

EFTPOS Integration Set-Up

EFTPOS Integration

EFTPOS integration allows Jim2[®] to communicate directly with your EFTPOS machine, greatly improving card processing time, and reducing errors by eliminating any manual re-keying.

The EFTPOS integration in Jim2[®] works with most major banks and EFTPOS machines by using the industry standard PC EFTPOS software. The PC EFTPOS software is freely available, directly from the PC EFTPOS website. The installation and setup of a suitable EFTPOS machine should be done directly via your existing bank.

Payment types within Jim2[®] are flagged as EFTPOS related. The workstation is then configured via options to communicate with Jim2[®] EFTPOS Server, an application that is installed on the workstation that has the EFTPOS machine attached. Multiple workstations can do EFTPOS transactions via the EFTPOS server allowing them to share a common EFTPOS machine. All EFTPOS payment related transactions including Invoice and Debtors payments, and Debtors refunds are then processed directly from within Jim2[®]. The EFTPOS payment details are printed directly onto your customer's invoice.



Installation and setup of Jim2[®] EFTPOS

Steps to install and setup Jim2[®] EFTPOS:

- Contact your bank and organise a PC-EFTPOS compatible EFTPOS machine
- Download and install the PC-EFTPOS software
- Download and install the Jim2[®] EFTPOS Server
- Configure Retail & EFTPOS options
- Configure Payment Types as EFTPOS

Contact your Bank

Contact your bank and organise a PC-EFTPOS compatible EFTPOS machine. Supported Banks include:

- Westpac
- ANZ
- Commonwealth
- NAB
- Suncorp
- St George
- BWA
- Travelex

For more information please refer directly to your bank or the PC EFTPOS web site www.pcEFTPOS.com

Install PC-EFTPOS

Your EFTPOS machine will typically be connected to a retail workstation. Some EFTPOS machines still use a RS232 serial connection so a USB to Serial converter may be required.

Once you have received your PC-EFTPOS compatible EFTPOS machine, download and install the PC EFTPOS software (www.pcEFTPOS.com) on this workstation.

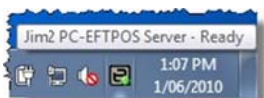
Install Jim2 EFTPOS Server

Download and install the Jim[®] EFTPOS Server. The Jim2[®] EFTPOS Server is installed on the same workstation that the EFTPOS machine is physically connected to and the PC-EFTPOS software is installed on.

Once Jim[®]2 EFTPOS Server is installed run the server (Jim2[®] EFTPOS Server.exe) normally located under:

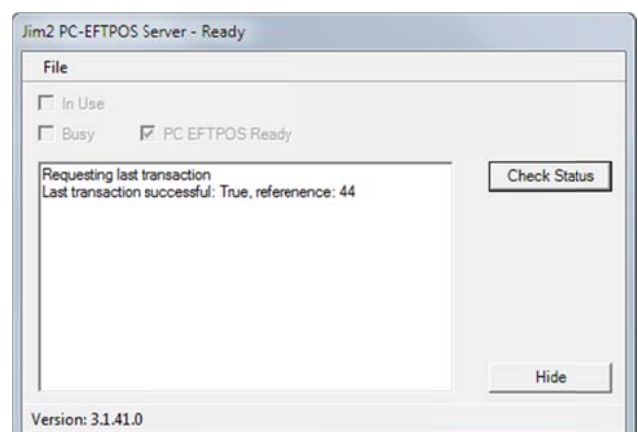
C:\Programs Files\Happen Business\Jim2 EFTPOS Server

The Jim2[®] EFTPOS Server will then appear in your Windows notification area, at the far right of the taskbar.



The icon displays with a green \$ sign, indicating that the EFTPOS server is running and currently connected to the EFTPOS machine via PC-EFTPOS.

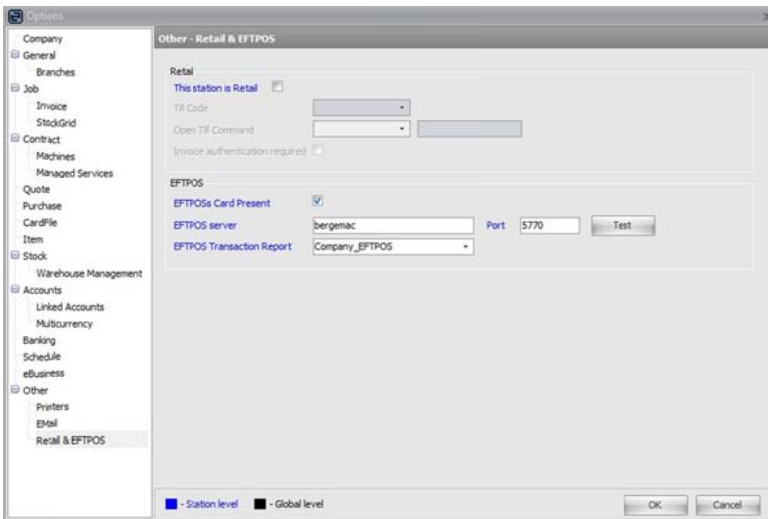
Right click on the EFTPOS server icon and click open to display the Jim2[®] EFTPOS Server.



Configure Retail and EFTPOS options

On each workstation that you wish to share your EFTPOS machine with, including the workstation that the EFTPOS machine is connected to, the next step is to set up your Retail & EFTPOS options.

From the Jim2® client click **Tools > Options > Other > Retail and EFTPOS**.



Set the following EFTPOS options as required:

EFTPOS Option	Description
EFTPOS Card Present	Indicates that the EFTPOS transactions are normally 'Card Present' Default = ticked
EFTPOS Server	The name of the workstation that Jim2® EFTPOS Server is running on localhost if running on same machine
Port	The port that Jim2® will use to communicate with Jim2® EFTPOS Server Default = 5770
EFTPOS Transaction Report	Report used to reprint last transaction. This report is located in Report Designer under the EFTPOS folder Default = Company_EFTPOS

Once you have set your EFTPOS options click the Test button to check that Jim2® can talk to the Jim2® EFTPOS Server.

Note: All EFTPOS options are Workstation Level, that is, you will need to configure these options on all workstations that you wish to use EFTPOS.

Configure EFTPOS Payment Types

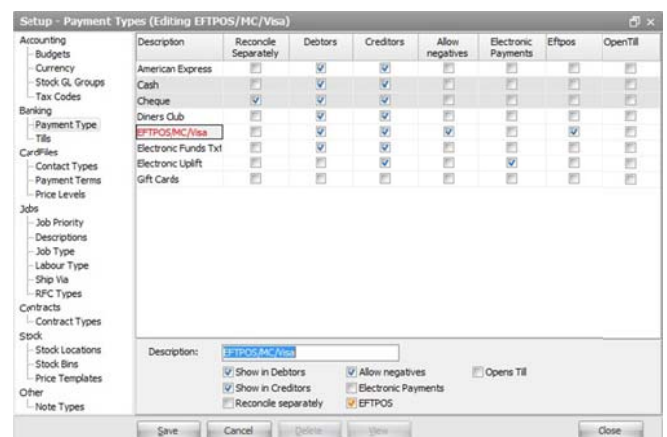
The final step in setting up Jim2® EFTPOS involves selecting which payment types you wish to process via EFTPOS.

From the Jim2® client click **Tools > Setups > Banking > Payment Types**.

Click on the payment type you wish to process via EFTPOS and click **Edit**. Next tick the EFTPOS tickbox and click **Save**.

Typically you would set up a separate payment type for each EFTPOS payment type your business handles: AMEX, VISA/MC/EFTPOS, DINERS etc.

Note: It is suggested to also set up a 'Manual EFTPOS' payment type to handle EFTPOS payments when the EFTPOS machine is down and the payment needs to be processed by hand using your swipe machine.



Using EFTPOS in Jim2

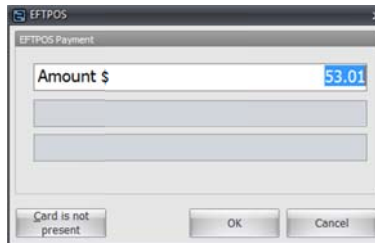
Using EFTPOS within Jim2® is quite straightforward. Process a payment as normal, that is, any payment transaction from the invoicing screen or from Debtors (including refunds) using a payment type that is flagged as EFTPOS. The EFTPOS form will then appear.

Card Present Transaction

For a card present transaction follow these steps:

Step 1.

Confirm Amount and click **OK**



Step 2.

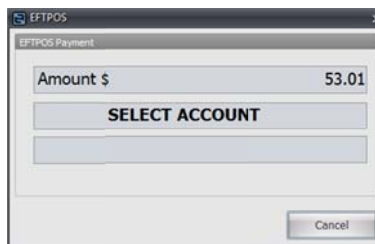
Ask customer to swipe their card



Step 3.

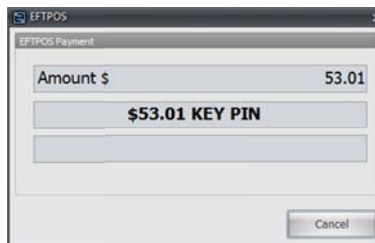
Ask customer to select account

Cheque, Savings or Credit



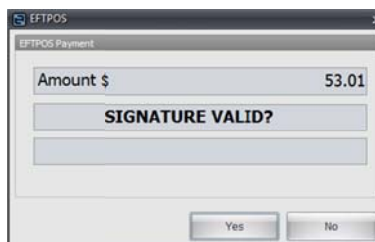
Step 4.

Ask customer to key their PIN or ENTER to sign



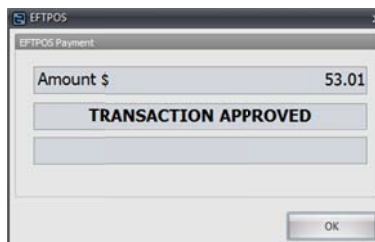
Step 5.

If 'sign' confirm signature matches card then click **Yes**



Step 6.

Transaction approved



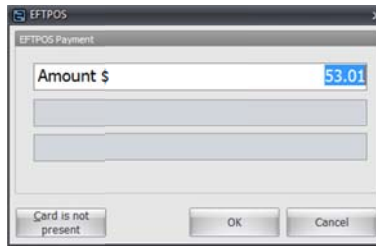
Card NOT Present Transaction

For a card not present transaction follow these steps:

Step 1.

Confirm Amount

Click **Card is not present** (see options)

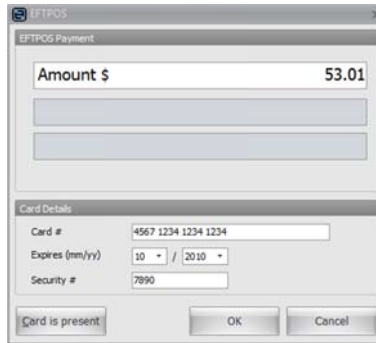


The screenshot shows the 'EFTPOS Payment' dialog box. The 'Amount \$' field contains the value '53.01'. Below the amount field are two empty input fields. At the bottom, there are three buttons: 'Card is not present', 'OK', and 'Cancel'. The 'Card is not present' button is highlighted with a blue border.

Step 2.

Enter card details

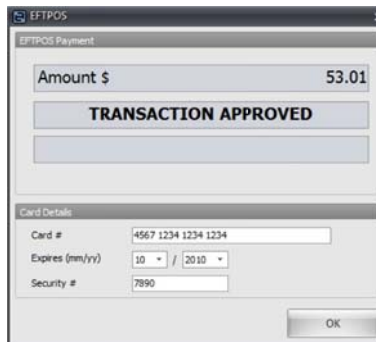
Click **OK**



The screenshot shows the 'EFTPOS Payment' dialog box. The 'Amount \$' field contains '53.01'. Below it are two empty input fields. The 'Card Details' section is expanded, showing fields for 'Card #' (4567 1234 1234 1234), 'Expires (mm/yy)' (10 / 2010), and 'Security #' (7890). At the bottom, there are three buttons: 'Card is present', 'OK', and 'Cancel'. The 'Card is present' button is highlighted with a blue border.

Step 3.

Transaction approved



The screenshot shows the 'EFTPOS Payment' dialog box. The 'Amount \$' field contains '53.01'. A large box in the center displays the text 'TRANSACTION APPROVED'. Below it are two empty input fields. The 'Card Details' section is expanded, showing fields for 'Card #' (4567 1234 1234 1234), 'Expires (mm/yy)' (10 / 2010), and 'Security #' (7890). At the bottom, there is one button: 'OK', which is highlighted with a blue border.

Payment details

When applying for an EFTPOS related payment to an Invoice the EFTPOS payments details will be printed on the bottom of the customer's invoice. This applies for both A4 and 80mm receipt style Invoice reports.

Reprint an EFTPOS payment receipt

EFTPOS payment applied to Invoice.

- Simply reprint the Invoice as normal **Jobs > Sales Register > Print Invoice**

EFTPOS payment via Debtors

- Open the related Debtors and click on the payment you wish to reprint
- From the Report Toolbar select **Payment Receipt** or **Payment Receipt 80mm**
- Click Print

Note: It is an EFTPOS requirement that a record of the last EFTPOS transaction be reprinted in case of error, or due to power loss midway through a transaction etc. This report will be automatically reprinted by Jim2[®] as required, using the 'EFTPOS Transaction Report', as set in Options.