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# **RMS-TD Bridge User's and Setup Guide**

Version 2.9.9

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Part I

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# **RMS-TD Bridge User's Guide**

Version 2.9.9

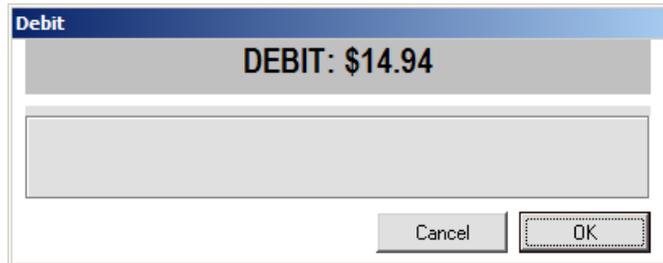
## Debit Cards

### Debit Cards: Standard Transactions

Process your transaction as normal.

On the tender window, choose Debit from the payment menu. (Either type in the amount or press the '+' key.)

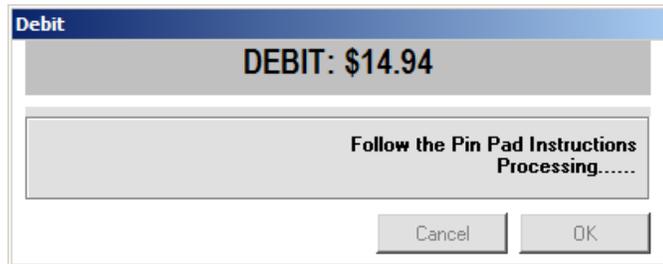
You will see a window similar the one on the right.



Press the Enter key to proceed.

You will be prompted to "Follow the Pin Pad Instructions".

The Pin Pad will have the prompt "Swipe/Insert Card". The customer must swipe their card and follow the prompts on the Pin Pad.



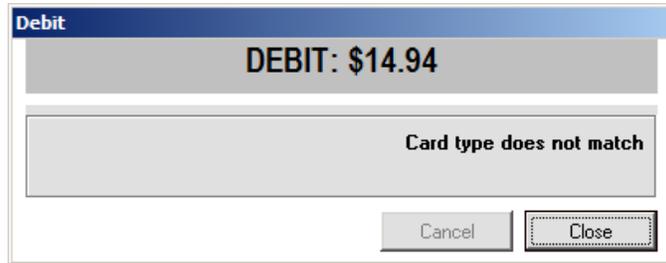
The Debit window will remain on the screen until the customer completes their transaction at the Pin Pad and the transaction is completed with an approval, decline or error.

If the transaction is approved, you will see a window like the one on the right. Simply press the Enter key to begin a new transaction.



## Debit Cards: Failed Transactions

There are a number of error messages including “Swipe cancelled”, “PIN Error”, “Invalid Card”, “ Card Type does not match”, etc. Should you receive a message like this, you will be given the option to try again.



Based on the error, you can decide if you would like to try again. Choosing “Yes” will bring you back to the “Follow the Pin Pad Instructions” prompt.

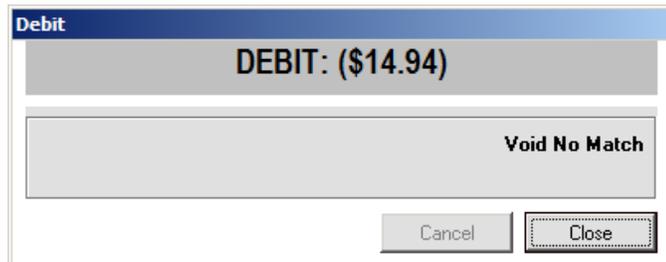
Choosing “No” will return you to your transaction to select a different form of payment.



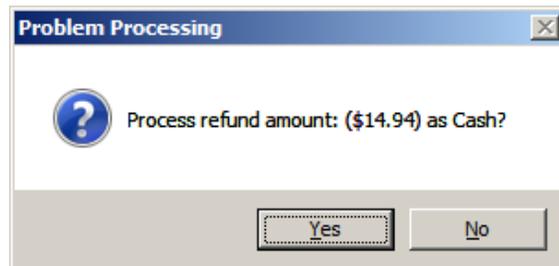
## Debit Cards: Void No Match

When recalling a transaction for void and the debit card entered along with the value are not the same as the original transaction, this message will be displayed: “Void No Match”.

Select the Close button to close the “Debit” window.



The transaction can be completed using Cash. Responding Yes will complete the transaction using Cash. Responding No will allow you to reenter the card.



## Credit Cards

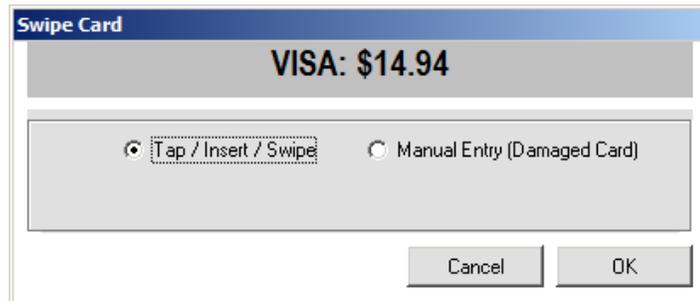
### Credit Cards: Standard Transactions

#### Swiped Cards

Process your transaction as normal.

On the tender window, choose the appropriate credit card from the payment menu.  
(Either type in the amount, or press the '+' key.)

You will see a window like the one on the right.

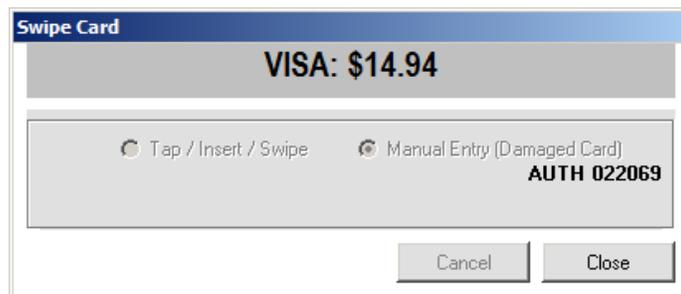


Press Enter to proceed and swipe, insert if chip card or tap the customer's card.  
The customer is then required to tap, swipe or insert the credit cards through the Pin Pad.

If your "Other Reader" option is off, follow the instructions on the Pin Pad. Chip cards must be inserted into the Pin Pad. Cards without chips may be swiped.



The screen to the right will be displayed when the transaction is approved. Press the Enter key to clear this window and completely end the transaction.

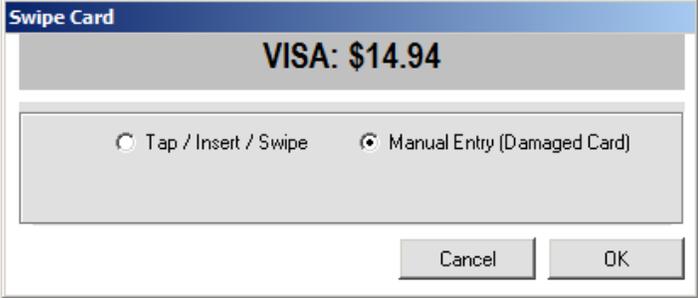


## Damaged Cards (Manual Entry)

Process your transaction as normal.

On the tender window, choose the appropriate credit card from the payment menu.  
(Either type in the amount, or press the '+' key.)

You will see a window like the one on the right.



The screenshot shows a window titled "Swipe Card" with a blue header. Below the header, the text "VISA: \$14.94" is displayed in a grey box. Underneath, there are two radio button options: "Tap / Insert / Swipe" (which is unselected) and "Manual Entry (Damaged Card)" (which is selected). At the bottom of the window, there are two buttons: "Cancel" and "OK".

In cases where the swipe or insert of card doesn't work you can arrow over to Manual Entry or use your mouse to select Manual Entry. Press Enter to proceed and you will be prompted at the Pin Pad to type in the credit card number and expiry date. Do not put spaces or dashes in the credit card number. Do not put slashes or dashes in the expiry date. Press the green OK when you have finished typing in the card number and expiry date.

### Important Notes:

It is the merchant's responsibility to get an imprint of the credit card if the card will not swipe.

If a message is displayed similar to "Transaction Key Card Not Supported", the TD Host has a setting enabled that disables manual entry. This is a setting that helps reduce fraudulent transactions. The setting can be turned on by contacting TD Merchant Services to request that manual entry be enabled.

If your account is enabled with TD Merchant Services to accept manual entry, the PIN Pad will prompt with:

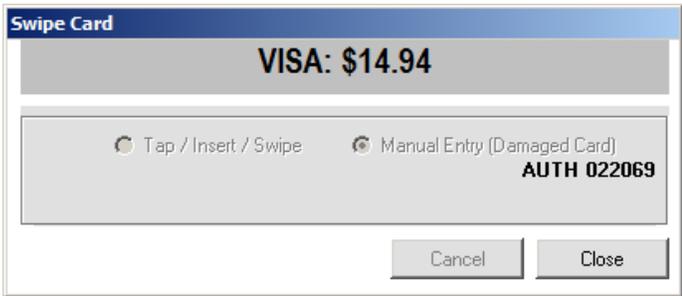
F1 – Phone Order

F2 – In Person

Select the appropriate option.

You will then be prompted for Card Number and Expiry Date.

The screen to the right will be displayed when the transaction is approved. Press the Close button or keyboard Enter key to clear this window and complete the transaction.



The screenshot shows a window titled "Swipe Card" with a blue header. Below the header, the text "VISA: \$14.94" is displayed in a grey box. Underneath, there are two radio button options: "Tap / Insert / Swipe" (which is unselected) and "Manual Entry (Damaged Card)" (which is selected). Below the radio buttons, the text "AUTH 022069" is displayed. At the bottom of the window, there are two buttons: "Cancel" and "Close".

## Credit Cards: Failed Transactions

There are a number of error messages including “Cancelled”, “Communication Error”, “Invalid Card” etc. Should you receive a message like this, you will be given the option to try again.

Based on the error, you can decide if you would like to try again. Choosing “Yes” will bring you back to the Swipe or Manual Entry window.

Choosing “No” will return you to your transaction to select a different form of payment.



## Credit Cards: Manual Authorizations

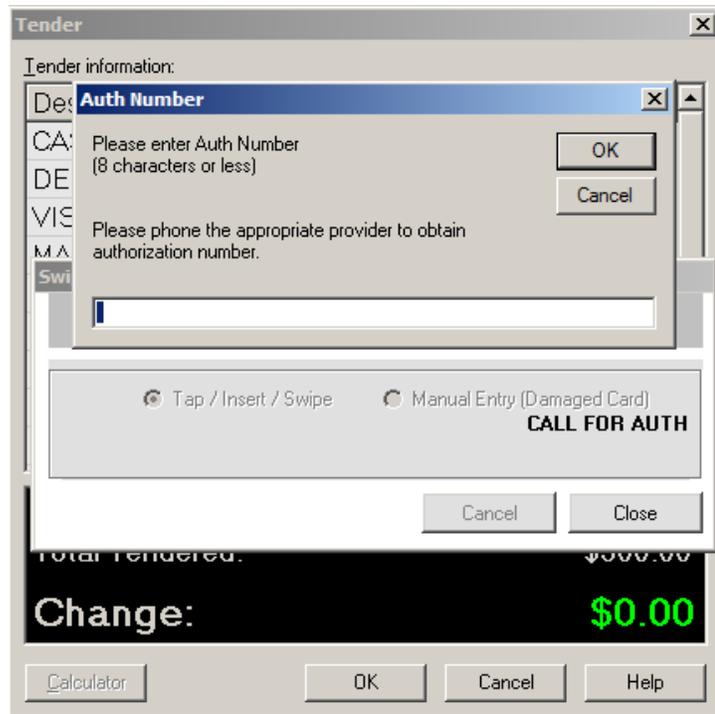
In some cases, you may receive a “CALL FOR AUTH” message. This may occur if your internet connection is down or if there are other reasons why you can’t reach the TD host. The TD host may also request the “CALL FOR AUTH”.

In these cases, you must phone the appropriate financial institution for authorization, take an imprinted draft of the card, note all transaction details on the imprinted draft (including the authorization number obtained by phone) and have the customer sign the imprinted draft.

If the TD host has requested the “CALL FOR AUTH”, the PINPad will request that the card be swiped / inserted to verify the card being authorized after entering a valid Auth Number.

Authorization codes will often have a combination of numbers and letters and will generally be 8 characters or less.

Press the Enter key to finalize the transaction.



## Credit Cards: Invalid Card Type

To avoid tender total mismatching, an operation is performed to validate that the type of card swiped or entered is the same type as the type that has been selected from the tender screen.

If the card that is swiped or entered is not the same type as selected on the tender screen, a message will be displayed and the card should be entered or swiped again.

In this example, Visa was selected on the tender screen but a Mastercard card was swiped.



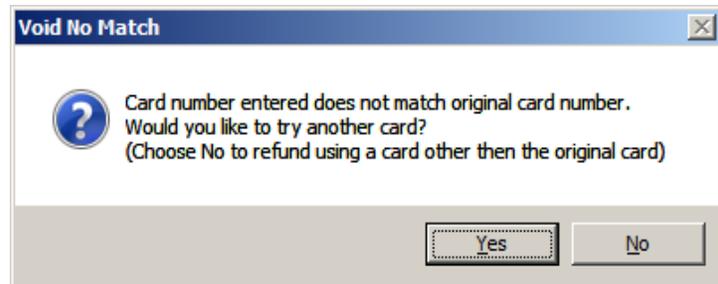
## Credit Cards: Void No Match

When recalling a transaction for void and the credit card entered along with the value are not the same as the original transaction, this message will be displayed: "Void No Match".



Select the Close button to close the "Swipe Card" window.

Responding Yes will allow you to reenter the card. Responding No will allow for a refund to a card other than the card that was used in the original transaction.



Note: Recalled transactions must be voided using only one credit or debit card. Multiple card transactions (split tenders) cannot be voided. The return function must be used. These transactions can be refunded to one tender type or method of payment only.

## Card Failure: Multiple Card Transactions

If a transaction is tendered with multiple credit or debit cards and a card cannot be authorized, all previously authorized cards in the transaction must be reversed in order to proceed in the transaction.

Example:

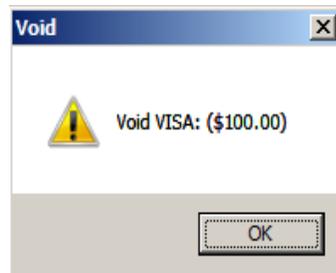
Transaction total:	\$143.99
Debit Tendered for	\$ 43.99
VISA Tendered for	\$100.00

Credit cards are processed first.

Assuming the Visa is approved but the debit card will not approve, the Visa must be voided prior to proceeding in the transaction.

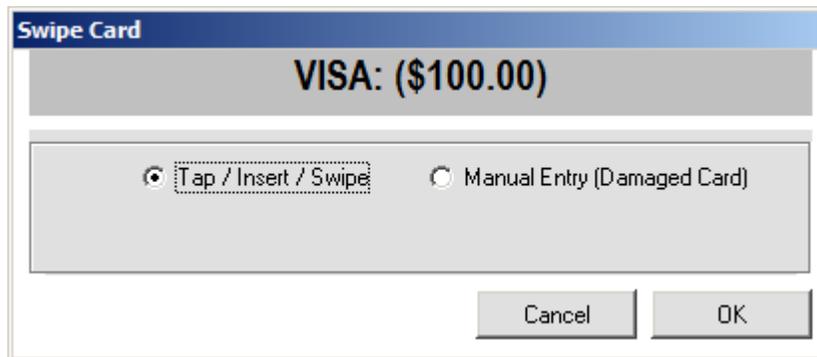
The following screen will be displayed for each card that has been authorized prior to a card failure. All previously authorized cards must be voided prior to proceeding.

Press the OK button or press Enter to automatically void the credit card that has been previously authorized in this transaction. You will be immediately prompted at the PINPad to Swipe or Insert the credit card.



The customer will be prompted at the PINPad to accept the "Purchase Correct" for the value that was previously authorized.

When the "Purchase Correct" is accepted at the PINPad the authorization will be reversed.



The tender window will be displayed with all values removed. Alternate tenders may be selected or the transaction may be cancelled.

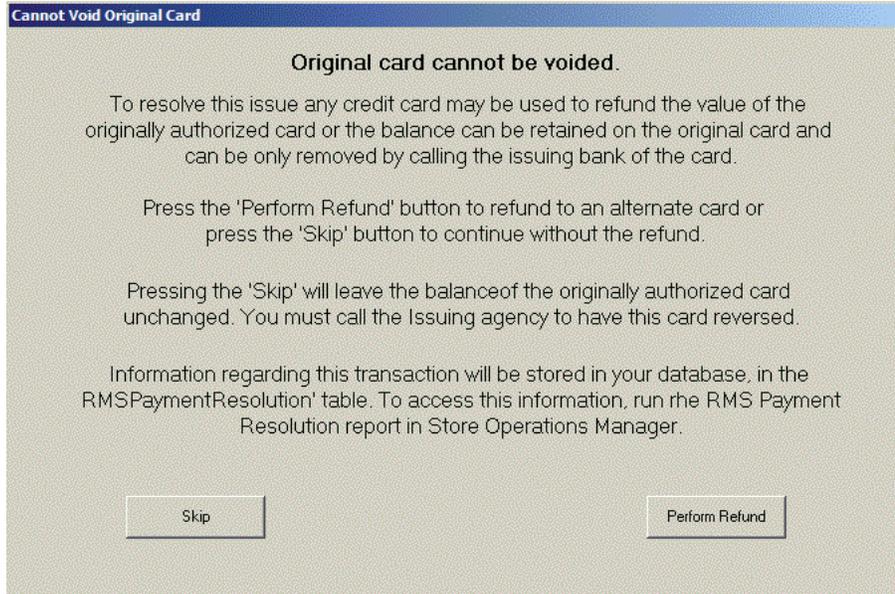
### Voiding of Credit Card Gift / Prepaid cards

If the case arises that at least one credit card gift card has been successfully authorized in a transaction then a subsequent tender fails and the transaction cannot be completed, the previously authorized cards must be voided in order to balance the transaction.

In some cases, credit card gift cards or prepaid credit cards may not be able to be voided. If this scenario happens within a transaction, the initial attempt to void the previously authorized card may fail. If the initial automatic void attempt fails you will be prompted to try again but a window will be displayed requesting a selection. The options are to either refund the value to an alternate

credit card or accept that the authorization has been accepted and continue in the transaction as if the card was voided.

If accepting to continue in the transaction, the issuer of the card must be contacted to reverse the transaction manually. If the option to refund to an alternate credit card is selection the transaction will balance and no further processing is required.

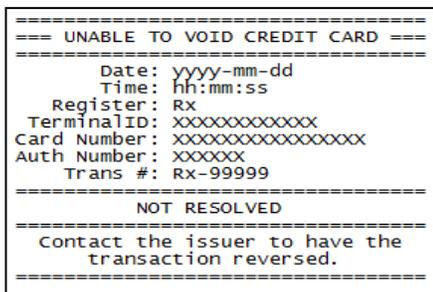


If the window above is displayed you can select Skip to leave the balance of the card or Perform Refund to refund the amount of the originally authorized card to an alternate credit card.

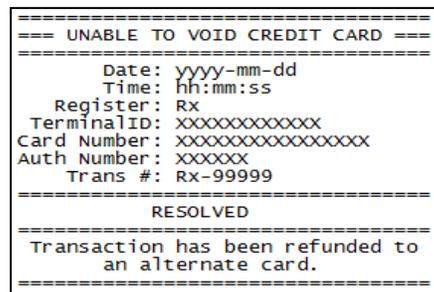
If you select the option to Skip, the card issuer must be called to have the transaction reversed. The issuer phone number should be on the physical card.

If you select the option the Perform Refund you will be prompted to enter a different credit card to refund the amount to.

In either case, the transaction information will be recorded to ensure that you have the information. A special receipt will be printed to indicate to option selected.



Skip Selected



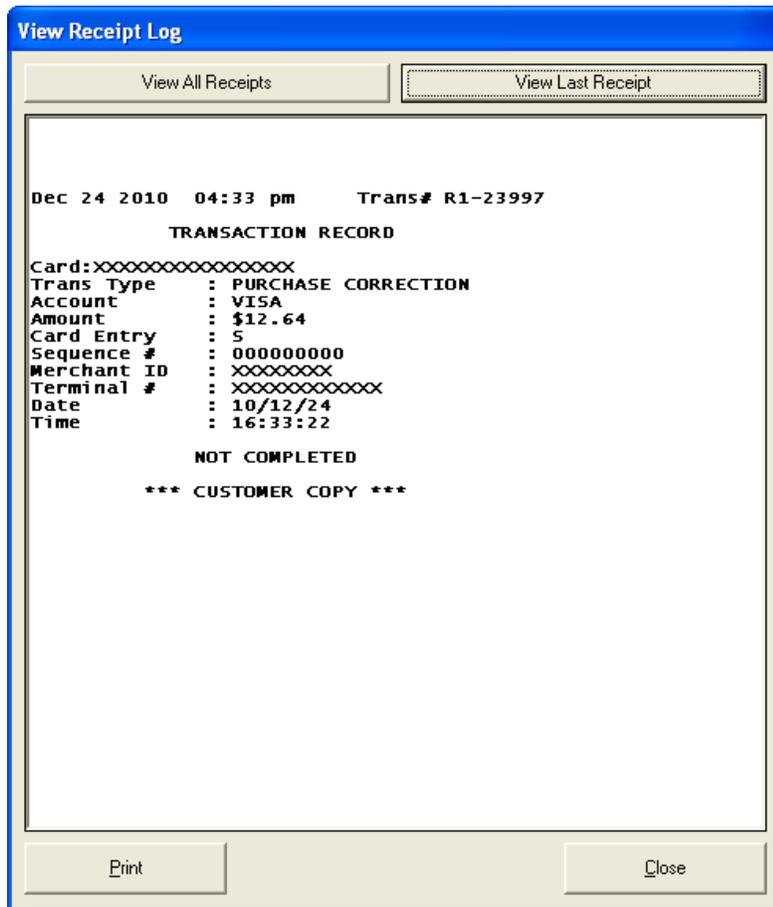
Refund Selected

## Reprinting a Debit or Credit Receipt

Click the  button.

At the top of the page, click View Receipt Log.

Click the  button to view and or print the last receipt.



Click the  button to select from a list of transaction dates and choose the date that corresponds with the receipt you would like to print. The format of the date is YYYYMMDD.

Once you have selected a date, the receipts will be displayed in the window. Highlight the receipt you wish to reprint before clicking print.

## End of Day Settlement



Click the  
below.

button to access the screen

The transaction settlement screen will show you all of your current authorized credit and debit transactions.

**Transaction Settlement**

File View Receipt Log License Code

Print Transaction Totals Close Batch Force Post

TerminalID Type

TransactionNumber	Type	CreditCardNumber	Amount	AuthNum	TerminalID	BatchNumber
- Debit						
6679	Debit	XXXXXXXXXXXXXXXX	(\$14.94)	901971 B	XXXXXXXX	516
6680	Debit	XXXXXXXXXXXXXXXX	(\$1.13)	373998 B	XXXXXXXX	516
Count: 2			Amount: (\$16.07)			
- VISA						
6675	VISA	XXXXXXXXXXXXXXXX	\$2.10	016576	XXXXXXXX	516
6677	VISA	XXXXXXXXXXXXXXXX	\$2.10	020096	XXXXXXXX	516
6681	VISA	XXXXXXXXXXXXXXXX	\$12.64	019760	XXXXXXXX	516
6682	VISA	XXXXXXXXXXXXXXXX	\$12.64	021576	XXXXXXXX	516
Count: 4			Amount: \$29.48			
Count: 6			Amount: \$13.41			

Close

## Closing the Batch (End of Day)

At the end of each business day, you will want to balance your cash drawer and clear this screen. You may use the Print Transaction Totals button as often as necessary to query TD regarding your totals for this till.

The Print Transaction Totals button functions very much like your X report.

A summary will print totaling your credit cards and your debit cards. The host totals and your totals should match.

The report can be compared to your X report in RMS to make sure that the amounts match.

Once you are satisfied with the totals, click the Close Batch button. An identical receipt will print and the Transaction Settlement screen will be cleared making the POS ready for the next shift.

Under "HOST TOTALS"

"DEBIT" is the total of transactions that have added a positive amount to your merchant accounts. This is the total of Purchases.

"CREDIT" is the total of transactions that have subtracted from your merchant accounts. This is the total of Refunds.

"Adjustment" is the total of void transactions. This is the balance of all "Purchase Correction" and "Refund Correction" transactions.

The centre column is the transaction count. The following equations show how the counts are calculated:

- Debit Count = Total Number Count of Purchase  
+ Purchase Void transactions
- Credit Count = Total Number Count of Merchandise Return  
+ Merchandise Return Void transactions
- Adjustment Count = Total Number of Purchase Void  
+ Merchandise Return Void transactions

\* Note that the count calculations are different from the total's calculations (for example: the debit totals are for purchases while the debit transaction count total is for Purchases + Purchase Voids)

Under "TRS TOTALS"

You will find the card types listed. In these samples they are Visa, MasterCard, American Express and Interac Debit. You will find the total transaction count and balance for each card type. The transaction count is the number of all purchase, refund, purchase correction and refund corrections.

Beneath the card types are the DEBIT and CREDIT counts and amount totals. These are defined the same as under "HOST TOTALS". These are the totals as recorded by Merchant Connect Multi. They should agree with the "HOST TOTALS". You will find that the "TRS TOTALS"

Batch Inquiry Transaction		
Terminal #	:	MS1234567890
Sequence #	:	0011050120
Date	:	yy/mm/dd
Time	:	hh:mm:ss
Batch #	:	0105
HOST TOTALS		
DEBIT	6	281.75
CREDIT	4	120.75
Adjustment	2	40.25
TRS TOTALS		
Visa	2	-5.75
MasterCard	1	23.00
American Express	1	34.50
Interac Debit	6	69.00
DEBIT	6	281.75
CREDIT	4	120.75
Adjustment	2	40.25
**** TRANSACTION APPROVED ****		

Batch Close Transaction		
Terminal #	:	MS1234567890
Sequence #	:	0011050120
Date	:	yy/mm/dd
Time	:	hh:mm:ss
Batch #	:	0105
HOST TOTALS		
DEBIT	6	281.75
CREDIT	4	120.75
Adjustment	2	40.25
TRS TOTALS		
Visa	2	-5.75
MasterCard	1	23.00
American Express	1	34.50
Interac Debit	6	69.00
DEBIT	6	281.75
CREDIT	4	120.75
Adjustment	2	40.25
**** TRANSACTION APPROVED ****		

(terminal totals) may be out of balance with the “RMS TD Bridge” totals if you have rung through Force Post transactions.

Beside “Adjustment” you will find the total transaction count and amounts for “Void” transactions. These are defined the same as under “HOST TOTALS”. These are the totals as recorded by Merchant Connect Multi. They should agree with the “HOST TOTALS”.

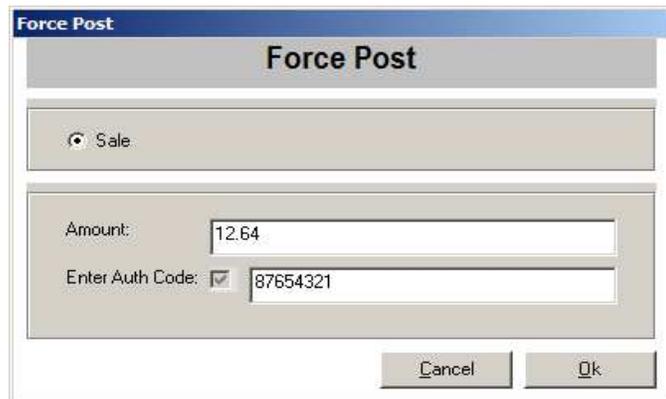
If there are discrepancies between the “HOST TOTALS” and the “TRS TOTALS”, you should contact TD RMS Helpdesk for support at 1-877-836-7767 (Press 1 for English or 2 for French, then press 2 for TD RMS Merchant Support).

## Force Post

On the occasion that RMS may have not been operational and credit cards have been manually authorized via phone, the Force Post may be used to post finalize these transactions with TD. Force Post transactions will only be accepted if a previous phone authorization has been provided. The previously obtained authorization number must be entered in order to complete this type of transaction.

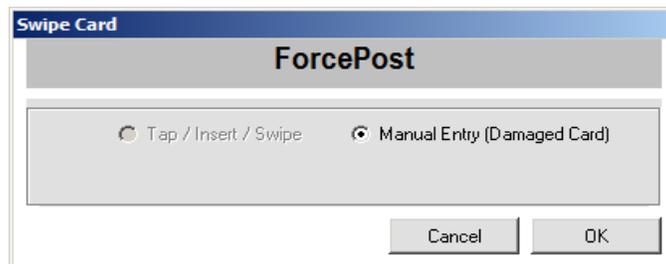
Please be aware that Force Post transactions require that manual card entry be enabled. If manual card entry has not been enabled, TD Merchant Services may be contacted to request that the manual entry feature be enabled.

Only phone authorized transactions may be entered using Force Post. Enter the amount and the auth code that you have already received by phone then press Ok.



The screenshot shows a software interface titled "Force Post". At the top, there is a header bar with the text "Force Post". Below the header, there is a section with a radio button selected next to the word "Sale". Underneath, there are two input fields. The first is labeled "Amount:" and contains the value "12.64". The second is labeled "Enter Auth Code:" and contains the value "87654321". At the bottom right of the interface, there are two buttons: "Cancel" and "Ok".

Continue the transaction as normal by entering the card number and expiration date on the PIN Pad then press Ok.



The screenshot shows a software interface titled "Swipe Card". At the top, there is a header bar with the text "ForcePost". Below the header, there are two radio buttons. The first is labeled "Tap / Insert / Swipe" and is unselected. The second is labeled "Manual Entry (Damaged Card)" and is selected. At the bottom right of the interface, there are two buttons: "Cancel" and "OK".

The transaction totals will not be in any of the RMS POS totals. To see the transactions that have been authorized, use the TD Force Post Transaction Report in RMS.

# Reporting in Microsoft Retail Management System

## TD Transactions Report

At any time, you may run a report of all your TD Transactions from within RMS.

In Store Operations Manager, click Reports → Custom → TD Transactions.

This report can be filtered in the same manner that you filter all RMS report.



Active Report: TD Transactions

**TD Transactions**  
Generated On 5/11/2005

Register	Tender	Date	Time	Amount	Card #	Expiry	Auth.Code
<b>Overall</b>				<b>\$11,759.10</b>			
<b>Register 1</b>				<b>\$9,595.81</b>			
Register 1	Debit			\$3,677.72			
Register 1	Mastercard			\$2,144.50			
Register 1	Visa			\$3,773.59			
<b>Register 2</b>				<b>\$2,681.96</b>			
Register 2	Debit			\$85.00			
Register 2	Mastercard			\$442.78			
Register 2	Mastercard	5/3/2005	4:25PM	\$68.00	XXXXXXXXXXXX3448	1205	79431B
Register 2	Mastercard	5/3/2005	4:43PM	\$307.66	XXXXXXXXXXXX3448	1205	79437B
Register 2	Mastercard	5/4/2005	1:41PM	\$67.12	XXXXXXXXXXXX3454	1205	79575B
Register 2	Visa			\$2,154.18			
Register 2	Visa	5/3/2005	4:20PM	\$1,234.72	XXXXXXXXXXXX3447	1205	79424B
Register 2	Visa	5/3/2005	4:47PM	\$56.82	XXXXXXXXXXXX3448	1205	79439B
Register 2	Visa	5/4/2005	11:22AM	\$180.87	XXXXXXXXXXXX3453	1205	79547B
Register 2	Visa	5/4/2005	11:37AM	\$265.90	XXXXXXXXXXXX3453	1205	79557B
Register 2	Visa	5/4/2005	1:39PM	\$36.19	XXXXXXXXXXXX3454	1205	79572B
Register 2	Visa	5/4/2005	2:56PM	\$155.04	XXXXXXXXXXXX3455	1205	79594B
Register 2	Visa	5/4/2005	4:48PM	\$224.64	XXXXXXXXXXXX3457	1205	79635B
<b>Register 3</b>				<b>(\$518.67)</b>			
Register 3	Mastercard			(\$518.67)			
Register 3	Mastercard	5/4/2005	3:14PM	(\$518.67)	XXXXXXXXXXXX3455	1205	79602B

## Force Post Report

At any time, you may run a report of all your TD Transactions from within RMS that have been processed using the Force Post button.

In Store Operations Manager, click Reports → Custom → TD Force Post Transactions.

This report can be filtered in the same manner that you filter all RMS reports.



Active Report: TD Force Post Transactions

Report Date: 09/12/2006

**TD Force Post Transactions**  
Generated On 09/12/2006

Date	Type	Card Number	Expiry	Amount	Auth
08/18/2006	VISA	XXXXXXXXXX0005	0906	\$10.00	87654321
08/18/2006	VISA	XXXXXXXXXX5445	0906	\$125.00	12345678
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.23	123456
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.23	123444
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.23	123445
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.00	111111
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.00	222222
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.00	333333
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.00	000001
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$301.00	000002
08/31/2006	MASTERCARD	XXXXXXXXXX1915	0906	\$3.03	000003
08/31/2006	MASTERCARD	XXXXXXXXXX1915	0906	\$401.00	000004
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.00	000001
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$2.00	000002
08/31/2006	VISA	XXXXXXXXXX5445	0906	\$1.00	000001

## Initialize Pin Pad and Refresh Services



If required, click the File → Setup.

button followed by

**A** Click the Initialize Pin Pad button to query the bank and initialize your Pin Pad. You will be required to initialize every time a new Pin Pad is installed.

**B** Click the Refresh Service button to both initialize the Pin Pad and to stop and restart the Merchant Connect Multi service.

If you are unsure about which button to click, choose the Refresh Service button.

After clicking the Initialize Pin Pad or Refresh Service button a receipt will print after a moment.

The screenshot shows the 'Setup' dialog box with the 'Pin Pad' tab selected. The fields are as follows:

- Terminal ID: [XXXXXXXXXX]
- Time Out: 30
- Transaction Identifier: 31
- Save Log File:
- Receipt Printer:  Windows Drive,  POS Drive
- Available Printer: EPSON
- Printer Name: EPSON
- Port: LPT3
- IP Address: 194.99.75.70
- Port Number: 31323
- Default Language: English

At the bottom, there are two buttons: 'Initialize Pin Pad' with a blue circle containing the letter 'A', and 'Refresh Service' with a blue circle containing the letter 'B'. There are also 'Cancel' and 'Save' buttons at the bottom right.



Part II

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**RMS-TD Bridge Setup Guide**  
Version 2.9.9

## **Overview: Before you begin....**

You should have the following information and equipment from TD Merchant Services before you begin the setup process:

- Terminal ID
- IP Address
- Port Number
- Ingenico Pin Pad (Serial)
- RMS-TD Bridge License

You should also have:

- 1 available Serial Port (COM port) on your computer
- A functioning receipt printer
- A working internet connection
- The ability to log on as the computer administrator

Download the RMS-TD Bridge software

Using your internet browser, connect to the [RMSTDBridge.com](http://RMSTDBridge.com) web site. Click on **User Installation Version** to download the software. To continue with the download, you read and agree to the terms. Click on **I Have Read and Agree to the License Terms** to continue. You will be prompted to open or save the file, select Save. Save the file in a location on your PC that you can access after the download is complete. After the download is complete, open the zip file and extract the entire contents to a new folder on your local C: drive. The installation program cannot be installed correctly unless the files are first extracted.

Power off your computer and connect the Pin Pad to the computer and to an available power outlet.

The following steps will need to be performed:

- Step 1: Determine your printer settings (at each PC)
- Step 2: Changes to the RMS database (just once per store)
- Step 3: Install RMS-TD Bridge software (at each PC running POS)
- Step 4: Configure RMS-TD Bridge software (at each PC running POS)
- Step 5: License RMS-TD Bridge software (at each PC running POS)

### **Important:**

**These files and folders require that full rights be enabled. Please have your System Administrator enable full rights on the "C:\Windows\Multi.ini" file. These folders must also have full permissions: "C:\MCMulti"  
"C:\Windows\mcm"  
"C:\Windows\ltrs"**

**If you currently have the RMS-TD Bridge installed but is an earlier version than 2.6.2, you must first install the version 2.6.2 before installing this version. To verify your current version, click on the TD Merchant Services button then select File then Setup. The version will be shown at the top of the screen.**

## Step 1: Determine your printer settings

(This step must be performed before you install the RMS-TD Bridge software)

A 40 column receipt printer is recommended for credit authorization transactions. Normally, this is the same printer you are already using for transaction receipts.

The first step is to determine your printer settings in Store Operations Manager.

Open Store Operations Manager.

Click Database → Registers → Register List → (highlight the register in the list)

Click the Properties button → Click the Receipt Printer 1 or Receipt Printer 2 tab

1 Click either the Receipt Printer 1 or Receipt Printer 2 tab.

2 Record the printer type: Either Windows or OPOS.

3 Record the Windows device name or the OPOS device name.

### Important:

If your Printer Type is OPOS follow the instruction below.

In Store Operations Manager → Click File → Configuration → Options → POS Options, put a check mark beside the option “Share the OPOS printer with other applications”.

**Register Properties: Register #1 - 1**

Touch Screen	PIN Pad	Signature Capt.	Net Display
MICR	MSR	Pole Display	Scale
Cash Drawer 1	Cash Drawer 2	Receipt Printer 1	Receipt Printer 2
General	Receipt Printer 1	Receipt Printer 2	Scanner

Receipt Printing

Do not print receipts

Print receipts automatically after each transaction

Print receipts only after asking the cashier

Printer Type

Windows

OPOS

Windows device name:

EPSON

Options

Journal receipts from this printer

Receipt format:

Default 40 Column Receipt

OK Cancel Help

## Step 2: Changes to the RMS database

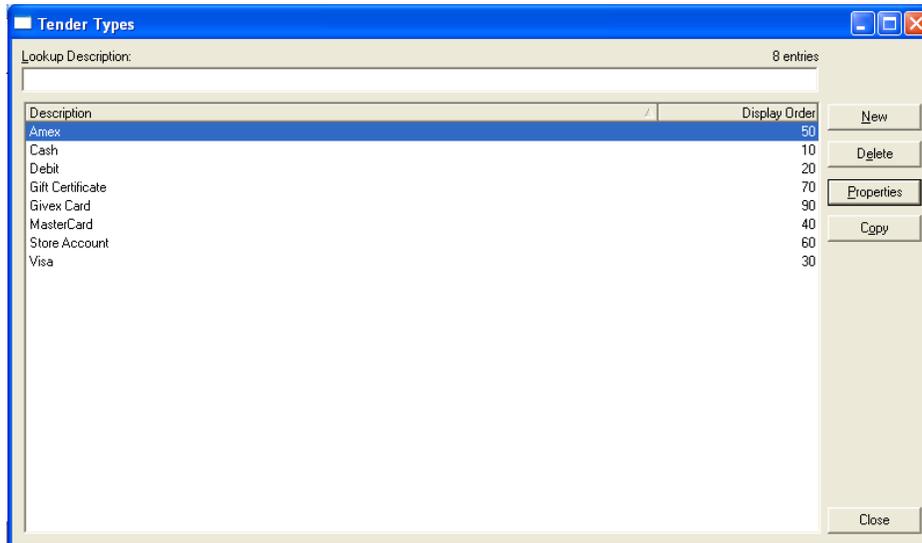
(This step must be performed before you install the RMS-TD Bridge software)

In this step, you must verify that the Tender Types are setup correctly in RMS.

Open and log into Store Operation Manager

Click Database → Tender Types

Your screen will look similar to this one...



For each tender that requires authorization complete the following steps:

Highlight tender in the list and click the Properties button.

Verify that the “Tender Code” Under the “General” tab matches the “Tender Code” on the chart on the right. The tender codes must be entered in capital letters.

Tender Type	Tender Code
Cash	TD-CS
Debit / Interac	TD-DB
Visa	TD-VS
Mastercard	TD-MC
Amex	TD-AM
Discover	TD-DS
JCB	TD-JC
Union Pay	TD-UP

### Important Notes:

The Cash Tender Code must always be changed regardless of what tender types you accept.

Diners and Enroute cards are now covered under Mastercard and should be used only as Mastercard cards. If used as a separate card type, totals may not balance between RMS and TD transactions.

JCB cards are now covered under American Express (Amex) but are required to be tendered under a JCB card type. In order to accept JCB a JCB tender type must be set up. Totals for JCB cards will be accumulated with American Express totals.

You must only verify tender types that are in the chart.

Your screen should look similar to this one...

1 The tender codes must be set as described on the previous page.

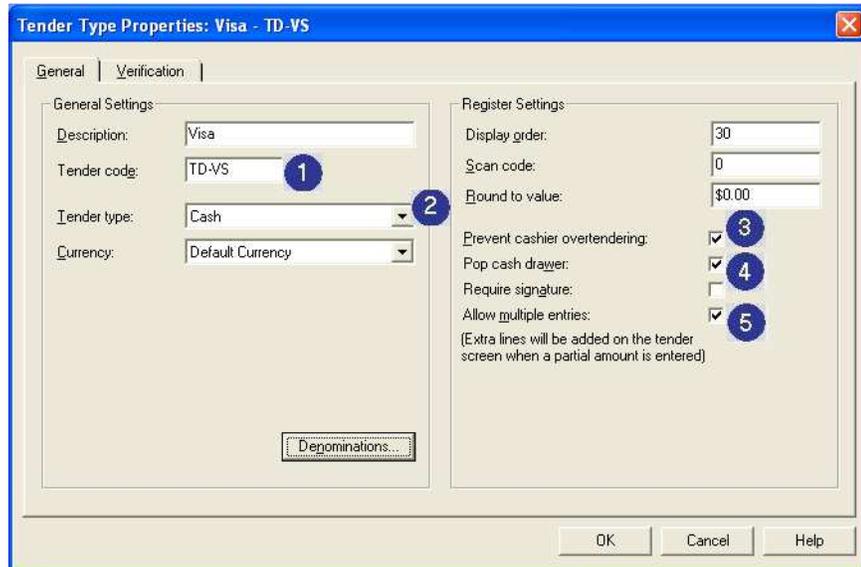
2 The Tender type must be set to Cash (or possibly check or other in special circumstances).

3 “Prevent cashier overtendering” option must be checked on for all debit and credit cards.

4 The “Require Signature” option must be disabled. This option is set in Merchant Connect Multi. When configured correctly the signature line will be printed on the Merchant copy of the receipt. Instructions can be found under “Receipt Formatting”.

5 The “Allow multiple entries” option may be checked on if more than one of this card type may be used to tender a single transaction.

Click the “OK” button after any modifications to save your work.



### Step 3: Install RMS-TD Bridge

**Important:**

You must be logged on as the computer Administrator in order to install the RMS-TD Bridge.

Close the POS software. POS must be already set up prior to installing the RMS-TD Bridge. If the RMS-TD Bridge is installed prior to running POS, error will occur and the software will need to be re-installed after running POS.

Using the software provided, locate and double click the **RMSTDBridgeSetup\_vX.X.X.exe** file. If the software has been downloaded and resides in a file with a 'zip' file extension, all files from within the 'zip' file must first be extracted/copied to a folder on the local drive. The executable installation program should not be run from within the 'zip' file.

Follow the prompts to install the software. You must know the type of PINPad prior to installing as you will be requested to select your PINPad type during the installation. Choices of PINPad are i3070 or iPP320.

**Important:**

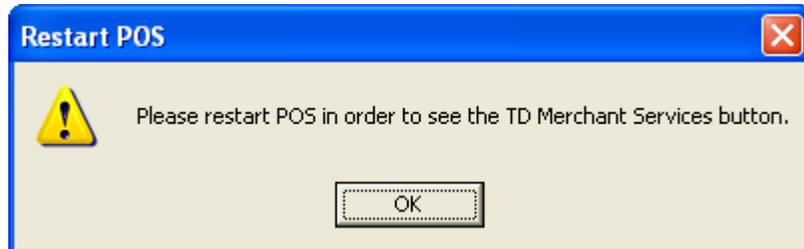
If you have user security setup on your PC, please have your System Administrator enable full rights on both the "C:\MCMulti" directory and all it's subdirectories and the "C:\Windows\Multi.ini" file.

### Step 4: Configure RMS-TD Bridge

After the software has installed, start POS and log in. If you normally have to choose a sales rep and or customer, go ahead and do this.

You will be prompted to restart POS.

Close POS and then restart POS.



Once you restart POS you should see the following button:



You should also receive the following message.



# RMS-TD Bridge Settings

## General Settings

Click the  button followed by File → Setup.

On the General Settings tab, the following fields MUST be filled out:

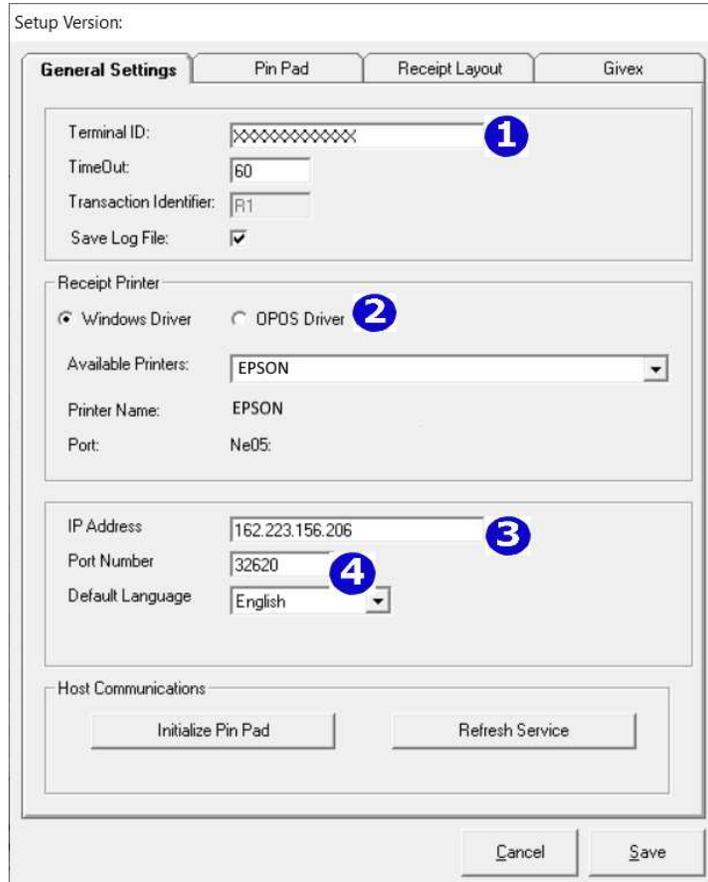
**1** Terminal ID: provided by TD Merchant Services, the Terminal ID is unique by Pin Pad. Please note, the Terminal ID is case sensitive.

**2** Available Printers: must select either Windows Driver or OPOS driver. If you choose Windows driver, then use the drop down box to choose from the available Windows printers. If you choose OPOS Driver, you must type in the OPOS printer name. The OPOS printer name can be found in Store Operations Manager → Database → Registers → Register List → Properties → Receipt Printer 1 or Receipt Printer 2.

**3** IP Address: provided by TD Merchant Services.

**4** Port Number: provided by TD Merchant Services.

You may also choose your default language (English or French).



Once you have made changes to the General Settings tab, click Save to exit or click another tab to continue with setup.

## Pin Pad Settings

**5** Previous version provided an Other Reader option. Because Chip Cards must be processed through the PIN Pad, the Other Reader option is no longer available.

**Note:** Chip cards must be inserted into the Pin Pad.

**6** In the Port field, type in the serial (COM) port number to which the Pin Pad is connected. Make sure that there are no other devices on your computer using this port.

Ensure that the correct PINPad has been selected. Communication errors to the PINPad may arise if the incorrect PINPad type has been selected.

**7** In the Accepted Card Types area, put a check mark beside all the card types you will be authorizing.

**8** Enter the phone numbers for accepted card type. Reference these numbers to obtain manual phone authorization. These numbers are for reference purposes only. If a “Call For Auth” message is displayed during a credit card transaction, the appropriate number for the card type will be displayed.

Setup Version:

General Settings **Pin Pad** Receipt Layout Givex

Serial

**5** Port **6** 1

Baud Rate 19200

Parity 2

Data Bit 7

Stop Bit 1

Mask Number 9

Accepted Card Types

Visa **7**

Mastercard

American Express

Debit (Bank Card)

Enroute Diners (Mastercard)

Discover

JCB (American Express)

Union Pay

Voice Authorization Phone Numbers

Visa 1-800-363-1163 **8** Enroute Diners

Mastercard Discover

American Express JCB

These phone numbers are for reference purposes only

Cancel Save

# Receipt Layout Settings



If required, click the → Setup → Receipt Layout.

button followed by File

**9** Type in your store name and address in the header area provided.

This will print at the top of your credit card and debit card receipts.

These Cardholder agreement statements are approved by Visa and TD Merchant Services and should not be edited.

After making the appropriate changes in setup, click the SAVE button or continue making setting changes.

**The Givex tab is explained in a separate RMSTDBridge Givex Guide.**

## Step 5: License Code

Before you can perform an authorization, you will need to input a valid license code.

Click the  button and choose License Code from the top of the screen.



The dialog box titled "License Code" contains the following fields and buttons:

- RMS-TD Bridge License Code:** A field with six sub-inputs, each containing "0000" and separated by hyphens.
- TD Terminal ID:** A field containing a masked string of ten "X" characters.
- Register Number:** A field containing the number "1".
- Buttons:** "Verify", "Cancel", and "Save".

Type your license code into the boxes provided and click the verify button. If you receive the License Code Accepted message, click the Save button. If the license code is not accepted then check the license code again.

## Initialize Pin Pad and Refresh Services



If required, click the File → Setup.

button followed by

**A** Click the Initialize Pin Pad button to query the bank and initialize your Pin Pad. You will be required to initialize every time a new Pin Pad is installed.

**B** Click the Refresh Service button to both initialize the Pin Pad and to stop and restart the Merchant Connect Multi service.

If you are unsure about which button to click, choose the Refresh Service button.

After clicking the Initialize Pin Pad or Refresh Service button a receipt will print after a moment.

**C** The save button must be clicked the first time that settings are entered or whenever settings are changed.

The image shows a screenshot of a software setup window titled "Setup Version:". The window has four tabs: "General Settings", "Pin Pad", "Receipt Layout", and "Givex". The "General Settings" tab is active. It contains several input fields: "Terminal ID" (masked with 'x'), "TimeOut" (60), "Transaction Identifier" (R1), and "Save Log File" (checked). Below this is the "Receipt Printer" section with radio buttons for "Windows Driver" (selected) and "OPDS Driver", a dropdown for "Available Printers" (EPSON), and fields for "Printer Name" (EPSON) and "Port" (Ne05). The next section has "IP Address" (162.223.156.206), "Port Number" (32620), and "Default Language" (English). At the bottom, there are two buttons: "Initialize Pin Pad" and "Refresh Service". At the very bottom of the window are "Cancel" and "Save" buttons.

If a receipt similar to this one prints (with the word 'APPROVED'), then your Pin Pad had initialized successfully.

```
PARAMETER DOWNLOAD
-----
MY STORE NAME
Register : 000X
----- TD -----
TERM ID: (Your Term ID Here)
DATE    TIME

00 APPROVED

TD --> TRS: 00
```

If the receipt that prints is similar to this one, please check the troubleshooting section of this manual.

```
PARAMETER DOWNLOAD
-----
MY STORE NAME
Register : 000X
----- TD -----
TERM ID: (Your Term ID Here)
DATE    TIME

COMMUNICATION PROBLEM 05
```

If you are having trouble initializing, verify your terminal ID. See the "Unable to Initialize during Initial Setup" section in this manual.

## Log File backup

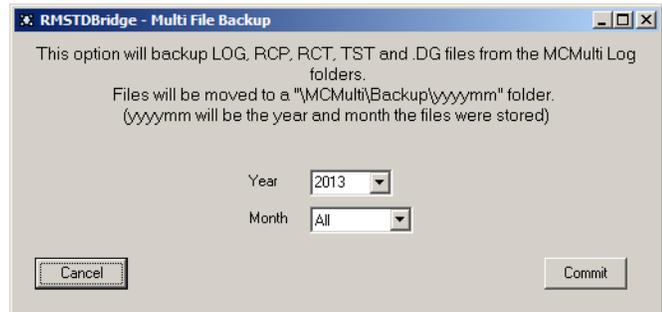
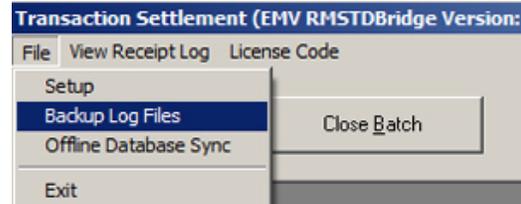
Press the  button in POS.

Select **Backup Log Files** from the **File** menu.

Over time, many log files and credit/debit receipt files are created.

This utility will backup these files into a Backup folder. Select the year and month (use All to backup all months of the selected year) to backup log files for.

Press Commit to start the backup procedure or press Cancel to quit.



## Offline Database Sync

This option will create the necessary tables in the offline database that are required to perform credit/debit transaction while RMS is in offline mode.

Select **Offline Database Sync** from the **File** menu.

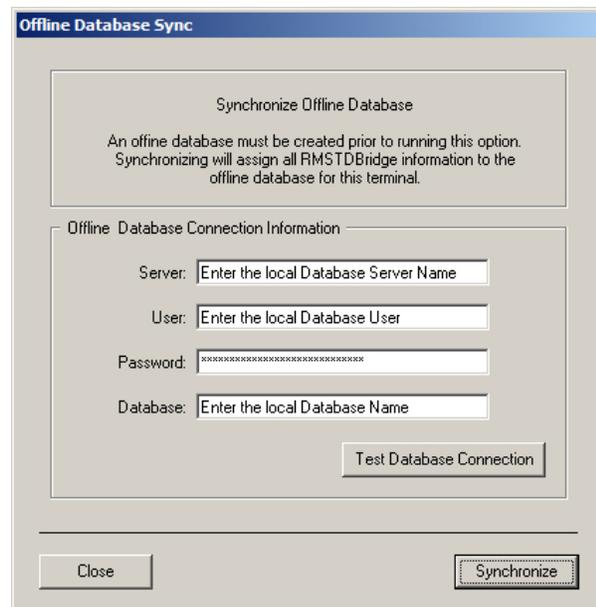
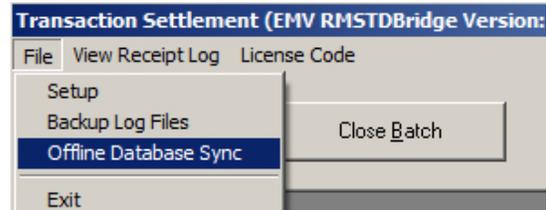
The offline database must already be created.

Enter the database connection details for the offline database that resides on this computer.

Press Test Database Connection in order to ensure that you have the correct information entered.

Press the Synchronize button to synchronize the RMS-TD Bridge information from the main store database to the local offline database.

This routine must be performed on each register that uses an offline database.



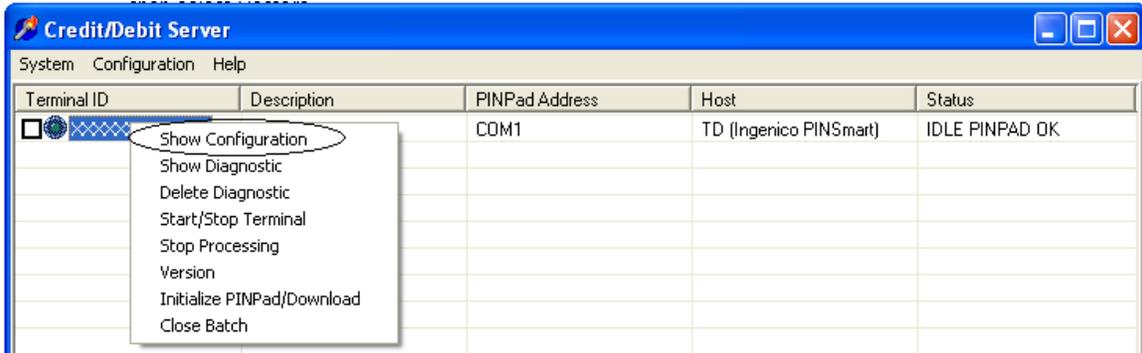
## Receipt Formatting

### Merchant & Customer

Settings can be made so that a merchant copy and a customer copy will be printed. The merchant copy will read “Merchant Copy” at the bottom.

To adjust these settings right-click the Merchant Connect Multi icon  in the system tray then select Restore.

Right-click on the Terminal ID and select Show Configuration.

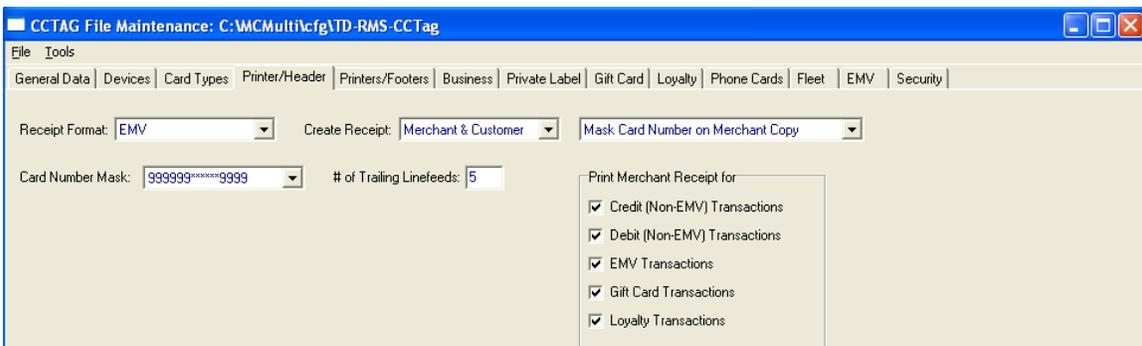


Select the Printer/Header tab

Receipt Format must be set to **EMV**. Create Receipt must be set to “**Merchant & Customer**” and the option to the right must be set to “**Mask Card Number on Merchant Copy**”.

Card Number Mask should be set to “**999999\*\*\*\*\*9999**”.

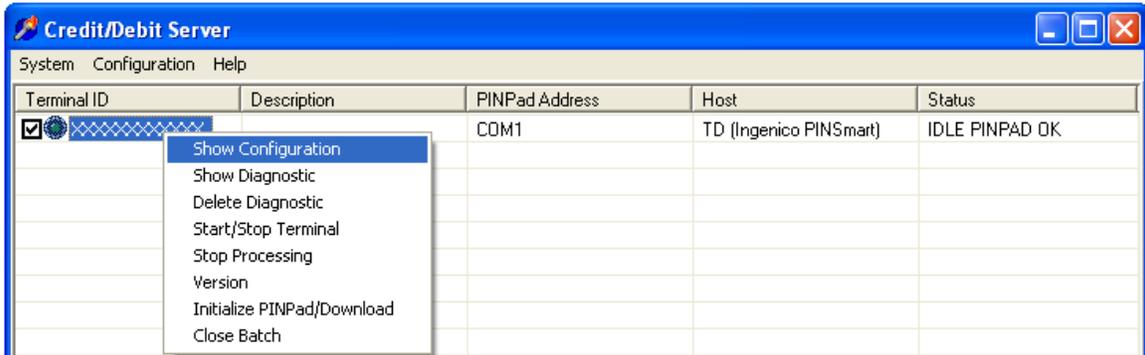
“Print Merchant Receipt for” should have all options checked ON (regardless of what is supported on the POS).



All other option selections may result in errors.

## EMV Settings

To adjust these settings, click the Merchant Connect Multi program icon  in your system tray. Right-click on the Terminal ID and select Show Configuration.



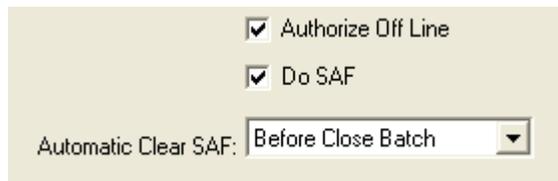
Select the **Devices** tab and within the **PINPad** tab select **EMV Mode** to be **EMV Supported**.



Change to the **Card Types** tab.

Authorize Off Line and Do SAF must be checked ON.

Automatic Clear SAF must be set to “Before Close Batch”



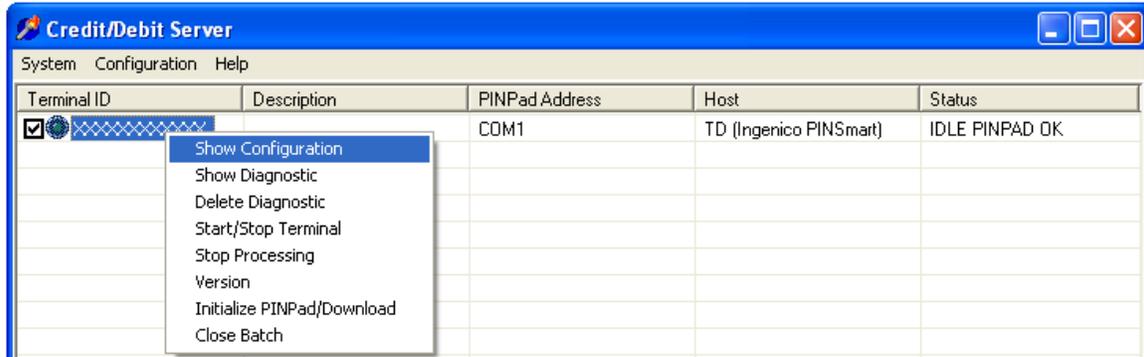
Select the **EMV** tab and within the **RIDs** tab enter your Terminal ID. This must be the same Terminal ID that is on the Credit/Debit Server screen. Both the “**RID Config Id**” and the “**TMS Terminal Id**” must be changed to be the same as the Authorization Terminal from the General tab.



## Contactless Settings

Contactless can only be used if approved with limitations provided by TD Merchant Services.

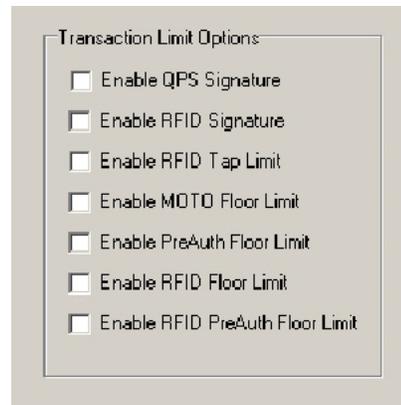
To adjust these settings, click the Merchant Connect Multi program icon  in your system tray. Right-click on the Terminal ID and select Show Configuration.



Change to the **Card Types** tab.

In the Transaction Limit Options check ON the following:

- Uncheck all Transaction Tap Limit boxes

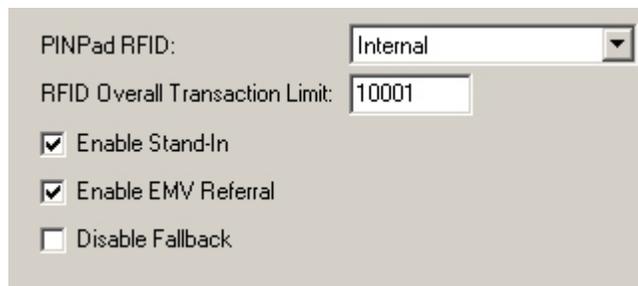


All other settings must remain unchecked.

Change to the **EMV** tab then **Terminal Capabilities**.

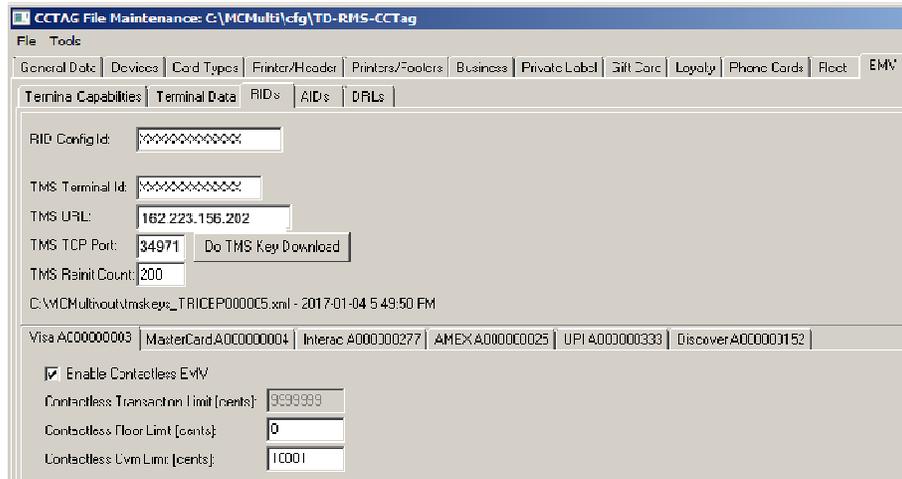
**PINPad RFID:** Set to Internal

**PINPad Overall Transaction Limit:**  
Set to the amount authorized for your account. Enter the value in cents (\$100.00 – 10001)



Press the **RIDs** tab within the **EMV** section.

For each of the card types that require contactless setup the contactless information must be entered on the lower section of the screen (Visa A000000003, MasterCard A000000004, Interac A0000000277 and AMEX A000000025).



Enable Contactless EMV:

- Check on

Contactless Transaction Limit (cents):

- This value is part of the download and will be populated from initializing the PIN Pad and is not editable

Contactless Floor Limit (cents):

- Enter 0 (Contactless Floor Limit must always be set to zero)

Contactless Cvm Limit (cents):

- Enter the value approved by Merchant Services (Enter \$100.00 as 10001)

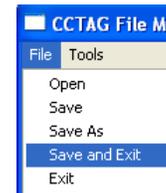
TMS URL:

- 162.223.156.202

TMS TCP Port:

- 34971

When all configuration settings are complete, select the File menu then and Exit” to save any changed settings.



“Save

Minimize the Credit/Debit Server program, **do not close the program.**

If any changes have been made in the receipt formatting or EMV information, the credit/debit services must be refreshed.

To refresh the services, click the



button in POS followed

Click on the



button.

After you have refreshed services go back to Multi EMV configuration to verify that your contactless settings are still in place. If your contactless settings have been reset, you must call TD Support and ask them to set your Term Group ID to “RM” to enable contactless.”

Part III

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**Troubleshooting and Appendices**

Version 2.9.9

## Common Setup Issues

It is recommended that you follow the steps below if you are having trouble setting up a Pin Pad.

- 1) Confirm your general settings: Double check your terminal ID, IP address, and Port number. If you make any changes, save your changes and return to setup to refresh services.

Click the  button and then File → Setup.

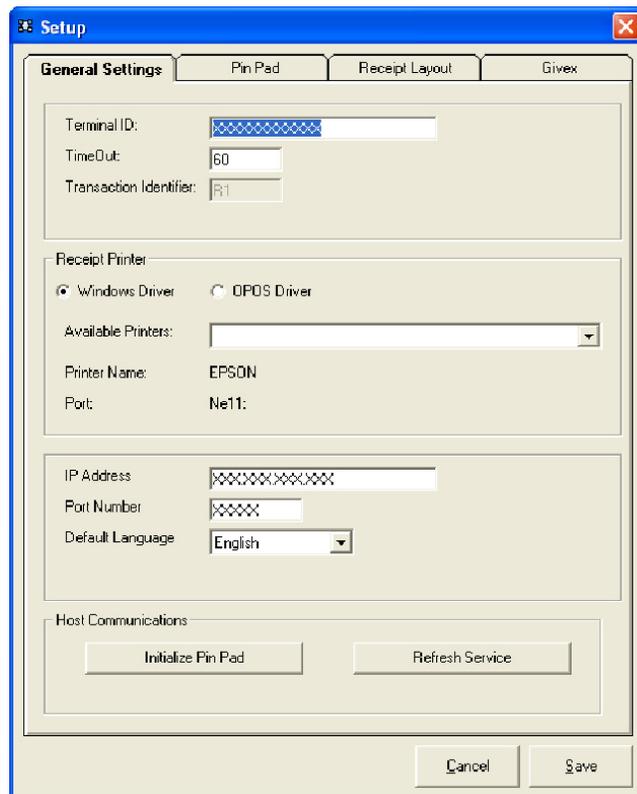
Carefully, verify the following settings:

**Terminal ID**  
**(Important: Terminal ID must be UPPERCASE)**  
IP Address  
Port Number

Click the Pin Pad tab and click.



If you to receive the communication problem receipt again continue troubleshooting.

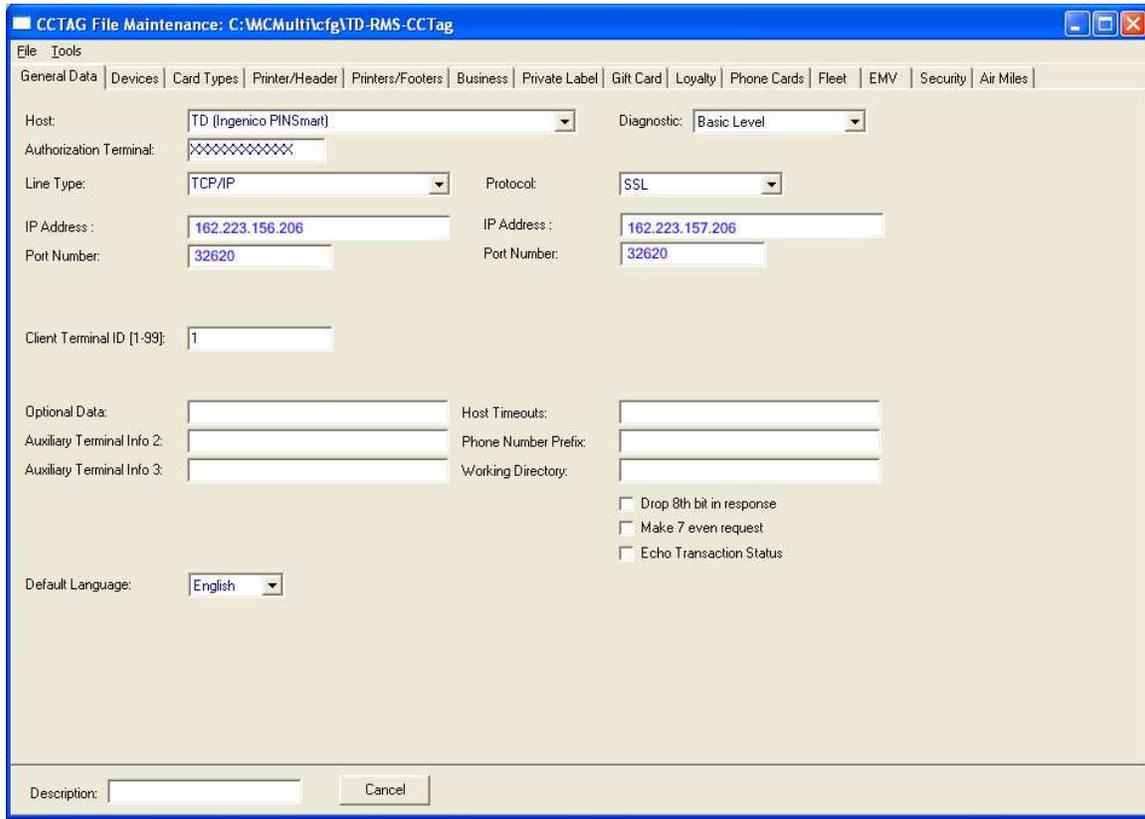


- 2) Confirm that your internet connection is working. In most cases, you can check if your internet connection is working by checking to see if you can send and receive email or by checking if you can “surf the net” in Windows Explorer or another browser.
- 3) Confirm your Pin Pad port. Double check the Pin Pad port number. If you have 2 COM ports, it may be worth changing the port number or physically moving the Pin Pad to an alternate port on the computer. Save the changes, if any changes have been made, then return to setup to refresh services. Another test is to set the Pin Pad port to 0. If you are able to initialize with the Pin Pad port set to 0, then the issue is the port allocation or a port conflict. (When port is set to 0 Merchant Connect Multi does not attempt to find a Pin Pad. If the initialization fails it may be another configuration or communications setting).
- 4) Verify the port is free: A common issue that will prevent your Pin Pad from functioning is when there is software “using” the COM port that the Pin Pad is attempting to access. If

- possible, try testing a second device (not a Pin Pad) in this port. Also, check to make sure that you don't have any windows printers attempting to use that COM port. Other software that might cause problems on the COM port include: Touch screen software, any OPOS device including printers, pole displays, cash drawers etc., Hot Sync software, automatic shutdown software and others. If you find any software that is accessing the COM port you are trying to use, either use a different COM port, disable, or uninstall the software. If you make any changes, save your changes and return to setup to refresh services.
- 5) Try another Pin Pad. If you have a second Pin Pad, preferably one that is working on another PC, attempt to install that Pin Pad on this PC. This will assist you in understanding if the PC or the Pin Pad is the issue. Generally, a "healthy" Pin Pad will have a Welcome screen. If you make any changes, save your changes and return to setup to refresh services.
  - 6) Do you have a firewall that is blocking access to the port required for your authorizations? Check with your PC administrator if you think this might be the case.
  - 7) Follow the instructions on the preceding pages titled "Unable to Initialize during Initial Setup".
  - 8) If your OPOS printer is not printing, make sure that no others devices are referencing the port that the OPOS printer is using. For example, if the OPOS printer is on LPT1, there must be no Windows printers set to port LPT1.

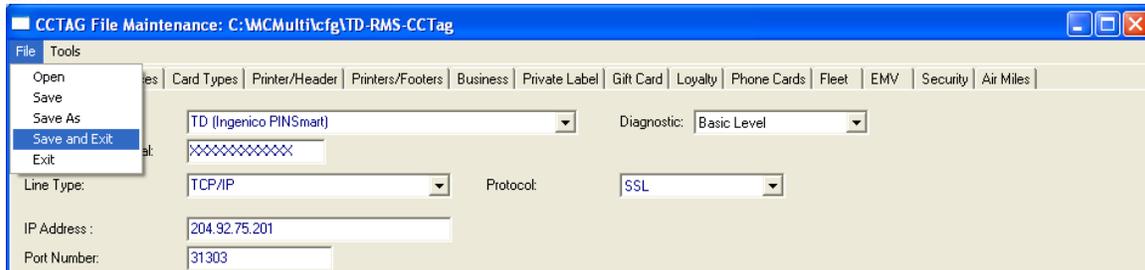


Change the Authorization Terminal field to reflect the Terminal ID number provided by TD Merchant Services. All other changes should take place in the RMS-TD Bridge setup as outlined in the manual.



IP Address on the left is the main TD Host IP Address. This should be set to 162.223.156.206  
 IP Address on the right is the Failover TD Host IP Address. This should be set to 162.223.157.206  
 Both Port Numbers (right and left) should be set to 32620

When you have successfully changed the Authorization Terminal number click File → Save and Exit.



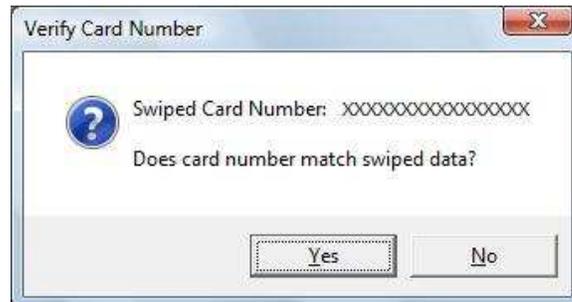
Following the change, leave Merchant Connect Multi running, and optionally minimize the Merchant Connect Multi software.

Resume setup in the RMS-TD Bridge setup as described in this manual.

## Duplicate Credit Card Number Verified

If the permissions are not set up correctly on the “C:\MCMulti” directory and all its subdirectories, and on the C:\Windows\Multi.ini file, RMS-TD Bridge will not function correctly.

The symptom of this issue is that when a credit card is swiped, the Verify Card Number screen pops up with the same credit card number as was used in the previous transaction.



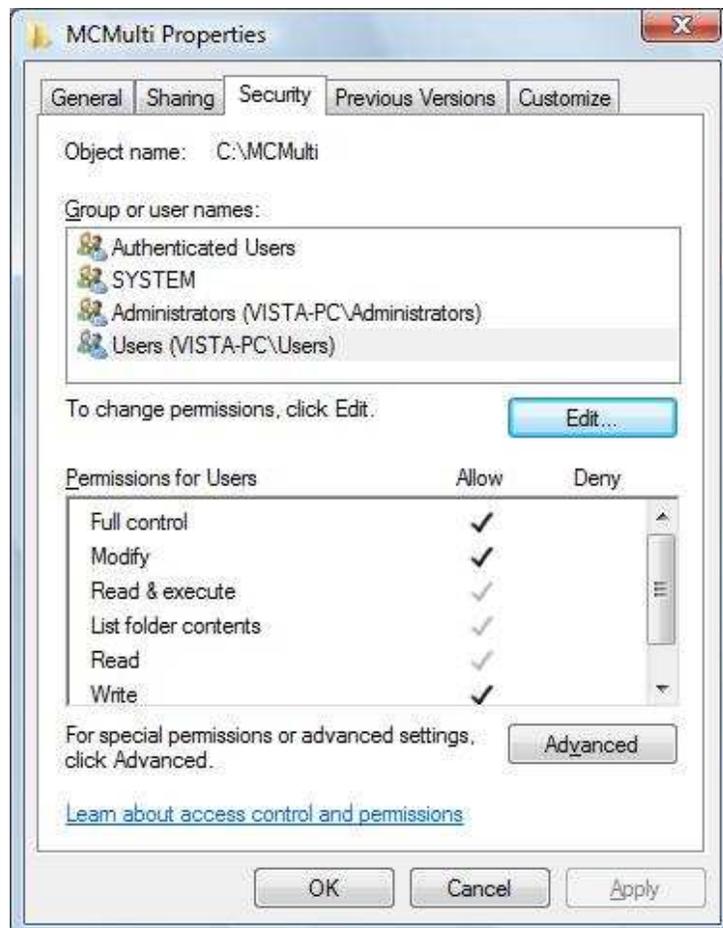
The cause of this issue is due to insufficient privileges on the “C:\MCMulti” directory and its subdirectories.

You will require sufficient permissions to change the permissions for other users.

Open “Windows Explorer” →  
Open Local Disk C: →  
Locate C:\MCMulti →  
Right click and select Properties  
→  
Choose Security →  
Make sure that all users are  
allowed Full Control, Modify, Read  
& Execute, Read, Write, etc.

Make sure that you have set  
permissions on all files by  
checking some of the files in the  
C:\MCMulti subdirectories.  
Ensure that your security changes  
affected all files in the directory; if  
not, set the security on those  
directories and files as well.

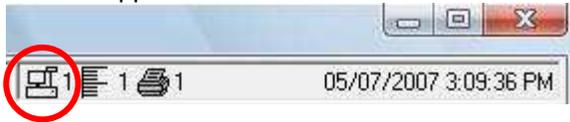
You must also modify the  
permissions on the  
C:\WINDOWS\Multi.ini file.



## Determine your RMS Register Number

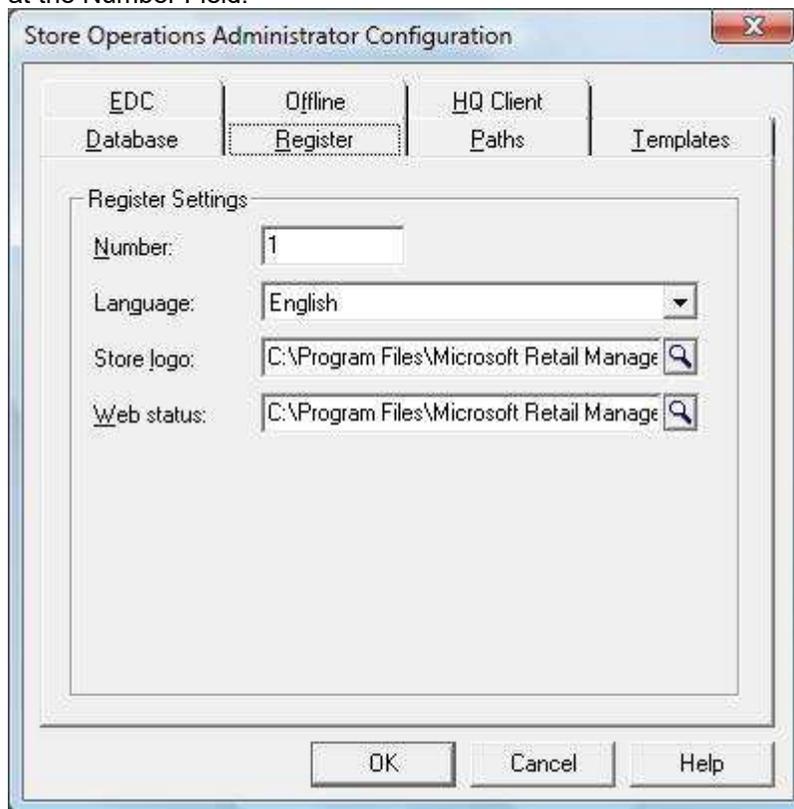
Either...

In Store Operations POS, in the upper right hand corner, the first picture is the register – the number appears beside it.



Or....

Open Store Operations Administrator → File → Configuration → Click the Register Tab → Look at the Number Field.



## Batch Settlement Report Issue

If your batch settlement report is cut off on the left then you should adjust the resolution of your printer.

See the “Configure the Windows Print Driver” section of this manual for complete details.

```
Batch Close Transaction

Terminal # : MS12345678
Sequence # : 0011050120
Date      : yy/mm/dd
Time      : hh:mm:ss
Batch #   : 0105

HOST TOTALS

DEBIT      6      281.
CREDIT     4      120.
Adjustment  2      40.

TRS TOTALS

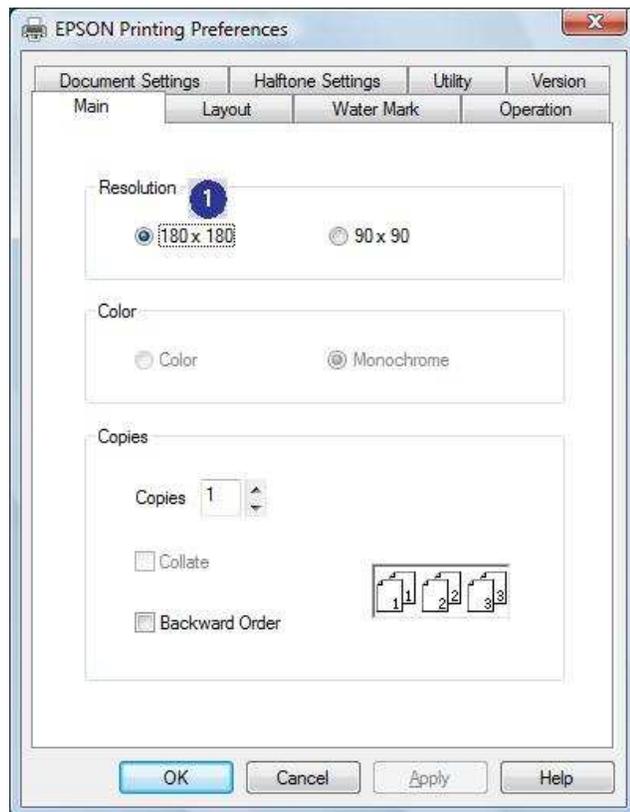
Visa       2      -5.
MasterCard 1      23.
American Express 1  34.
Interac Debit 6  69.
DEBIT      6      281.
CREDIT     4      120.
Adjustment  2      40.

**** TRANSACTION APPROVED ****
```

In the print driver properties, under the General Tab → Printing Preferences → Advanced button as well as under the Advanced tab → Printing Defaults.

- 1 Change the resolution to 180 x 180.

Once you have made the above changes click the OK button.



## Offline Database Setup for RMS

If you are using the RMS Offline Database please read the following instructions carefully.

In order to have credit authorization capabilities when you are in offline mode, your offline database must be based on a backup of your RMS database including your RMS -TD Bridge settings.

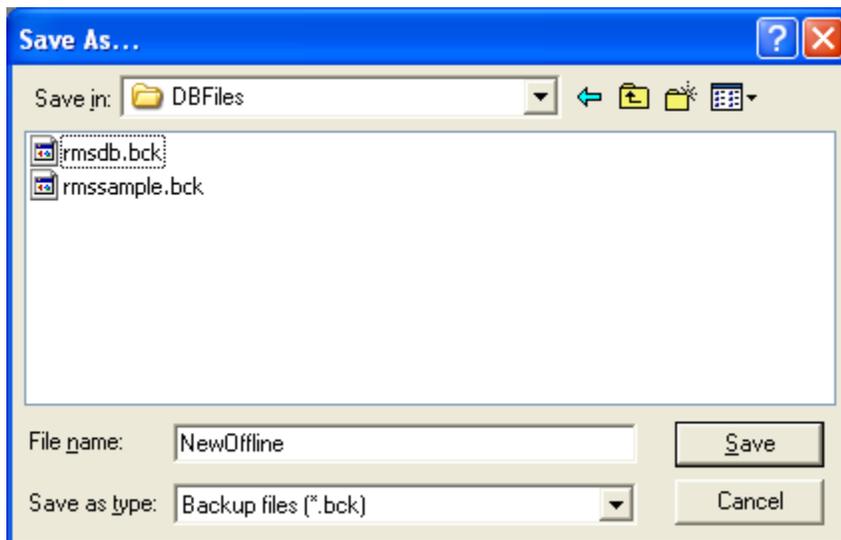
Once you have tested your RMS-TD Bridge software *at all your POS stations* and are satisfied that your settings are suitable follow the instructions below to create a new offline database.

### Step 1: Make a backup of your current existing live database.

#### At your POS (SQL) server, perform the following steps:

Open Store Operations Administrator. Click File → Connect → (type your password) → Click OK.

Click Database → Backup --> (save as location C:\Program Files\Microsoft Retail Management System\Store Operations\DBFiles) → Name the database "NewOffline" without the quotes → Click Save.



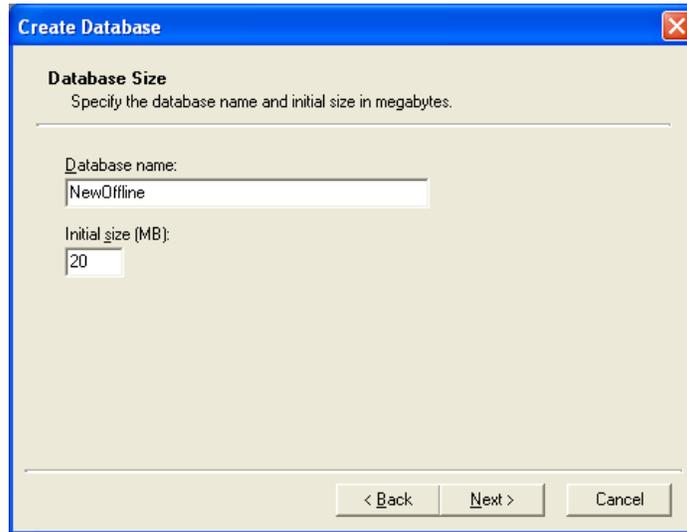
## Step 2: Creating a new Offline Database.

At each POS terminal that requires an Offline database, perform the following steps.

Open Store Operations Administrator. Click File → Connect → (type your password) → Click OK.

Click Database → Create → (type in the name “NewOffline”).

Click Next.

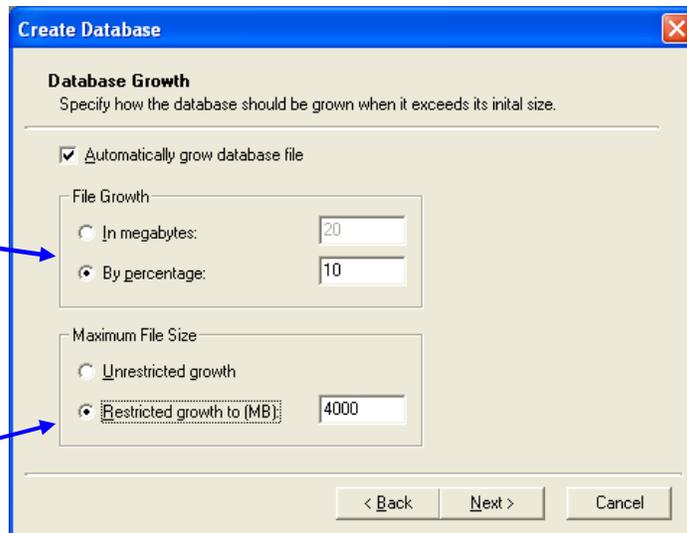


The screenshot shows the 'Create Database' dialog box with the 'Database Size' tab selected. The title bar reads 'Create Database'. Below the title bar, the text 'Database Size' is followed by the instruction 'Specify the database name and initial size in megabytes.' There are two input fields: 'Database name:' with the text 'NewOffline' and 'Initial size (MB):' with the value '20'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

If using Microsoft SQL Express, select File Growth as “By percentage”.

Choose “Restrict growth to (MB)”. If using Microsoft SQL Express, enter 4000. If using MSDE (RMS version 1.3 or below), enter 9000.

Click Next.



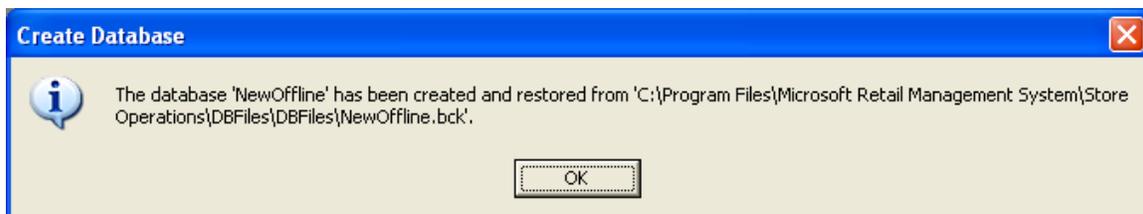
The screenshot shows the 'Create Database' dialog box with the 'Database Growth' tab selected. The title bar reads 'Create Database'. Below the title bar, the text 'Database Growth' is followed by the instruction 'Specify how the database should be grown when it exceeds its initial size.' There are two main sections. The first is 'File Growth', which has a checked checkbox for 'Automatically grow database file'. Below this, there are two radio buttons: 'In megabytes:' (unselected) and 'By percentage:' (selected). The 'By percentage:' option has a text box containing '10'. The second section is 'Maximum File Size', which has two radio buttons: 'Unrestricted growth' (unselected) and 'Restricted growth to (MB):' (selected). The 'Restricted growth to (MB):' option has a text box containing '4000'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Locate your backup file “NewOffline.bck” created in the previous step.

Click Next.

Click Finish.

Click OK when prompted.



The screenshot shows the 'Create Database' dialog box with a completion message. The title bar reads 'Create Database'. On the left, there is an information icon. To the right of the icon, the text reads: 'The database 'NewOffline' has been created and restored from 'C:\Program Files\Microsoft Retail Management System\Store Operations\DBFiles\DBFiles\NewOffline.bck'.' At the bottom center, there is an 'OK' button.

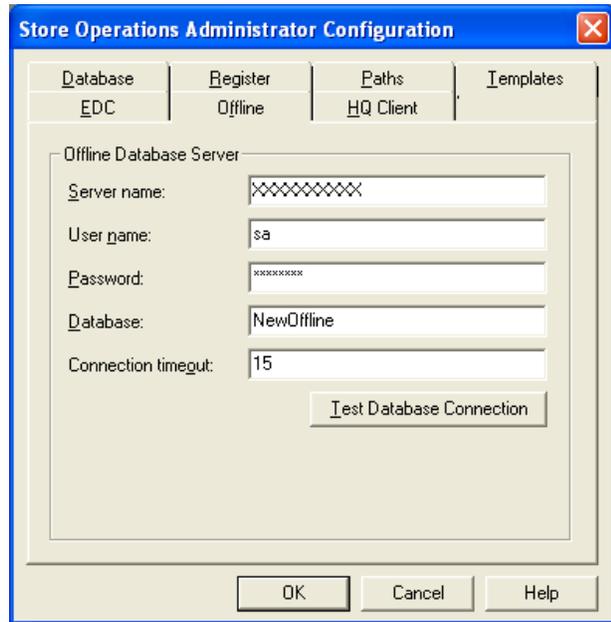
You will see a message box similar to the one to the right.

Click File → Configuration → Offline Tab.

Type NewOffline into the database box.

Click OK to finish.

Your new offline database will be ready once a Z report has been performed in POS.



The screenshot shows the 'Store Operations Administrator Configuration' dialog box with the 'Offline' tab selected. The 'Offline Database Server' section contains the following fields:

Database	Register	Paths	Templates
EDC	Offline	HQ Client	

Offline Database Server:

- Server name: [XXXXXXXXXX]
- User name: sa
- Password: [XXXXXXXXXX]
- Database: NewOffline
- Connection timeout: 15

[Test Database Connection]

[OK] [Cancel] [Help]

## Program Revision Notes

### Union Pay Support

- The system now supports processing cards for Union Pay.

### PCI Compliance

- Unmasked credit/debit card information is not written to any files within the system.
- Only TCP/IP is allowed for passing of information amongst the various programs.

### Multi (Merchant Connect Multi) program changes

- Multi (Merchant Connect Multi) is now version 4.2.17.533
- Contactless limits may now be set to a maximum of \$250 by TD Merchant Services
- Manual card entry may only be available if authorized by TD Merchant Services
- Manual card entry provides prompts on the PIN Pad for 'Phone Order' or 'In Person'
- The Merchant Connect Multi program interface may be visible when it is started.
- **Caution must be taken to never close the Merchant Connect Multi (Credit/Debit Server) window – only minimize.**

### Windows Operating Systems

- The following chart shows the supported operating systems

Operating System	Supported in Version 2.9.9	Supported in Version 2.7	Supported in Previous versions
Windows 10 Professional / Enterprise	YES	NO	NO
Windows 8 / 8.1 Professional / Enterprise	YES	NO	NO
Windows 7 Professional / Ultimate **	NO	NO	NO
Windows Vista Business or Ultimate	NO	YES	YES
Windows Vista Home Premium	NO	NO	NO
Windows Vista Home Basic	NO	NO	NO
Windows 7 Home / Home Premium	NO	NO	NO
Windows XP Professional SP3 or greater	NO	YES	YES
Windows XP Home	NO	NO	NO
Windows 2000	NO	NO	YES
All other Windows Systems	NO	NO	NO
All other Operating Systems	NO	NO	NO

Windows operating system may be 32 or 64 bit

\*\* Windows 7 (at the time of creation of this document) has been discontinued

## ***EMV Chip Card Processing Facts***

1. The two most important payment processing tips for Chip card transactions are:
  - a. Follow the POS and PINPad prompts.
  - b. Always check the receipt to see if a signature line is printed indicating the customer must sign the receipt.
2. If the customer does not want to sign because they entered a PIN the cashier must inform them that if a signature line is printed, they must sign the receipt.
3. A chip card may require a customer PIN. Pass the PINPad to the customer for PIN Entry. Do not ask the customer for the PIN.
4. There are three ways the Chip card and PINPad may validate the transaction when a Chip card is used.
  - a. Customer Enters PIN only.
  - b. Customer Signs receipt only.
  - c. Customer Enters PIN and Signs receipt.
5. The best practice is to allow Customer to follow the prompts if a Chip card is presented: Hand the customer the PINPad so they can insert the card and follow the prompts. Remember to check the receipt for a signature line. You do not have to confirm they entered a PIN.

## ***Uninstall RMS-TD Bridge***

From Control Panel → Programs and Features double-click on RMSTDBridge x.x.x.

The RMS-TD Bridge files and all previous setting will remain on your computer after the uninstall has been run, however RMS will no longer require authorization on credit card and debit card transactions.

## ***Important Phone Numbers***

***TD RMS Helpdesk***

1-877-836-7767

Press 1 for English or 2 for French

Press 2 for TD RMS Merchant Support

## ***Credit Card Authorization Numbers***

VISA voice authorization (All Visa Cards)	1-800-363-1163
MasterCard (Enroute/Diners)	
AMEX	
Discover	
JCB	

These “Voice Authorization” numbers must be called in order to process any credit cards that require a manually entered “Auth Number”. Failure to enter an issuer provided authorization number may result in the transaction not being approved.

## ***Other Important Contact Numbers***
