



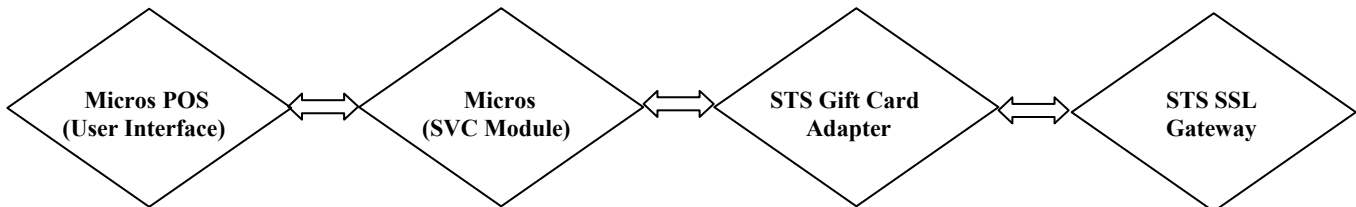
# SMART TRANSACTION SYSTEMS

## Guidelines for Setting up the SVC Module to work with Smart Transaction Systems

This document provides useful tips for Micros dealers that need to install and configure Smart Transaction Systems (STS) gift and/or loyalty card capability on the Micros RES-3700 system. It also supplements the documentation provided with the Micros Stored Value Card (SVC) Module. The STS gift card program works with virtually any version of the Micros 3700 software, but version 4.8 or higher is recommended for loyalty programs.

### How it Works

There are 3 separate software products involved in a gift card transaction. Transactions flow from the Micros POS software to the Micros SVC Module, which sends the transaction to the STS Host Adapter. The STS Host Adapter encrypts the transaction and sends transaction to our SSL gateway over the merchant's internet connection. The response is then sent back in the reverse order.



### Step 1: Make sure you order the correct software from Micros

The Micros Stored Value Card module is referred to as the “SVC” module. Micros dealers sometimes confuse this with the “SVS” module, which is not the same thing and will not work. Normally, you will want to order the SVC module with SIM. The only exception would be for customers that already have the SIM. Here is the information from the member area of the Micros website regarding the SVC Module:

#### Stored Value Card (SVC)

P/N 003790-300 (with SIM)

\$440/MSRP

\$220/Dealer Cost

P/N 003791-300 (without SIM)

\$440/MSRP

\$220/Dealer Cost

### Step 2: Verify that Micros has provided the license key to go with the SVC module

The SVC module will not work unless a valid license key has been entered into the system for the “SVC Interface”. According to Micros, the License Manager application has not been updated in all versions to support entry of the SVC Interface code. You may need to use a utility program called SVCLICENSING.exe. This program is been included in the SVC installation zip file from Micros. (see pg. 23 of the Micros Stored Value document)

### **Step 3: Install the SVC module using the install program provided by Micros**

#### Reminders:

- a) Before you begin, make sure that the XML parser from Microsoft is installed on the machine. (MSXML 4.0 Service Pack 2 or higher) You can download it directly from Microsoft at: <http://www.microsoft.com/downloads/details.aspx?FamilyID=3144b72b-b4f2-46da-b4b6-c5d7485f2b42&DisplayLang=en>
- b) Don't forget to rename the svc.isl (normally found in the \MICROS\ProfessionalServices\StoredValueCard folder) and copy it to the \MICROS\RES\POS\Etc folder on each workstation as indicated on page 25 of the Micros Stored Value document.
- c) After the SVC server has been installed, make sure the Micros Stored Value Card Server service is running.

## Step 4: Download and Install the STS Host Adapter

The STS Gift Card Adapter acts as a conduit between the Micros SVC interface and our transaction processing system. It is a very small program that accepts transactions from your POS software and sends them to our internet gateway over a secure connection.

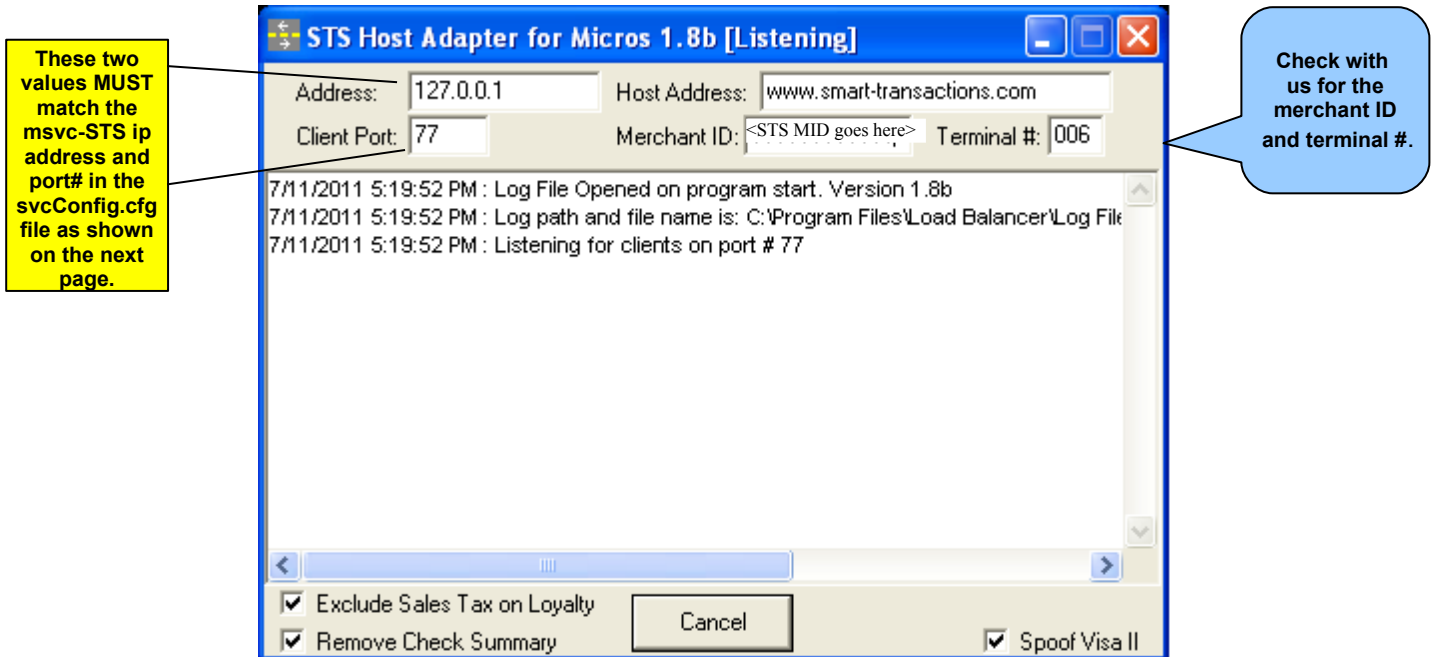
Complete the following steps to install the program:

1. Download *HostAdapterSetup.exe* from our web server at:  
<http://smartrtransactions.com/micros>
2. Run *HostAdapterSetup.exe*
3. Follow the prompts. (Check the box to create a desktop shortcut.)

The Host Adapter must be running at all times for gift & loyalty cards to work. The install program adds a shortcut to the program to the Startup folder so that the program is started and minimized to the system tray automatically whenever the server boots up.

### 5-step Configuration for the STS Gift Card Adapter

1. Enter the merchant's 12-digit Merchant ID and 3-digit Terminal #.
2. The 'Address' field is the IP address that the software will “listen” for transactions on. This will be the IP address of the machine that the STS Gift Card Adapter is installed on. (This is the IP address machine on the LAN, not the public internet address.) The software will normally automatically load the IP address of the machine into this field. The default value of *127.0.0.1* does not need to be changed for most installs.
3. Leave the Host Address at it's default value – this is the address of our SSL gateway.
4. The Client Port should be 77.



5. Leave all check boxes at their default settings and click the “Listen” button. The log window will show that the program is now listening for transactions.

After installation and setup, the program will automatically start listening and minimize itself to the system tray whenever the program starts. (The system tray is the small row of icons near the clock on the desktop) The Host Adapter icon looks like this:

### Step 5: Enter the host adapter setting in the svcServer.cfg file

The Micros SVC module installation program will place a file named svcServer.cfg in the `\professional services\etc` folder. (This is where it is usually located.) The parameters in this file define how gift card transactions will be processed and where they will be sent to.

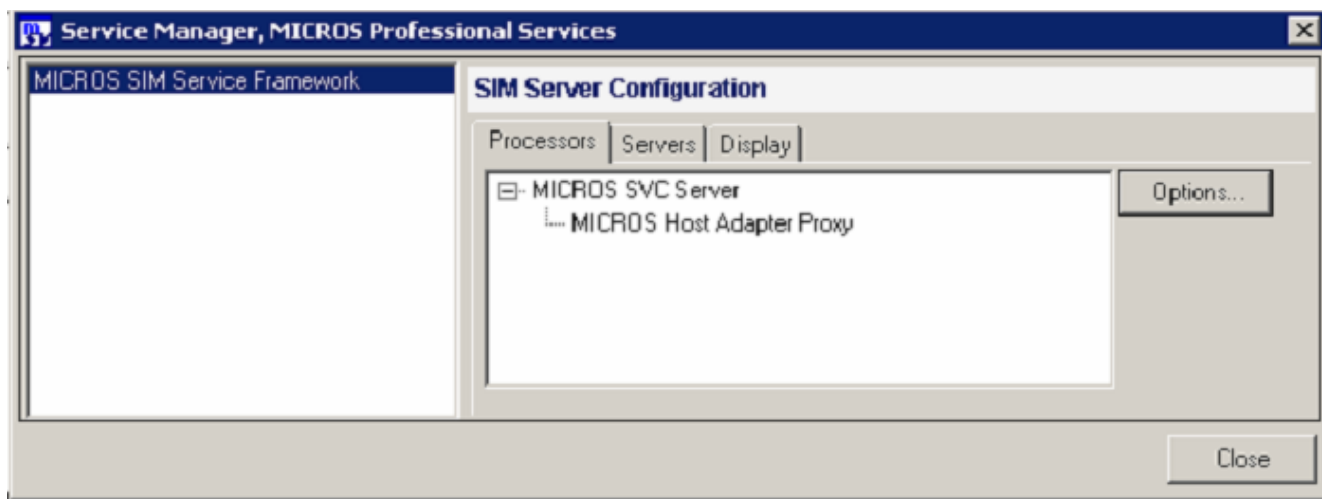
At a minimum, the following settings must be present in the svcServer.cfg file:

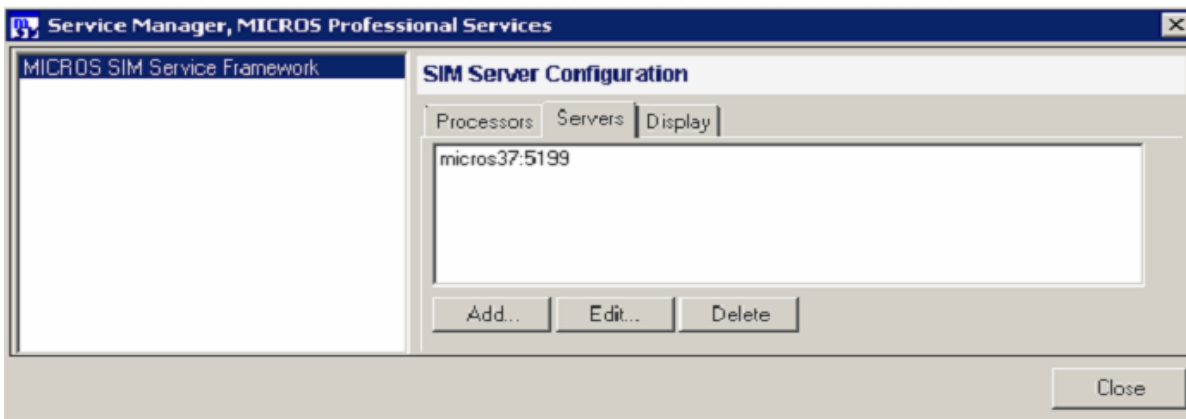
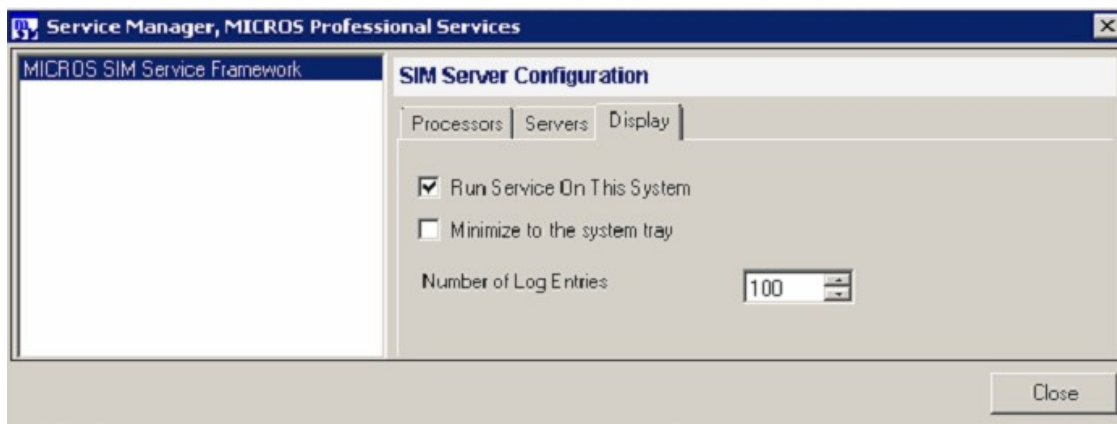
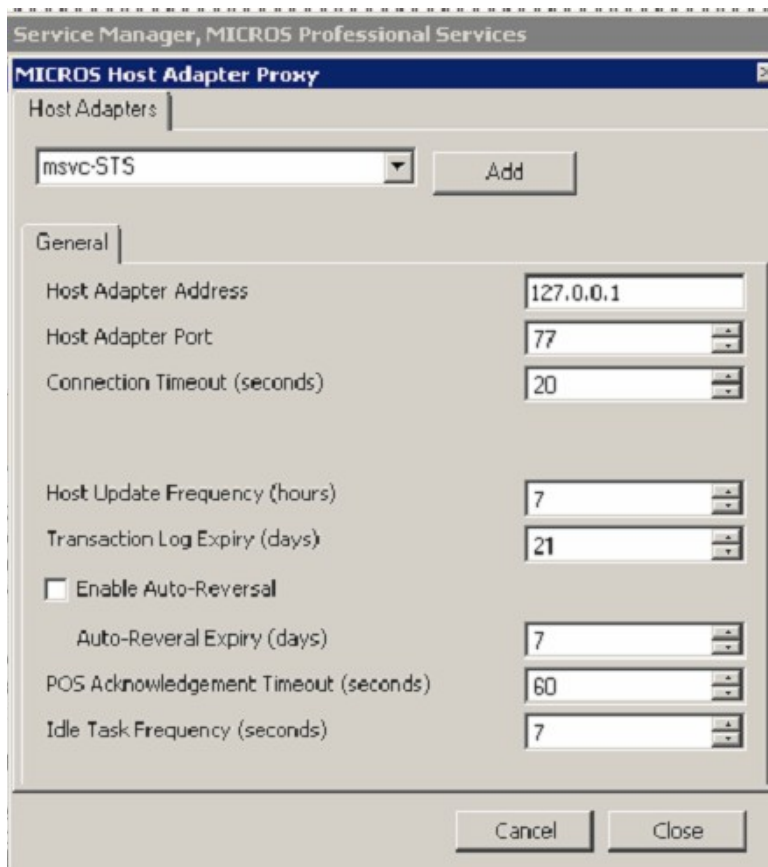
```
#####
#           Host Adapter Settings
#####
#
# Stand-alone Host-Adapter Settings
#
msvc-STS-address           127.0.0.1 (IP Address of the STS Host Adapter.)
msvc-STS-port              77 (Port# of the STS Host Adapter.)
msvc-STS-protocol-version  1 (This is always '1')
msvc-STS-send-check-summary Y (Set to 'Y' for loyalty, 'N' if you are only doing gift cards.)
msvc-STS-prompt-for-points N (Recommended setting is 'N'.)
msvc-STS-offline-tender    0 (This is always '0')
msvc-STS-allow-tip-on-redeem N (This is normally 'N')
msvc-STS-prompt-for-auth-on-reversal N (This is always 'N')
```

**\*IMPORTANT\***

The address and port numbers in the svcServer.cfg file **MUST** match the values that in the *Address* and *Client Port* fields in the STS Host Adapter.

In newer versions, you will need to use the *Micros Service Manager* (Micros.Ssf.UI.exe) software to set the IP address and port# as shown below.

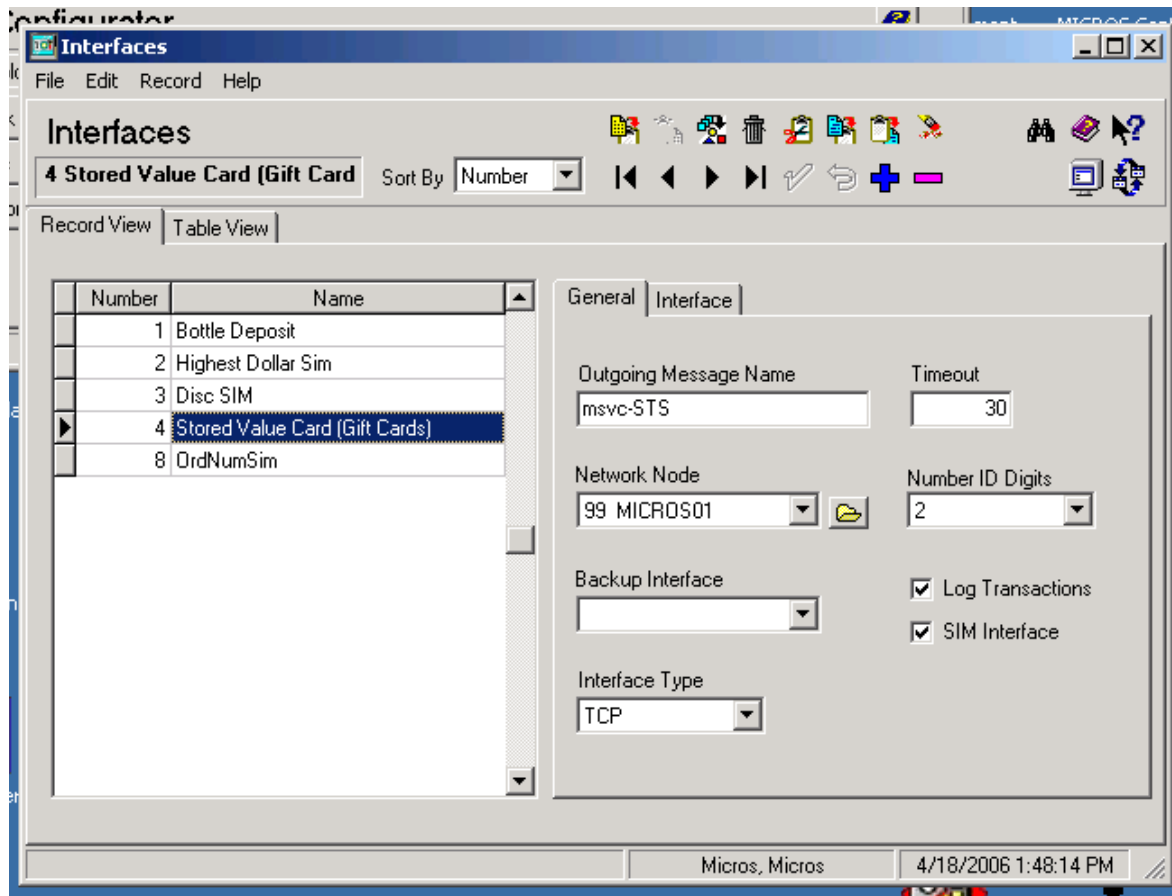




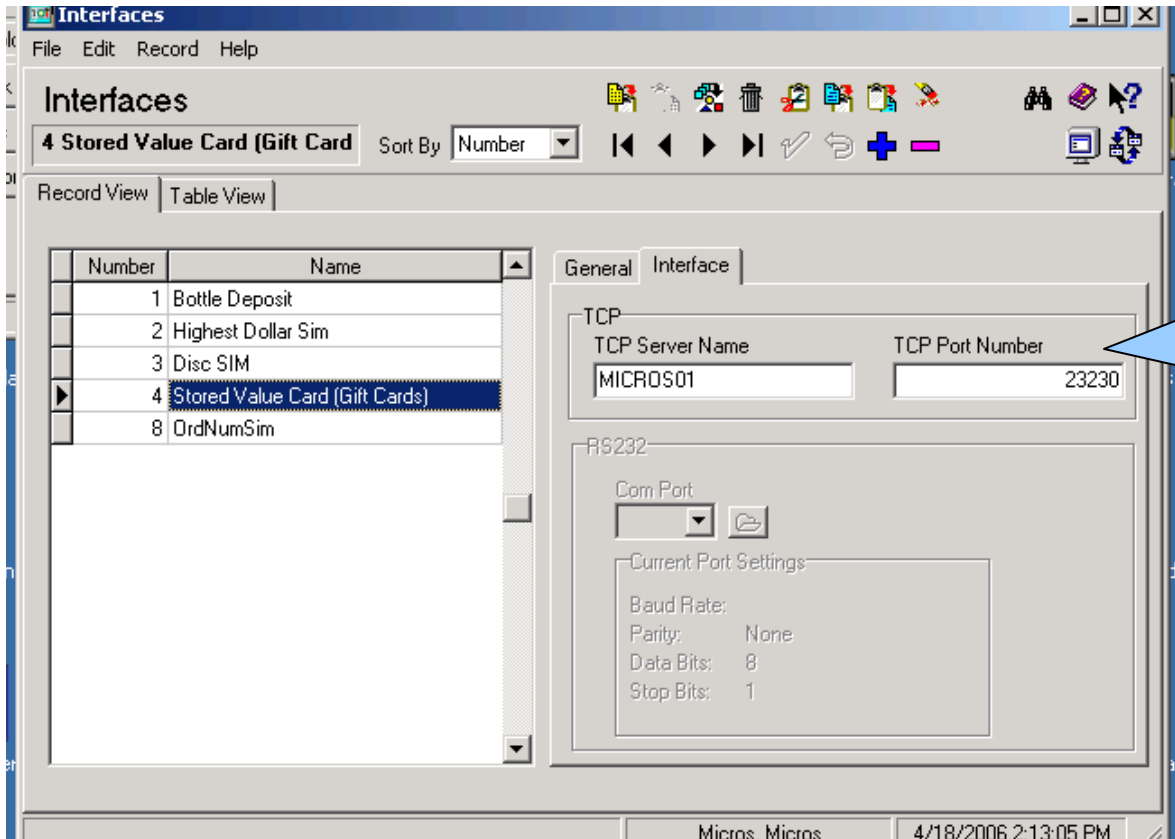
**Step 6: Make sure you have the correct settings in the Interface screen**

Use the following sample screens to make sure you have the correct values set in the POS Configurator interface screen.

SVC Interface Screen from the Micros POS Configurator – General tab



Sample SVC Interface Screen from the Micros POS Configurator – Interface tab



Note: Make sure that you enter the correct machine name in the “TCP Server Name” field. This can be found in the “System” applet in Control Panel. The full computer name shown on the “Name” tab is the correct value for this field.

**Don't get the Micros SVC module confused with our host adapter they are two different things. (See the diagram on page 1) They do not listen on the same port numbers.**

### Step 7: Define touch screen buttons for gift and/or loyalty transactions

Not all of the Micros SVC transaction types apply to the STS gift card program. The following touch screen buttons should be set up for merchants that are doing gift cards with STS:

<u>SVC Inquiry#</u>	<u>Description</u>
2	Activate Card
3	Reload Card
5	Balance Inquiry
6	Balance Transfer
10	Redeem
11	Redeem Authorize (optional)

The following touch screen buttons should be set up for merchants that are doing loyalty cards with STS:

<u>SVC Inquiry#</u>	<u>Description</u>
7	Issue Points (a.k.a. Loyalty Accrual)
9	Points Inquiry

### Step 8: Setup item codes for service charge and tender types

The SVC interface requires that STS send back an 'item type' and 'item code' with the approval response for most gift & loyalty transactions. The item codes returned from STS are hard coded. Therefore, the following items codes **must** be setup using the Micros POS Configurator.

<u>Item Type</u>	<u>Number</u>	<u>Name</u>
Service Charge	902	Add ValueGC
Service Charge	903	GCard Sold
Tender/Media Payment	9002	Redeem GCard
Tender/Media Payment	9003	Redeem Auth & Balance Inquiry (You can allow a chit with tip line to be printed)
Tender/Media Payment	9006	Add Points (Only needed for loyalty programs. Place under the Service Total category)

The screens on the following pages were captured from a typical RES-3700 setup:



## Add Value service charge – General tab

Discount / Service

File Edit Record Help

Discount / Service

902 Add ValueGC Sort By Number

Record View Table View

Number	Name
401	\$ Disc
402	% Disc
403	Rtl Empl Disc
404	20% Off
500	- QSR Disc
501	QSR Empl Disc
503	Senior Meal
504	Coupon
506	Open % Disc
902	Add ValueGC
903	GCard Sold
998	GSS Open \$
999	
1000	Charge Tip

General Options Discount Service Charge Min / Max Values

Type: Service Charge

Tax Class: [ ] SLU: 900 Service Charges

Print Class: 101 Guest Check Menu Level Class: 101 All Levels

Privilege: 0 NLU: [ ] Amount: [ ] Effective From: [ ]

Category: [ ] Key Code: 6 Percent: [ ] Effective To: [ ]

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## Add Value service charge – Options tab

The screenshot shows the 'Discount / Service' configuration window with the 'Options' tab selected. The window title is 'Discount / Service' and the record being edited is '902 Add ValueGC'. The 'Sort By' is set to 'Number'. The 'Record View' is set to 'Table View'.

Number	Name
401	\$ Disc
402	% Disc
403	Rtl Empl Dsc
404	20% Off
500	- QSR Disc
501	QSR Empl Dsc
503	Senior Meal
504	Coupon
506	Open % Disc
902	Add ValueGC
903	GCard Sold
998	GSS Open \$
999	
1000	Charge Tip

The 'Options' tab contains the following settings:

**General Settings**

- Preset
- Amount
- Reference required
- Print validation
- Reset itemizers
- Item is shareable
- Override combo discount
- Cash Management Till Required

**External Type**

**Apply to Discount / Svc Chg Itemizer**

- Itemizer 1
- Itemizer 2
- Itemizer 3
- Itemizer 4
- Itemizer 5
- Itemizer 6
- Itemizer 7
- Itemizer 8

The status bar at the bottom shows 'Micros, Micros' and the date/time '4/18/2006 1:47:00 PM'.

## Add Value service charge – Service Charge tab

The screenshot shows the 'Discount / Service' configuration window. The 'Service Charge' tab is selected, displaying the following options:

- Type:**
  - Standard
  - Non-Revenue
  - Non-Revenue Cash Back
- Post to:**
  - Post to cover count
  - Post to svc charges total
  - Post a percentage to tips paid
  - Post to tips paid total
  - Post to charged tips total
  - Do not post to emp tip totals
- Tender/Media for Tips Paid:** [Dropdown menu]

The left-hand list shows the following items:

Number	Name
401	\$ Disc
402	% Disc
403	Rtl Empl Disc
404	20% Off
500	- QSR Disc
501	QSR Empl Disc
503	Senior Meal
504	Coupon
506	Open % Disc
902	Add ValueGC
903	GCard Sold
998	GSS Open \$
999	
1000	Charge Tip

## Redeem GCard Tender/Media Payment – General tab

**Tender / Media**

File Edit Record Help

**Tender / Media**

9002 Redeem GCard Sort By Number

Record View Table View

General Tender Presets CC Tender Credit Auth PMS Service TTL Prio

Number	Name
904	Hold Check
905	Reprint Chck
906	Seat Check
907	Receipt Chck
908	Shared Check
909	Suspend
910	Chain Check
911	Fire Hold Or
9001	Issue SVS
9002	Redeem GCard
9003	Print SVS
9004	Cash Back SV
9005	Offline GCar
9006	Loyalty Accr

Type: Payment Effective From: Effective To:

Exempted Tax Class: SLU:

Print Class: Menu Level Class: 101 All Levels

Privilege: 0 Category: 1 NLU: 9002 Key Code: 9002

Icon

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## Redeem GCard Tender/Media Payment – Tender tab

The screenshot shows the 'Tender / Media' configuration window. The 'Tender' tab is selected, and the item '9002 Redeem GCard' is highlighted in the list on the left. The right pane shows configuration options for this tender type.

Number	Name
904	Hold Check
905	Reprint Chck
906	Seat Check
907	Receipt Chck
908	Shared Check
909	Suspend
910	Chain Check
911	Fire Hold Or
9001	Issue SVS
9002	Redeem GCard
9003	Print SVS
9004	Cash Back SV
9005	Offline GCar
9006	Loyalty Accr

**General Options**

- Open drawer
- Use with currency conversion
- Reference required
- Exempt auto service charge
- Employee meal
- Assume paid in full
- Require amount entry
- Declare tips paid
- Item is shareable
- Post to gross receipts
- Post to charge receipts
- Post fiscal cash register credit
- Tax exempt coupon
- Allow with Euro

**External Type**

**Charged Tip**

1 Charge Tip

**High Amount Lockout**

Enable HALO

HALO limits overtender  
 HALO limits amount tendered

**Options**

- Enable Tender Rounding
- Round Tender to Nearest 10
- Rounding Based on Tens Digit

**Insignificant Digits**

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