

# **triPOS<sup>®</sup> Cloud**

## **Installation and Activation Best Practices**

Developer Integrations

Worldpay Integrated Payments

August 1, 2019

# triPOS<sup>®</sup> Cloud Integration and Activation Best Practices

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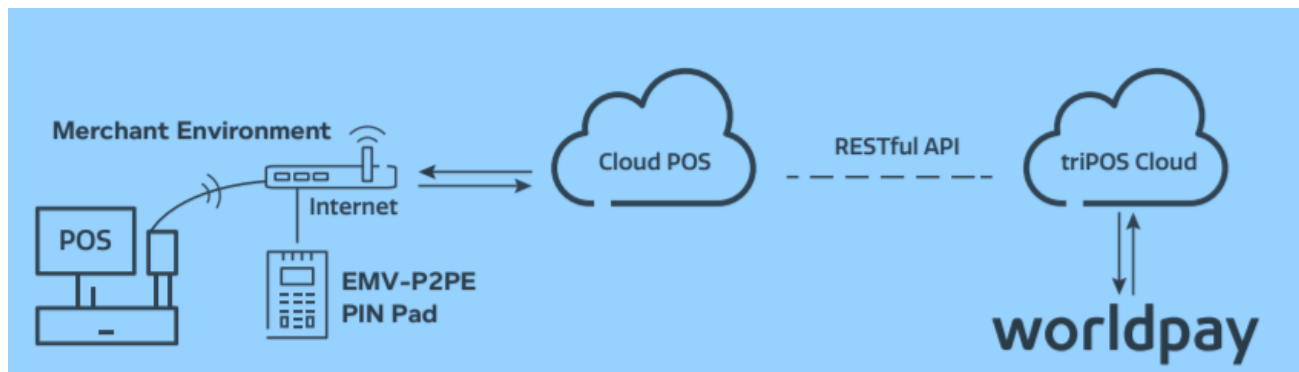
## Overview

The purpose of this document is to outline technical details on the triPOS<sup>®</sup> Cloud configuration and activation procedures, and to supply POS developers with triPOS Cloud installation best practices.

- This document is intended for developers who have completed a triPOS Cloud certification and who are building out their own POS specific merchant implementation documentation.
- Where the activation of a given supported device will be relatively consistent across integrations, there are options which may be unique to your solution and merchant base.
- In the end, the hope is that the information shared in this document will lead to an enhanced merchant install experience and consistent adoption of triPOS Cloud.



For questions about developing your own POS implementation or installation materials, please contact us at [certification@vantiv.com](mailto:certification@vantiv.com).



## Installation Prerequisites and Merchant Setup Configuration

1. **Complete the triPOS Cloud integration and corresponding certification.** During the integration and subsequent certification process, you will need to enable and demonstrate functionality within your POS application to activate triPOS Cloud supported devices as well as specific merchant account information.
2. **Configure the merchant's network settings to allow access to triPOS Cloud's URL and ports.**

Always make sure the network equipment and internet connection are working properly before you begin. Connectivity to triPOS Cloud should occur automatically however to you may wish to confirm within the network configuration that outbound https traffic can reach the following:

- <https://tripos.worldpay.com> on port **443**
- <https://device.worldpay.com> on port **9001**
- Enable TCP/IP **TLS v1.2** protocol for <https://device.tripos.vantiv.com>



Because triPOS Cloud uses Microsoft Azure data centers for load-balancing and redundancy, there is not a set range of Worldpay-owned IP addresses behind the triPOS Cloud Cert and Production environment.

Note, though, that Microsoft publishes a (large) weekly list of all Azure IP address ranges (<https://www.microsoft.com/en-us/download/details.aspx?id=41653>), which can be used by organizations to update firewalls where necessary. Only U.S. regions are used, and to support triPOS Cloud, firewalls should allow access to outbound port 9001.



If you are unable to access triPOS Cloud, review the merchant's router and/or firewall configuration to make sure it doesn't block access to the above URLs.

- How to configure the network equipment depends on the vendor and model.
- Contact the network equipment vendor or the party responsible for managing the merchant's network configuration to complete this step.

3. **Add the merchant account details as provided in the triPOS Cloud Dealer Letter and Merchant Setup Sheet**

When your merchant account is enrolled with Worldpay, you will receive a Dealer Letter with merchant account details.

- Steps 1-4, outlined in the example letter below, are used to access your merchant credentials.
- Use this information to configure the merchant settings
- An example of the Dealer Letter (VAR sheet) and the Merchant "Welcome" set up letter follow below

Merchant Account Setup for Developers and Dealers

worldpay | integrated payments
Express

### Merchant Account Setup for Developers and Dealer Installers

Merchant Setup information for {dbName} using {ProductName}, {VersionName}

<b>MID</b>	{GLOBALMERCHANTID}
<b>Owner Name</b>	{Contact}
<b>DBA Name</b>	{dbName}
<b>Address</b>	{dbaAddress} {dbaCity}, {dbaState} {dbaZip}
<b>Email</b>	{Email}
<b>Phone</b>	{dbaPhone}
<b>StoreCardID</b>	{TerminalID}{NickName}
<b>StoreCard Password</b>	{WebServicePassword}
<b>Enabled Credit Cards</b>	Visa, MasterCard, Discover, JCB & UnionPay: Yes American Express: {AMEXTYPE}
<b>Additional Payment Methods</b>	PIN Debit: {AcceptsPINDebit}, EBT: {CashBenefit}, Food Stamps: {FoodStampsAccepted}

To setup your merchant for processing, you will need to retrieve their **Account ID**, **Acceptor ID**, **Account Token** and **Default Terminal ID**. See our [video](#) and screenshots on how to [login](#) to the the iQ portal to get these Express Credentials. Contact us at **800-846-4472** if you need access to the iQ portal.

1. [Login](#) to the iQ portal
2. On the left menu, click 'Merchant Not Processing' or "Merchant Processing"
3. On the first dropdown, select an "Enrolled" merchant. A second dropdown will appear.
4. On the second dropdown, select 'Merchant Setup Sheet' which shows the express credentials.

One TerminalID (TID) can be used per merchant location. If the merchant wants separate batch settlements by workstation, you can assign a unique TerminalID for each.

Please be sure to run test transactions in the process. If you have any questions during the installation, or if you are unable to run a successful transaction, contact us at **800-846-4472**.

Use the above credentials if your merchant will be processing Gift/Storecard with Worldpay.



Merchant Welcome Letter

worldpay
Welcome

{Legalname}  
d/b/a {DBAName}

{DATE}

Hello {FirstName},

Welcome to Worldpay Integrated Payments! Thank you for choosing us as your payments partner.

**Simply follow these steps to get your payment processing up and running.**

<b>STEP 1</b>	<p><b>Receive your equipment.</b></p> <p>If you ordered equipment from Worldpay and haven't received it within 10 business days, call us at <b>800-846-4472</b>. Upon receipt, contact your dealer to set an install appointment.</p>
<b>STEP 2</b>	<p><b>Set up access to statements, transactions and more on our iQ portal.</b></p> <p>Look for an email from <a href="mailto:iq@accessmyiq.com">iq@accessmyiq.com</a> to enroll in iQ. If you don't get an email within 24 hours, click <a href="#">here</a> to get one resent. <b>NOTE:</b> you will need your Merchant ID (MID) and Tax ID numbers for the resend. Click <a href="#">here</a> for an iQ User Guide.</p> <p><b>Need to run transactions right away?</b> Use our Express Virtual Terminal (VT) in iQ. Click <a href="#">here</a> for an Express VT demo, or see pages 3-4 in the iQ User Guide to learn how. You can also use the Express VT to process refunds, voids and other functions.</p> <p><b>Worldpay Merchant ID (MID):</b> {GLOBALMERCHANTID}</p>
<b>STEP 3</b>	<p><b>Retrieve your Express Credentials from the reporting portal.</b></p> <p>Your dealer will <b>likely</b> get these for your installation, confirm with them. If you do need to get your <b>Account ID, Acceptor ID and Account Token</b>, click <a href="#">here</a> for a quick video on how to do it. Please keep these credentials secure and do not send them via email.</p> <ol style="list-style-type: none"> <li>1. Select the Self Service tab on the left navigation panel</li> <li>2. Click on the blue + button. <b>select</b> your Merchant ID (MID), click <b>search</b></li> <li>3. See your credentials under the Express Credentials tab on the top right</li> <li>4. Your <b>DefaultTerminal ID</b> is 0001</li> </ol>
<b>STEP 4</b>	<p><b>Contact your dealer to complete set up.</b></p> <p>Contact your {Dealer} to complete installation of your credit card payments system. <b>Have your MID and credentials ready for the installation.</b></p> <p>Contact: {DealerTechName} at {DealerTechEmail}, {DealerTechPhone}</p>

## Configuring the Merchant Information and Activate the Device

1. **Access and configure the merchant's account information into the POS.**

- How this screen is accessed will be specific to your POS application.
- The below screenshot is from our triPOS Cloud Demo application available here <https://triposcert.vantiv.com/demo/pos>



**NOTE:** The Express Acceptor ID, Account ID, and Account Token from the Merchant Setup Sheet are required in order for the merchant to process transactions.

<b>Account ID</b>	<input type="text" value="Account ID"/>
<b>Acceptor ID</b>	<input type="text" value="Acceptor ID"/>
<b>Account Token</b>	<input type="text" value="Account Token"/>

2. **To configure the merchant's lane management**, the POS will supply input screens similar to the ones above and below. POS applications will vary in the way they display or configure this information. Required Lane Management details include:

- **Lane ID**, **Terminal ID**, and **Description** are configured with values referencing the merchant location and the specific device being implemented.
- You may default the configurations of the **Lane ID** to "1", the **Terminal ID** to "0001," (or use whatever convention is already implemented in the merchant location.)
- **Serial Number** and **Model** values are specific to the device itself, typically found on the back of the device. These values are not required.
- The **Description** is defined by the location or revenue center, as in "Side Bar" or "Host Stand" but can be defined to whatever makes sense to the merchant environment.
- The **Activation Code**, which is required and should always be made accessible, is used to pair your PIN pad device with the POS Application. The Activation Code is obtained on the PIN pad in the final step below.

<b>Lane ID</b>	<input type="text" value="Lane ID"/>
<b>Terminal ID</b>	<input type="text" value="Terminal ID"/>
<b>Serial Number</b>	<input type="text" value="Serial Number"/>
<b>Model</b>	<input type="text" value=""/>
<b>Description</b>	<input type="text" value="Description"/>
<b>ActivationCode</b>	<input type="text" value="Activation Code"/>
	<input type="button" value="Submit"/>
	<input type="button" value="Close"/>

3. **To obtain the device Activation Code**, connect the PIN pad to the local network.
  - If the PIN pad utilizes a wired connection use the provided Ethernet/RJ45 cable and connect it to an active Ethernet port.
  - If wireless, connect the PIN pad to the appropriate wireless connection. Software loaded on the device will then connect to the triPOS Cloud server and obtain an activation code which will be displayed on the PIN pad screen.
  - If an Activation Code does not display after the device is connected, first verify your network and ports settings to make sure the device can reach the triPOS Cloud service.



The Activation Code refreshes every 15 minutes so be sure to use the last Activation Code that appears on the device.

Production Activation Codes will always begin with the letter "P". If the activation code begins with the letter "C" the PIN pad has been configured for our test environment and will need to be replaced.

## Troubleshooting FAQ and Scenarios

### I plugged in my PIN pad to my local network for the first time, but an Activation Code is not being displayed. What do I do?

- The first step is to power cycle the PIN pad.
- Make sure the Ethernet cable is plugged into the PIN pad before powering it up.
- Confirm the Ethernet port being used is active and that any firewalls in the merchant network are not blocking the triPOS Cloud URL's defined in the Installation Prerequisite section earlier in this document.
- If the merchant is using a managed network service (i.e. managed router/switch) they should contact their ISP and ISV for further assistance.
- If you still can't see an activation code (similar to what is displayed below) your device may be configured incorrectly and a new device will need to be ordered. Before you contact your supplier, first call Worldpay Customer Care to ensure all other possibilities have been exhausted.



Our triPOS Cloud Connectivity tool located at the URL below can be used to validate if the network has access to triPOS Cloud. <https://developer.vantiv.com/docs/DOC-3325>

### How can I confirm that my PIN pad is still connected to triPOS Cloud?

- Assuming your POS software application supports it, you should initiate an idle message request to triPOS Cloud. If you get an "http 200" response, the PIN pad is still connected to triPOS Cloud.

### I never initiated a "Lane Delete" request, but my PIN pad is no longer paired with triPOS Cloud. How did this happen?

- Devices may be moved from one location to another but the account information found on the merchant setup sheet is specific by location.
- As a result the device would need to be paired again using the merchant information specific to the new location. This is done by deleting the existing lane and adding a new lane with the correct

merchant information.

**My PC crashed and my POS software application lost the associated credentials to my PIN pad. How can I reset so that I can start using my PIN pad again?**

The Worldpay Customer Care team has access to a triPOS Cloud Lane Management (using a tool called "Sight Stream") tool that can be used to review lane configurations for every connected PIN pad, and can also initiate a Lane Delete (unpair) request to the PIN pad. At that point, when the PIN pad is restarted, an Activation Code will be displayed so that the merchant can initiate a Lane Create request to triPOS Cloud via your POS software application.

**Appendix**

**Verifone MX 915 Activation**

**Step One:** Connect Ethernet cable to the PIN PAD

Before you power on, connect an Ethernet cable into the correct port on the back of the PIN Pad.



-💡- The Ethernet cable needs be connected to the router or modem before moving to step two.

**Step Two:** Power on the PIN pad to obtain an Activation Code

To power on the PIN pad, connect the power cable and plug it into AC outlet.

- The PIN pad screen will display several screens during the boot process.

**Important:** This process may take several minutes





### Step Three: Capture the Activation Code

Copy/Notate the Activation Code exactly as displayed on the PIN pad screen. The Activation Code is required to be entered into the POS setup configuration.

- A triPOS logo or idle message will be displayed on the PIN pad screen once activation is successful

-💡- The Activation Code refreshes every 15 minutes so be sure to use the last Activation Code that appears on the device.



## Ingenico iSMP4 Device Activation

### Step One: Power on the PIN pad

Power on the iSMP4 by pressing the On/Off button

-💡- Makes sure the device has been fully charged.

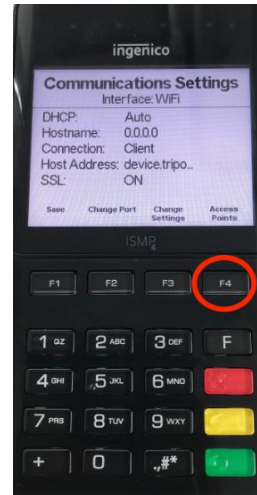


### Step Two: Connect Access point

To get into the iSMP4 system settings menus, press the “F” key 5 times.



Next press “F4” button to select “Access Points”



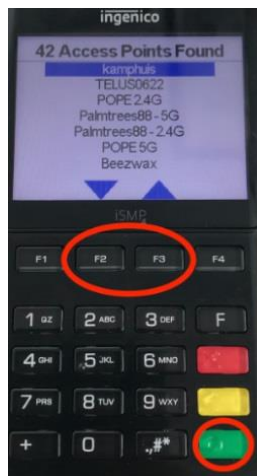
Next press “F1” to create/configure a new access point.



Wait for the PIN pad to scan for available Wi-Fi networks. This may take a minute or two.



Once the list of available networks is populated, use the “F2” (down) and “F3” (up) keys to scroll to your preferred network.



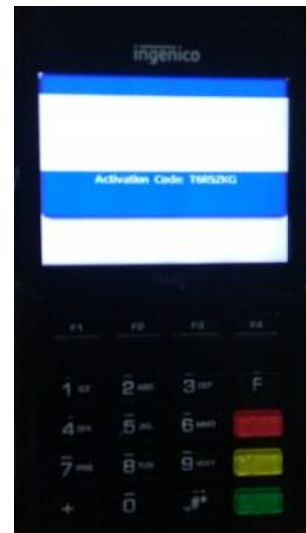
- Then press the green button to select your preferred network.

Now use the key pad to enter your password. To select letters, press the appropriate number multiple times. Once you are finished entering your password, press the green button.



**Step Three:** Capture/notate the activation code displayed on the PIN pad screen.

- Enter into the POS setup screen.



## Compatible PIN Pad Devices and Ordering Availability

Manufacture / Device (EMV Certified)	Verifone MX 915/925	Ingenico IPP 320/350	Ingenico ISC 250/480	Ingenico iSMP 4
EMV Certified Processor	Worldpay, First Data, Chase, TSYS, Global	Worldpay, First Data, Chase, Global	Worldpay, First Data, Chase, Global	Worldpay, First Data, Chase, Global
Communication Type	Ethernet	Ethernet	Ethernet	WiFi
KIF Support	POS Portal, TPG, Worldpay	POS Portal, JRs POS, TPG, BlueStar, Worldpay	POS Portal, JRs POS, TPG, BlueStar, Worldpay	POS Portal, JRs POS, TPG, BlueStar, Worldpay