

Upgrade from Point of Success Version 2.63 or earlier to Point of Success Version 2.7 or higher PA-DSS (PCI) Compliant version

Credit Card Processing

Online credit card processing in Point of Success version 2.7 has changed dramatically. There have been several steps taken to ensure that the credit card data is securely stored (or not stored as the case may be), transmitted, and used by Point of Success for payments.

To prepare for this change, there are several steps involved from checking the operating system to changing merchant numbers and installing new software. Following is a list of steps required. PC Charge payments and Mercury Payment Systems payments are both affected so instructions are available for each.

Note: *PCCharge Connector* has been discontinued and replaced with *Chargepath for PCCharge* effective with the release of version 2.7. If you were using *PCCharge Connector* you must obtain an upgrade to *Chargepath for PCCharge* **before** installing version 2.7. Contact your dealer or Point of Success for details. Chargepath for PCCharge requires PCCharge Payment Server version 5.9.1 or above – Arrange for this PCCharge upgrade **before** installation of version 2.7.

All users:

- Confirm that every computer used with Point of Success has at least Windows XP service pack 3 installed. All versions of Windows Vista and Windows 7 are supported.
- Install Point of Success version 2.7 or higher (PA-DSS validated version)
- Install Chargepath for Mercury Payments or Chargepath for PCCharge
- Run Chargepath Server (Start > All Programs > Chargepath > Chargepath Server)
 - The first time Chargepath Server runs it will require setup. Set up Administrative user. The password requirement is more than 7 characters with a least one letter and one number. The password will automatically expire and have to be changed every 90 days. The last four (4) passwords cannot be re-used.
- Login to Chargepath Server using the Administrator Login established in the previous step.
- Set up Chargepath Server including all the settings on the General tab.
- Chargepath Client launches whenever Point of Success Order runs and needs no configuration.

Processing credit cards, gift cards and loyalty transactions through Mercury Payment Systems:

- ❑ Obtain a new *M-Token Terminal ID* (for both Brick and Mortar and MOTO accounts if you use both) from Mercury Payment Systems. E-commerce merchant numbers for online order processing with BigHoller do not need to be changed.
- ❑ Fill in the new and existing merchant numbers on the Merchant Numbers tab of Chargepath Server.
- ❑ Complete credit card processing settings in Office Manager > Tools > Credit card, gift card and loyalty options. Assign Point of Success service types to the appropriate merchant account type on the Merchant Numbers tab.

Processing credit cards through PCCharge Payment Server:

- ❑ Install PC Charge Payment Server Version 5.9.1 or higher

Online Ordering

Order delivery for Online Ordering using Big Holler has changed. Customers will not notice the difference when placing orders but the setup process is significantly different. There is no longer a need for a static IP address for the business from the Internet Service Provider nor an internal static IP address setup on the Local Area Network (LAN) database server.

All Online Ordering users:

- ❑ Obtain a dedicated email address exclusively for use with online ordering. (Must have POP3 access - not web-based email access; POP3 with SSL is not supported). Your Internet service provider is the best place to get this email account. **“Exclusively” means that the email account can be used only for online orders, not for personal email or for any other purpose.**
- ❑ Configure Point of Success Order Monitor
 - [Order Polling] POP3 Server is the email server receiving the orders from Big Holler.
 - Login Name is the login name or email address for the POP3 server
 - Password is the password to check the email
 - Do not change the Port setting
 - Poll mail server time default = 30 seconds – this should be sufficient. This is the interval used to check for new incoming online orders.

- Contact BigHoller to change setup from HTTP POST to email polling for order retrieval.
- Test email order retrieval with a test order.
- Disable port forwarding in your router after a successful test.