

## Tablet POS 2.0 Credit Card and Device Setup

Tablet POS 2.0 allows you complete transactions anywhere you can connect to the internet.

In this course we will go over the set up needed to process credit card transactions with Epicor Payment Exchange along with the Ingenico iSMP.

We will also provide the steps needed to configure Authorize.net accounts, configure a Receipt Printer and install a Socket Scanner.

There are several options available for credit card processing and Tablet POS.

If you have selected Epicor Payment Exchange, that team will provide you with an email containing information to set up your 'Payeezy' page.

Please refer to the Training on Demand Payeezy Agenda for questions on that application. Here you can download the Payeezy Gateway Guide for reference.

From Settings on your tablet, tap 'Tablet POS' on the left side of screen.

In the 'Payment Processor' section, tap the 'Processor' field.

Select the 'Epicor Payment Exchange – Net' field.

A check mark now appears to the right of this selection.

Click the Back button.

After establishing a Payment Page in Payeezy for your mobile devices you may begin setting up your Tablet POS for manually entered credit cards for use with Epicor Payment exchange.

Remember you can review the Payeezy Gateway Guide for step by step instructions.

Tap 'Epicor Payment Exchange – Net'.

Enter the 'Gateway ID', the 'Transaction Key', and the 'Payment Page ID' found here, under the 'MANUAL' heading.

Press the Back button to save your changes.

Again, the information needed to complete this can be found on your Payeezy Gateway internet page.

To test, post a transaction and select 'Enter Manually' from the payment screen. A successful implementation will look like the following:

You can now configure the 'Swipe' Credentials from your tablet Settings, Tablet POS and Epicor Payment Exchange – Net.

Enter the 'Merchant ID' or MID.

Update the 'Terminal ID' or TID.

Set the 'TPP ID' to REP011, the 'Group ID' 10001, and the 'Device ID' to 001. If you have additional devices set the ID to 002, 003 and so on.

In the 'Cashier' field, enter the default user name from your location.

Tap the Back button at the top of the screen to save your changes.

[Ingenico iSMP PIN Pad Pairing]

Ingenico iSMP PIN Pad is available to Epicor Payment Exchange users only.

On your Apple device, select 'Settings', 'Bluetooth' and set the slider to enable.

It should display 'Now discoverable' along with your device name.

On the iSMP unit, press the F button 4 times very quickly.

The screen displays this information.

Press the F1 button and choose 'iOS mode'.

The PIN Pad indicates that it is 'rebooting for iOS mode' and will restart itself.

When the iSMP displays the Apple device name, press the green O button.

Enter the PIN listed at the bottom of the iSMP's screen in the Apple device's 'Enter PIN' window.

Press the 'Pair' button in the upper-right corner.

The iSMP beeps and the Apple device displays a 'Connected' message.

If you choose Authorize.net as your payment processor, you will need to go to [www.authorize.net](http://www.authorize.net) and sign up for their gateway and merchant account.

If you already have an iNET account with Authorize.net, that is a 'Card Not-Present Account'.

You must get another one added that is denoted as a 'Card Present Account'.

You will also need to specifically ask them to enable American Express processing.

After those steps are complete, go to the 'Payment Processor' section in your tablet Settings and tap 'Authorize.Net'.

Enter your 'Username' and 'Password' to access Authorize.net for payment processing.

Go back to the Tablet POS application and begin a test transaction

Total the transaction and add a valid credit card to the payment page. Tap 'Pay' to process the Test.

Log into your Authorize.net merchant account and click the Account tab.

Choose 'Mobile Device Management' and you will see mobile devices that are enabled, disabled, and pending.

Click the hyperlink for the device that you want to authorize.

Enable the device from the drop down choices in the pop-up menu if needed.

You can now process credit cards with Authorize.net and Tablet POS.

From your Tablet Settings, click 'Tablet POS' on left side of screen.

In the 'Local Receipt Printer' section, tap the 'Type' field.

Select Epson, Zebra, or None depending on your printer model.

Tap the back button at the top of the screen to save your changes.

Tap 'Printer IP Address'.

Enter the IP address for your wireless printer.

Tap the back button at the top of the screen to save the changes.

At the bottom of the Point of Sale screen, tap the gear icon, then select Printer Setup.

Select Test to test the printer.

SocketScan is an optional scanner that can be used with the iPad via Bluetooth.

In Settings, Tablet POS go to the Scanner section.

Set your Softscan Mode speed.

Set the 'SocketScan Enabled' field to 'ON' or set to 'OFF' for Red Laser scanning.

When you use the scanner for the first time in Tablet POS, you must register the scanner, configure it, and set firmware.

Open the Tablet POS application and go to the posting screen. Tap the gear icon at the bottom and choose 'Scanner Setup'.

Follow the directions on this screen for Pairing your Socket Scanner to Tablet POS.

You should now be able to configure your Tablet to process credit cards through Epicor Payment Exchange or Authorize.net.

You also have the instructions needed to add an iSMP PIN Pad, a wireless receipt printer or a handheld scanner.

Review this course as many times as needed and print off the Install Setup Guide located in the Course Materials section for reference.

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