

Guide to Setting up Valorpay Devices with Point of Success V4

Valorpay devices are currently stand alone devices, meaning they are NOT integrated with the Point of Success program. **Please note that you can still use the Onscreen Credit Card Payment GUID.** While we are working to integrate these devices with a future build of Point of Success, please follow this guide to setup and use the Valorpay devices.

1. These devices either require a Wireless network or ethernet connection to work. These device are unlike the VX805 devices which connected via a USB cable. You must have an ethernet cable dedicated to each Valorpay device you receive. If you do not have enough ports on the back of your modem to accommodate the extra ethernet cables you may have to purchase a switch. You also have the option to use these devices over a wi-fi network. If you connecting the device to Wi-Fi, please follow the **ValorPay Quick Start Guide**.
2. If you are currently using Point of Success integrated processing you will need to follow the instructions for setting up your system to accommodate on the side processing.
 - a. In Office manager go Tools – and under Payment and Tender Setup up click Setup Tender Types.
 - b. In the Tender Type List, Add an item for each Valorpay terminal you receive. If you receive two devices for example, you will add a button for each, naming it “Terminal 1 and Terminal 2” these buttons will appear on your pay screen. Set the Credit Card button in this way will let you process on the screen payments. Setting Terminals up in this way allows reporting in POS to matches batches on Valorpay.

The screenshot displays the 'Tender Type List' dialog box in the Point of Success software. The dialog is divided into two main sections: 'Tender Types' and 'Selected Tender Type'. In the 'Tender Types' list on the left, 'Terminal 1' is selected. The 'Selected Tender Type' section on the right shows 'Description: Terminal 1' and 'Type of Tender: Other'. There are 'Add Item', 'Delete Item', 'Help', and 'Close' buttons at the bottom of the dialog. The background shows the 'Accounting and Business Information' and 'Other Tools' sections of the software interface.

3. Then if Office Manager under Payment and tender Set Up, go to Select the Tender Types, add the Terminal 1 buttons to the Pay Screen as shown in the picture below. **Keep the Credit Card button if you are using On Screen Payment.**

Company Information

- Edit [company name](#) and address information.
- Software [registration](#).
- Set up employee [departments](#).
- Set up [product categories](#). Categories are used to organize and group the food menu items and products you sell.
- Set up [Personal Identification Numbers \(PIN\)](#) and register fingers for Staff members.
- Set up the [default area code](#) for phone number.
- Set up [mapping](#) access.

Till and Bank Set Up

- Set up [opening balances](#) for new tills for each day of the week and for new banks. These are default values that can be overridden when creating a new till or bank. Also the [maximum amount](#) a

New Order Set Up

- Set up [service types](#). These types indicate the type of service you give to your customers. For example: Dine In, Take Out and Delivery.
- When a new order is created it will have a [default service type](#) assigned to it.
- Set the [delivery address and options](#) and default delivery charge.
- Set up a [street database](#) with delivery address and information and [delivery zones](#).
- Set the [order warning times](#) for delivery and kitchen orders.
- Set [order entry options](#) for these items: allowed portions, how modifiers print on tickets, the current business day, future orders, guest count, customer lookup and main screen options.
- Set the [colors](#) used for order buttons and warning times.

Payment and Tender Set Up

- Set up [tender types](#). These types indicate the kind of payments accepted from your customers. For example: cash, checks, credit and gift certificates.
- [Select the tender types](#) for each type of payment (Cash, Check, etc.) you accept before payments can be tendered. Set up additional payment options for cash drawer, tip amount, check number, on phase-out rounding, etc.
- Select the [on account tender types](#) for each payment type (Cash, Check, etc.) before payments can be tendered for an On Account balance.
- Set up [discounts](#), coupons, promotions and gratuity for large parties.
- Set up a [promotional message](#) that can appear on the customer receipt.
- Use and set up [quick pay](#) options.
- Set up [local loyalty](#) options.
- Set up [credit card, gift card](#) options.

Default Tender Settings

Select the tender types that should be used for each button below. If the tender type is not listed, click on the magnifying glass to add it.

Buttons 1-10 are shown with dropdown menus for tender types (Cash, Credit Card, Terminal 1, Terminal 2, Gift Card, Reserved).

Payment Tender Button Preview

Buttons: Cash, Credit Card, Terminal 1, Terminal 2, Reserved, Gift Card.

Other related features:

- Set up options for [kitchen monitor and notifications](#).

4. Then you will need to proceed with the next **step on each workstation**.
 - a. Open up Workstation Manager and then got to Workstation Setup
 - b. Then go to the Credit Card tab and set both the Encrypted Card Reader and EMV Encrypted Card Reader to "None"

Workstation Setup

General | Printers | Cash Drawers | **Credit Card** | Pole Display | Kitchen Monitor | Food Scale | Expeditor Monitor

Card Processor: Credit card processing is not set up Show all devices

Encrypted Card Reader: **None**

EMV Compatible EMV Prompt for Tip

EMV Encrypted Card Reader: **None**

Use encrypted card reader for employee/loyalty cards

When the "Bar Tab" feature is activated, credit card transactions will not be processed using the EMV card system. This means if a counterfeit card is processed in this system, the liability for a fraudulent charge-back will be with you, the merchant, not the financial institution.

Com Port: **USB**

Lane ID: **L1** **Each workstation that processes credit cards must have a unique Lane ID. It can contain letters or numbers with a length no greater than 3 characters.**

Processor Terminal ID: **Leave blank if not required.**

4. When making a Credit Card Sale, if using a Valorpay terminal, select the terminal you are using from the payment list. The user then keys in the sale amount on the Valorpay terminal, the customer inserts or taps to pay, when it

approves you print a copy for the customer and one for the store. If you are using the onscreen payment use the Credit Card button.

Pay Ticket: 13

Order: 5 Discount: 0.00
Payment to Till: 1 Sub Total: 12.99
For: Joe Costello (JC0) Sales Tax: 0.78

Discount

Ticket Total: 13.77

Large Party: 0.00
Tip: 0.00

Tax Exempt

Tip Paid Out

No Receipt Delivery Charge: 0.00

Remove Lg Party Amount

Grand Total: 13.77

Tender Type	Status	Amount

Cash Credit Card

Terminal 1 Terminal 2

Gift Card

Remove Payment **Amount Due: 13.77**

Cancel Done

5. At the end of the night when you print reports from the POS the Terminal #1 or #2 should match the printed batch reports from the Valorpay terminals