

## Credit Card Reader Implementation Guide

Some tasks related to the sale, set-up, and installation of the card reader may happen concurrently, but this is a general outline of the actions necessary to get a card reader ready to operate in the field. It is assumed that a customer already has an IVS account, and they already have a Merchant Agreement with Heartland Payment Systems (HPS) for processing credit card transactions. Customers should allow at least a week to get a Merchant Agreement established with HPS. After the Merchant account is established, customers should allow 2 or 3 days to get new card readers added to their HPS account.

This guide describes implementation in Protel's IVS software version 1.0, and slight changes to the guide will be made for IVS version 2.0 when it is released.

1. Customer places order with Protel for a card reader, which initiates the Protel production process of assembling the unit(s) and preparing for shipment. The order would typically also include an AVW controller/monitor and an encrypted cellular modem. The cellular modem includes a SIM, and SIMs are typically shipped deactivated.
2. At the time of shipment, the product serial numbers are scanned at Protel and assigned to the customer's IVS account. Customers must "Receive" AVW controller/monitors in their IVS account, but it is not necessary for a customer to "Receive" card readers or SIMs in IVS.
3. Customer requests for a SIM to be activated by sending a request to Protel via email to [protel.cr.admin@protelinc.com](mailto:protel.cr.admin@protelinc.com). Customers should allow 24 hours for SIM activation, and monthly billing from Protel for a machine starts when a SIM is activated. This task is independent of tasks 5 through 8.
4. Designated Protel personnel will send a reply to the SIM activation request email when SIM activation is complete.
5. Customer requests addition of new card reader Terminal Number (TN) from HPS. Please allow 2 to 3 days for processing at HPS. This task is independent of tasks 3-4 and 6-8.
6. In IVS, customer sets up Route/Site/Machine, assigns monitor, and sets up monitor as usual including Monitor Event Configuration and Scheduling Wizard (same as for a non-credit card monitor). This task is independent of tasks 3-5.
7. Customer receives Parameter Sheet for each card reader terminal (TN) from HPS via email. HPS sends this as a PDF file. Customer forwards Parameter Sheet to Protel email address [protel.cr.admin@protelinc.com](mailto:protel.cr.admin@protelinc.com) with "Parameter Sheet" in the subject line of the email.
8. Designated Protel personnel enter the parameters into the Card Reader Configuration in IVS, and reply to the "Parameter Sheet" email indicating the

Card Reader is ready for installation. Please allow at least 24 hours for this task. Task 6 (set up of machine in IVS) must be complete before Protel can complete this task. **Important Note:** *a card reader should not be connected to a working monitor in the field until the card reader configuration has been entered in IVS.*

9. When Tasks 1 through 8 are complete, the monitor and card reader can be installed in the field. Note that the card reader serial number does not have to be entered into IVS. When a card reader is connected to a monitor, the card reader serial number is communicated to IVS and displayed on the Route/Site/Machines screen. If it is ever necessary to change the card reader that is connected to a monitor, the serial number of the card reader will automatically be updated on the IVS screen. See the product manual for a guide to changing out a card reader.
10. When a card reader is installed, a real credit card should be used to initiate a vend on the machine. The Service Button on the card reader should be used to cause the transaction to be settled at HPS. Customer should verify the settlement was successful. This can be verified using Protel IVS data or your HPS Online Merchant Center account. It would be desirable for this verification to occur at the customer's shop location prior to field installation. This would allow for resolving potential card reader configuration errors and confirming the HPS TN is active before the equipment is exposed to the public.

**Notes:**

1. A monitor is scheduled to call Protel's IVS servers every night to report data, and the card reader is programmed to call HPS servers every night to settle credit card transactions. When Protel configures the card reader, we will always set the card reader to settle with HPS before the monitor communicates with IVS. That insures all information on the settlement is sent to IVS so data is available the next day, and any problems can be addressed. If a customer changes a monitor's IVS call time, the customer should also request that Protel change the card reader settlement time accordingly.
2. HPS only knows a card reader terminal by its Terminal Number (TN), and they do not know the Protel serial number for the card reader. If a card reader is ever changed out on a machine, IVS will configure the new card reader with the terminal number (TN) associated with that machine, and this change will be completely transparent to HPS.
3. For credit card operation, the cellular GSM modem must have encryption capability. If a customer has ever purchased a non-encrypted cellular GSM modem, those cannot be used in credit card reader applications.
4. SIM activation typically occurs in much less than 24 hours, but Protel does not control this task. The cellular carrier is involved, and they require a 24 hour allowance for activation.



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## Revision History

<u>Revision Date</u>	<u>Summary of Changes</u>
9/22/08	First Release
4/3/09	Changed "Terminal ID" references to "Terminal Number".
10/20/09	Changed the email address for SIM activation from Jim Reukauf's email to the card reader admin email address.