like a refund, proceed to **"Issuing a Refund" on page 163**.

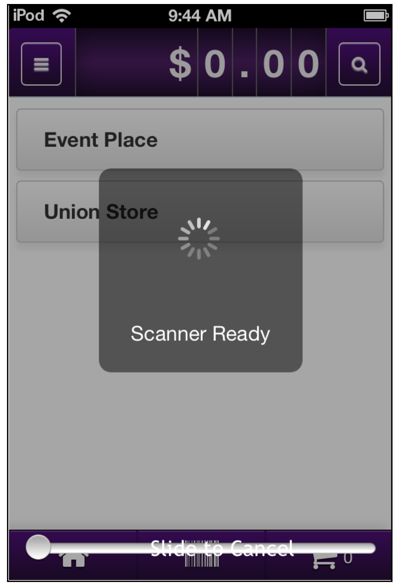
Scanning a Receipt Bar Code with a Mobile Device

If a customer has their receipt and the receipt contains a bar code, the Point-of-Sale attendant can use the Ingenico iSMP Companion to scan the bar code and thus navigate directory to the Order Details page in the Point-of-Sale application. (The Ingenico iCMP device does not have bar code scanner.)

Note: The Epson TM-P60II printer is capable of printing bar codes on receipts, but the Blue Bamboo PocketPOS P25i printer is not.

Follow these instructions to search for an order by scanning a bar code:

1 Tap the scan/bar code icon in the bottom navigation bar. (Or on an iPad, tap the Scan icon to the right of the search field.) The Scanner Ready window appears. The Ingenico device's scanner is now ready.



The Scanner Ready panel.

2 Point the top of the Ingenico device at a bar code printed on a Point-of-Sale receipt.

3 Press the scanner activation key on either side of the Ingenico device.

When the activation key is pressed, the Ingenico device emits a wide, red laser beam.

4 Point the top of the Ingenico device at a bar code on a Point-of-Sale receipt.


Book Store

Order: 1039
Terminal ID: 2513
Date: 10/20/2015
Time: 01:42 PM

1 Ancient Egypt 125.00

Subtotal: 125.00
Tax: 10.44
Total: 135.44

Transaction Type: SALE
Payment Type: Credit
Card Type: Visa
Card Number: ************0010
Auth Code: 096203
Reference Number: 20151020000001
EMV Fallback: No
EMV AID: A0000000031010
APP: VISA CREDIT
APP Preferred Name: Visa Credit
TSI: F800
TC AAC: B0FDC16DDDCC5AE3
TC AAC TVR: 0200008000
ARQC: B0FDC16DDDCC5AE3
TVR ARQC: 0200008000
Issuer PIN Verified: Yes
EMV Transaction Type: 00
EMV Transaction Response: 00
EMV Transaction Data Source: C

* 1 0 3 9 *

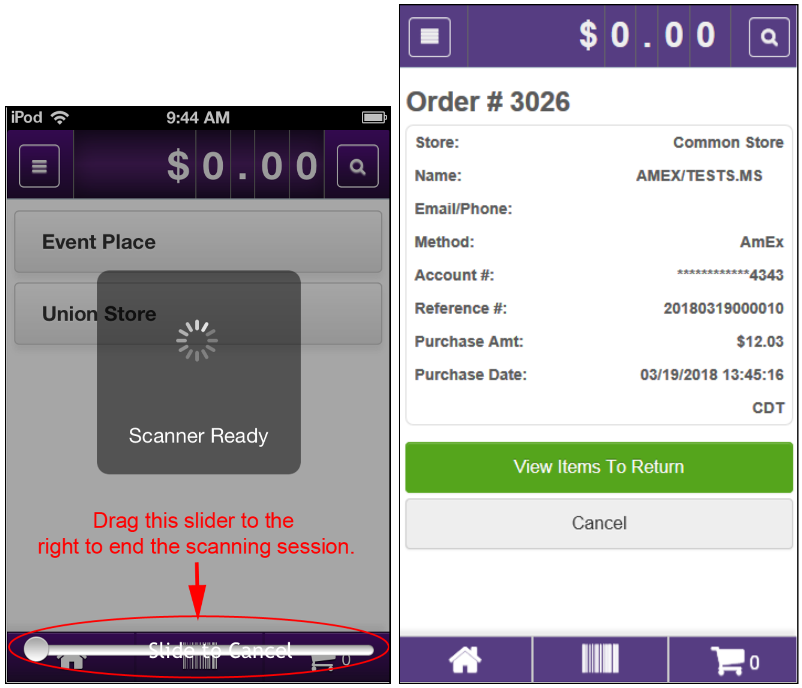
A sample receipt with a bar code.

5 Adjust the Ingenico device in relation to the receipt bar code so that the red laser covers the entire width of the bar code.

Continue to scan the bar code until the Ingenico device beeps. The beep indicates the bar code has been successfully read.

Note: If you do not immediately hear a beep, try varying the angle of the Ingenico device to the bar code or the distance between the Ingenico device and the bar code.

6 Slide the scanner bar to the right. The Scanner Ready page will go away and the Order Details page will appear.



Left: *Use this slider to stop scanning.* ***Right:*** *The Order Details page.*

The following fields appear on the Order Details page:

- **Store**
- **Name**
- **Email/Phone** (The information displayed in this field depends on how the receipt was delivered to the customer.)
- **Method**
- **Account #** (The last four digits of the payment card are displayed. The other digits are masked with asterisks.)
- **Reference #**
- **Purchase Amount** (includes any applicable taxes)
- **Purchase Date** (includes date, time, and time zone)

And if a refund/return has been processed for this order, the order information will also include the following information:

- **Return Amount** (includes applicable taxes)
- **Return Date** (includes date, time, and time zone)

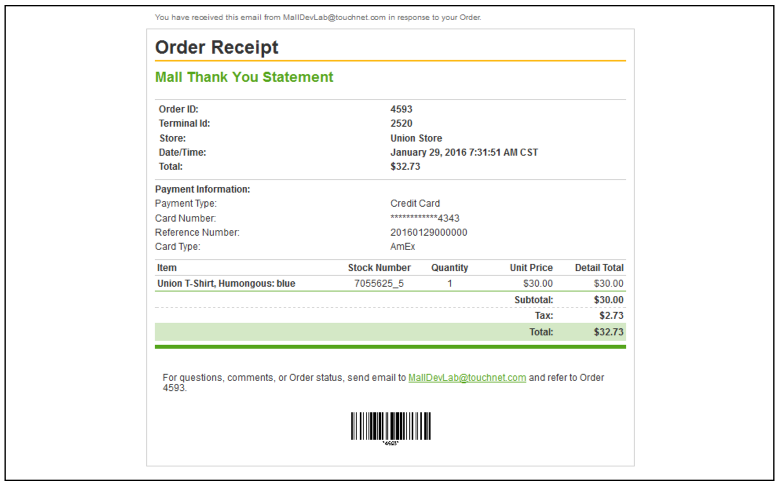
7 If the customer would like a refund, proceed to **"Issuing a Refund" on page 163**.

Scanning a Receipt Bar Code with a Countertop Device

If a customer has their order receipt and the receipt contains a bar code, the Point-of-Sale attendant can scan the bar code and thus navigate directly to the Order Search Results page in the Point-of-Sale application.

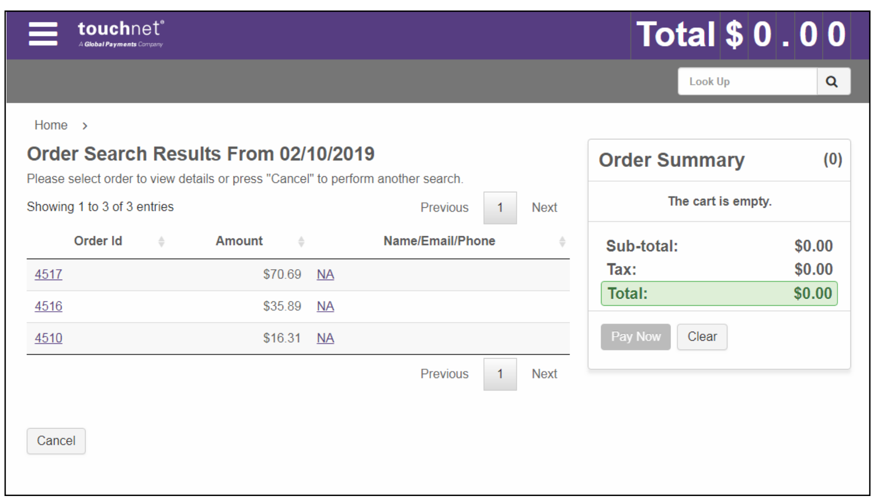
Follow these instructions to search for an order by scanning a bar code:

1 Point the scanner at the order bar code on a Point-of-Sale receipt and press the scanner's activation key. (The bar code is located at the bottom of the printed order receipt.)



A sample printed receipt.

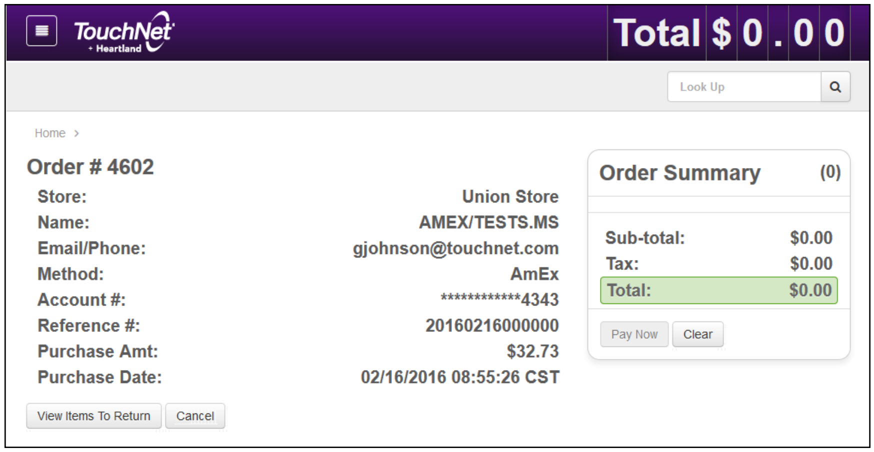
After the order bar code is scanned, the Order Search Results page then appears.



The Order Search Results page appears when a receipt bar code is scanned.

Note: The Point-of-Sale application can be on any page when the bar code scanner's activation key is pressed and the order receipt bar code is scanned. The result is the same: the Order Search Results page will then appear with the order listed.

2 To view the details for an order, click the row with the same Order ID as the bar code. The Order Details page then appears.



To return items, select the View Items to Return button.

The following fields appears on the Order Details page:

- **Store**
- **Name**
- **Email/Phone** (The information displayed in this field depends on how the receipt was delivered to the customer.)
- **Method** (The payment method used.)
- **Account #** (The last four digits of the payment card are displayed. The other digits are masked with asterisks.)
- **Reference #**
- **Purchase Amount**
- **Purchase Date** (includes date, time, and time zone)

If a refund/return has been processed for this order, the order information will also include the following information:

- **Return Amount**
- **Return Date** (includes date, time, and time zone)

3 If the customer would like a refund, proceed to **"Issuing a Refund" on page 163**.

Issuing a Refund

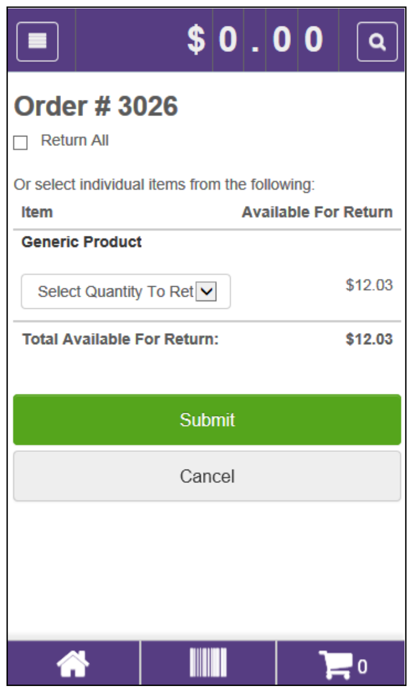
After locating an order that has already been processed with the Point-of-Sale application, a user with the Point-of-Sale attendant user role AND the Point-of-Sale attendant refunder user role can issue a refund or process a return (or a user with the attendant refunder role must be available to validate the refund request by entering their username and password).

> ***Important!*** To issue a refund, the user must have the Point-of-Sale attendant user role AND the Point-of-Sale attendant refunder user role

A user does not need the Point-of-Sale attendant refunder role in order to search for an order or to view details for that order. However, to complete the refund process, the user must have the attendant refunder role.

Follow these instructions to issue a refund (or to process a return):

1. Locate an order as described in **"Issuing a Refund" on page 163** or **"Issuing a Refund" on page 163**
2. While viewing the Order Details page for an order, tap the "View Items to Return" button. The Order Return page then appears for the selected order.



The Order Return page.

This page contains the following fields and functionality:

- **Return All** — Select this checkbox to return all items in the order.
- **Select Quantity To Return** — This drop-down list appears for each item ordered. You can use the drop-down list to select the quantity of items that will be returned.
- **Total Available For Return** — This field displays the total amount available for refund, including any applicable taxes.

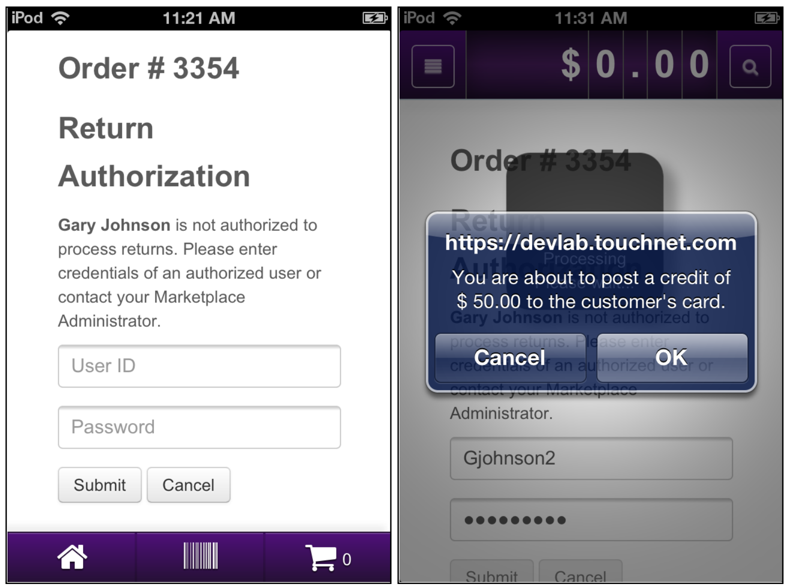
Note: If all items in the order have been returned, a message is displayed: "Ordered quantity of [#] has previously been returned.

3 Select either the Return All checkbox to return all the items in the order or use the Select Quantity To Return drop-down list to select a quantity to return.

4 Tap the Submit button.

If the user has the Point-of-Sale attendant refunder role ...
A message appears confirming that you want to process a refund. Go to Step 6.

If the user does not have the Point-of-Sale attendant refunder role ...
The following message appears in a pop-up prompt: "Return Authorization. [Username] is not authorized to process returns. Please enter credentials of an authorized user or contact your Marketplace Administrator." Go to Step 5.

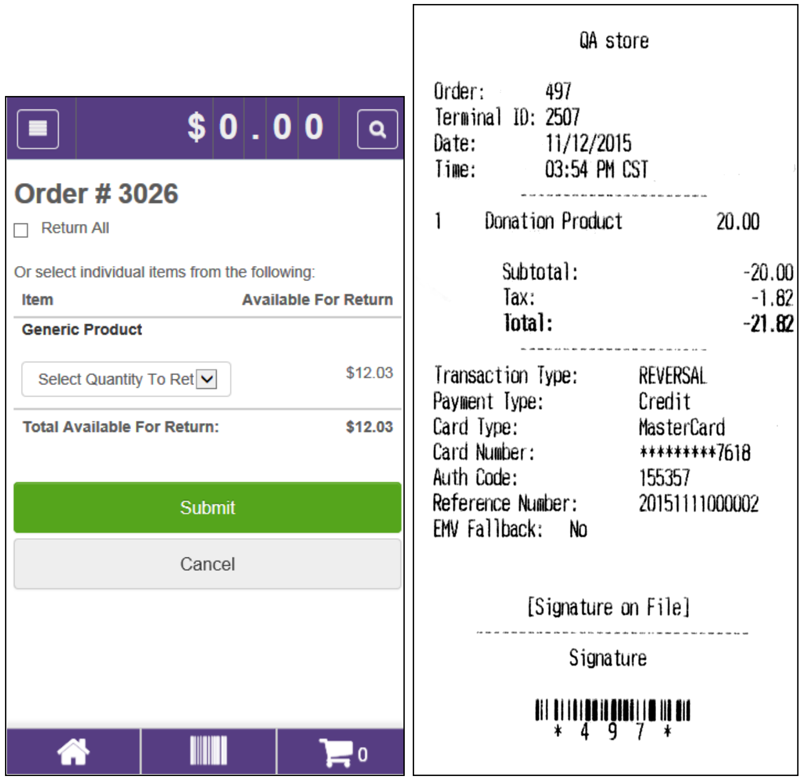


Left: *The Return Authorization page appears if the refund process is initiated by a user who does not have the attendant refunder user role.* ***Right:*** *Before a refund is processed, this prompt appears.*

5 In order to process the refund, a user with the Point-of-Sale attendant refunder user role must now enter their username, password, and tap the Submit button.

6 The following warning message appears: "You are about to post a credit to the customer's card. Do you wish to continue?"

7 Confirm that you would like to process the refund by tapping the OK button. The Return Receipt page then appears.



Left: *The Return Receipt page.* ***Right:*** *A sample receipt for a refund.*

8 Provide the customer with the receipt options, as described in **"Providing Receipts to Customers" on page 146**.

Notes on Refunds

The following conditions and limitations apply to refunds and returns that are processed with the Point-of-Sale application:

- Refunds can also be processed with the Marketplace Operations Center. To process a refund with the Marketplace Operations Center, the user needs the "fulfiller with refund/cancel rights" user role for the store in question.
- Any refunds processed with the Point-of-Sale application will be communicated to the general ledger system.
- All items returned with with the Point-of-Sale application will be placed back into the available inventory for the store in question.
- Refunds/returns can only be processed with the Point-of-Sale application for items that were purchased with the Point-of-Sale application (i.e., refunds/returns cannot be processed for transactions that were processed with Marketplace uStores or Mobile Marketplace).
- Refunds/returns are not allowed for PIN debit transactions and cannot be processed with either the Point-of-Sale application or the Marketplace Operations Center. If an attendant views the order details

for an order that was processed with PIN debit, the following message appears on this page: "This transaction was paid using PIN debit. Returns must be handled at the business office."

- A user with the Point-of-Sale attendant role can only process refunds with the Point-of-Sale application for stores in which they have also been granted the Point-of-Sale attendant refunder role.

7.0 Point-of-Sale Configuration in the Marketplace Operations Center

This section provides a comprehensive discussion of all Point-of-Sale functionality in the Marketplace Operations Center. For a quick introduction to Point-of-Sale functionality, see **"Using the Marketplace Operations Center" on page 39**.

About Point-of-Sale Configuration

Many of the same settings in the Marketplace Operations Center apply for all three Marketplace shopping applications: uStores, Mobile Marketplace, and Marketplace Point-of-Sale. The base settings for product names, prices, options, and modifiers apply regardless of the web application.

Several settings in the Marketplace Operations Center are specific to Point-of-Sale and must be configured separately. Here are some brief examples of configuration that is specific to Point-of-Sale:

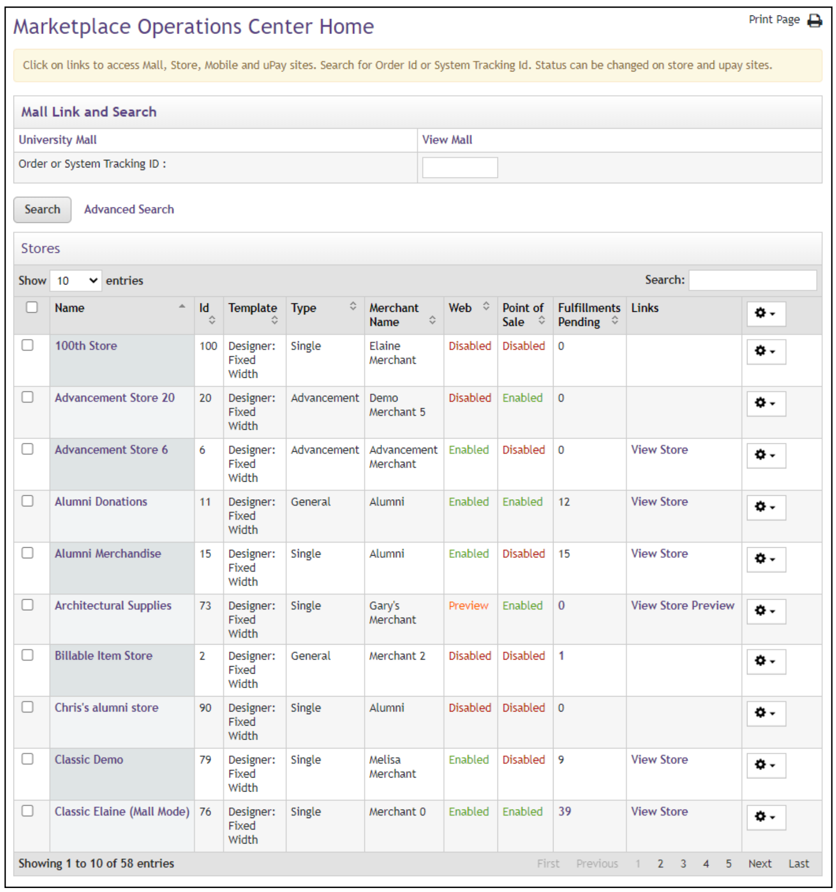
- **Host system account**—Each Marketplace merchant must be configured to use a new Payment Gateway host system account to be used for Point-of-Sale transactions. This host system account must be different than the host system account used by uStores, uPay, and Mobile Marketplace. For more information, see **"Merchant Configuration" on page 171**.
- **Payment methods**—Point-of-Sale does not use the payment methods that are selected in the product settings. Instead, the payment methods for Point-of-Sale must be selected per store, and these payment methods apply to all products in a store. For more information see **"Store Point-of-Sale Settings" on page 175**.
- **Tax address info**—When determining the applicable taxes for a transaction, Point-of-Sale uses an address that is configurable for each store. For more information see **"Store Point-of-Sale Settings" on page 175**.
- **Point-of-Sale attendant user role**—The Point-of-Sale attendant user role must be granted to any user who will process Point-of-Sale transactions. For more information, see **"Point-of-Sale Users" on page 177**.
- **Featured Items category**—A new product category is available for Point-of-Sale. This category is named "Featured Items." This category works with the Point-of-Sale web application to make products in this category easy to locate. For more information, see **"Product Categories" on page 182**.
- **Device Manager**—Functionality is built into Marketplace that allows you to manage device information and track the handoff of devices. For more information, see **"Device Manager" on page 188**.

In addition to these examples, Marketplace also provides new functionality for enabling Point-of-Sale stores and Point-of-Sale products.

The following sections provide descriptions of all the Operations Center fields that affect Point-of-Sale.

7.1 The Marketplace Operations Center Home Page

When a Marketplace user logs in (who has user roles for one or more stores), the Marketplace Operations Center home page displays a list of all stores. For each store, the "Point of Sale" column contains a single word—Enabled or Disabled—that indicates the store's status.


Marketplace Operations Center Home
Print Page
Click on links to access Mall, Store, Mobile and uPay sites. Search for Order Id or System Tracking Id. Status can be changed on store and upay sites.

Mall Link and Search

University Mall	View Mall
Order or System Tracking ID :	

Search   Advanced Search

Stores

Show 10 entries   Search:

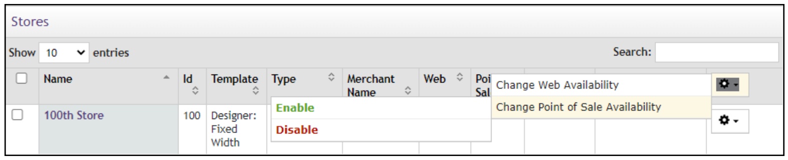
Name	Id	Template	Type	Merchant Name	Web	Point of Sale	Fulfillments Pending	Links
100th Store	100	Designer: Fixed Width	Single	Elaine Merchant	Disabled	Disabled	0	
Advancement Store 20	20	Designer: Fixed Width	Advancement	Demo Merchant 5	Disabled	Enabled	0	
Advancement Store 6	6	Designer: Fixed Width	Advancement	Advancement Merchant	Enabled	Disabled	0	View Store
Alumni Donations	11	Designer: Fixed Width	General	Alumni	Enabled	Enabled	12	View Store
Alumni Merchandise	15	Designer: Fixed Width	Single	Alumni	Enabled	Disabled	15	View Store
Architectural Supplies	73	Designer: Fixed Width	Single	Gary's Merchant	Preview	Enabled	0	View Store Preview
Billable Item Store	2	Designer: Fixed Width	General	Merchant 2	Disabled	Disabled	1	
Chris's alumni store	90	Designer: Fixed Width	Single	Alumni	Disabled	Disabled	0	
Classic Demo	79	Designer: Fixed Width	Single	Melisa Merchant	Enabled	Disabled	9	View Store
Classic Elaine (Mall Mode)	76	Designer: Fixed Width	Single	Merchant 0	Enabled	Enabled	39	View Store

Showing 1 to 10 of 58 entries   First Previous 1 2 3 4 5 Next Last

The "Point of Sale" column indicates which stores are enabled for Point-of-Sale.

Marketplace users can change the availability of stores for which they have the store manager user role.

To change the availability of an individual store, mouse over the Gear icon in the far right column. A flyout menu appears.



The Gear flyout menu allows you to change the availability of stores.

Choose Change Point-of-Sale Availability > Available.

To change the availability of multiple stores, select the checkbox (in the far left column) for each store. Then mouseover the Gear icon in the column header. A flyout menu appears. Choose Change Point-of-Sale Availability > Available.

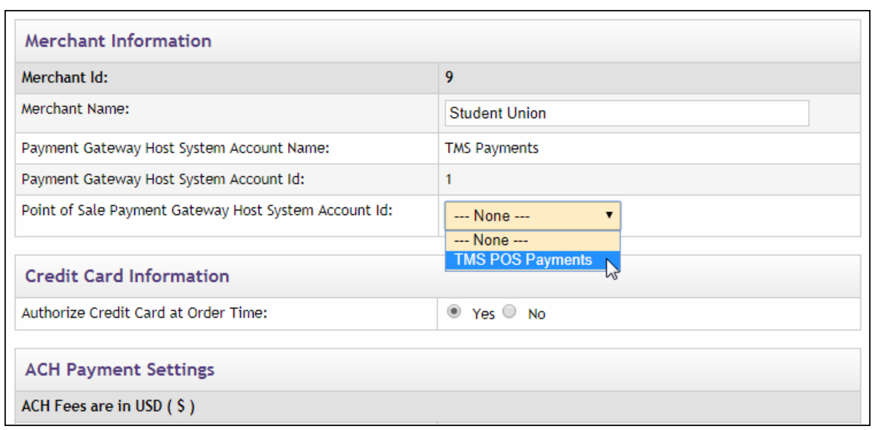
7.2 Merchant Configuration

Before a store can use Point-of-Sale, its Marketplace merchant must be configured for a Payment Gateway host system account that has been configured for "card present" transactions. After the host system account has been configured, as described in **"Payment Gateway Configuration" on page 37**, go to the Merchant Settings page.

To display the Merchant Settings page ...

Navigate to Marketplace Home > [merchant name] > Settings

The Merchant Settings page then appears.



The Merchant Settings page shows the Payment Gateway host system accounts used by the merchant's stores.

Merchant Information

Payment Gateway Host System Account Name

This field displays the Payment Gateway host system account that will be used for uStores, uPay, and Mobile. These applications all use "card not present" transactions. In contrast, Point-of-Sale uses "card present" transactions, so it cannot use the same Payment Gateway host system account as the other Marketplace web applications. Therefore, the Point-of-Sale Payment Gateway Host System Account ID field is necessary.

Note: The Payment Gateway Host System Account Name displayed on the Marketplace Merchant Settings screen is for informational purposes only.

Point-of-Sale Payment Gateway Host System Account ID

This field displays the host system account that will be used by Point-of-Sale. This Payment Gateway host system account must be different than the one used for uStores, uPay, and Mobile. Marketplace will not allow the same host system account to be used for both host system account fields. The dropdown list for Point-of-Sale Payment Gateway Host System Account ID will not display the host system account already selected for the Payment Gateway Host System Account Name field.

7.3 Store and Product Settings

Before a store and its products are available for sale with the Point-of-Sale web application, the store and its products must be configured for Point-of-Sale.

This section describes all the store and product settings in the Marketplace Operations Center that involve Point-of-Sale.

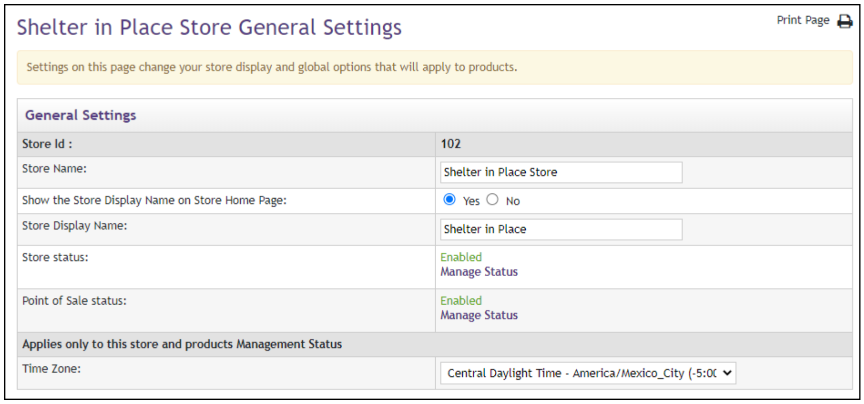
Store General Settings

The Store General Settings page contains many settings that are used by uStores, Mobile, and Point-of-Sale—such as Store Name, Store Contact Email Address, Email Messages, Admin Settings, Storefront Tile Images, and the Return Policy; however, the only functionality on this page that exists solely for Point-of-Sale is the Point-of-Sale Status row.

To display the Store General Settings page ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > General

The Store General Settings page then appears.



"Point-of-Sale status" displays whether the store is "ENABLED" or "DISABLED."

The "Point of Sale status" field has two possible values—ENABLED or DISABLED—and it displays a link named "Manage Status" that when clicked displays the Store Status Management page (and this page allows the store status to be changed).

For more about changing the status of a store, see **"Store Status Management" on page 173**.

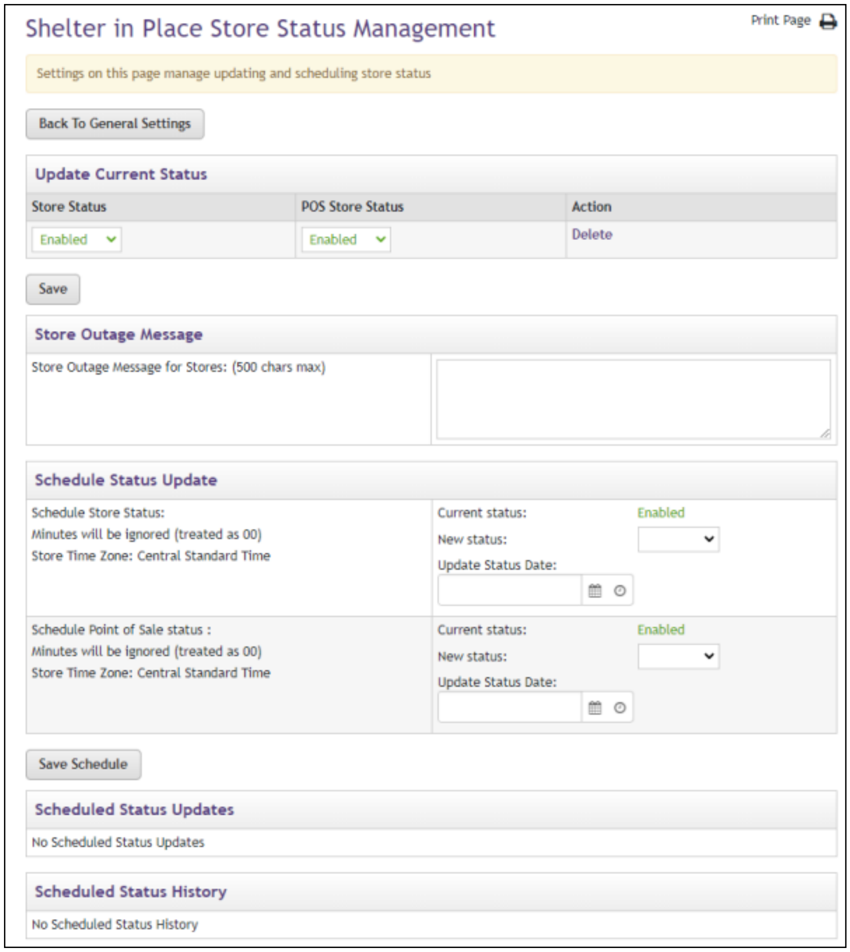
Store Status Management

The Store Status Management page determines whether stores are available for taking orders, including whether stores are available for Point-of-Sale.

To display the Store Status Management page ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Status Management

The Store Status Management page then appears.



You can schedule a Point-of-Sale status change for a store.

Update Current Status

The Update Current Status section allows you to immediately change the status of a store. Only two status values are available in the POS Store Status dropdown list—DISABLED and ENABLED.

Schedule Status Update

You can schedule a Point-of-Sale status change for a store by following these instructions:

1. Find the "Schedule Point-of-Sale status" row in the Schedule Status Update section.
2. Select a store status from the "New status" dropdown list.
3. Click the calendar icon in the "Update Status Date" field and select the desired date from the calendar widget. If you enter a date, you must use this format: mm/dd/yy. For example, enter October 29, 2014 as **10/29/14**.

4 Click the clock icon to select the desired time from the dropdown list.

5 Choose the Save Schedule button.

Scheduled Status Updates

Once a status update has been scheduled, it appears in the Scheduled Status Updates table. The "Update" column will show POS for any scheduled status changes for the Point-of-Sale application.

Scheduled Status Updates

Update	Scheduled Status	Scheduled Date	Scheduled Hour	Action
POS	ENABLED	10/31/13	8:00	Delete

Scheduled status updates appear in this table.

You can delete a schedule status update by selecting the Delete link in the Action column.

Scheduled Status History

Once the scheduled date and time have passed, the status-change record moves from the Scheduled Status Updates table to the Scheduled Status History table.

Any history items can be deleted by clicking the Delete link in the Action column.

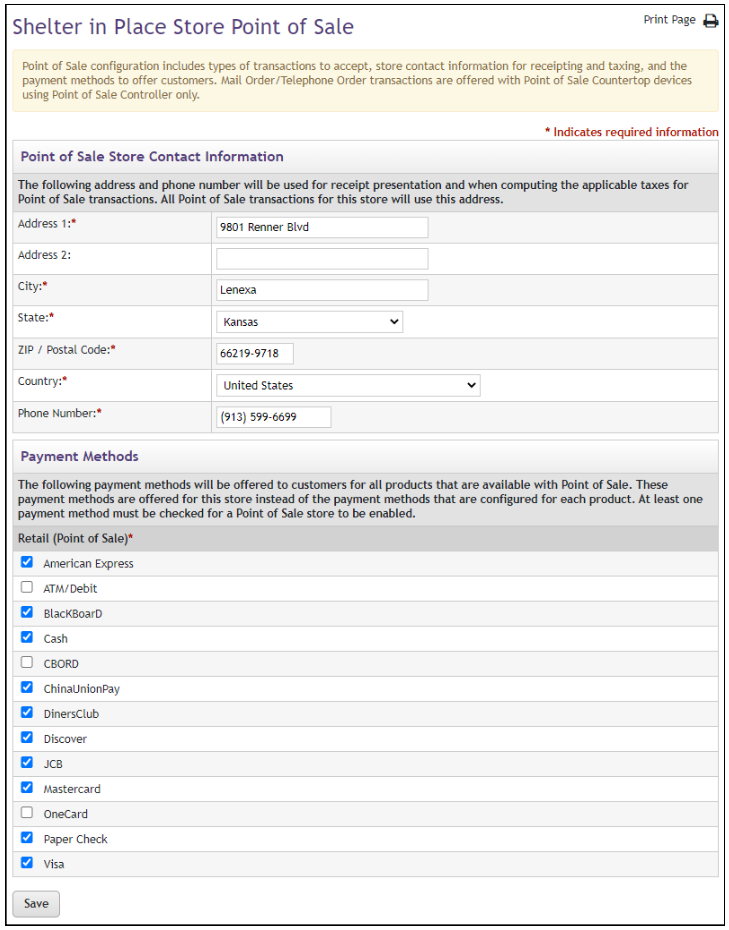
Store Point-of-Sale Settings

The Store Point-of-Sale page contains settings that are unique for Point-of-Sale.

To display the Store Point-of-Sale page ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Point-of-Sale

The Store Point-of-Sale page then appears.



Point-of-Sale has its own tax address info and payment methods.

Point of Sale Store Contact Information

With uStores and Mobile, the contact information is used for receipt and tax purposes. Taxes are computed based on the shipping address. However, with Point-of-Sale, no shipping takes place. The item is picked up at the time of the purchase. Therefore, in order to figure taxes on Point-of-Sale transactions, Marketplace needs an address that specifies where transactions will take place. For Point-of-Sale transactions, this address is typically the location where transactions will be processed with the Point-of-Sale devices. Be sure to keep this address up-to-date. The store manager can enter this address in the Point of Sale Store Contact Info fields.

Payment Methods

When you create a product in the Marketplace Operations Center, you can select which payment methods are accepted for that product. However, the payment methods that you select on the Product Settings page do NOT apply to Point-of-Sale transactions. Instead, for Point-of-Sale, the payment methods are chosen on the Point-of-Sale Settings page, and these payment methods apply to ALL products for this store.

Be sure to select the checkboxes for all transaction types that should be available for Point-of-Sale transactions for this store, and then click the Save button.

If you would like to accept debit cards, be sure to select ATM/Debit as an allowed payment method. If ATM/Debit is not listed, contact your Payment Gateway admnistrator.

> ***Important!*** You must assign complete the contact information and one or more Point-of-Sale payment methods before you can enable a store for Point-of-Sale.

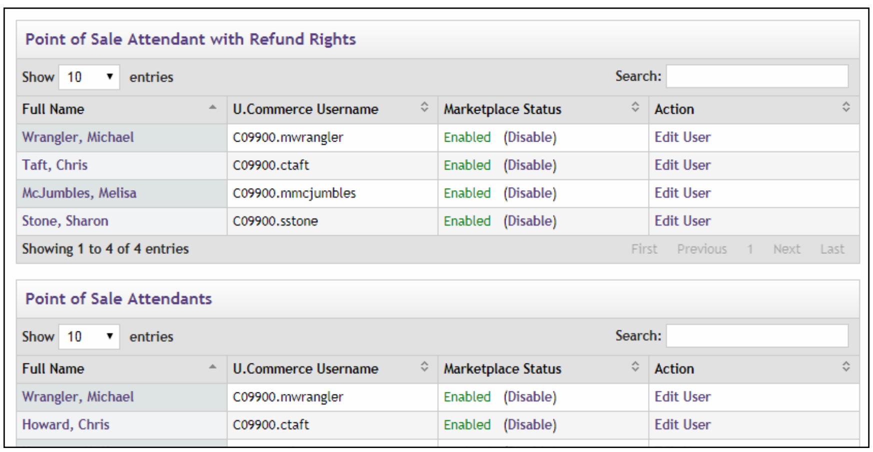
Point-of-Sale Users

For a store to sell products with the Marketplace Point-of-Sale application, the Point-of-Sale attendant user role must have been assigned by a store manager (or a merchant manager). A store can have multiple Point-of-Sale attendants. Point-of-Sale attendants can be assigned on the Store Users page.

To display the Store Users page ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Users

The Store Users page then appears.



Point of Sale Attendant with Refund Rights

Show 10 entries Search:

Full Name	U.Commerce Username	Marketplace Status	Action
Wrangler, Michael	C09900.mwrangler	Enabled (Disable)	Edit User
Taft, Chris	C09900.ctaft	Enabled (Disable)	Edit User
McJumbles, Melisa	C09900.mmcjumbles	Enabled (Disable)	Edit User
Stone, Sharon	C09900.sstone	Enabled (Disable)	Edit User

Showing 1 to 4 of 4 entries First Previous 1 Next Last

Point of Sale Attendants

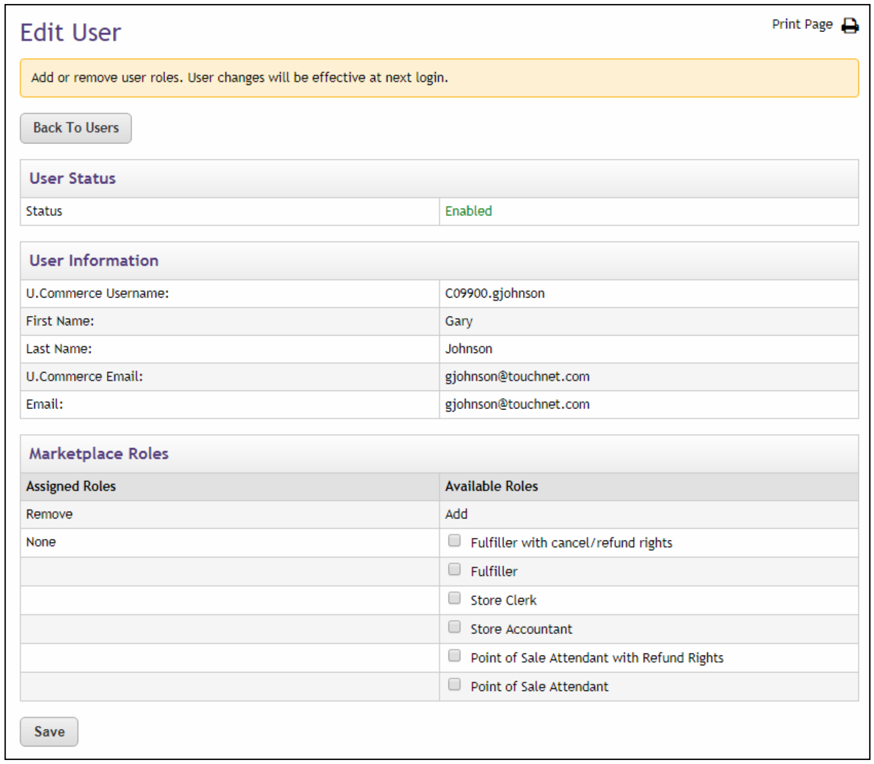
Show 10 entries Search:

Full Name	U.Commerce Username	Marketplace Status	Action
Wrangler, Michael	C09900.mwrangler	Enabled (Disable)	Edit User
Howard, Chris	C09900.ctaft	Enabled (Disable)	Edit User

All Point-of-Sale attendants for a given store are displayed on the Store Users page.

Point-of-Sale Attendants

Review the Point-of-Sale Attendants section to determine if any Point-of-Sale Attendants have been assigned. If none have been assigned, you can assign the Point-of-Sale Attendant role to any user displayed on this page. Simply click the Edit User link in the Action column for the user to whom you would like to grant the Point-of-Sale attendant role. The Edit User page then appears.



The Point-of-Sale attendant role can be assigned on the Edit User page.

In the Marketplace Roles section, the Available Roles column displays all the available roles. Select the Point-of-Sale Attendant checkbox and then click the Save button. (Subsequently, the selected role moves to the Assigned Roles column.)

If the user to which you would like to grant the Point-of-Sale attendant role has NOT been previously granted a role for this store, the user will not be listed on the Store Users page. In this case, click the View U.Commerce Users button near the top of the Store Users page. A complete list of all U.Commerce users will then appear on the U.Commerce Users page. Select the Edit User link for the user to whom you would like to grant the Point-of-Sale attendant user role. Select the Point-of-Sale Attendant checkbox and then click the Save button.

Note: If the desired user does not appear on the U.Commerce Users page, then that user has not yet been added to U.Commerce User Management. See your U.Commerce user administrator to get this user added to U.Commerce.

Point-of-Sale Attendant Refunder

If a user also needs the ability to refund orders, the user must have been granted both the Point-of-Sale attendant role *and* the Point-of-Sale attendant refunder user role. (The Point-of-Sale attendant refunder role *alone* does not allow the user to log in to the Point-of-Sale application.)

You can assign the Point-of-Sale attendant refunder user role to any user displayed on the Store Users page. Simply click the Edit User link in the Action column for the user to whom you would like to grant the Point-of-Sale attendant role. The Edit User page then appears.

In the Marketplace Roles section, the Available Roles column displays all the available roles. Select the Point-of-Sale Attendant Refunder checkbox and then click the Save button. (Subsequently, the selected role moves to the Assigned Roles column.)

If the user to which you would like to grant the Point-of-Sale attendant refunder role has NOT been previously granted a role for this store, the user will not be listed on the Store Users page. In this case, click the View U.Commerce Users button near the top of the Store Users page. A complete list of all U.Commerce users will then appear on the U.Commerce Users page. Select the Edit User link for the user to whom you would like to grant the Point-of-Sale attendant refunder user role. Select the Point-of-Sale Attendant checkbox and then click the Save button.

Note: If the desired user does not appear on the U.Commerce Users page, then that user has not yet been added to U.Commerce User Management. See your U.Commerce user administrator to get this user added to U.Commerce.

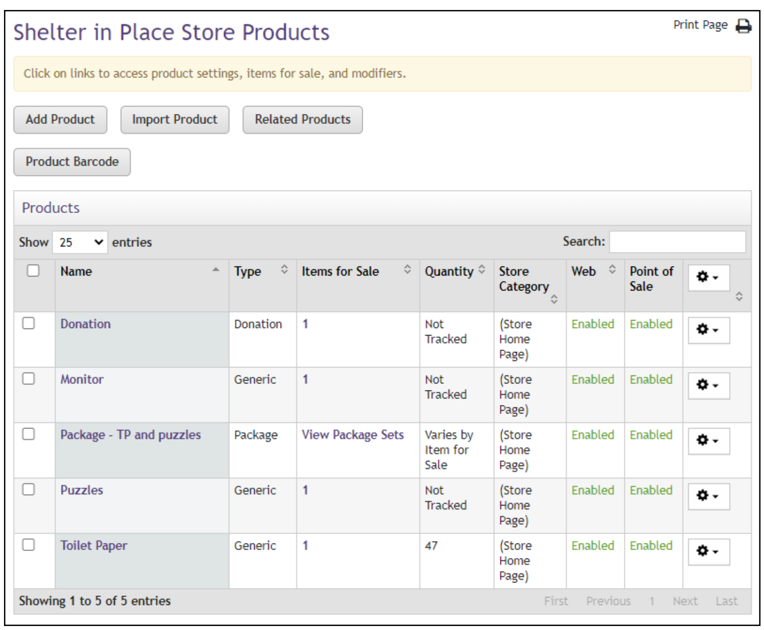
Managing Products

With Point-of-Sale, a new column is added to the Store Products page.

To view the Store Products page ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Products

The Store Products page then appears.

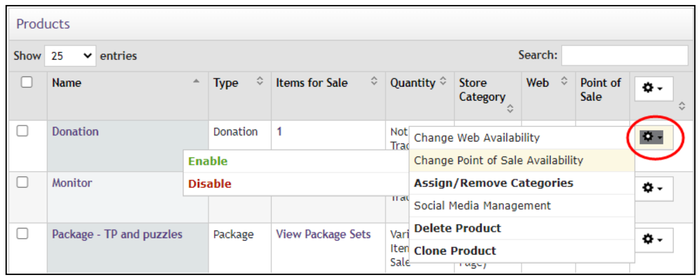


The Store Products page

The Point-of-Sale column on this page describes whether each product is available for Point-of-Sale: "Enabled" for available and "Disabled" for not available.

How to Change Product Availability for Point-of-Sale

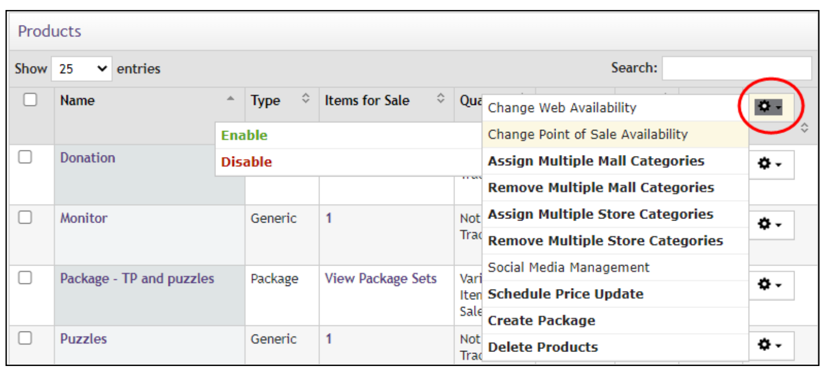
Additional functionality for Point-of-Sale is available through the Gear column. To change the availability of an individual product, mouse over the Gear icon on the same row as the product name. The Gear flyout menu appears.



The Gear flyout menu for individual products.

To make an individual product available for Point-of-Sale, choose Change Point-of-Sale Availability > Enable.

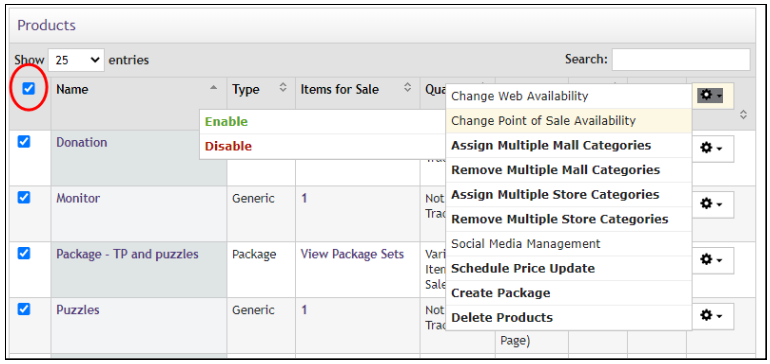
You can also change the availability of multiple products at the same time. Select the checkbox for each product that you would like to make available for Point-of-Sale, and then mouse over the Gear icon in the column header. The Gear header flyout menu appears.



The Gear flyout menu for the column header.

Choose Change Point-of-Sale Availability > Enable.

You can also select or deselect all the products listed on the page by selecting the checkbox at the top of the Select column. This will place a checkmark in front of all the products. You can then change the availability of all the selected products for Point-of-Sale. Mouse over the Gear icon in the column header and select Change Point-of-Sale Availability from the Gear header flyout menu and select the desired option (Enable or Disable).



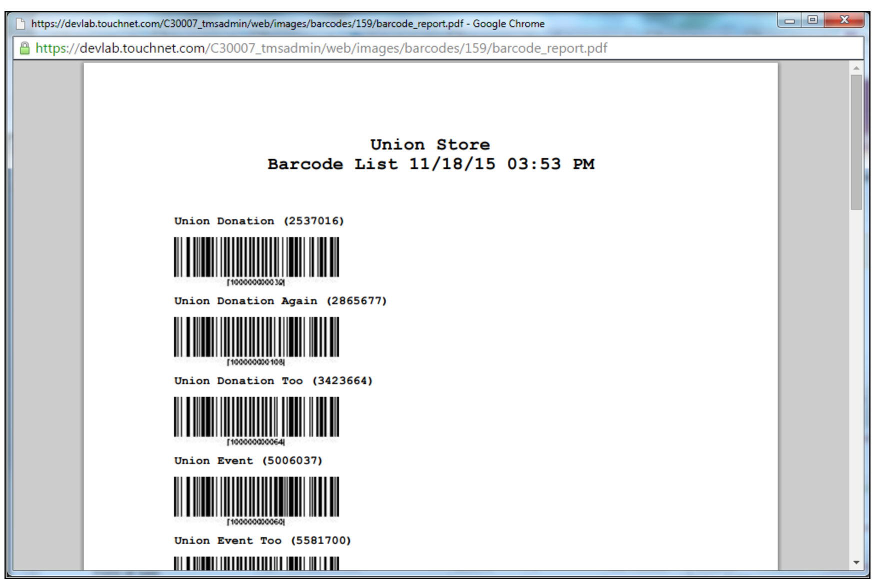
How to Change Category Assignments

The Store Products page also provides functionality that can be used for changing product category assignments. The Gear flyout menu for an individual product contains an Assign Category option. And the Gear flyout menu in the column header provides several options for modifying product category assignments. The category assignment functionality is relevant for a discussion of Point-of-Sale because a new category is available for Point-of-Sale. This category is called Featured Items. For more about the Featured Items category, see **"Product Categories" on page 182**.

How to Print Product Bar Codes

The Products page also provides the ability to print product bar codes. To use this functionality, simply select the Product bar code button near the top of the page.

A pop-up window will then appear. A PDF will be loaded in the pop-up window. This PDF will include a bar code for every product that is available for Point-of-Sale from the active store.



The bar code PDF appears in a pop-up window.

The bar code PDF can be printed for use by the Point-of-Sale attendants. By using the printed output, Point-of-Sale attendants—using an Ingenico iSMP Companion (or a PC with a connected bar code scanner)—will be able to scan the bar code for the item that the customer requests and quickly locate the product in the Point-of-Sale application. The printed bar code list can be stored in a binder or folder or even taped to a wall—whatever is most convenient for use by the Point-of-Sale attendants.

Note: Point-of-Sale attendants are not required to use the bar code list. However, when used in conjunction with the bar code scanning ability of the Ingenico iSMP Companion, Ingenico iSMP4, (or a PC with a connected bar code scanner), the bar code list represents an easy and efficient way to initiate the transaction process.

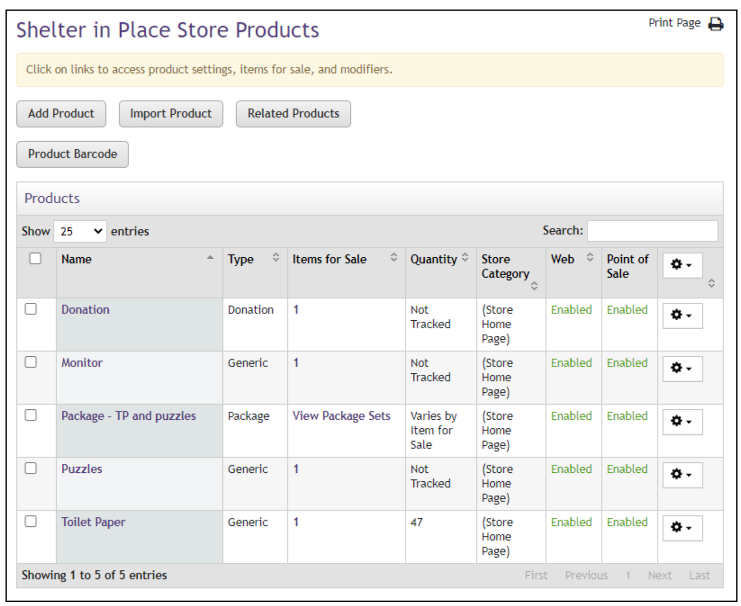
Product Categories

With Marketplace Point-of-Sale, you use the same store product categories that you use for uStores and Mobile—with one exception: there is a new category called "Featured Items" that is for use with Point-of-Sale. We recommend you use this category for items that you anticipate the greatest demand. The Point-of-Sale attendant can then simply navigate to this category and find most products that you expect customers will purchase.

To assign products to the Featured Items category ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Products

The Store Products page then appears.



The Store Products page.

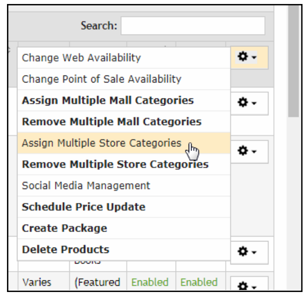
How to Assign Multiple Products to the Featured Items Category

To add multiple products to the Featured Items category, follow these instructions:

1 Select the checkbox for all products that you would like to assign to the Featured Items category.

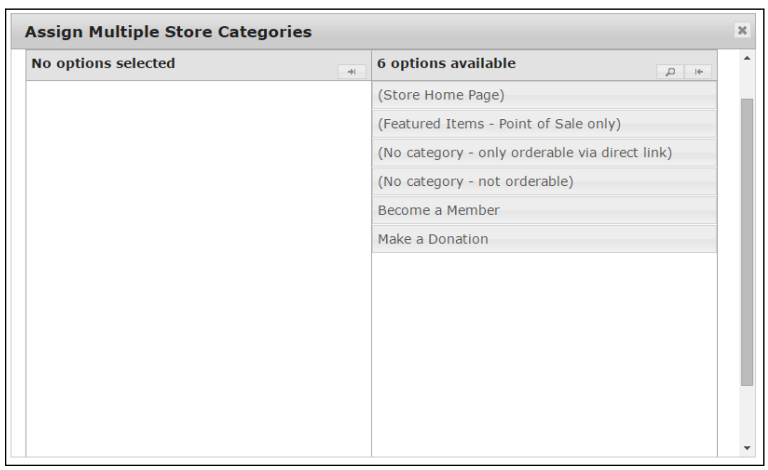
2 Then mouse over the Gear Icon in the column header. A flyout menu will appear.

3 Select Assign Multiple Store Categories from the Gear flyout menu.



To add products to the "Featured Items" category, select "Assign Multiple Store Categories" from the Gear flyout menu.

4 The Assign Multiple Store Categories window appears. This menu lists all the available product categories for the store, including the "Featured Items" category.



The Featured Items category is unique for Point-of-Sale.

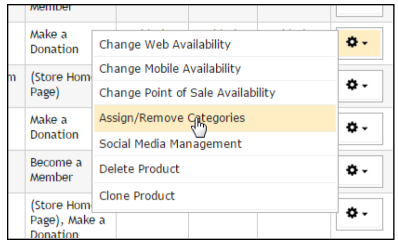
5 Click "(Featured Items - Point-of-Sale only)" in the right column. This category then moves to the left column. (The left column header will then indicate the number of categories that have been selected—such as "1 selected option.")

6 Click the Save button.

How to Assign a Single Product to the Featured Items Category

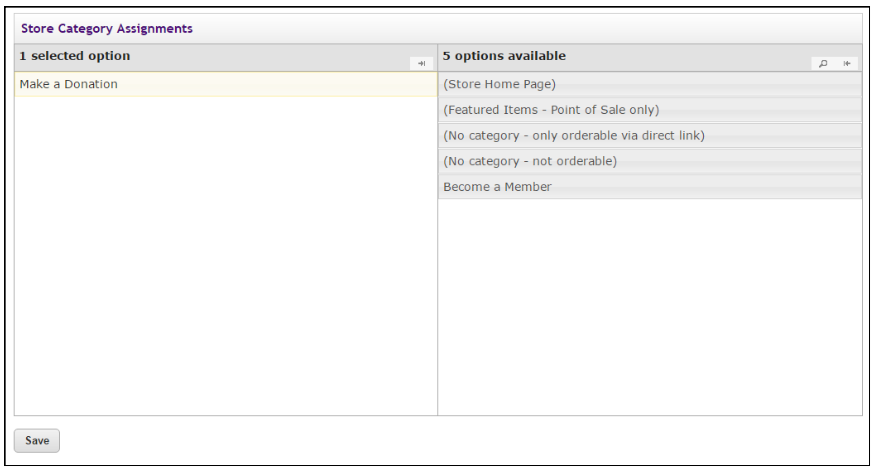
To add a single product to the Featured Items category, follow these instructions:

1 Mouse over the Gear icon in the same row as the product that you would like to assign to the Featured Items category. The Gear flyout menu appears.



The Gear flyout provides the Assign Categories option for individual products.

2 Choose Assign Categories. The Manage Category Assignments page appears.



The Store Category Assignments section of the Manage Category Assignments page.

3 Click "(Featured Items - Point-of-Sale only)" in the right column. This category then moves to the left column. (The left column header will then indicate the number of categories that have been selected—such as "1 selected option.")

4 Click the Save button.

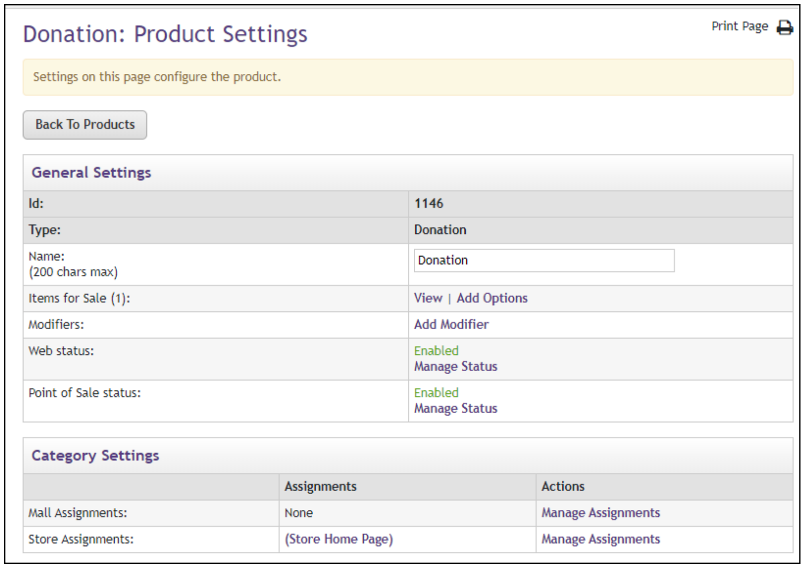
Product Settings

Most product settings for an individual product apply to the product regardless of whether the product is available via uStores, Mobile, or Point-of-Sale. However, once Point-of-Sale is licensed and installed, two additional fields appear in the product settings for Point-of-Sale status: 1) Point-of-Sale Status and 2) Point-of-Sale Description.

To view product settings ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Products

The Store Products page then appears, as depicted in "Managing Products" on page 179. To see the product settings for an individual product, click the product name. The Product Settings page then appears.



The Products Settings page.

General Settings

The "Point-of-Sale status" field appears at the bottom of the General Settings section. Two status values are possible: ENABLED and DISABLED. Products that are ENABLED are available for purchase through the Point-of-Sale application.

To change the status of the product, click the "Manage status" link. The Manage Status page then appears. For more information about changing the status of a product, see **"Product Status Management" on page 186**.

Remember that Point-of-Sale product availability can also be managed from the Products page, as described in **"Managing Products" on page 179**.

Description Settings

The "Point-of-Sale Description" field appears in the Description Settings section. The description that you enter in this field will only appear in the Point-of-Sale application (i.e., it will not appear in uStores or Mobile Marketplace).

This field is not required. If no Point-of-Sale Description is entered on the Product Settings page then no description will be available via the Point-of-Sale application.

Product Image Management for Stores

1. Click the "Upload full size image" to launch the upload dialog window, which allows you to browse for images on the hard drive as well as network locations. Follow these guidelines when choosing images:

- You can only use GIF, JPG, or PNG format images.
- Full size product images are best displayed at 400 pixels wide by 400 pixels high.
- All images must have file sizes of 250K or less.

For schools that have licensed Marketplace Point-of-Sale, you have the ability to upload and display your own storefront and product images (within a store) for Marketplace Point-of-Sale. Previously, default images were the only images available. These uploaded and stored images will display on your desktop and handheld devices for Point-of-Sale.

Note: The file name of each image must be unique within a store. If you upload an image that uses the same name as another image within the same store, the original image will be overwritten. So remember to always use unique names for images.

Important! It is your responsibility to ensure that you have all necessary rights for the images you upload. Images that you did not create (such as images on other web sites) are typically protected by copyright law and should not be uploaded for use in Marketplace unless you have received permission from the copyright holder.

Product Status Management

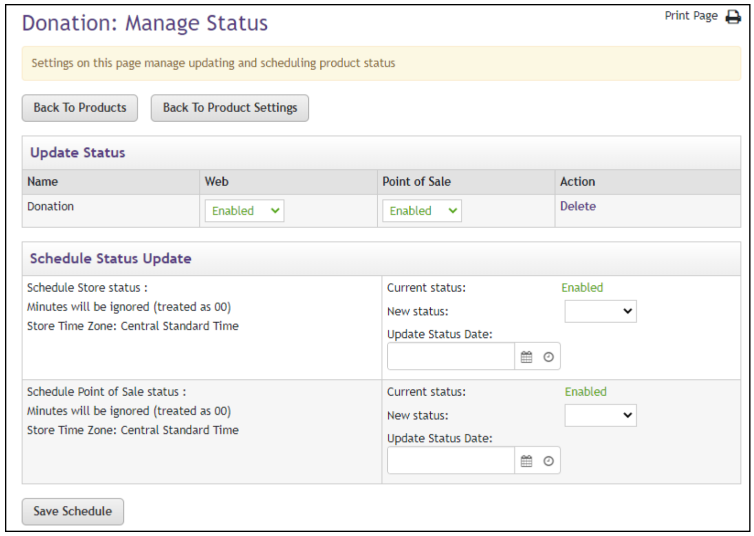
Product status can be easily changed on the Products page, as described in **"Managing Products" on page 179**; however, additional functionality for changing product status—such as the ability to schedule status changes—is available when you navigate to the Manage Status page for an individual product.

To change the status of a product using the Manage Status page ...

Navigate to Marketplace Home > [merchant name] > Stores > [store name] > Store Settings > Products

The Store Products page then appears, as depicted in **"Managing Products" on page 179**. To see the product settings for an individual product, click the product name. The Product Settings page then appears.

On the Product Settings page, find the "Point-of-Sale status" field in the General Settings section and click the "Manage status" link. The Manage Status page then appears.



The Manage Status page.

Update Status

The Update Status section allows you to immediately change the status of a store. Only two status values are available in the Point-of-Sale dropdown list—either Disabled or Enabled. Products with the status of Disabled are not available in the Point-of-Sale application. Products with the status of Enabled are available for purchase in the Point-of-Sale application.

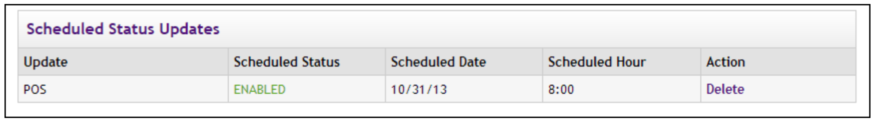
Schedule Status Update

You can also schedule a Point-of-Sale status change for a product by following these instructions:

1. Find the Schedule Point-of-Sale status row in the Schedule Status Update section.
2. Select a product status from the "New status" dropdown list of the Schedule Point-of-Sale status row.
3. Click the calendar icon in the "Update Status Date" field and select the desired date from the calendar widget. If you enter a date, you must use this format: mm/dd/yy. For example, enter October 29, 2014 as 10/29/14.
4. Click the clock icon to select the desired time from the dropdown list.
5. Choose the Save Schedule button.

Scheduled Status Updates

Once a status update has been scheduled, it appears in the Scheduled Status Updates table. The "Update" column will show POS any scheduled status changes for the Point-of-Sale application.



Scheduled Status Updates

Update	Scheduled Status	Scheduled Date	Scheduled Hour	Action
POS	ENABLED	10/31/13	8:00	Delete

Scheduled status updates appear in this table.

You can remove a scheduled update by selecting the Delete link in the Action column.

Scheduled Status History

Once the scheduled date and time have passed, the status-change record moves from the Scheduled Status Updates table to the Scheduled Status History table.

Any history items can be deleted by clicking the Delete link in the Action column.

7.4 Device Manager

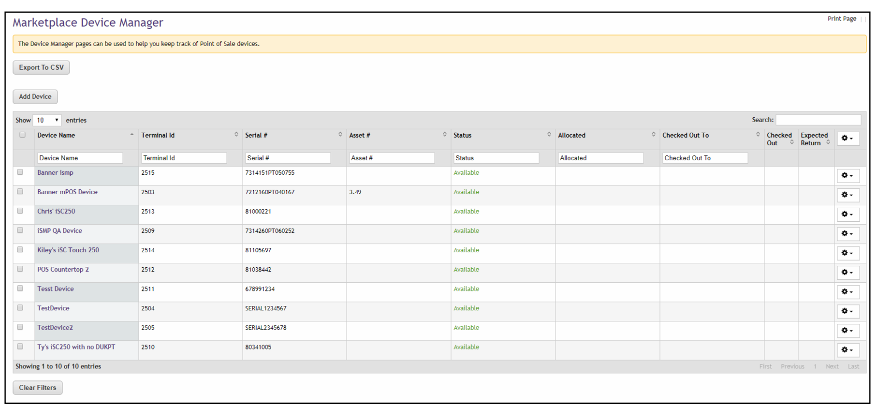
The Marketplace Operations Center provides functionality that you can use to manage your Point-of-Sale devices. This functionality is called Device Manager.

You are not required to use Device Manager, but it does provide important functionality that you can use for checking out devices (as well as other functionality). If you use Device Manager, you can keep track of who is responsible for each device, you can disable lost or stolen Ingenico devices, and you can view detailed information on all your devices.

To view Device Manager ...

Navigate to Marketplace Home > Device Manager

The main Device Manager page then appears.



Marketplace Device Manager

Print Page

The Device Manager pages can be used to help you keep track of Point of Sale devices.

Export To CSV

Add Device

Show 10 entries

Search:

Device Name	Terminal Id	Serial #	Asset #	Status	Allocated	Checked Out To	Checked Out	Expected Return
Banner ismp	2515	7314151PT050755		Available				
Banner mPOS Device	2503	7212160PT040167	3.49	Available				
Chris' iSC250	2513	81000221		Available				
iSMP QA Device	2509	7314260PT060252		Available				
Kiley's iSC Touch 250	2514	81105697		Available				
POS Countertop 2	2512	81038442		Available				
Tesst Device	2511	678991234		Available				
TestDevice	2504	SERIAL1234567		Available				
TestDevice2	2505	SERIAL2345678		Available				
Ty's iSC250 with no DUKPT	2510	80341005		Available				

Showing 1 to 10 of 10 entries

First Previous 1 Next Last

Clear Filters

Device Manager shows all Ingenico devices, as well as any additional devices that have been added by the campus.

All your Ingenico payment devices automatically appear in Device Manager. Any other devices (such as printers and iOS devices) must be added by each campus.

The main page of Device Manager shows the following information:

- **Device Name**—This field displays the name assigned to the device. If a device name has not been entered, then a default value is displayed. The default value for Ingenico devices is a combination of the Manufacturer field and the Device Type field.
- **Terminal ID #**—This field contains an identifying number for the Point-of-Sale payment device. This number appears on printed receipts and e-mail receipts that were processed with this device. This number also appears for Point-of-Sale transactions on the Order Details page of the Marketplace Operations Center.

Important! If a customer questions the validity of a Point-of-Sale transaction and provides a printed receipt or an e-mail receipt, a user with access to Device Manager can locate a Point-of-Sale device with a matching Terminal ID # and (if necessary) disable that device.

- **Serial #**—This field represents the serial number of the device. For Ingenico devices, this field entry is provided by TouchNet.
- **Asset #**—This field is typically used for displaying an identification number that has been assigned by the campus for keeping track of the Point-of-Sale device.
- **Status**—Four status values are available for describing the current status of the device:
  - *Available*—The device has not been checked out.
  - *Checked Out*—The device has been checked out.
  - *Disabled*—The status of the device was set to disabled by an administrator. This status is typically used for devices that have been lost or stolen.
  - *Overdue*—The device has been checked out and the Expected Return Date has passed without the device being checked in.
- **Allocated**—The device has been handed off or will be handed off to another administrator, a merchant manager, or a store manager. (The device can then be checked out as necessary.) The name of the user to whom the device has been allocated appears in this field.
- **Checked Out to**—The device has been handed off or will be handed off to a Marketplae user. The name of the user to whom the device has been checked out appears in this field.
- **Checked Out**—This field is automatically completed with the current date and time when a device is checked out.
- **Expected Return**—The return date and time that was selected when the device was checked out appears in this field.

Device Manager Functionality

Device Manager provides the following functionality:

- **Search for devices**—Enter a search criteria in the Search field. As you enter characters in this field, the list of the displayed devices will be filtered to meet your criteria. Filtering takes place on device information displayed in all columns.
- **Filter devices**—Enter a filter criteria in a column header to filter the displayed devices based on the values in the selected column. As you enter characters in this field, the list of the displayed devices will be filtered to meet your criteria.
- **View detailed device information**—Click a device name displayed in the Device Name column to view detailed device information on the selected device. The Marketplace Device Information page appears. For more information, see **"Viewing Detailed Device Info" on page 191**.
- **Add devices**—Click the Add Device button. The Marketplace Add Device page appears. For more information, see **"Adding Devices" on page 194**.
- **Allocate devices**—Mouse over the Gear icon for the device you would like to allocate and select Allocate Device from the flyout menu. The Marketplace Device Allocate page appears. For more information, see **"Allocating a Device" on page 196**.
- **Check out/in devices**—Mouse over the Gear icon for the device you would like to check out/in and select Check Out Device (or Check In Device, if the device is already checked out) from the flyout menu. The Marketplace Device Check Out page appears. For more information, see **"Checking Out a Device" on page 197**.
- **Disable/enable devices**—Mouse over the Gear icon for the device you would like to disable/enable and select Disable Device (or Enable Device, if the device has been disabled) from the flyout menu. For more information, see **"Disabling/ Enabling a Device" on page 198**.
- **Edit device information**—Click a device name displayed in the Device Name column to view detailed device information on the selected device (the Marketplace Device Information page appears), and then click the Edit Device button (the Marketplace Edit Device Information page appears). For more information, see **"Editing Device Info" on page 199**.
- **Add comments**—Click a device name displayed in the Device Name column to view detailed device information on the selected device (the Marketplace Device Information page appears). Enter a comment in the Add Comment field and then click the Add Comment button. You can also add comments when checking in/out a device and when allocating a device. For more information, see **"Viewing Detailed Device Info" on page 191**.

User Roles

The available functionality in Device Manager depends upon the user roles granted to the user. The following table indicates which functionality is available with each user role.

Functionality	Chief Admin	Admin	Merchant Manager	Store Manager	Attendant
Allocate a Device	x	x			
Check Out/In a Device	x	x	x	x	
View Device Information	x	x	x	x	
Edit Device Information	x	x			
Disable/Enable a Device	x	x			
Add a Device	x	x			
Log Into the Point-of-Sale Application					x

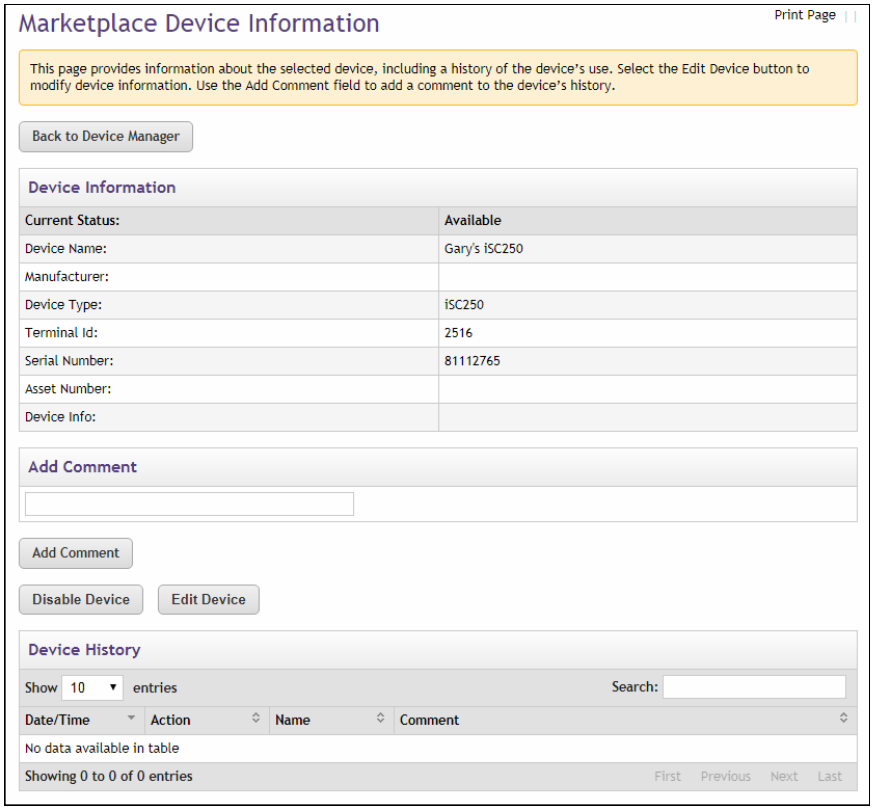
Point-of-Sale Attendant

Devices can be checked out to users with the Point-of-Sale Attendant role, so before you can use Device Manager to check out a device, one or more users must have been assigned the Point-of-Sale Attendant user role. This user role is required for using the Point-of-Sale web application. This user role does not provide the user with any capabilities in the Marketplace Operations Center. For example, a user who only has the Point-of-Sale attendant role will be able to log in to the Marketplace Operations Center but they will only have access to their own profile—and no other Marketplace functionality.

> ***Important!*** In order for a store to process transactions with the Point-of-Sale devices, at least one user for that store must have been given the Point-of-Sale attendant user role.

Viewing Detailed Device Info

A chief administrator, an administrator, a merchant manager, or a store manager can view detailed device information by clicking a device name in the Device Name column on the Marketplace Device Manager page. The Marketplace Device Information page then appears:



The Marketplace Device Information page.

Device Information

Device Name

The value in this field is modifiable. The default value is a combination of the Manufacturer field and the Device Type field, as displayed on the Marketplace Device Information page (which can be accessed by clicking the Device Name on the Marketplace Device Manager page).

Manufacturer

This field represents the manufacturer of the device. For Ingenico devices, this field cannot be modified; this field is provided by TouchNet. For all other devices, this field can be modified.

Device Type

A product number or name for the device.

Serial Number

This field represents the serial number of the device. For Ingenico devices, this field cannot be modified; this field entry is provided by TouchNet. For all other devices, this field can be modified.

Asset Number
This field can be used by the campus for entering their own identification number for the device. This field is optional and can be modified.

Device Info
This field can be used by the campus for entering their own text description for the device. This field is optional and can be modified.

Add Comment

[Comment field and Add Comment button]
You can enter a comment in this field and select the Add Comment button to save the comment as part of the device's history, as displayed in the Device History section of this page.

[Disable Device button]
When you click the Disable Device button (visible only to users with the chief administrator or administrator user role), the device will be immediately disabled so that no transactions can be processed. (The disable/enable functionality can only be used with Ingenico devices.) This functionality is typically used when a device has been lost or stolen. For more information, see **"Disabling/ Enabling a Device" on page 198**.

[Enable Device button]
When you click the Enable Device button (visible only to users with the chief administrator or administrator user role), the device will be immediately enabled so that transactions can be processed. (The disable/enable functionality can only be used with Ingenico devices.) For more information, see **"Disabling/ Enabling a Device" on page 198**.

[Edit Device button]
When you click the Edit Device button (visible only to users with the chief administrator or administrator user role), the Marketplace Edit Device Information page appears. For more information, see **"Editing Device Info" on page 199**.

Device History

[Search field]
You can filter the device history by making an entry in the Search field. As long as any fields in a single history record contain the entered characters then that line of history will be displayed.

Date/Time
This field shows the date and time that the history item was recorded. The history item appears when a device is checked in or out; when a device is allocated; when a comment is added; when device information is modified; when a device is enabled or disabled; or when a device is added.

Action
This field is completed automatically depending on the action that generated the history item. Entries include Allocated, Check Out, Check In, Add Device, Edit Device, Comment, and Status (for when the device is enabled or disabled).

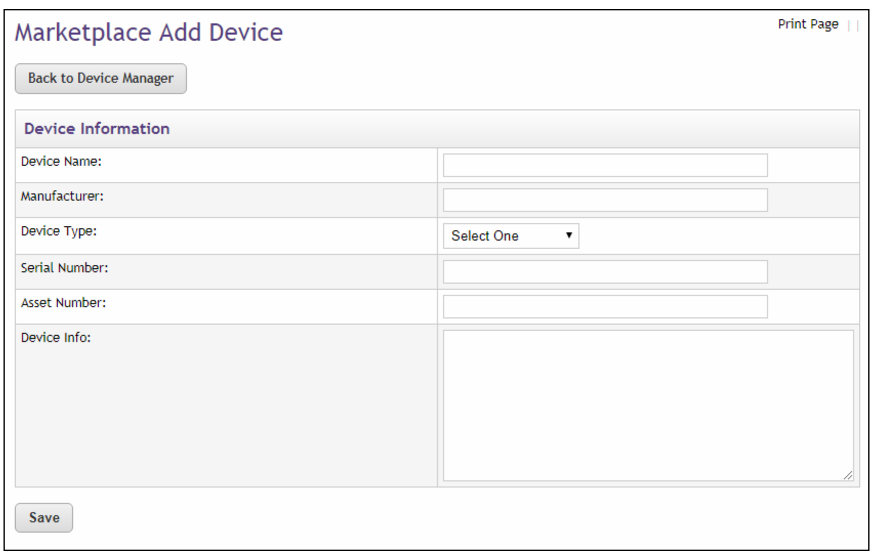
Name
The name of the user responsible for the action that generated the history record.

Comment
If the action column says "Comment," the full text of the comment appears in this field.

Adding Devices

Ingenico devices are automatically added by TouchNet to Device Manager. If you would like other devices to appear in Device Manager, you will need to add these devices.

To add a device to Device Manager, a user with the chief administrator or administrator role clicks the Add Device button on the Marketplace Device Manager page. The Marketplace Add Device page then appears:



The Marketplace Add Device page.

Complete the following fields

To add a device, enter the following fields and then click the Save button:

Device Information

Device Name
Enter your name for the device. This entry is optional. If a device name is not entered, a default value is displayed. The default value is a combination of the Manufacturer field and the Device Type field.

Manufacturer
Enter the name of the device manufacturer.

Device Type
Enter a product number and/or a name for the type of device. For example, for the Epson TM-P60II printer, you might enter Epson in the Manufacturer field and TM-P60II in the Device Type field (or "TM-P60II printer").

Serial Number
Enter the serial number for the device.

Asset Number
Enter an identification code (alphanumeric) that your campus will use for identifying this device. This number is assigned by the campus and can be any alphanumeric value. This field is optional.

Device Info
(Optional) Enter a text description of the device. For example, if the device will only be used for a particular type of transaction, you could enter a short descriptive message of this intention.

Allocate vs. Check Out

The process of handing off a Point-of-Sale device so that it can used for processing transactions includes two possible actions in the Device Manager: 1) allocate and 2) check out.

When you allocate a device, you designate that the device will be handed off to a chief administrator, an administrator, a merchant manager, or a store manager. This user may not immediately use the device for processing transactions. (In fact, this user will *not* be able to use the device unless they also have the Point-of-Sale Attendant role.) When a device is allocated, it is handed off to a user who will *in turn* check out the device to a user with the Point-of-Sale attendant user role.

For example, a Marketplace administrator may not know the available Point-of-Sale attendants for a store, so the administrator won't be able to check out the device directly to a Point-of-Sale attendant. In this situation, the administrator delegates the responsibility of checking out the device by *allocating* the device to a store manager. The store manager will use their knowledge of the store and its users to decide which user with the Point-of-Sale attendant user role should process Point-of-Sale transactions for the store. The store manager then checks out the device to the Point-of-Sale attendant.

Devices do not need to be allocated *before* they are checked out. A device can be directly checked out to a user with the Point-of-Sale attendant user role *without* first allocating the device.

Device Manager provides you with the allocate/check out structure for handing off a device, and you are free to use this structure as it best fits the needs of your campus for keeping track of how Point-of-Sale devices are being used.

Note: Any Point-of-Sale device can be used by any user with the Point-of-Sale attendant user role. However, each attendant will only have access via the Point-of-Sale web application to those stores for which they have been granted the Point-of-Sale attendant user role.

Allocating a Device

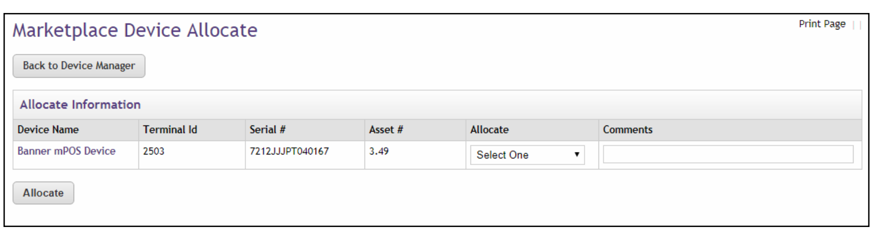
A chief administrator or an administrator can allocate a device by following these instructions:

1. Log In to the Marketplace Operations Center.
2. Choose Device Manager in the left navigation. The Marketplace Device Manager page appears.
3. Find the device that you would like to allocate and review the status of this device. You can only allocate a device that has the status of Available. You cannot allocate a device with the status of Checked Out or Disabled.
4. Mouseover the Gear icon for the desired device and choose Allocate Device from the flyout menu.

   OR

   Select the checkbox in the left column for each device that you would like to allocate. Then mouseover the Gear icon *in the column header*. Choose Allocate Multiple Devices from the flyout menu.

   The Marketplace Device Allocate page appears.



The Marketplace Device Allocate page.

5. Choose a user from the Allocate dropdown list.

   Note: In the dropdown list, administrators will see 1) other administrators (including chief administrators), 2) the merchant managers for all merchants, and 3) the store managers for all stores.

6. (Optional) Enter a comment.
7. Click the Allocate button.

A user who followed these steps to allocate a device should next physically handoff the device to the user who was selected in Step 4. That user will be responsible for checking out the device to a specific user with the Point-of-Sale attendant user role.

Note: An allocated device will have the status of "Available" until the device is checked out.

Checking Out a Device

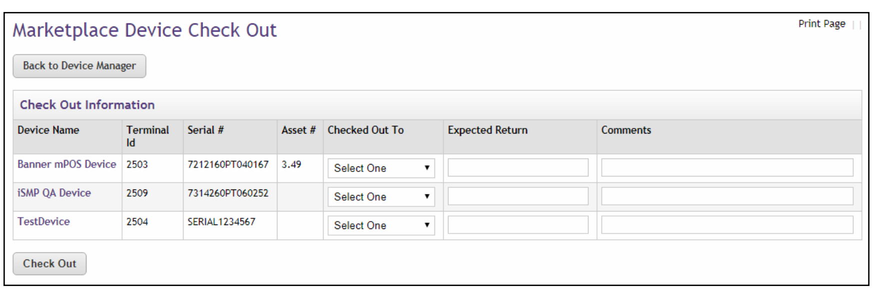
A chief administrator, administrator, merchant manager, or store manager can check out a device by following these instructions:

1. Log In to the Marketplace Operations Center.
2. Choose Device Manager in the left navigation.
3. Find the device that you would like to check out and review the status of this device. You cannot check out a device with a status of Checked Out or Disabled.
4. Click the Gear icon for the desired device and choose Check Out Device from the flyout menu. The Marketplace Device Check Out page appears.

   OR

   Select the checkbox in the left column for each device that you would like to check out. Then click the Gear icon *in the column header*. Choose Check Out Multiple Devices from the flyout menu.

   The Marketplace Device Check Out page appears.



Choose a user from the Check Out To dropdown list.

5. Choose a Point-of-Sale Attendant from the Checked Out To dropdown list. (If you are checking out multiple devices, be sure to select a user from the Checked Out To dropdown list for every displayed device.)

Note: In the Check Out To dropdown list, chief administrators and administrators will see all Point-of-Sale Attendants for all stores. Merchant managers will see all Point-of-Sale Attendants for the stores that they serve as a merchant manager. Store managers will see all Point-of-Sale Attendants for the stores that they serve as store manager.

6. Enter/select a date and time in the Expected Return field.
7. (Optional) Enter Comments.
8. Click the Check Out button.

The device will now have a status of Checked Out. The user who followed these checkout steps to allocate the device must next physically handoff the device to the user who was selected in Step 4. That user will be responsible for processing transactions with the device.

Disabling/ Enabling a Device

Device Manager's disable functionality is designed for use with Ingenico devices. If an Ingenico device is lost or stolen or damaged, you may choose to use Device Manager to disable the device.

When an Ingenico device is disabled, it cannot be used for processing transactions until the device is again enabled. This functionality is integrated with the Marketplace Point-of-Sale application and will prevent the device from being used.

> ***Important!*** The disable/enable functionality can only be used with Ingenico devices.

A chief administrator or administrator can use Device Manager to disable (or enable) an Ingenico device by following these instructions:

1. Log In to the Marketplace Operations Center.
2. Choose Device Manager in the left navigation.
3. Find the device that you would like to disable (or enable).
4. Mouseover the Gear icon for the desired Ingenico device and choose Disable Device (or Enable Device if the device is already disabled) from the flyout menu.

   OR

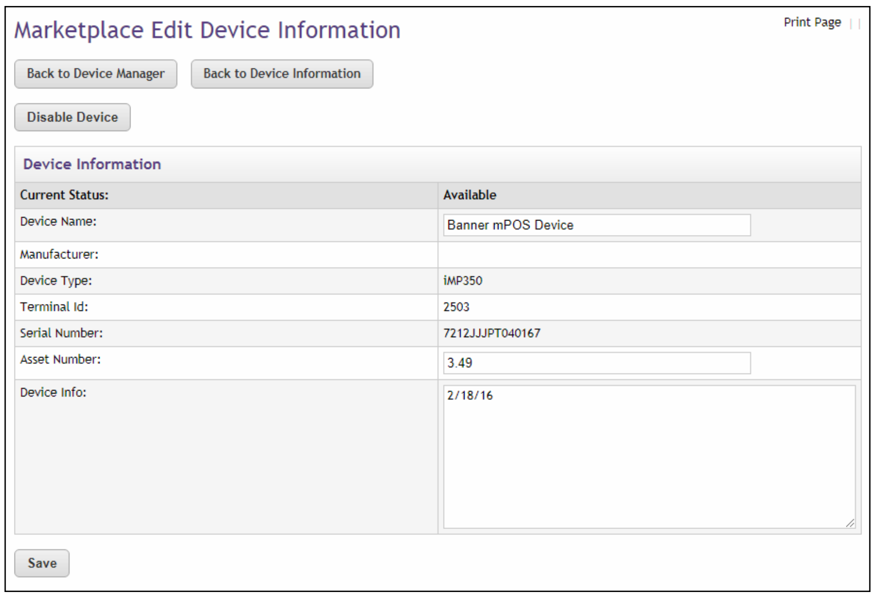
   Select the checkbox in the left column for each Ingenico device that you would like to disable (or enable). Then mouseover the Gear icon *in the column header*. Choose Disable Multiple Devices (or Enable Multiple Devices) from the flyout menu.

When you disable an Ingenico device, it cannot be used for processing transactions until it is again enabled.

Editing Device Info

A user with the chief administrator or administrator user role can edit device information by following these instructions:

1. Log In to the Marketplace Operations Center.
2. Choose Device Manager in the left navigation.
3. Find the device that you would like to edit and click the device name in the Device name column. The Marketplace Device Information page appears.
4. Click the Edit Device button. The Marketplace Edit Device Information page appears.



The Marketplace Edit Device Information page.

5. Edit the device information. These fields can be used as your campus desires. See the field descriptions below.

   Note: For Ingenico devices, the Manufacturer, Device Type, and Serial Number fields cannot be edited: These values are provided by TouchNet.

6. Click the Save button.

Field Descriptions

When you edit device information, the following fields are available:

Device Information

Device Name
Enter your name for the device. If no value is entered in this field, a default value will be displayed. The default value is a combination of the Manufacturer field and the Device Type field.

Manufacturer
Enter the name of the device manufacturer.

Device Type
Enter a product number and/or a name for the type of device. For example, for the Epson TM-P60II printer, you might enter Epson in the Manufacturer field and TM-P60II in the Device Type field (or "TM-P60II printer").

Serial Number
Enter the serial number for the device.

Asset Number
Enter an identification code (alphanumeric) that your campus will use for identifying this device. This number is assigned by your campus and can be any alphanumeric value. This field is optional.

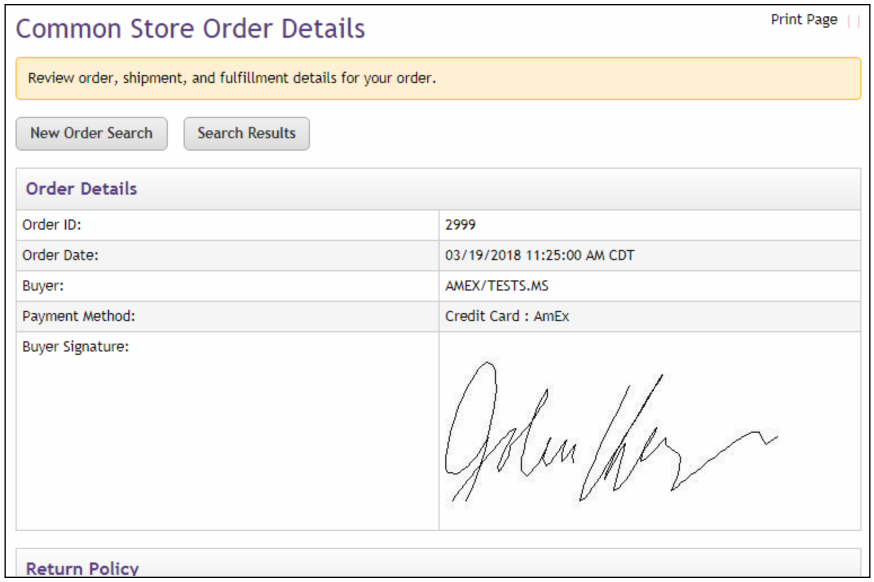
Device Info
(Optional) Enter a text description of the device. For example, if the device will only be used for a particular type of transaction, you could enter a short descriptive message of this intention.

7.5 Order Details for Point-of-Sale

Order details for Point-of-Sale transactions can be searched using the existing functionality available from the Marketplace Operations Center home page or from the Store Order Search page. The order details for Point-of-Sale transactions may contain two additional fields. The Buyer Signature field will appear if the customer entered their signature during the payment process, and the Terminal ID field appears for all transactions.

The Buyer Signature field displays the signature that the customer provided on the signature panel during the checkout process. The Terminal ID field shows an identifying number for the payment device upon which the transaction was processed.

Here is an example of the Order Details page:



The customer's signature can be viewed on the Order Details page.

> ***Important!*** Terminal ID is included on printed receipts. Terminal ID can be used to determine which payment device was used to process a transaction. If you need to determine the payment device represented by a particular Terminal ID, contact your Marketplace administrator (who can look up information about the device by using the Device Manager page in the Marketplace Operations Center).

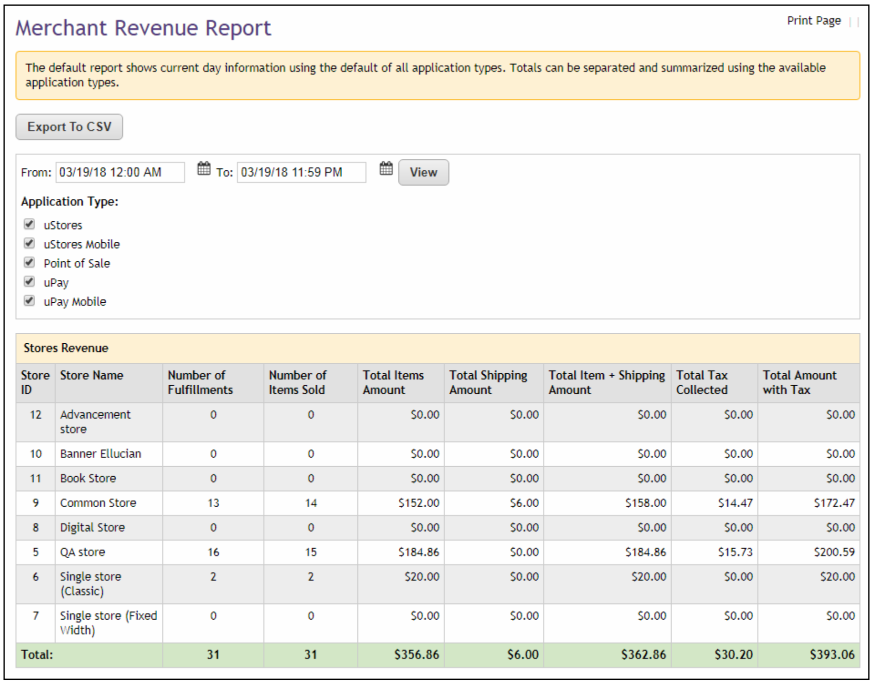
The Order Details page also lists each item that was purchased, the stock numbers, the item prices, the applicable tax, the total price, the TPG reference number, the date and time of the transaction, and other relevant information (including the return policy and amounts refunded).

8.0 Reports for Point-of-Sale

Once Point-of-Sale is licensed and installed, an additional checkbox for "Point-of-Sale" appears in the Application Type section of the Marketplace revenue reports. The following reports have the "Point-of-Sale" checkbox filter:

- Revenue by Merchant Report
- Merchant Revenue Report
- Store Revenue Report

Here is an example of the Merchant Revenue Report:


Merchant Revenue Report

Print Page

The default report shows current day information using the default of all application types. Totals can be separated and summarized using the available application types.

Export To CSV

From: 03/19/18 12:00 AM To: 03/19/18 11:59 PM View

Application Type:

- uStores
- uStores Mobile
- Point of Sale
- uPay
- uPay Mobile

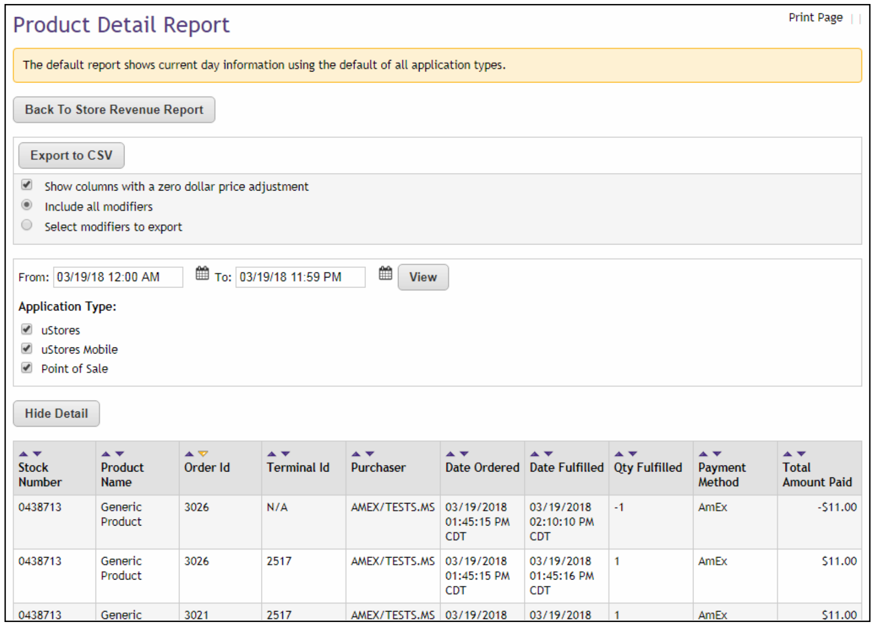
Stores Revenue

Store ID	Store Name	Number of Fulfillments	Number of Items Sold	Total Items Amount	Total Shipping Amount	Total Item + Shipping Amount	Total Tax Collected	Total Amount with Tax
12	Advancement store	0	0	$0.00	$0.00	$0.00	$0.00	$0.00
10	Banner Ellucian	0	0	$0.00	$0.00	$0.00	$0.00	$0.00
11	Book Store	0	0	$0.00	$0.00	$0.00	$0.00	$0.00
9	Common Store	13	14	$152.00	$6.00	$158.00	$14.47	$172.47
8	Digital Store	0	0	$0.00	$0.00	$0.00	$0.00	$0.00
5	QA store	16	15	$184.86	$0.00	$184.86	$15.73	$200.59
6	Single store (Classic)	2	2	$20.00	$0.00	$20.00	$0.00	$20.00
7	Single store (Fixed Width)	0	0	$0.00	$0.00	$0.00	$0.00	$0.00
Total:		31	31	$356.86	$6.00	$362.86	$30.20	$393.06

The "Application Type" checkboxes allow you to determine which Marketplace applications are represented in the reports.

If you want to see only the transactions taken with Point-of-Sale, make sure the checkboxes for Stores, Mobile, and uPay are not selected while the Point-of-Sale checkbox is selected.

In addition, on Product Detail Reports for which the checkbox for Point-of-Sale has been selected, a column for Terminal ID appears.



When the Point of Sale checkbox is selected on the Product Detail Report page, the Terminal ID column appears.

The Terminal ID represents the device that was used to process the order. Terminal ID is included on printed receipts and e-mail receipts.

> ***Important!*** If you need to determine the payment device represented by a particular Terminal ID, contact your Marketplace administrator (who can look up information about the device by using the Device Manager page in the Marketplace Operations Center).

9.0 Device Maintenance and Troubleshooting

This section describes how to upgrade the Point-of-Sale application and how to troubleshoot frequently encountered issues. This section also provides a comprehensive list of all error messages that a Point-of-Sale attendant may encounter. Finally, this section describes how to restart an Ingenico device and the Point-of-Sale application.

9.1 Software and Firmware Upgrades for Mobile Devices

This section is about firmware and software maintenance for your Marketplace Point-of-Sale mobile devices. This software may include the firmware installed on an Ingenico device and the Point-of-Sale software installed on iPOS devices.

Upgrading the Point-of-Sale Application

TouchNet will occasionally release a new version of the Point-of-Sale application for mobile devices. When this happens, the new version will be available for download and installation from the iTunes App Store (use the App Store application on the iOS device). A new version of the Point-of-Sale application may contain bug fixes and/or new features.

> ***Important!*** Never install a new version of the Point-of-Sale application without first contacting your Marketplace administrator. If you install a version of the Point-of-Sale application that is not compatible with your installation of Marketplace in the TouchNet Data Center, the iOS device may not be able to communicate with your installation of Marketplace—effectively disabling the Point-of-Sale device.

Upgrading Ingenico Firmware

TouchNet will inform you if the Ingenico firmware needs to be updated. Typically, firmware updates can only be done by returning Ingenico devices to TouchNet. For example, any Ingenico device that was purchased before the introduction of EMV support (Marketplace 6.5 Service Pack 26) must be returned to TouchNet so that the firmware can be updated. If you have not already heard from TouchNet about firmware updates required for EMV support, please contact your TouchNet representative for instructions on this upgrade process.

9.2 Troubleshooting FAQ

Here is a list of frequently asked questions, along with solutions to the issues.

I entered updates in the Marketplace Operations Center but attendants aren't seeing these updates in the Point-of-Sale application ...

When changes take place in the MarketplaceOperations Center, those changes will not be seen in a current active session of the Point-of-Sale application. To see changes, the Point-of-Sale attendant must log out and log in.

I established Bluetooth connectivity between the Epson TM-P60II and the iPod touch, but the Point-of-Sale application won't print receipts.

Before you can print receipts, you must also turn on printing from within the Point-of-Sale application. For instructions on how to connect to the printer, see **"Turning On Mobile Printing" on page 72**.

When I try to launch the Point-of-Sale application, I keep getting returned to the iPod touch home page.

A timeout is preventing the Ingenico device from communicating with the Point-of-Sale application. Force close the Point-of-Sale application. Restart the Ingenico device. Then relaunch the Point-of-Sale application. (For more information about stopping and restarting Point-of-Sale devices and the Point-of-Sale application, see **"How to Restart Point-of-Sale" on page 222**.)

I've added a product to the shopping cart, but the Pay Now button is greyed out. So I can't complete the transaction.

Place your finger on the right side of the iPod touch display and drag out the right menu. When the menu appears, confirm that the Device Status field says "Disconnected." In this situation, the Ingenico device has unexpectedly become disconnected from the iPod touch (or possibly the Ingenico device is off). Force close the Point-of-Sale application. Restart the Ingenico device, and then relaunch the Point-of-Sale application. (For more information about stopping and restarting Point-of-Sale devices and the Point-of-Sale application, see **"How to Restart Point-of-Sale" on page 222**.) You must now add the product to the shopping cart again. The Pay Now button will now be active.

I just used the Point-of-Sale application several minutes ago, but now it says "For security reasons, your session has been closed due to inactivity" ...

The session time out period was exceeded for the Point-of-Sale application. After 15 minutes of inactivity, a session will automatically be terminated. You must log in to the Point-of-Sale application again.

I attempted to launch the Point-of-Sale application, but it says "No internet available"...

This message typically appears when the iOS device uses a Wi-Fi connection instead of a cellular data connection. In this case, Hi-Fi connectivity was not enabled when you launched the Point-of-Sale application. Ensure Wi-Fi is available. The Wi-Fi icon should appear in the status bar of the iPod touch. Ensure a Wi-Fi network has been selected on the iPod touch and ensure you have logged in (if required) to that network. Try launching a web browser. If internet connectivity is available, you should be able to navigate to web sites. If you cannot navigate to web sites, contact the Wi-Fi network administrator.

I tried to log in but it says "The User does not have rights to a POS enabled store."

In order to log in to the Point-of-Sale application, the user must have been granted the Point-of-Sale attendant user role. When this message appears, one or more Marketplace user roles have been granted to this user, but the user does not have the Point-of-Sale attendant user role.

I tried to launch the Point-of-Sale application but it says "This device is not authorized."

The Ingenico device has been disabled. A Marketplace administrator or store manager has used Device Manager functionality in the Marketplace Operations Center to disable the device. An administrator or store manager may take this action if the device was misplaced or stolen. When a device is disabled, it cannot be used for processing transactions. Contact the Point-of-Sale administrator to determine if the device can be enabled.

I tried to launch the Point-of-Sale application but it says "Device Disconnected."

This message may appear during an active session with the Point-of-Sale application when the connection with the Ingenico device has been lost (for example, if the Ingenico device is accidentally turned off). You must force stop the Point-of-Sale application and restart the Ingenico device. Then restart the Point-of-Sale application. (For more information about stopping and restarting Point-of-Sale devices and the Point-of-Sale application, see **"How to Restart Point-of-Sale" on page 222**.)

I pressed the bar code icon in the Point-of-Sale application and now I'm pressing the buttons on the side of the Ingenicio device but the scanner doesn't emit a red beam.

First, try waiting a few seconds. In some situations, there can be a delay before the Ingenico device responds after you press the bar code icon in the Point-of-Sale application. If the scanner still does not emit a red beam, force close the Point-of-Sale application. Restart the Ingenico device. Then relaunch the Point-of-Sale application. After the application launches, try pressing the bar code icon again. If the scanner still does not emit a red beam, contact your Marketplace administrator. (For more information about stopping and restarting Point-of-Sale devices and the Point-of-Sale application, see **"How to Restart Point-of-Sale" on page 222**.)

I pulled the iPod touch out of the Ingenico device and reinserted it. Now I can't launch the Point-of-Sale application.

When the iPod touch is removed from Ingenico device, the connection between these two devices is broken. To re-establish the connection, you must restart the Ingenico device after first inserting the iPod touch. Then retry launching the Point-of-Sale application. This message may also appear if the iPod touch has been inserted into the Ingenico device but it is not completely seated (i.e., a good connection has not been established). In this case, try pushing the iPod touch further into the Ingenico device and then retry launching the Point-of-Sale application. If the Point-of-Sale application still will not launch, contact your Point-of-Sale administrator.

9.3 Error Messages

The following error messages may appear when using (or attempting to use) the Marketplace Point-of-Sale application.

Connectivity Errors

Connectivity error messages appear on a purple background with the TouchNet logo at the top of the page. These messages apply to mobile devices and not countertop devices.

Note: During the login process for mobile devices, the Point-of-Sale application sends the serial number of the Ingenico device to the Device Management Service in the TouchNet Data Center. If the serial number is valid, the Device Management Service responds with the URL for the school's Marketplace Point-of-Sale installation in the TouchNet Data Center. The Point-of-Sale application on the iOS device then uses this URL and launches the Point-of-Sale login page. Subsequent activity in Point-of-Sale involves the user navigating Point-of-Sale pages delivered by the Point-of-Sale web application in the TouchNet Data Center. These pages are displayed courtesy of the Point-of-Sale application that is installed on the iOS device. A connectivity error is displayed when a communication problem exists with any of these components, with the Ingenico device, or with the iOS device.

A sample connectivity error message.

Device Disconnected.
Cause: This message may appear during an active session with the Point-of-Sale application when the connection with the Ingenico device has been lost (for example, if the Ingenico device is accidentally turned off).
Solution: You must stop the Point-of-Sale application and restart the Ingenico device. Then restart the Point-of-Sale application. (For more information about stopping and restarting Point-of-Sale devices, see **"How to Restart Point-of-Sale" on page 222**.)

No Internet Available.
Cause: This situation may occur if internet connectivity is lost after you have successfully launched the Point-of-Sale application. This message may also appear if internet connectivity was not enabled when you launched the Point-of-Sale application. (This message may appear if there is a temporary drop in Wi-Fi coverge—in which case the message will appear briefly and then disappear.)
Solution: Ensure Wi-Fi is available. The Wi-Fi icon should appear in the status bar of the iOS device. Ensure a Wi-Fi network has been selected on the iOS device and ensure you have logged in to that network. To confirm internet access, try launching a web browser: If internet connectivity is available, you should be able to navigate to web sites. If you cannot navigate to web sites, contact the Wi-Fi network administrator.

This device is not authorized for use with Marketplace POS. Please contact your Marketplace administrator.

Cause: The serial number of the Ingenico device is not recognized as a valid serial number for Point-of-Sale. All Ingenico devices used with Point-of-Sale must be purchased from TouchNet.
Solution: Contact your Marketplace administrator. If the Ingenico device was acquired from Touchnet, the Marketplace administrator must contact TouchNet Customer Care and provide the serial number of the device.

A device authorization timeout has occurred. Please retry or contact your Marketplace Administrator.

Cause: The Point-of-Sale application was not able to communicate with the servers in the TouchNet Data Center.
Solution: Retry launching the Point-of-Sale application. If it still doesn't launch, contact your Marketplace administrator. The administrator must contact TouchNet Customer Care and provide the serial number of the Ingenico device.

This device is not configured with a Marketplace POS server. Please retry or contact your Marketplace administrator.

Cause: The Point-of-Sale application on the iOS device communicated with the Device Management Service in the TouchNet Data Center; however, this communication failed to provide the URL for the Point-of-Sale web application.
Solution: Retry launching the Point-of-Sale application. If it still doesn't launch, contact your Marketplace administrator. The Marketplace administrator must contact TouchNet Customer Care and provide the serial number of the Ingenico device.

This device is unable to connect to the Marketplace POS server. Please retry or contact your Marketplace Administrator.

Cause: The Point-of-Sale application on the iOS device communicated with the Device Management Service in the TouchNet Data Center, and the Device Management Service provided the URL for the Point-of-Sale web application. However, the Point-of-Sale application on the iOS device is not able to communicate with the Point-of-Sale web application.
Solution: Retry launching the Point-of-Sale application. If it still doesn't launch, contact your Marketplace administrator. The administrator must contact TouchNet Customer Care and provide the serial number of the Ingenico device.

This device is unable to connect to the Device Management Service. Please retry or contact your Marketplace Administrator.

Cause: The Point-of-Sale application on the iOS device is able to communicate with servers in the TouchNet Data Center, but it cannot communicate with the Device Management Service.
Solution: Retry launching the Point-of-Sale application. If it still doesn't

launch, contact your Marketplace administrator. The administrator must contact TouchNet Customer Care and provide the serial number of the Ingenico device.

This device is not authorized to connect to the Device Management Service. Please retry or contact your Marketplace Administrator.

Cause: The Ingenico device has been disabled with Device Manager in the Marketplace Operations Center.
Solution: Contact your Marketplace administrator to determine if the device can be enabled.

This device is not configured with all required Marketplace POS files. Please retry or contact your Marketplace Administrator.

Cause: Files used by the Point-of-Sale application cannot be found.
Solution: Restart the Ingenico device. Then retry launching the Point-of-Sale application. If the application will not launch, you must reinstall the Point-of-Sale application. (For more information about stopping and restarting Point-of-Sale devices, see **"How to Restart Point-of-Sale" on page 222**.)

Unable to authorize device for use with Marketplace POS. Please contact your Marketplace Administrator.

Cause: The Point-of-Sale application on the iOS device is able to communicate with servers in the TouchNet Data Center, but it cannot communicate with the Device Management Service.
Solution: Restart the Ingenico device. Then retry launching the Point-of-Sale application. If it still doesn't launch, contact your Marketplace administrator. The administrator must contact TouchNet Customer Care and provide the serial number of the Ingenico device. (For more information about stopping and restarting Point-of-Sale devices, see **"How to Restart Point-of-Sale" on page 222**.)

Unable to connect with Device Management Service. Make sure internet is available, or contact your Marketplace Administrator.

Cause: The Point-of-Sale application on the iOS device communicated with the Device Management Service in the TouchNet Data Center, and the Device Management Service provided the URL for the Point-of-Sale web application. However, the Point-of-Sale application on the iOS device is not able to communicate with the Point-of-Sale web application.
Solution: Restart the Ingenico device. Then retry launching the Point-of-Sale application. If it still doesn't launch, contact your Marketplace administrator. The administrator must contact TouchNet Customer Care and provide the serial number of the Ingenico device. (For more information about stopping and restarting Point-of-Sale devices, see **"How to Restart Point-of-Sale" on page 222**.)

Device restarting.
Cause: The Ingenico device is restarting. This can happen if the device has been turned on for 24 hours or more: After 24 hours, the device will automatically restart. This message may also appear the very first time the Point-of-Sale application is launched.
Solution: Retry launching the Point-of-Sale application after the Ingenico device has fully restarted.

Login Errors

Login errors appear as white text on a light red background, below the Sign In button on the login page.

A sample login error message.

The user is not authorized.
Cause: The user has been granted the Point-of-Sale attendant role; however, the user has been disabled.
Solution: Contact the Marketplace administrator (or store manager) and determine if the user can be enabled.

The User Id and Password combination was not recognized.
Cause: This message may appear for two reasons: 1) The username entered is not valid; or 2) The password entered for the username is not valid.
Solution: Ensure you have the correct username and password and attempt to log in again.

Note: Unlike the U.Commerce Central login page, the User ID field of the Marketplace Point-of-Sale login page does not require a realm. For example, if you log into U.Commerce Central as T0001.jdoe (and **T0001** is your realm and **jdoe** is your username), you should only enter **jdoe** in the User ID field of the Point-of-Sale login page.

Authentication Service is unavailable.
Cause: An attempt to authenticate the user as a valid U.Commerce user failed.
Solution: Retry logging into the Point-of-Sale application. If the application still doesn't launch, contact your Marketplace administrator. The administrator must contact TouchNet Customer Care.

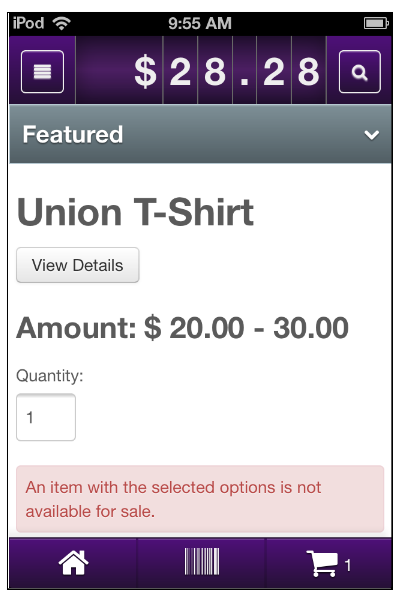
The User does not have rights to a POS enabled store.
Cause: The user has a role in Marketplace but not as a Point-of-Sale attendant.
Solution: Contact the Marketplace store manager and ask to be granted the attendant role for the store in question.

User ID is required.
Cause: No entry was made in the username field.
Solution: Attempt to log in again and ensure you enter a user ID.

Password is required.
Cause: No entry was made in the password field.
Solution: Attempt to log in again and ensure you enter a password.

Shopping Cart Errors

Shopping cart errors appear on Product Detail pages when you attempt to add a product to the shopping cart and the entry fields are not complete or contain problematic data. These messages have red text on a pink background.



A sample shopping cart error message.

Unable to add item. Only items from the same store may be purchased in the same order.

Cause: You cannot add items to the shopping cart from two or more stores. All items added to the shopping cart must be from the same store.
Solution: If the customer would like to purchase items from a different store, you must first complete the payment process for the item(s) in the cart. You must complete the payment process separately for each store.

All options must be selected.

Cause: No selection was made from a product option dropdown menu.
Solution: Ensure you have selected an option from the dropdown menu.

Invalid Length: must be between [x] and [y] characters.

Cause: The supplied data does not meet the minimum or maximum length requirements of the field.
Solution: Modify the entry so the entry length is within the specified range.

Amount is required. Amount must be greater than [x] and less than or equal to [y].

Cause: The entered donation/payment amount does not meet the minimum or maximum length requirements of the field.
Solution: Modify the donation/payment entry so the amount is within the specified range.

Invalid quantity: must be 1 or more.

Cause: The quantity entered is 0 or null or non-numeric.
Solution: Modify the quantity entry so the value is valid.

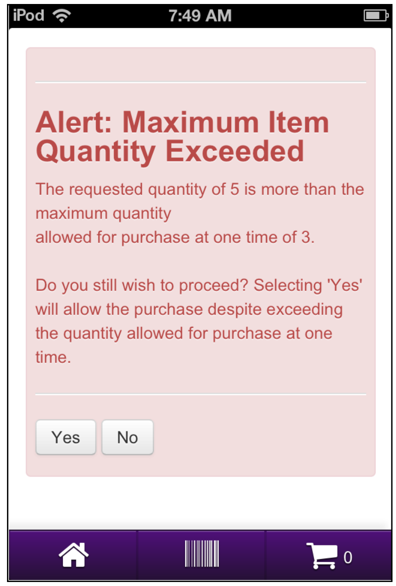
An item with the selected options is not available for sale.

Cause: The combination of selected product options is not available.
Solution: Notify the customer that no items are available with the selected options. Determine if the customer would accept an alternate option value.

Inventory Alerts

These messages are not error messages. Instead, these message are alerts meant to draw the attendant's attention to an issue regarding inventory limitations that apply to the order.

These messages appear with red text on a pink background. You must press the Yes button to continue.

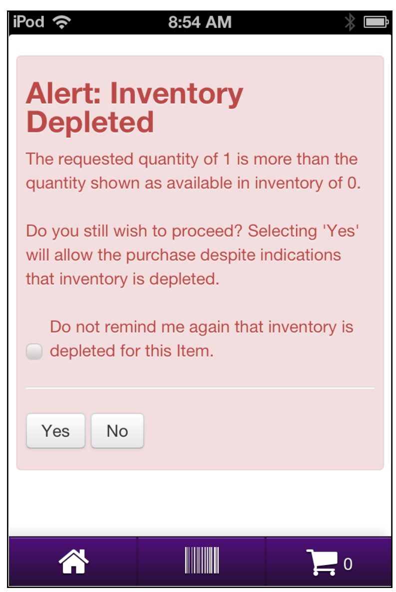


This inventory alert appears when the quantity ordered exceeds the maximum allowed for this item.

Alert: Maximum Item Quantity Exceeded

Cause: The quantity ordered exceeds the maximum allowed for this item. The maximum quantity allowed is configured in the Marketplace Operations Center, in the settings for each product.

Solution: Additional text in the alert message specifices the maximum quantity allowed for the product. By pressing the Yes button, the attendant can proceed with the order.



This inventory alert appears when the quantity ordered exceeds the amount in inventory.

Alert: Inventory Depleted

Cause: The quantity ordered exceeds the amount remaining in inventory for this item. The inventory quantity is configured in the Marketplace Operations Center, in the settings for each product.

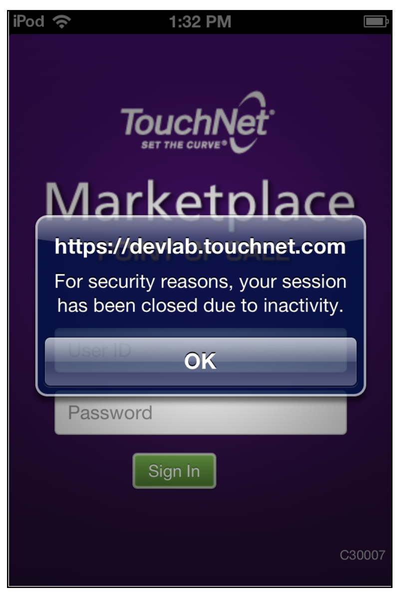
Solution: Additional text in the alert message specifies the amount available in inventory. By pressing the Yes button, the attendant can proceed with the order. For example, if additional stock was received but the inventory amount was not updated in the product settings in the Marketplace Operations Center, the attendant may have sufficient inventory on hand when the attendant receives this message. In this case, the attendant may want to proceed with the order by pressing the Yes button. Be careful when proceeding, however, because the customer's payment card will be charged for the items, so it's important the attendant is certain that sufficient inventory exists for filling the order before they press the Yes button.

Note: Items cannot be backordered with the Point-of-Sale application.

Session Timeout Errors

In order to protect Point-of-Sale devices from unauthorized use, the Point-of-Sale application will automatically timeout after 15 minutes of inactivity. If a user subsequently needs to process a transaction, the user must log in to the Point-of-Sale application.

Session-timeout errors appear as pop-up prompts. You must press the OK button to continue.



The session timeout message.

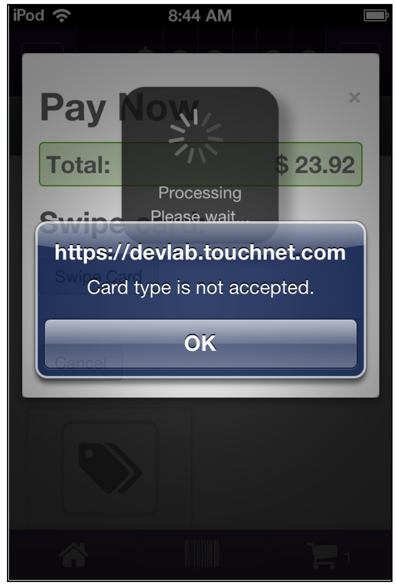
For security reasons, your session has been closed due to inactivity.

Cause: The session time out period was exceeded. After 15 minutes of inactivity, a session will automatically be terminated.

Solution: Click the OK button. Then log in again to the Point-of-Sale application.

Payment-Processing Errors

Payment-processing errors appear as pop-up prompts. You must press the OK button to continue.



A sample payment-processing message.

Unable to authorize.
Cause: When the Point-of-Sale application attempted to contact Payment Gateway, a timeout occurred.
Solution: Click the OK button. Retry the customer's payment card. If the same message appears, force close the Point-of-Sale application. Restart the Ingenico device, relaunch the Point-of-Sale application, login, and add the product again to the shopping cart. Retry the customer's payment card. If the same message appears, contact your Marketplace administrator. (For more information about stopping and restarting Point-of-Sale devices, see **"How to Restart Point-of-Sale" on page 222**.)

Unable to determine card type.
Cause: The Ingenico device card reader was not able to read the card type from the payment card's magnetic strip.
Solution: Click the OK button. Retry the customer's payment card. If the same message appears after you swipe the card, you can manually enter the card. For more information about entering payment cards manually, see **"How to Restart Point-of-Sale" on page 222**.

A signature is required to complete the payment transaction. Please sign and press 'Done' to continue.

Cause: The customer used a payment card (or used a debit card and subsequently chose the Credit option), but they did not enter a signature during the checkout process.
Solution: Click the OK button. Ask the customer if they intended to cancel the transaction. If they did not intend to cancel the transaction, you must swipe the customer's payment card again.

Card type not accepted by store.

Cause: The store is not configured to accept this type of payment card.
Solution: Click the OK button. All Point-of-Sale attendants must know the accepted types of payment cards (and the store manager must provide a list of the accepted payment card types to the attendants). If the attendant does not know the accepted types of payment cards, they should contact the store manager and get the list of accepted payment card types.

Unable to complete transaction.

Cause: The Point-of-Sale application did not receive input as expected from the customer. This message may appear in two situations: 1) the customer did not sign the signature panel within 60 seconds and 2) the customer did not enter their PIN within 60 seconds.
Solution: Click the OK button. If the customer did not sign the signature panel, the customer can now sign the signature panel (unless the 15 minute timeout has also occurred for the Point-of-Sale application). If the customer did not enter their PIN, the "PIN Entry, User Cancelled" message now appears. If the customer would like to proceed with the transaction, you must swipe the customer's payment card again.

User has cancelled. No transaction has been processed.

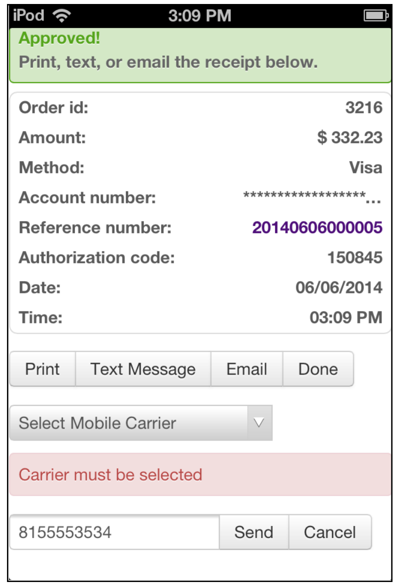
Cause: The customer touched the Cancel button when the signature panel was displayed on the iOS device.
Solution: Click the OK button. Ask the customer if they intended to cancel the transaction. If they did not intend to cancel the transaction, you must swipe the customer's payment card again.

PIN Entry. User Cancelled.

Cause: This message may appear in two situations: 1) The customer pressed the Red cancel button on the Ingenico device when asked for their debit card PIN and 2) The customer chose the Debit card option but then did not enter their PIN within 60 seconds.
Solution: Click the OK button. Ask the customer if they intended to cancel the transaction. If they did not intend to cancel the transaction, you must swipe the customer's payment card again.

Receipt Errors

Text message receipt errors and e-mail receipt errors appear on the Receipt page, below the message buttons. These messages appear when the entries are incomplete or are formatted incorrectly. These messages have red text on a pink background.



A sample fatal error message.

Unable to send Text Message receipt. Please provide receipt using another method.

Cause: The text message service was not able to send the text message.
Solution: Try sending the text message again. If the same message results, try using an alternate method for providing the receipt. If this problem presists for additional transactions, you should contact your Marketplace administrator. The administrator should contact TouchNet Customer Care and determine is there is problem with the text message service.

Carrier must be selected.

Cause: The Point-of-Sale attendant did not select a carrier from the drop-down list of carriers.
Solution: Be sure to make a selection from the Mobile Carrier field.

Phone Number [an invalid phone number] is not valid. Please enter phone number in this format: 5551117777

Cause: The phone number entered by the Point-of-Sale attendant must contain ten digits and a valid North American numbering format.
Solution: Be sure the phone number is formatted correctly.

Invalid email address. Please re-enter.

Cause: The provided e-mail address does not conform to the formatting standards for e-mail addresses.
Solution: Be sure the e-mail address is formatted correctly.

Unable to send receipt email to [an email address] for order with id [an order id].

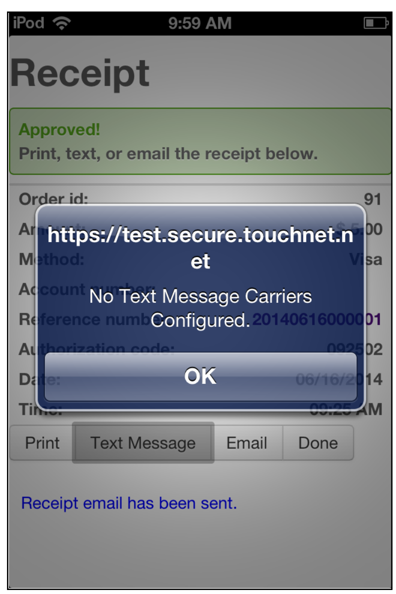
Cause: The e-mail message service was not able to send the e-mail message.
Solution: Try sending the e-mail message again. If the same message results, try using an alternate method for providing the receipt. If this problem presists for additional transactions, you should contact your Marketplace administrator. The administrator should contact TouchNet Customer Care and determine if there is a problem with the e-mail message service.

Unable to send receipt email. Please provide receipt using another method.

Cause: The e-mail message service was not able to send the e-mail message.
Solution: Try sending the e-mail message again. If the same message results, try using an alternate method for providing the receipt. If this problem presists for additional transactions, you should contact your Marketplace administrator. The administrator should contact TouchNet Customer Care and determine if there is a problem with the e-mail message service.

Text Message Configuration Errors

Text message configuration errors appear as pop-up prompts. You must press the OK button to continue.



A sample text message configuration error.

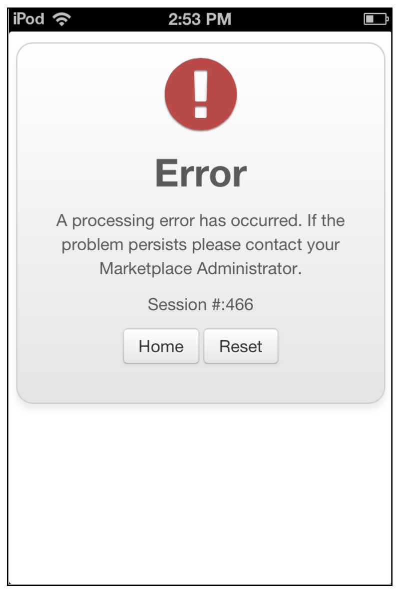
No Text Message Carriers Configured.

Cause: No text message carriers have been configured in the Marketplace Operations Center. Only text message carriers that have been configured in the Marketplace Operations Center are available on the Receipt page during the the Point-of-Sale application's checkout process.

Solution: A Marketplace administrator must log in to the Marketplace Operations Center and configure one or more text message carriers in the System Administrative settings.

Fatal Errors

Fatal errors appear with a large exclamation mark at the top of the error message. These error messages have a Home button (which can typically be used to load the home page of the Point-of-Sale application) and a Reset button (which can be used to return to the login page for the Point-of-Sale application).



A sample fatal error message.

A processing error has occurred. If the problem persists, please contact your Marketplace administrator.

Cause: An unexpected error occurred.

Solution: When an unexpected error occurs, the Point-of-Sale functionality the user was attempting was aborted. Try pressing the Home button: In some situations, the Point-of-Sale home page will appear. If the Home button doesn't work, try the Reset button: the Point-of-Sale application's log in page will appear. If you use the Reset button, you must log in again. The error can be investigated further by contacting TouchNet Customer Care. Provide the actions that you took immediately before the error appeared. Also, be sure to provide the session number that appears in the error message.

9.4 How to Restart Point-of-Sale

If you encounter a connectivity error when using a mobile device (as described in **"Error Messages" on page 208**), you typically must stop the Point-of-Sale application, restart the Ingenico payment device, and relaunch the Point-of-Sale application. Here are instructions for completing this process.

First, you should stop Point-of-Sale application:

1. Press the iOS device's Home button once to return to the iOS home screen.
2. Press the Home button twice to display a list of the active applications.
3. Press and hold the MPOS icon until a red minus (-) icon is added to the MPOS icon.

The active applications can now be closed.

4. Touch the red minus icon.

The Point-of-Sale application is now stopped.

Next, you restart the Ingenico payment device:

1. At the same time, press the pound/number key (#) and the yellow key. Hold these keys down until the device powers off.
2. Press the green key to power the device on.
3. Wait until "Marketplace POS" is displayed on the Ingenico device's screen.

The Ingenico device has now restarted.

Finally, you must restart the Point-of-Sale application:

1. Press the iOS device's Home button once to go to the iOS home screen.
2. Press the MPOS icon to launch the application.
3. Log in to the Point-of-Sale application.

10.0 Appendix

This Appendix describes configuration issues that involve Ingenico devices.

10.1 Bluetooth Configuration for Ingenico iSMP Companion and iCMP

This section describes configuration that is typically completed on the Ingenico iSMP Companion and the Ingenico iCMP before these devices leave TouchNet. However, these settings may return to the factory default values if the battery is removed from a device or the battery becomes completely drained.

If your devices are not working reliably, you can confirm the following settings to make sure your devices are using the correct settings.

These instructions involve those settings which influence how Bluetooth connectivity works when you attempt to pair an iOS device with an Ingenico payment device.

Opening the Ingenico Configuration Menu

To launch the Ingenico configuration menu, turn on the device (if it is already on, turn it off and then back on) and wait for the copyright page to appear. At this point, enter the following key sequence: **2 6 3 4 Green**. (Or in other words, press the **2** key, then the **6** key, followed by the **3** key, and then the **4** key. And then press the **Green** key!) You MUST enter this key sequence very quickly or the window of opportunity will close and the device will continue to boot as normal.

If you entered the key sequence correctly, a “Press F for menu” message will appear. So go ahead: Press the F key. You will now be looking at the Ingenico device’s Functions menu.

Configuration Selections

The following menu selections must be made on each Ingenico iSMP Companion and iCMP device. If these selections are made, the process of establishing a Bluetooth connection between an iOS device and an Ingenico payment device will be simplified and easier to manage.

When using the Ingenico menus, press the **F2** key to scroll down, the **F3** key to scroll up, and the **Green** key to make a selection.

- On the Functions menu ...
  Select 5 “BT Pairing.”
  Select 4 “Security Mode.”
  Select “Legacy.”

If Legacy was already selected, the BT Pairing menu will appear again.
If Legacy was not selected, the device will now reboot. When it reboots, you must again press **2 6 3 4 Green** when the copyright page appears. Then press **F**. When the Function menu appears. Press **5** to display the BT Pairing menu.

- On the BT Pairing menu ...
  Select **3** “Wakeup on Bluetooth.”
  Select “On (Both).”
  The BT Pairing menu will appear again.
  Press the **Red** key.
  Then press the **F** key.
- On the Functions menu ...
  Select **3** “TDA.”
  Select **0** “Configuration.”
  Select **0** “Communication.”
  Select **0** “Select Comm. Type.”
  Select **5** “Bluetooth.”
  Press the **Red** key once.
  The Communication menu then appears again.
- On the Communication menu ...
  Select **4** “Bluetooth Settings.”
  Select **0** “Mode.”
  Select **0** “iOS.”
  Press the **Red** key four times.
  The Save and Reboot message will then appear.
  Select **1** for “Yes.”
  The mode selection will now be saved.

After you have completed the steps above, the device is now ready for use.

If you would like to test a device, you can use the following instructions.

10.2 Pairing Devices and Maintaining Bluetooth Connectivity

This section describes the steps that must be followed to pair devices, as well as the steps that can be taken to maintain Bluetooth connectivity between iOS devices and Ingenico payment devices.

Pairing Devices for the First Time

As a result of the selections described in **"Bluetooth Configuration for Ingenico iSMP Companion and iCMP" on page 224**, the “BT Pairing Required” menu will automatically be displayed when an Ingenico device is turned on (that is not currently paired to an iOS device). The "BT Pairing Required" menu makes it easy for attendants to complete the pairing steps. So when the “BT Pairing Required” menu appears …

1. Press **F1** to select “IOS.”
   A scroll box will then appear that lists all the Bluetooth devices in the vicinity.
2. On the iOS device …
   Turn on Bluetooth Connectivity (Settings > Bluetooth > On).
   It will help if you know the name of the iOS device (Settings > General > About > Name). If necessary, you may want to edit the name of the iOS device so that the name is unique and easy to identify.
3. Using the scroll box on the Ingenico device …
   Use the **F2** key to scroll down (and the **F3** key to scroll up), until your target iOS device is highlighted.
4. Press the **Green** key.
   A message will now appear on the Ingenico device that contains a PIN number.
   In addition, a prompt will appear on the iOS device asking for a PIN number entry.
5. Enter the PIN number displayed on the Ingenico device in the PIN field on the iOS device, and then press Pair on the iOS device.
   The devices are now paired.
   “Marketplace POS” will appear on the Ingenico device’s display.
   The Ingenico device will now show as “Connected” in the “My Devices” section of the iOS device’s Bluetooth panel.

Removing a Paired Device

If the “BT Pairing Required” menu does not automatically appear when the Ingenico device is started—if instead “Marketplace POS” is displayed on the Ingenico display panel-- then the device has already been paired to an iOS device. It will continue to assume it is paired until you remove the pairing. To remove the paired device …

Press the F key four times within two seconds.

The “BT Pairing Required” menu will now appear. You can go to the “Pairing Devices for the First Time” section above to pair the Ingenico device with an iOS device.

Note: If an Ingenico device is paired to an iOS device and subsequently the pairing is removed on the iOS device, the Ingenico device will attempt to reconnect to the iOS device—and the PIN prompt panel will appear on the iOS device—but the Ingenico device will not display a PIN number at this time. In this situation, you must remove pairing on the Ingenico device, as described above. Then, Bluetooth connectivity can be established as described in “Pairing Devices for the First Time.”

Re-establishing Bluetooth Connectivity Between Two Devices That Are Already Paired

If you have previously paired an Ingenico device and an iOS device, these devices will automatically be re-paired whenever they are both turned on (and Bluetooth is set to On for the iOS device) – as long as these devices are within Bluetooth range (typically no more than 30 feet). Bluetooth connectivity is always turned on for Ingenico devices.

If you do not want these two devices to be connected—or if you do not know which iOS device the Ingenico device is connected to—you can remove the pairing by following the instructions above for "Removing a Paired Device."

About Bluetooth Names

If multiple Ingenico devices and iOS devices will be used in the same area, you must pay attention to the names of the devices.

You can find the iOS device name by navigating to the following location on the iOS device: Settings > General > About > Name. This name will appear on the Ingenico device during the pairing process.

The Bluetooth name of the Ingenico device is displayed when you attempt to connect the Ingenico device to an iOS device. This name appears on the BT Pairing panel of the Ingenico device. This Bluetooth name will also be displayed on the Bluetooth panel of any iOS device in the vicinity for which Bluetooth has been turned on.

If necessary, you can change the name of an Ingenico device. See "Changing the Name of an Ingenico Device."

And if necessary, you can change the name s of the iOS devices. Go to Settings > General > About > Name.

Important! We recommend you print the Ingenico device's Bluetooth name on a label that you affix to the Ingenico device. By clearly labeling each Ingenico device, you will eliminate any confusion that may result when multiple Ingenico devices are used in the same area. Likewise, we recommend you clearly label each iOS device with its Bluetooth name, as well as any printers.

Changing the Name of an Ingenico Device

In some situations, you may find it advantageous to change the name that an Ingenico device uses during the Bluetooth connection process. Maybe the name is too long and difficult to remember. Maybe the default name assigned to the device does not represent the expected value. In these situations (and others), you may choose to change the name of an Ingenico device.

To change the name of an Ingenico device, you must first access the menu system on the Ingenico device, as described in **"Opening the Ingenico Configuration Menu" on page 224**. Then follow these instructions ...

- On the Functions menu …
  Select **5** "BT Pairing."
  Select **2** "Bluetooth name."
  Review the name.
  If you would like to change the name, press the **F** key.
  A text edit panel then appears.
  Keep in mind that the maximum name length is 15 characters.
  Press the **Yellow** key to backspace.
  Use the **F1**, **F2**, **F3**, and **F4** keys to navigate to characters you would like to choose.
  Press the **Green** key to select a highlighted character.
  Or press the **Red** key to cancel.
  Press the **F** key to save your changes.

10.3 Ingenico Devices that Suddenly Shut Off

This section describes a known issue with Ingenico payment devices in which the devices suddenly shut off within 60 seconds of starting. The conditions that cause this issue and the steps to remedy the issue are described.

> ***Important!*** We strongly recommend you follow the steps outlined in this document for all your Ingenico payment devices that are used with Marketplace Point-of-Sale. If you follow these steps, you will ensure your payment devices are available for taking payments throughout your business day.

The Issue

An Ingenico payment device—such as the iSMP Companion or the iCMP—may suddenly shut off within 60 seconds of starting.

This issue only occurs under the following conditions:

- The device is running on battery power (i.e., the device is not connected with a charger or USB cable to a power source).
- The device's internal clock is set to 11:00 p.m. to 11:59 p.m.

This issues affects ALL Ingenico devices.

Resolving This Issue

Ingenico recommends the best way to resolve this issue is by setting the Ingenico payment device's internal clock. The clock setting is not displayed by the Ingenico payment device when the device is in its normal operational mode for accepting payments; however, there is nonetheless an internal clock, and the setting for this internal clock plays a critical role in this issue. The internal clock most likely is not set to the merchant's local time and may be off by several hours. Therefore, setting the internal clock to local time will most likely resolve this issue—unless payments need to be accepted between 11:00 p.m. and midnight (in which case the internal clock should be set to an alternate time).

Follow these steps to set the internal clock for an Ingenico payment device:

1. Turn on the device (if it is already on, turn it off and then back on) and wait for the copyright page to appear.
2. When the copyright page appears, immediately enter the following key sequence: **2 6 3 4 Green**. (Or in other words, press the **2** key, then the **6** key, followed by the **3** key, and then the **4** key. And then press the **Green** key!) You MUST enter this key sequence very quickly or the window of opportunity will close and the device will continue to start as normal.
3. If you entered the key sequence correctly in Step 2, a "Press F for menu" message will appear. When this message appears, press the **F** key. You will now be looking at the Ingenico device's Functions menu.

> ***Important!*** If the "Press F for menu" message did not appear, you must return to Step 1. The "Press F for menu" message must appear in order for you to access the device's internal settings.

4. The following menu selections must be made on the Ingenico payment device. When using the Ingenico menus, press the **F2** key to scroll down, the **F3** key to scroll up, and the **Green** key to make a selection. You may also select a menu option by choosing the corresponding number on the Ingenico keypad.
   a. Select **TELIUM MANAGER**
   b. Select **Initialization**
   c. Select **Parameters**
   d. Select **Date and time**
   e. Select **Set time**
   f. Enter the merchant's local time and then press the **Green** key. If the merchant needs to take payments from 11:00 p.m. to midnight local time, you must enter an alternate time.

Note: By default, most Ingenico devices are set to use a 24 hour format (e.g., 11:30 p.m. would be 23:30 on the Ingenico device's internal clock). To change the time format to AM/PM, you can repeat the steps above and then select **Time format** instead of **Set time** in Step E. However, if you select AM/PM as the time format, be sure to select AM or PM as appropriate on the **Set time** panel.

g Press the **Red** key one or more times until the "MODIF_PARAM" screen is displayed. (A prompt will then appear for printing a "param" receipt.)

h Press the **Green** key. (The "Press F for menu" message will appear again.)

i Reboot the device. (You can reboot an iCMP device by holding down the power button on the side of the device.)

After you have completed these steps, the Ingenico device will no longer turn off as described previously.

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