LEARNER GUIDE

TSYS Express – FEO Terminal Hierarchy

Module 3



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Intended Usage

This guide is designed for classroom use and is not intended to be an application reference document.



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Module Introduction

Your credit card and the terminal used to swipe your card are the most commonly recognizable items involved in the process of electronic payment transactions. In this module, you will learn the detailed process involved in setting up a terminal to authorize electronic payments, store transaction data, and facilitate electronic deposits involved in bank card processing.

MODULE OBJECTIVES

Upon completion of this module, you will be able to:

- Explain the front-end terminal hierarchy
- Understand the hardware and software components of a terminal and describe the terminal file build process
- Perform the following in the Express system:
 - o A standard terminal file build
 - o A secondary system terminal file build
 - o A terminal specific file build



LESSON 01 Front-End Terminal Hierarchy

The first phase of payment card processing is Authorization and Capture. Authorization refers to the electronic process for approving or denying purchases. Capture is the recording and storing of the transactional data. Terminals are devices used in the Authorization and Capture process.

The three main functions of a terminal are:

- Facilitate the authorization process
- Capture (store) the transactional data
- Transmit transaction data for electronic deposit

The unit used to swipe your payment card at the grocery store is an example of a terminal. POS (Point of Sale) Device is the generic name for all electronic payment devices, including terminals. Examples of POS devices that can be used for electronic payment transactions are terminals, touch screen monitors connected to a computer, and a website. For the purposes of this training we will use the terms terminal and POS device interchangeably.

Components of a Terminal Hierarchy

Terminal data is organized and accessed by the Express system using the front-end terminal hierarchy model. The front-end terminal hierarchy is an electronic address used to identify a terminal.

The front-end terminal hierarchy has six components:

- BIN
- Agent
- Chain
- Merchant POS
- Store
- Terminal

In the Express system you will see the terminal hierarchy referred to by the first letter of each component, BACMST (Bin, Agent, Chain, Merchant POS, Store, and Terminal).

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Bank Identification Number (BIN)

The Bank Identification Number (BIN) is a six-digit number which is assigned by Visa. A bank is identified by the BIN number.

Agent and Chain Numbers

The Agent and Chain numbers are six-digit numbers which are determined by the user/acquiring bank. The Agent and Chain numbers are optional numbers used for reporting purposes. Define categories or groups for analysis by using Agent and Chain numbers.

The Agent and Chain numbers can correspond to the Group and Association levels of the back-end merchant hierarchy. The Agent and Chain numbers can directly link to the Group and Association levels, or can be used as separate reporting features such as using the Agent number to represent a smaller bank or ISO (Independent Sales Organization) and the Chain number to identify a corporation.

Merchant POS Identification Number (MID)

The Merchant POS Identification Number is referred to as the POS MID. The Merchant number is a unique number which identifies the merchant. The acquiring bank assigns the 12-digit POS Merchant number.

Store Number

The four-digit store number is used to identify the store where the terminal is assigned. The store number can be used to identify a store or a department within a store or business. The Store number can also be used to identify the individual stores of a multi-store merchant.

Terminal Identification Number

The Terminal Identification Number is a four-digit number assigned to a specific terminal or POS device.



LESSON EXERCISE

Answer the following questions about the front-end terminal hierarchy.

1. List and define the six components of the front-end terminal hierarchy.

2. Describe a practical reporting use for the Agent and Chain numbers within the terminal hierarchy.

3. Name the institution which issues BIN numbers.

LESSON SUMMARY

To review, the three main functions of a terminal are authorization, capture, and electronic deposits involved in the electronic payment process. You have learned that Express manages the electronic transaction data by using a front-end terminal hierarchy model.





LESSON 02 Terminal Components and Build Process

POS devices/terminals are made up of two separate components:

- Terminal Software
- Terminal Hardware

Terminal Software

The software application on the terminal provides the functional directions and rules which allow the terminal to operate. A terminal model can use more than one type of software. The type of software selected will be based on the functionality needs of the merchant using the terminal. Terminal software is typically divided into the following industry types: retail, restaurant, lodging, and cash advance. There are two types of TSYS support available for terminal software.

Levels of TSYS Support for Terminal Software

- Class A TSYS supported software
- **Class B** Third party software that is TSYS certified but not supported by TSYS. Class B is known as Stage Only.

Terminal Hardware

The actual unit used to swipe a card or enter the data is the hardware component. The number of keys on the terminal, the display screen, and the amount of memory contained in the device are all terminal hardware features.

The memory on the terminal allows it to store electronic purchase data and the software rules, which enables the terminal to operate and function. Batch capacity is the term used to describe the amount of transactions a terminal can store. For example the batch capacity for a terminal may be 400 transactions. Transmitting or sending one or more transactions to the storage database is referred to as a batch, as well as batching or batching out.



Terminal File-Build Process

"Building a file" is the phrase used to describe entering all of the information needed to activate a new terminal in the Express system. The Express terminal file build is a six-stage process:

- 1. Locate the merchant
- 2. Introduce the terminal to the database
- 3. Create terminal operating instructions
- 4. Assign the allowable payment cards
- 5. Set authorization communication
- 6. Board the terminal

Locate the Merchant

Stage one of the terminal file build process is to find the intended merchant for the new terminal. Based on the hierarchal structure of Express, merchants are assigned terminals.

Introduce the Terminal to the Database

Stage two of the terminal file build process is to introduce the new terminal to the front-end terminal hierarchy database. An address is created in the database to identify the new terminal within the system. The new terminal's address within the database is called the V Number.

Create Terminal Operating Instructions

Stage three of the terminal file build process is to create the operating instructions for the terminal. Define the terminal's functionality by specifically setting up what the terminal can and cannot do.

Assign the Allowable Payment Cards

Stage four of the terminal file build process is to assign the payment cards to the new terminal. A terminal will be assigned to accept debit cards as well as specific credit card brands such as Visa, Master Card, Discover, and American Express.

Set Authorization Communication

Stage five of the terminal file build process is to set the authorization communication. The terminal facilitates the card authorization process providing an approval or denial of the transaction. A terminal will send an authorization request to the cardholder's issuing bank. A host is the processor or switch the terminal uses to communicate with the card issuing bank.

Board the Terminal

Stage six of the terminal file build process is to board the terminal. The new terminal file information created in Express will be downloaded on to the terminal and boarded or placed into the front-end terminal hierarchy database.



LESSON EXERCISE

Answer the following questions about the terminal components and terminal file build process.

- 1. Explain "Stage Only".
- 2. Batch Capacity is ______.
- 3. "Batching Out" is a term used to describe what process?
- 4. Define Class A.
- 5. What is a V Number and in what stage of the file build process is the V number created?

LESSON SUMMARY

To review, terminals consist of both hardware and software. In this lesson, you explored the high-level method of enabling a terminal to authorize bank card transactions, called the terminal file build process.



Create a Standard Terminal File

There are over 100 POS devices to choose from as well as multiple software applications for those terminals. However, there is a standard process to build the most common terminals/POS devices.

Standard Terminal File Assumptions

Before you begin creating any standard terminal file in Express, you will have already gathered the information needed about the merchant and terminal. We will use the following assumptions to build our standard terminal file in this module:

- Merchant Name and Number
- Terminal Model Number: Ingenico
- Software Support Level: Class A Full Support
- Card Type Acceptance: Credit and Debit
- Card Brand Acceptance: Visa, Master Card, American Express, Discover, and Debit
- Multi-Merchant Terminal: No
- Industry: Retail, gratuity is not added on to the receipt

Express Pages Used for Standard Terminal File Build

The Express pages used to build a standard terminal file are:

- TSYS Express Homepage
- Merchant Summary page
- Terminal Setup page
- Terminal Details page
- Card Range Select and Card Range Setup pages
- Host Select and Host Setup pages





TSYS Express Homepage

The TSYS Express Homepage is the page that displays when you log on to Express. You can begin building a standard terminal file from this page. First, you will need to locate the merchant that will be assigned the new terminal.

TSYS Express Homepage

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To locate a merchant:

- 1. From the Search Criteria section, enter the Merchant ID number in the Merchant Number field.
- 2. Click the **Search** button. The Merchant Summary page for that merchant displays.



Merchant Summary Page

The Merchant Summary page is the main page for the merchant record. You can initiate the terminal setup from this page.

Merchant Summary Page

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		Merchant Details			
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POS Merchant ID:	00000000000	Owner Name:			
Industry SE:	000000000	DBA Address:			
Seller ID:	000000				
Discover:	000000000000000	DBA City / State / Cour	try:		
PayPal Ind:	Y				
JCB:		DBA Postal Code:			
JCB Processing:	Y	Phone:			
Merchant Status:	O-Open	Sales Code:			
Last Maintained: MCC/SIC:					

To continue with the terminal setup:

- 1. From the Merchant Summary page, select **New Terminal Setup** from the **Terminal** menu.
- 2. The Terminal Setup page displays.





Terminal Setup Page

The purpose of the Terminal Setup page is to introduce the terminal to the database and identify the base characteristics of the terminal. You can also define the terminal's front-end hierarchy and generate a V Number for a terminal on the Terminal Setup page.

Terminal Setup Page

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Navigational Features

The Terminal Setup page was designed to provide an intuitive navigational flow to the terminal file build process. The Terminal Setup page has the following navigational features:

- 1. Smart Navigation
- 2. Collapse/Expand Sections
- 3. Quick Links

Smart Navigation

The Smart Navigation feature on the Terminal Setup page will direct the pages displayed as a terminal file is being created. After the completion of the Terminal Setup page, the terminal type of the file will determine the page displayed, for example Class A, Class B/Stage Only, or Secondary System.

Type of Terminal File	Page Display Order
Class A	The Terminal Details page will display.
Class B/Stage Only	The Profile Build page or Card Range page will display based on the type of hardware and software being used. The Terminal Details page will not display for this terminal file type.
Secondary System Build* *The Secondary System terminal build file process will be discussed later in this training.	The Profile build page will display and then the Terminal Details page.

Smart Navigation Page Display Order

In this lesson, Creating a Standard Terminal File (Class A), we will explore the Terminal Details page. The Profile Build page will be discussed in another lesson.



Collapse and Expand Sections

The Terminal Setup page allows the user to open (expand) and close (collapse) the sections of the page. The sections will display Collapse when the section is open or Expand when the section is closed. Perform the Collapse/Expand function by clicking the title bar on the desired section.

Terminal Setup Page

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Quick Links Menu

The **Quick Links** menu is located on the Terminal Setup page. The **Quick Links** menu provides a list of terminal-related pages, allowing you to open a link to the desired page. The Quick Links menu is available from any of the terminal file build pages in Express.

Terminal Setup Page





Steps to Complete the Terminal Setup Page

To complete the Terminal Setup page, enter information into the various sections. The Terminal Setup page contains the following sections:

- Terminal Header
- Terminal Summary
- Inquiry
- Hierarchy
- Terminal Information
- HWSW Information
- Merchant information
- Dial Settings
- Terminal Status

Inquiry Section

First, review the Inquiry section to confirm it is a new install request:

- Inquiry Code B 05
- Description New Installation Request

Hierarchy Section

Use the Tab key on the keyboard to move between fields and enter the field information:

- Bin
- Agent
- Chain
- POS Merchant ID
- Store
- Terminal
- Get V Number: Click Get V Number to generate the V number. The V number is the address assigned to the new terminal for the database.
- Request Contact: Enter your name as the person creating the file.
- Request Contact Phone: Enter your phone number as the person creating the file.

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Terminal Information Section

The information entered into the Terminal Information section will determine what will display on the Terminal Details page. Enter information for the following fields:

- **Host Capture Participation:** Select this field if the terminal file is a host capture setup. Enabling this field with will display additional options on the Terminal Details page.
- Attachment Code: This field identifies the voice authorization center used by the merchant. Select one of the following:
 - **IT** = DialPay Voice Approvals/Authorization Only
 - **IV** = DialPay Transaction Data Capture
 - All other drop-down options = Non-DialPay Authorization Centers
- Service Level: Select the service level for the terminal. RAO OLA Full DLL Install will identify the terminal software as Class A.
- **Copy An Existing Terminal?** This field allows you to copy the terminal information from an existing merchant's terminal. Select the checkbox, enter the V number you wish to copy in the **Copy From V Number** field, and then click **Copy**.

HWSW Information Section

The model and other hardware and software identifications used by the terminal are entered in the HWSW Information section. The information entered into this section will influence the fields displayed on the Terminal Details page. Enter the predetermined information into the following fields:

- Processor
- Manufacturer
- Model
- Track Type
- Option 1 = Credit Card Number, Expiration Date, and Card Holder Name
- **Option 2** = Credit Card Number and Expiration Date
- Software
- Retain Current Values

The next part of the Hardware/Software Information Section is used to enter the type of cards accepted by the terminal. The Merchant Product Setup page may impact the options displayed in this area. Complete the card information fields as needed:

- Accept AMEX
- AMEX SE or Industry SE: AMEX SE displays for merchants participating in the American Express ESA program, Industry SE displays for merchants participating in the American Express OptBlueSM program.
- Accept Discover
- Discover ID
- Accept JCB
- JCB ID
- JCB Processing
- Accept ATM



Store Descriptor Section

The Store Descriptor Section will display when the merchant already has other terminals built in the system. This section only displays when you are adding a new terminal for a merchant with pre-existing terminals.

Terminal Merchant information Section

The merchant information contained in this section will pre-populate from the Merchant Summary page and the Store Descriptor section on the Terminal Setup page. Review the fields in this section for accuracy and make any needed corrections.

Dial Settings Section

Information on the Terminal Setup page will default from the data entered into the HWSW Information section, Terminal Setup page. Review the information in this section and make any edits as needed.

To continue to the next page, click **Next** and the Terminal Details page displays.



Terminal Details Page

The Terminal Details page contains the specific data and instructions for terminal operation. This page will establish what a terminal can and cannot do.

Terminal Details Page

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Navigational Features

The Terminal Details page contains the same navigational elements as the Terminal Setup page. These elements are:

- 1. Smart Navigation
- 2. Collapse/Expand Sections
- 3. Quick Links Menu

Smart Navigation

Sections contained within the Terminal Details page will display based on the sections and fields completed in the Terminal Setup page. The hardware and software specifications will affect the sections shown on the Terminal Details page. For example, the Hotel and Lodging section will display on the Terminal Details page when using an Equinox model terminal with lodging enabled software (SPOSHTL).

Collapse/Expand Sections

The Terminal Details page contains the **Collapse/Expand** sections feature. This feature operates in the same manner as it does on the Terminal Setup page.

Quick Links Menu

The **Quick Links** menu displayed on the Terminal Setup page is also available on the Terminal Details page.





Steps to Complete the Terminal Details Page

To complete the Terminal Details page, enter information into the various sections. The Terminal Details page contains the following sections:

- Terminal Header
- AMEX
- Printer Settings
- Auto Close Settings
- Header/Custom Footer Lines
- Debit, EBT, Surcharge, and Other Settings
- Dial Settings
- Tip Settings
- Flags and Adjustments
- CPS Settings
- Invoice Settings
- Hotel and Lodging
- Advanced Terminal Settings

Terminal Header Section

Use the Terminal Header to reference the terminals hierarchy information which auto populates from the Terminal Setup page. Verify the auto-populated information as needed.

Amex Section

The Amex section is auto-populated from the Terminal Setup page. If needed, verify the auto-populated data in this field.

Printer Settings Section

The Printer Settings section fields default from the HWSW section of the Terminal Setup page. Review the fields as needed.

Auto Close Settings Section

Use the Auto Close Settings section to set a specific time to transmit the batch capture data, in military time. Complete the fields contained in the Auto Close Settings section as needed.

Header/Custom Footer Lines Section

Add customized messages to the header and footer of the receipt using the Header/Custom Footer Lines section. The character limits of the header/footer are driven by the terminal and the terminal printer requirements. If custom headers or footers are needed, complete this section.

Debit, EBT, Surcharge and Other Settings Section

This section contains the Debit, EBT, and Other Settings for the terminal. Verify the information on this page is correct, make any necessary changes.



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Dial Settings Section

The dial settings in this section will default from the HWSW section of the Terminal Setup page. It is not necessary to enter any information in this field.

Tip Settings Section

The Tip Setting section will display if the terminal model entered into the HWSW section of the Terminal Setup has the tip feature. If desired, complete the tip fields available in this section.

Flags and Adjustments Section

This section contains the terminals flags, adjustments, and password settings. Complete the flags and adjustment section as needed. The password protect keys will be based on the terminal make and model.

CPS Settings Section

The CPS Settings page contains card present services settings. Complete the following fields as needed:

- Reset Ref Number To 001 Flag
- Data Augmentation Flag If this field is enabled, ensure field check is displayed.
- Purchasing Card Flag
- Check Expiration Date If this field is enabled, ensure field check is displayed.

Invoice Settings Section

The Invoice Settings section is used to capture invoice numbers on the terminal receipts. The capture of invoice numbers can be based on type of transaction or all transactions. Complete the fields in this section, if desired.

Hotel and Lodging Section

The Hotel and Lodging section contains hospitality specific fields. This section will display based on terminal hardware and software entered on the Terminal Setup page. Complete the Hotel and Lodging section fields as needed.

To finalize the Terminal Details page, click **Save** or **Next**. Clicking **Next** will open the Card Range Select page.





Card Range Select Page and Card Range Setup Page

You can assign the payment cards accepted by the terminal using the Card Range Select page. The Card Range Select is used to establish the card types as well as the card brands. Examples of card types are Credit and Debt, and examples of card brands are Visa, MasterCard, American Express, and Discover. You will need to know the card ranges that you need to add before you start.

Keep in mind that the American Express and Discover card brands may be assigned to the merchant when the merchant is first boarded to Express. The card types and brands can then be added to the frontend terminal using the Card Range Select page. For example, the merchant must be set up for American Express during the Merchant Setup process in order to add the AMEX card range to the terminal.

Card Range Select Page



A configuration option which allows the most common card ranges to automatically populate is often active for this page. You can view a list of the populated card ranges in the Existing Card Ranges section.

Add a Card Range to the Existing Card Ranges

If the card range is not available in the Existing Card Range section, you will need to add the card range.

To add the card range:

- 1. From the **Available Card Ranges** list, select the card ranges you want to add. Use the **SHIFT** key to select multiple options.
- 2. Click Add. The card range you selected will display in the Select Card Ranges list.



- 3. From the **Selected Card Ranges** list, select the first card range, and then click **Setup New Card Range**.
- 4. The Card Range Setup page displays for the selected card range. Review the page and make edits to ensure all of the card range information is correct on the Card Range setup page.
- 5. Repeat steps for each card range you need to add.

Review Existing Card Ranges

If the correct card ranges are available in the Existing Card Ranges section:

- 1. Select a card range from the **Payment Service** column, and then click **Update**. The Card Range Setup page displays.
- 2. Review the page and make edits to ensure all of the card range information is correct on the Card Range Setup page.
- 3. Repeat steps for each of the card range options.





Card Range Setup Page

The Card Range Setup page displays when you are adding a card range or editing a card range in the terminal file. You can use the card range setup page to configure the fields for the specific card range.

Card Range Setup Page

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Configure or review the following fields:

- Payment Service: Select the appropriate card brand service.
- Voice ID: Enter the Voice ID number for the card range. The Voice ID number is often a form of the merchant account number for the card brand.
- Confirm the following auto-populated fields are correct:
 - o Accumulator Label
 - Host: This field identifies the host for the card brand.
 - Host 01 = Visa, MC, JCB, Discover, and American Express
 - Host 05 = Debit and ATM
 - **Host 10** = Check Authorization Services



- Indicators Section: Confirm the needed items are selected for the following options:
 - **Data Capture Required:** This option enables the POS device to capture authorization information.
 - **Mod 10 Check Account Number:** This option is required for all card types except Debit; the Mod 10 check box must remain unchecked.
 - **Printer Required:** This option enables receipt printing.
 - **Print Special Data:** This option provides additional authorization data on the receipt.
 - o Request Verification Code: This option enables CVV and CID prompts.
 - Service Indicator: This option is used for the Visa card range.
- Voice Authorization Phone Section: Confirm the Access Code/Phone number in the Primary field has auto-populated correctly, complete if not populated. This field will be left blank for Debit/ATM card ranges.
- Sharing Group Section: For Debit/ATM card ranges, select the networks from the Available list, and then click the Add button. Add the networks in order of dialing preference.

Finalize the Card Range Data

To finalize the data on the Card Range Setup page:

- 1. Review and enter data in the necessary fields.
- 2. Click **Save** to complete the Card Range setup.
- 3. Click **Continue** or **Cancel**. The Card Range Select page will display.
- 4. When all card ranges have been added or edited, click **Next**. The Host Select page will display.



Host Select Page and Host Setup Page

As you learned in lesson one, Stage Five of the terminal file build process is to set the authorization communication. The Host Select page in Express is used to designate the authorization communications. Separate settings will be used for credit cards, debit cards, and check services. The Host Select page displays after you set up the card ranges.

Host Select Page

				Portal Main	Help 🔻 Profile 🔻 Lo	g Of
@-Connec	TIONS		Host Select			
			Mercha	nt 🧹 Terminal	✓ Admin	
V Number: BIN: Agent:	V0000000 000000 000000	Chain: POS Merchant Id:	000000	Merchant Number: Store Number:	00000000000000 0000	
		Hosts				
Host 02 Host 03 Host 04 Host 10	2Gen Host (Visa 2Gen Host (Visa 2Gen Host (Visa Check Guaranter Add))) e Host	Remo	ve	Setup Host	
		Existing Ho	osts			
	Payment Se	rvice:	Host T	/pe: st (Visa)	View	
	© 13	1	05 ATM Ho	st (Visa)	Delete	
Back						
						_
		© 200	01-2014 TSYS Acquiring Soluti All rights reserved.	ons, L.L.C.		

The Host Select page allows you to view and edit the host settings for the terminal. The assigned hosts will auto-populate into the Existing Hosts section. You will need to review the Host Setup information for each host listed.

To view the Host Setup information,

- 1. Select a host from the **Payment Service** column, and then click **Update**. The Host Setup page displays.
- 2. Review the page and make edits to ensure all of the host information is correct on the Host Setup page.
- 3. Repeat steps for each of the Host options.



Host Setup Page

The Host Setup page allows you to configure the specific settings for the host. The settings will vary depending on if it is for credit card transactions or debit card transactions.

Host Setup Page – Credit

e-Connecți	ons		ŀ	lost Setu	р		
				Me	rchant	Terminal	Admin .
V Number:	V9618493	3					
BIN: Agent:	447475 000000		Chain: POS Merchant Id:	000000 1868004	60000	Merchant Number: Store Number:	18680046 0001
Terminal Numbe	r:	0002					
Host:		01	Host Payment Service	*	VISA		~
Record Format:			D 💌	Transa	action Code:	Swiped or Swiped and	Mail Order 🛛 👻
Check Guarante	e IIID/RII	D:		MCC:		5999	
			Authorization Ph	ones			
A	ccess Code	Phon	e		Descr	iption	
Primary		OTHE	R 🛛 1800411690)2	PRIME	EDC WATS	
Secondary		OTHE	ER 🔽 1877488075	57	SEC E	DC UATS	
				Hunarcom			
Cancel				Save			Validate
indicates a requ	uired field						

Host Setup Page – Debit

-Connect	'IONS)		Host Setup		
			Merchant	🗸 Terminal	🗸 Admin
V Number:	V9618493				
BIN:	447475	Chain:	000000	Merchant Number:	18680046
Agent:	000000	POS Merchant Id:	186800460000	Store Number:	0001
Host: Record Format:	05	Host Payment Servic	e:* ATM Transaction Code:	Swiped or Swiped and I	vlail Order
Check Guarante	e IIID/RIID:		MCC:	5999	
		Authorization Pl	hones		
	Access Code P	hone		Description	
Primary		8003708507 🔽	F	PRIM AUTH WATS	
Secondary	1	8774880358 💌		SEC AUTH WATS	
			Hypercom		
Cancel			Save		Continu
indicates a reg	wired field				

LEARNER GUIDE



Complete the Host Setup and Finalize Terminal File

Use the following steps to complete the Host Setup Page and finalize the terminal file:

- 1. On the Host Setup page, verify the auto-populated information is correct for each host, and then click **Save** to complete the Host setup.
- 2. Click **Continue** or **Cancel**. The Host Select page will display.
- 3. When all hosts have been added or edited, click **Validate**. Express will check all of the necessary fields for the terminal file for errors.
- 4. If errors are found, make the necessary changes using the links in the **Data Field** column, and then click **Validate**.
- 5. If no errors are found, click **Board**.



LESSON EXERCISE

Build a Standard Terminal file using the steps learned in Lesson Three: Creating a Standard Terminal Build. Example files will be provided by your trainer.

LESSON SUMMARY

To review, building a standard terminal file requires certain information be known before you start, such as the terminal model, terminal software type, terminal support level, merchant name, and merchant industry type. You have learned how to build a standard terminal file within the Express system.





LESSON 04 Create a Secondary System Terminal File

A secondary system is a separate terminal download system which provides additional terminal management functions. A secondary system terminal file may handle all or parts of the terminal operations, such as:

- Creating or modifying a terminal file
- Downloading a file to a terminal
- Generating reports and data management
- Diagnosing terminal problems and help desk issues

Based on individual needs, you may choose to use secondary system software in conjunction with other TSYS products and services. One of the most common reasons for using a secondary system is when one terminal will be shared by multiple merchants, referred to as a multi-merchant terminal. Another reason a secondary system may be required is if the merchant participates in Dynamic Currency Conversion (DCC).

The secondary system software may include:

- TermMaster
- VeriCentre

Secondary System File Build

You will follow the standard file build process that you learned in lesson two, Creating a Standard File Build, with the addition of completing the information needed for the secondary system application. Express will display additional terminal file build pages when a secondary system application is being used; these pages are called Terminal Details - Profile Build pages. The Express Terminal Details -Profile Build pages are specific to the terminal model.

Express Terminal Details - Profile Build Pages:

- Hypercom/Equinox
- VeriFone
- VirtualNet
- Microsoft RMS



Comments for Secondary System File Build

Comments will be entered in two separate locations when completing a secondary system file build. The Terminal Setup and the Terminal Profile Build pages are the two pages comments are entered. Comments on the Terminal Setup page will address information needed by the TSYS Help Desk. The Terminal Profile Build page comments are directions intended for the TSYS Implementation Process (IP) team. Enter a comment such as the example shown below, plus any additional team-specific information.

Example Comment

An example comment for a multi-merchant file build is: Multi-merchant/Software system name/V#XXXXXX/Terminal X of X/New Terminal Build

Merchant Summary – Secondary System Build Status Page

Completing the Terminal Details – Profile Build page will allow the terminal-specific secondary system information to be sent to the TSYS IP team. The IP team will then use the information contained on the Terminal Details – Profile Build page to create the terminal file. You can view the status of the secondary system file build by accessing the Express Merchant Summary Page – Secondary System Build Status page.





Portal Main Help 🔻 | Profile 🕶 | Log Off (e-Connections) **Merchant Summary** Merchant Terminal Admin Merchant Options **Record Status:** Submitted Merchant Number: Reload 01/01/1900 Date of Last Activity: Source: O-Online Add User ID: Merchant Type: FS Merchant Details Bank Number: 0000 **DBA Name:** Association: 999999 **Owner Name:** BIN: 000000 Legal Name (00): POS Merchant ID: 00000000000 Attn: AMEX SE: 0000000000 Address: Discover: City / State / Country: Authorization and Capture: 601100000000000 Clearing and Settlement: 601100000000000 Postal Code: JCB: 0000000000 Phone: (000)000-0000 JCB Processing: Ν Manager's Name: Sales Code: DDA: 000000000 Merchant Status: T/R: 000000000 Open Last Maintained: 04/04/2014 Amount of Last Deposit: 0.00 Date of Last Deposit: 1900-01-01 5999 MISCELLANEOUS AND SPECIALTY RETAIL STORES MCC/SIC: Merchant Terminals (Maximum table display is 100 terminals) Model / Alt Print Profile V Number Agent Chain Store Terminal Merchant Name Software / Alt Build Boarded Build Type (2nd Sys) Type Desc v99999999 000000 000000 0001 0002 STAGE STGENCR Y (N/A) 1 v0000000 000000 000000 0001 0003 VX510 SEVA321 N (N/A) Ε r d V0000000 000000 000000 0001 0005 VX520 XEVA431 N (N/A) Merchant Ouick Links Merchant Parameters Merchant Account Point to BETs Merchant Credit Petro Link Notes Product Setup Merchant Card Plans Pricing Summary MATCH Inquiry Terminal Setup MyPosLink Merchant Charge Records Back Status of secondary file build © 2001-2014 TSYS Acquiring Solutions, L.L.C. All rights reserved.

Merchant Summary Page – Secondary System Build Status



LESSON EXERCISE

Follow the steps provided by your trainer to build a secondary system file build request.

LESSON SUMMARY

To review, a secondary software system for a terminal provides the standard functions as well as additional terminal management features. You have learned how to build a secondary system file build request within the Express system.



LESSON 05 Terminal-Specific File Build

Some terminal models allow for additional settings or features. The terminal-specific settings will display on separate pages within the terminal file build process. The terminal models with specific pages within Express are:

- Hypercom/Equinox
- Ingenico
- VeriFone

Hypercom/Equinox Terminal Specific Pages

The Hypercom or Equinox terminal offers users extra functionality which is not available in all terminal models. The Hypercom/Equinox Terminal pages are:

- Hypercom/Equinox Setup
- Hypercom/Equinox Card Settings
- Hypercom/Equinox Host Settings



Hypercom/Equinox Setup Page

The Hypercom Setup page contains additional terminal options available for the Hypercom/Equinox terminal. The Hypercom Setup page will generally display after the Terminal Details page has been completed.

Hypercom Setup Page

Connections	Hypercom Setup
	Marchant Torminal Admin
	Merchant V Terminal V Admin
Merchant Number: 18680005	V Number: V9474218 DBA Name : DBA NAME
POS Merchant Id: 186800050000	Bin: 447475 Agent: 000000 Chain: 000000 Store: 0001 Terminal: 000
Password Settings	Coll
General Functions	Numbered Functions
Adjust Key	0 Test Transaction 73 Reprint Any Receipt
Balance Reporting Key	1 Display Journal 76 Debit Transaction
Batch Hold Key	2 Merchant Configuration 77 Server/Clerk Configuration
Checkout	3 Terminal Reset 78 Cashier Functions
Check Authorization Key	4 Keyboard Lock 79 Reports
Credit Key	5 Display Totals/Counts 82 Printer Test
Default to Cash Advance House (Cash Key Password	6 NMS Call 83 Display Test
Initialize Key	8 Display Batch Number 84 Keyboard Test
🔲 Mail Key	9 Delete Batch 86 Manager Password Configuration
Offline Key	10 Authorization Only Transaction 87 Tip Discount Configuration 21 Find Journal Transaction 90 Card Pender Tect
🔲 Open/Close Tab Key	22 Find Sound Individual Individua Individual Indina Individual Individual Individual Individual Individual Individu
Transmit Key	29 Display Transmit Status
🔲 Void Key	30 Local Programming
	68 PC Upload 94 PIN Pad Test
	69 Clear PC Upload Flag 95 Network Statistics
	70 Training Password 96 Response Time Monitor
	71 Printer Password 97 Local Option Configuration
	72 Reprint Last Receipt 98 Communication Parameters
Terminal Settings	Coll
Server and Clerk Sett	tings Dial Settings Dial Settings
Accept Tips:	Pre-Print Receipt: Audible Modem:
Adjust By Server/Clerk:	Printer Used: V Keyboard Dialing:
Assign Name For Server/Clerk:	Print Error Receipt: Memory Dialing:
Print Server/Clerk Sign Line:	Print Receipt Disclaimer: Pre-Dial Dialing:
Prompt For 'Clerk':	Print 'Tip': Referral Dialing:
Review By Server/Clerk:	Print Time On Receipt:
Server/Clerk Password:	Print 'Total' On Receipt:
Server/Clerk Processing:	
Hotel	Promot For 'Folio Or Cach Advance Address
Processing:	Room':
Exceeds Auth Amt' Prompt:	Folio/Room Prompt Text: FOLIO Cash Advance Processing:
Open/Close Tab Kev:	Open Tab Amount: 0000000000.0 House Account Cash Key:
	Manual Programming Check:
Process By Shift	tip Calculation %
Process By Shift:	Tip Calculation %: 00
Process By Shift:	Other Settings (2)
Process By Shift:	Other Settings (2) CR Baud Rate: 00 Reconcile Totals: Press Enter (01)
Process By Shift:	Other Settings (2) CR Baud Rate: 00 Reconcile Totals: Press Enter (01) inter Baud Rate: 00 Settle Merchant Number:
Process By Shift:	Other Settings (2) CR Baud Rate: 00 Reconcile Totals: Press Enter (01) inter Baud Rate: 00 Settle Merchant Number: anager Password: 0000 Telephone Line Hold: 2 seconds
Process By Shift:	Other Settings (2) CR Baud Rate: 00 Reconcile Totals: Press Enter (01) inter Baud Rate: 00 Settle Merchant Number:
Process By Shift: Auto Answer: EC Capture Track I Name: Pr Display Card Number: Ma Lock Keyboard: Te Process Credits Offline: Pr	Other Settings (2) CR Baud Rate: 00 Reconcile Totals: Press Enter (01) inter Baud Rate: 00 Settle Merchant Number: anager Password: 0000 Telephone Line Hold: 2 seconds erminal Password: 0000 Terminal Phone:
Process By Shift:	Other Settings (2) CR Baud Rate: 00 Reconcile Totals: Press Enter (01) inter Baud Rate: 00 Settle Merchant Number: anager Password: anager Password: 0000 Telephone Line Hold: 2 seconds erminal Password: 0000 Terminal Phone:
Process By Shift:	Other Settings (2) CR Baud Rate: 00 Reconcile Totals: Press Enter (01) > inter Baud Rate: 00 Settle Merchant Number: anager Password: 0000 Telephone Line Hold: 2 seconds errminal Password: 0000 Terminal Phone: erress Voids Offline:





The Hypercom Setup page contains two main sections:

- **Password Settings Section:** The Password Settings section provides additional password settings for the Hypercom/Equinox terminal including placing a password on specific keys or functions. You can use this section to customize passwords.
- **Terminal Settings Section:** The Terminal Settings page contains information for specific functionality including servers, receipts, hotel, and other settings. Complete the subsections on the Terminal Settings section as needed:
 - o Server and Clerk Settings
 - o Receipt Settings
 - o Dial Settings
 - o Hotel and Fine Dining Settings
 - Other Settings (1)
 - Other Settings (2)

Complete the Hypercom/Equinox Setup page

To complete the Hypercom Setup page, configure the needed options and then click **Next**. The Hypercom Card Settings page will display.



Hypercom/Equinox Card Settings Page

The Hypercom/Equinox Card Settings page provides industry specific options. Select the options which best meet the needs of the individual merchant. A separate Hypercom/Equinox Card Settings page will be completed for each card range.

Hypercom/Equinox Card Settings Page

	Portal	Main Help ▼ Profile ▼ Log	
-Connections)	Hypercom Card Settings		
	Merchant	🖵 Terminal 💦 🗸 Admin	
Number : V9414021	Chain - 000000	Merchant Number : 18680009	
an : 412700	POS Merchant Id : 186800090000	Store Number : 0001	
	· · · · · · · · · · · · · · · · · · ·	· - · · · · · · · · · · · · · · · · · ·	
Card Payment Service VISA			
Additional AMEX Prompts	Print Special Data	Authorize Margin %	
🗹 Adjustment Allowed	Process Debit Transaction	Floor Limit 0000	
Block Credits	Process Refunds Offline	Tip Discount % 00.00	
Block Voids	✓ Process Voids Offline	Transactions Requiring PIN	
Cash Only Transaction	Prompt For Special Data	Adjust	
Expiration Date Required	Reference Number Required	Balance Inquiry	
🗹 Manual Entry Allowed	🗹 Thanks For Using Visa	Cashback	
✓ Offline Entry Allowed	Validate Expiration Date	Credit	
PIN Entry Required	Verify 1st 4 Digits (Cash Advance)	Pre-Authorization	
Preferred Customer Card	Verify Last 4 Digits	Purchase	
Print 'Signature Not Required	Voice Referral Allowed	Void	
Canad		Velidek	

Use the following steps to complete the Hypercom/Equinox Card Settings page:

- 1. On the Card Range Setup page, click **Hypercom/Equinox** to open the Hypercom/Equinox Card Settings page.
- 2. Select the check box next to the desired options. Some available Hypercom card options are:
 - Verify Last 4 Digits: An option which requires the last four digits of a card be entered for each transaction.
 - Additional AMEX prompts: An option primarily used by the hotel industry that must be enabled for an American Express card range.
 - Cash Advance: Verify the 1st 4 Digits: This option is used for cash advance.
- 3. Click **Continue** on the Hypercom Card Settings page, and then click **Continue** on the Card Range Setup page.
- 4. Repeat the above process for each individual card range.
- 5. Click **Next** and the Host Select page will display.



Hypercom/Equinox Host Settings Page

The Hypercom Host Setting page provides for additional host-level features. A separate Hypercom Host Settings page is required for each card range.

Hypercom Host Settings Page

		Portal Main Help → Profile → Log (
(e-Connections) Hypercom Host Settings								
		Merchant 🗸 Terminal 🗸 Admin						
V Number : V9414021		Merchant Number : 18680009						
Bin : 412700	Chain : 000000	Store Number : 0001						
Agent : 000000	POS Merchant Id : 186800090	000 Terminal Number : 0001						
Host Payment Service:	VISA							
Host Message Protocol:	VISANET	Host Response Time-Out: 30						
Split Dial/Direct Check Id:		Host Multi-Threading: 00						
NII:	0025 - VISA AXSD Most ChkSrv	Current Batch Number: 000000						
Check Service Code:	00 - No Check Service	Next Batch Number: 000000						
AMEX Split Dial:								
Auth	orization	EDC						
Modem Mode:	14 - VISA 🛛 👻	Modem Mode: 14 - VISA 💙						
Primary Connect Time:	30	Primary Connect Time: 30						
Seconda ry Connect Time:	30	Secondary Connect Time: 30						
Primary Dial Attempts:	01	Primary Dial Attempts: 01						
Secondary Dial Attempts:	01	Secondary Dial Attempts: 01						
Cancel		Save Validate						

The Visa Hypercom Host Settings page contains the fields required to change a batch number on a Hypercom. The fields you can use to change the batch number are:

- Current Batch Number
- Next Batch Number

Caution: Only adjust the Host Message Protocol field on the Hypercom Host Settings page under direction of the Help Desk. Adjusting this field could have financial impact.



Terminal Details Page – Advanced Terminal Settings Section

The Advanced Terminal Settings section of the Terminal Setup page is available for the Ingenico and VeriFone terminal types. The field defaults and drop-down menu options in the Advanced Terminal Settings section will be slightly different based on the terminal type in use. The Advanced

Terminal Details Page

		Flags and Adjustments		Collaps				
Market Specific Data:		Maximum Number of Adjustments:	03 Amount Adjustment:	0				
Fraud Control Keys:	0000000	Device Code:	DR Amount Adjustment Password:	0				
Manager Password:	Z66831	Language Indicator:	00 Settle To PC:	N				
Password Protect Keys:	00000000000000	Beeper On:	0 Duplicate Trans Processing:	N				
			AVS Flag:	Y				
			Authorization Only:	N				
CPS Settings Colli								
Reset Ref Number To 001 Flag	: Y Data Au	gmentation Flag: Y Purchasing	Card Flag: Y Check Expiration Date:	Y				
		Invoice Settings		Collaps				
Number Keys:		Number Flag:	N Prompt:					
		Hotel and Lodging		Collap				
Calculate Check-In Amount:	N Pr	rint Check-In Amount:	N Print Checkout Receipt:	N				
Room Rate Amount:	P	restigious Property Indicator:						
		POS Check Settings		Collap				
ATM:	Che	ck Decline Disclosure:	Returned Item Fee Payee:					
Check Cashback Indicator:	Owr	ner Code:	Check Auth Disclosure:					
Check Cashback Limit:	Ret	urned Item Fee Method:	Check Print L2:					
Check Reader Model:	Ret or P	urned Item Fee Amount ercentage:						
		<						
		Advanced Terminal Settings		Collap				
Print Close Tab Receipt: Y	Auto Close Adjustment	Tip: Y Auto Close Open Tab: Y						
Print Open Tab Receipt: Y	Counter Pay Tip:	N Close Tab With New Card: N						
Print Disclaimer: Y	IRS Signature Line:	Y Open Tab Signature: Y						
Print Customer Copy:	Excessive Tip %:	00 Default Open Tab Amount: 025						
Customer Label Indicator: N	Tip Overage %:	Excessive Tab %: 00						
Custom Label Text:								
E-Commerce Indicator:	Cash Advance:	N Process Tax: N						
Manual Entry Password: 0	Lock Keyboard:	N Process Tax %: 0000						
Shift Processing:	Batch Authorization:	N Supervisor Password: Z66831						
Signature on Gift:								
Previous		Edit		Ne				
1 1011000		Luk		146.				
		© 2001-2009 TSVS Acquiring Solutions	11.0					
		© 2001-2009 1515 Acquining Solutions,	L.L.U.					

Terminal Settings section provides additional terminal specific options such as:

- Receipt settings
- Tip settings
- Tab settings
- Other settings

During the terminal file build process, you can configure the settings in the Advanced Terminal Settings section to provide additional functionality to the terminal.



LESSON EXERCISE

Build a terminal-specific file following the steps provided by your trainer.

LESSON SUMMARY

To review, specific terminal models contain additional functions and features which require additional steps within the Express system. You have learned how to create a terminal-specific file within Express.



MODULE EXERCISE

Following the directions provided by your trainer build a Hypercom/Equinox terminal with a secondary system build.

Module Summary

In Summary, there are three terminal file build models in the Express system, they are: 1) A Standard File Build, 2) A Secondary System File Build, and 3) A Terminal-Specific File build. In this module, you learned the process within the Express system to build a standard terminal file as well as a terminal specific and secondary system file.