

# EFTPOS Integration Setup

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This document will explain:

- How to set up your EFTPOS.
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EFTPOS integration allows Jim2 to communicate directly with your EFTPOS machine, greatly improving card processing time, and reducing errors by eliminating any manual rekeying.

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, debtors payments, and debtors refunds are then processed directly from within Jim2. The EFTPOS payment details are printed directly onto your customer's invoice.

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## Installation and setup of Jim2 EFTPOS

Steps to install and set up Jim2 EFTPOS:

- Contact your bank and organise a PC-EFTPOS compatible EFTPOS machine.
- Download and install the PC-EFTPOS software.
- Configure Retail & EFTPOS in **Options**.
- Configure Payment Type 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](http://www.pcEFTPOS.com)

## Install PC-EFTPOS

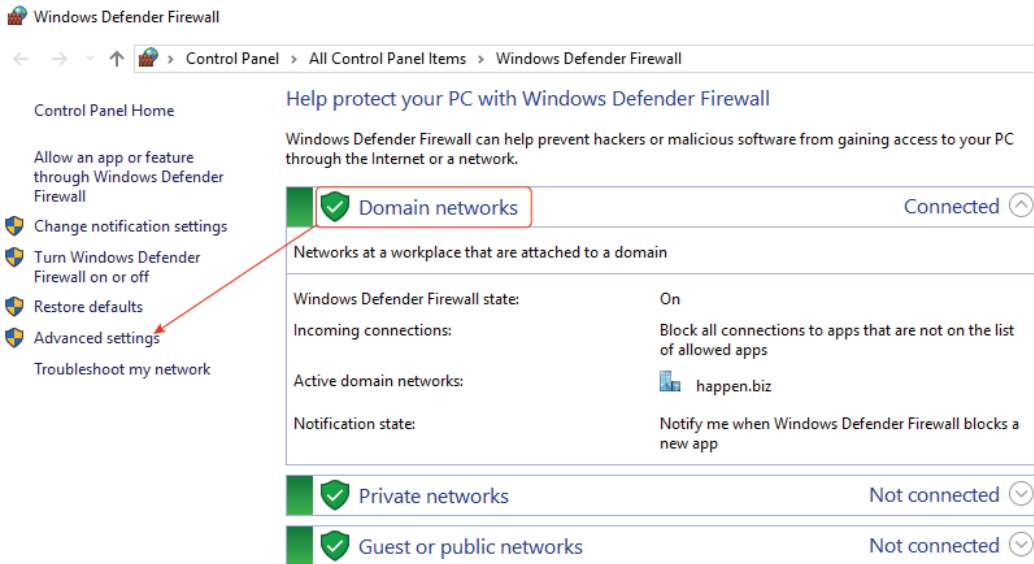
Your EFTPOS machine will typically be connected to a retail workstation. Some EFTPOS machines still use an RS232 serial connection, so a USB to Serial converter may be required.

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

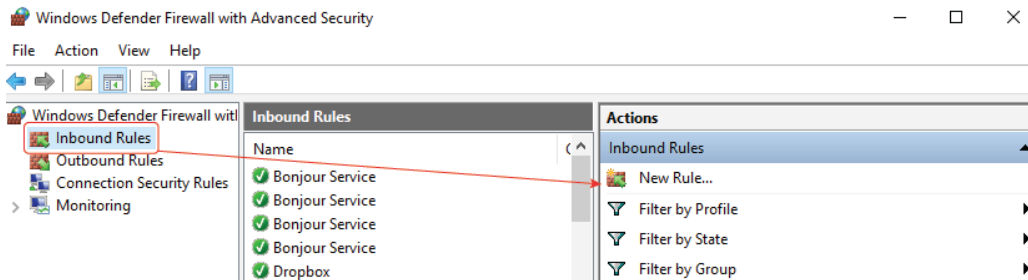
### Install Jim2 EFTPOS Server

Download and install the Jim2 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.

Create Windows Firewall Rule for Jim2 EFTPOS Server:



Add a new inbound rule:



Select 'Program'.

New Inbound Rule Wizard

**Rule Type**  
Select the type of firewall rule to create.

**Steps:**

- Rule Type
- Program**
- Action
- Profile
- Name

What type of rule would you like to create?

**Program**  
Rule that controls connections for a program.

**Port**  
Rule that controls connections for a TCP or UDP port.

**Predefined:**  
AllJoyn Router  
Rule that controls connections for a Windows experience.

**Custom**  
Custom rule.

< Back   Next >   Cancel

New Inbound Rule Wizard

**Program**  
Specify the full program path and executable name of the program that this rule matches.

**Steps:**

- Rule Type
- Program**
- Action
- Profile
- Name

Does this rule apply to all programs or a specific program?

**All programs**  
Rule applies to all connections on the computer that match other rule properties.

**This program path:**  
%ProgramFiles%\Happen Business\Jim2 EFTPOS Server\Jim2 EFTPOS Ser | Browse...

Example: c:\path\program.exe  
%ProgramFiles%\browser\browser.exe

Path : C:\Program Files\Happen Business\Jim2 EFTPOS Server\Jim2 EFTPOS Server.exe

Click Next, and tick 'Allow the connection':

New Inbound Rule Wizard

**Action**

Specify the action to be taken when a connection matches the conditions specified in the rule.

**Steps:**

- Rule Type
- Program
- Action
- Profile
- Name

What action should be taken when a connection matches the specified conditions?

**Allow the connection**  
This includes connections that are protected with IPsec as well as those are not.

**Allow the connection if it is secure**  
This includes only connections that have been authenticated by using IPsec. Connections will be secured using the settings in IPsec properties and rules in the Connection Security Rule node.  
[Customize...](#)

**Block the connection**

Click Next.

New Inbound Rule Wizard

**Profile**

Specify the profiles for which this rule applies.

**Steps:**

- Rule Type
- Program
- Action
- Profile
- Name

When does this rule apply?

**Domain**  
Applies when a computer is connected to its corporate domain.

**Private**  
Applies when a computer is connected to a private network location, such as a home or work place.

**Public**  
Applies when a computer is connected to a public network location.

Click Next, and enter the Name: Jim2 EFTPOS Server.

New Inbound Rule Wizard

**Name**

Specify the name and description of this rule.

**Steps:**

- Rule Type
- Program
- Action
- Profile
- Name

Name:

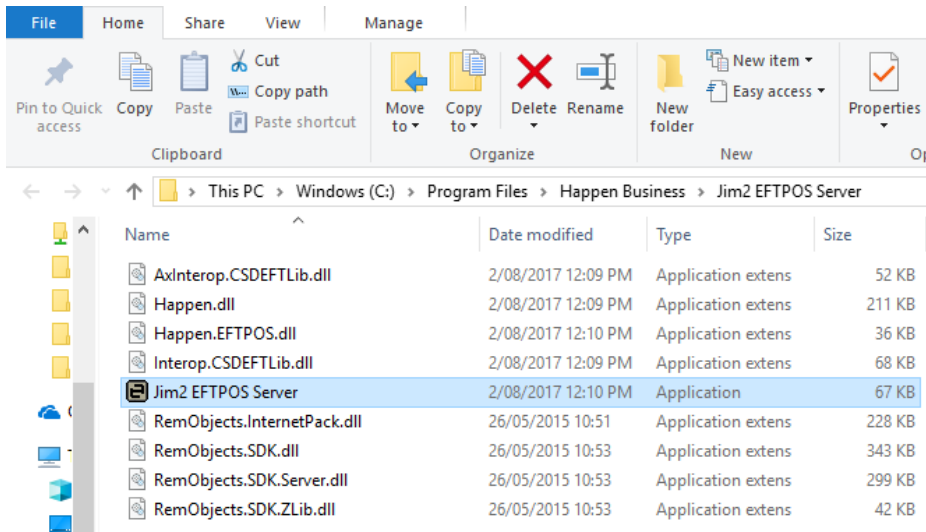
Description (optional):

< Back Finish Cancel

Click Finish.

Add Jim2 EFTPOS Server to the Windows Start-Up Folder:

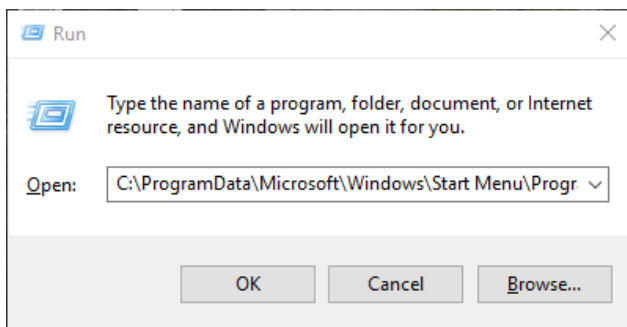
Browse to C:\Program Files\Happen Business\Jim2 EFTPOS Server



Right click and select 'Copy'.

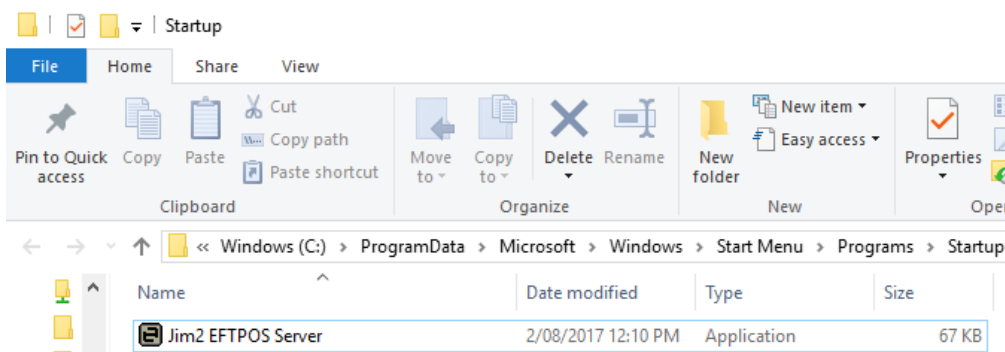
Click 'Start' and type 'Run', then press Enter.

In Open: type C:\ProgramData\Microsoft\Windows\Start Menu\Programs\Startup



Click OK.

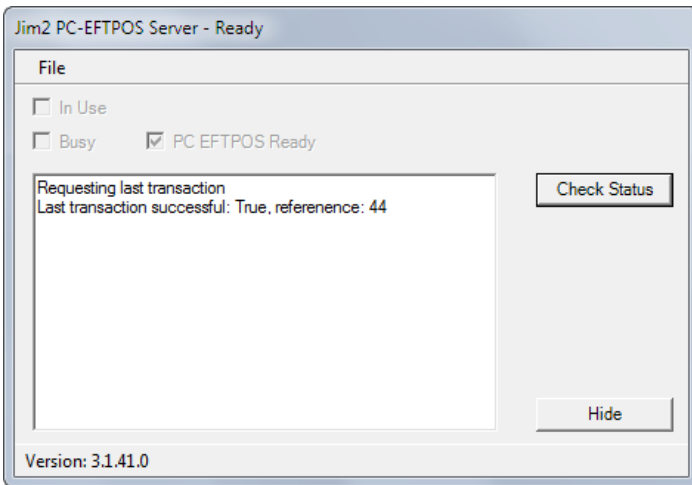
Paste the Jim2 EFTPOS Server icon into the folder that will open:



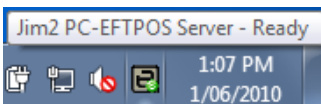
Restart your computer and Jim2 EFTPOS Server will run automatically.

Once Jim2 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.

Go to Tools > Options > Other > Retail and EFTPOS.

Set the following EFTPOS options as required:

EFTPOS	Description
EFTPOS Card Present	Indicates that the EFTPOS transactions are normally <b>Card Present</b> . 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 within 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. This means 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.

Go to Tools > Setups > Banking > Payment Types.

Description	Reconcile Separately	Debtors	Creditors	Allow negatives	Electronic Payments	Eftpos	OpenTill
BPay	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cash	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cheque	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Direct Debit	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Direct Deposit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MasterCard/Visa	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Description:

Show in Debtors     
  Allow negatives     
  Opens Till  
 Show in Creditors     
  Electronic Payments  
 Reconcile separately     
  EFTPOS

Buttons: Save, Cancel, Delete, View, Close

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

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**.

The screenshot shows a dialog box titled "EFTPOS Payment" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Amount \$" containing the value "53.01". Below this field are two empty rectangular boxes. At the bottom of the dialog, there are three buttons: "Card is not present" on the left, "OK" in the center, and "Cancel" on the right.

Step 2.

Ask customer to swipe their card.

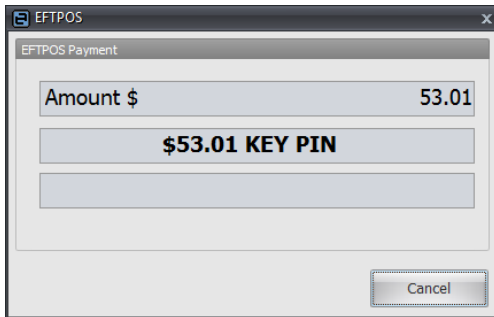
The screenshot shows the same "EFTPOS Payment" dialog box. The "Amount \$" field now displays "53.01". The two empty boxes below it are now replaced by a single button labeled "SWIPE CARD". A "Cancel" button is located at the bottom right of the dialog.

Step 3.

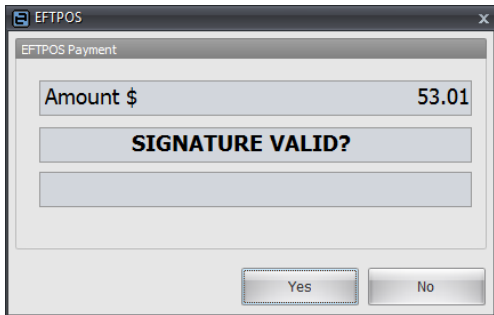
Ask customer to select account: cheque, savings or credit.

The screenshot shows the "EFTPOS Payment" dialog box. The "Amount \$" field displays "53.01". The "SWIPE CARD" button is replaced by a button labeled "SELECT ACCOUNT". A "Cancel" button is at the bottom right.

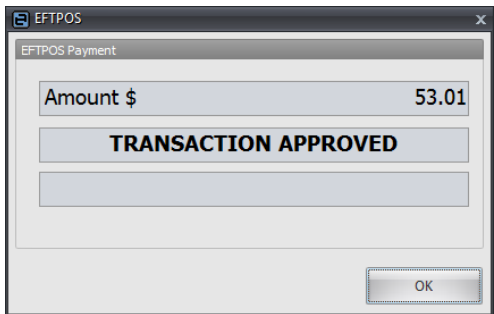
Step 4.  
Ask customer to key their PIN or **Enter** to sign.



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 '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'.

Step 2.

Enter card details. Click **OK**.

The screenshot shows the 'EFTPOS Payment' dialog box with card details entered. The 'Amount \$' field contains '53.01'. Below the amount field are two empty input fields. The 'Card Details' section contains: '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'.

Step 3.

Transaction approved.

The screenshot shows the 'EFTPOS Payment' dialog box with a 'TRANSACTION APPROVED' message displayed in a large button. The 'Amount \$' field contains '53.01'. Below the amount field are two empty input fields. The 'Card Details' section contains: 'Card #' (376011727751003), 'Expires (mm/yy)' (7 / 2012), and 'Security #' (9854). At the bottom, there is one button: 'OK'.

### Payment details

When applying 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 debtor 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 because of 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.

For further assistance or information please call Happen Business 02 9570 4696 or email [support@happen.biz](mailto:support@happen.biz)