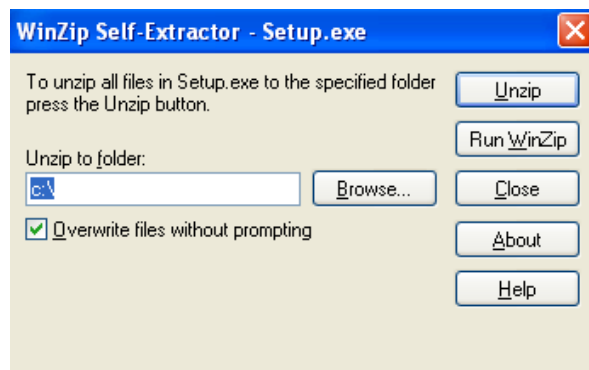




Before the installation and configuration of the required processing hardware, McAllister Payment Solutions (MPS), and AVImark, the *McAllister Payment Solutions PA-DSS Implementation Guide* must be reviewed in its entirety and referenced during the installation and configuration.

Processing Hardware Configuration

- ◆ **VeriFone MX850 All-In-One Device:** Before connecting the MX850 to your PC, the MX850 Driver CD will need to be installed.
 - Insert the CD into your CD-drive, and wait for the WinZip Self-Extractor window to auto-prompt.



- Select **Unzip** to extract the driver
- Once the driver is extracted, connect the MX850 to a USB port. As soon as the device is connected, Windows will automatically detect the device and driver and perform the installation.
- Should Windows not successfully perform the driver installation, locate the driver that is appropriate for your operating system (Windows 7 64-Bit or Windows 7 32-Bit, Vista, XP, 2000) within your C-drive and execute it by double-clicking it. The installation of the driver will then begin.
- Once the device is installed, the corresponding COM port will need to be obtained. Select the Start button...Control Panel or Start button...Settings...Control Panel.

- Double-click on the System option within the Control Panel
- Select the Hardware tab, then the Device Manager button



- Within the Device Manager window, expand the plus sign (+) next to the **Ports (COM and LPT)** option and note the COM number listed beside the **Communications Port** option.
- Keep the COM port that is listed for **MX800 Family POS Terminal** for use later in these instructions.

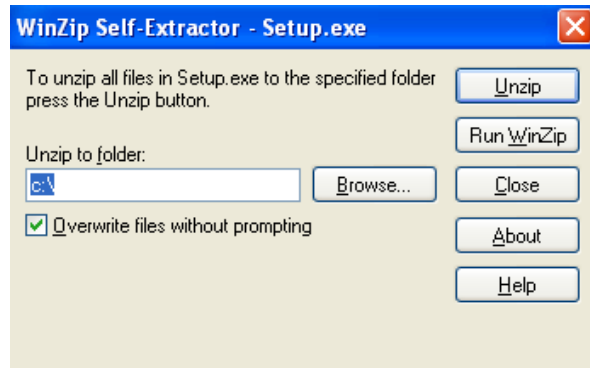
NOTE: If using the 32 or 64-Bit version of Windows 7 and the appropriate driver does not initially install properly, follow the steps listed below to temporarily disable the User Account Control (UAC).

- Select the Start button...Control Panel...User Accounts or Start button...Settings...Control Panel...User Accounts.
- From within the User Accounts, select the link *Change User Account Control Settings*.
- Move the slide bar down until *Never Prompt* is displayed.
- Restart Windows for the changes to be applied.
- Repeat the driver installation instructions listed above and again restart Windows.

- ◆ **Magtek Card Swipe:** The card swipe has a USB connection that will need to be connected to the AVImark server or workstation which will be processing credit card payments.
 - Connecting this device to a USB connection will display a brief **RED** light then immediately change to **GREEN**. Once the green light is displayed, the installation is complete.
- ◆ **VeriFone PINPad 1000SE:** This device is available with a Serial or USB connection that will need to be connected to the AVImark server or workstation which will be processing credit card payments.

NOTE: The USB VeriFone PINPad 1000SE is currently only available with the use of Windows Vista. This device will not currently function with Windows 2000 or XP.

- If using a USB PINPad:
 - Insert the CD into your CD-drive, and wait for the WinZip Self-Extractor window to auto-prompt.

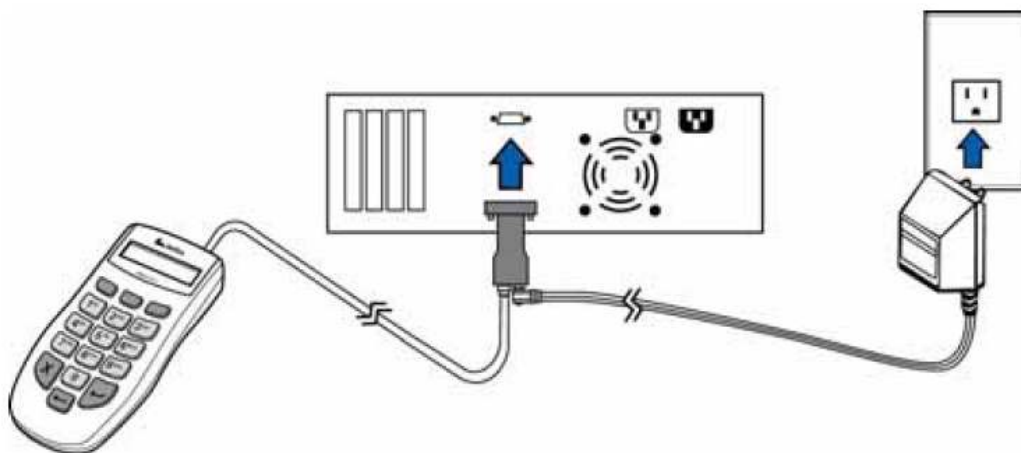


- Select **Unzip** to extract the driver
- Once the driver is extracted, connect the 4 pin “phone handset” end of your USB cable into the corresponding connector on the VeriFone device.
- Plug the USB end of the cable into an available USB port on the computer.
- In a few moments, the PINPad should be detected. Windows will then present you with the “Found New Hardware Wizard”. (If, for some reason, the device is not recognized and the Wizard does not start, check the section below on “Debugging the driver installation”.)
- Check the radio button indicating that you want to “Install from a list or specific location” and click NEXT.

- Check the radio button indicating "Don't search. I will choose the driver..." and click NEXT.
- Click the "Have Disk" button and "Browse" to the location where you placed the .INF file extracted from the .ZIP in the section above.
- Select the file "**VeriFone_PP1000SE usb-uart.inf**" to OPEN then click OK.
- At this point you may get warnings that "This driver is not digitally signed" and/or "has not passed Windows Logo testing". Just ignore it and click NEXT and "**Continue Anyway**".
- Finally, click "Finish" and your driver should now be installed and functional.
- Once you have installed the driver, the corresponding COM port will need to be obtained. Select the Start button...Control Panel or Start button...Settings...Control Panel.
- Double-click on the System option within the Control Panel
- Select the Hardware tab, then the Device Manager button



- Within the Device Manager window, expand the plus sign (+) next to the **Ports (COM and LPT)** option and note the COM number listed beside the **Communications Port** option.
 - Keep the COM port that is listed for **PP1000SE – PCI PIN Pad** for use later in these instructions.
- If using a Serial PINPad
- Connect the Serial connector of the PINPad cable into the serial port on the appropriate computer.
 - Connect the “phone handset” end of your serial cable into the corresponding connector on the VeriFone device.
 - Plug the power supply cord into the socket at the base of the serial connector. (see image below)



- Plug the power supply into an AC wall outlet.
- Once you have the PINPad connected to the computer, the corresponding COM port will need to be obtained. Select the Start button...Control Panel or Start button...Settings...Control Panel.
- Double-click on the System option within the Control Panel
- Select the Hardware tab, then the Device Manager button

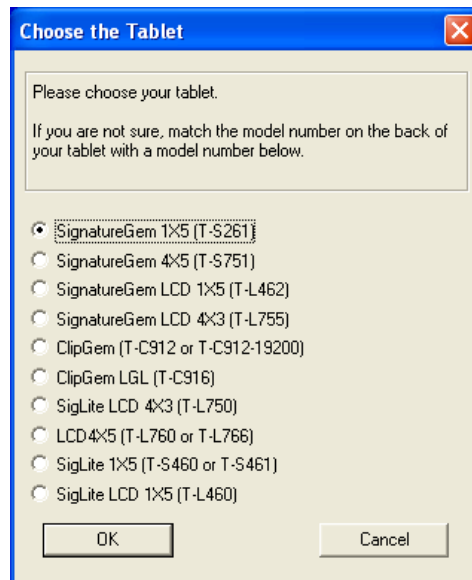


- Within the Device Manager window, expand the plus sign (+) next to the **Ports (COM and LPT)** option and note the COM number listed beside the **Communications Port** option.
 - Keep this COM port for use later in these instructions.
- ◆ **Topaz Signature Capture Devices All Models:** All models of the Topaz devices must first have the included Topaz Systems INC CD installed. Inserting the CD will auto-display an install menu:

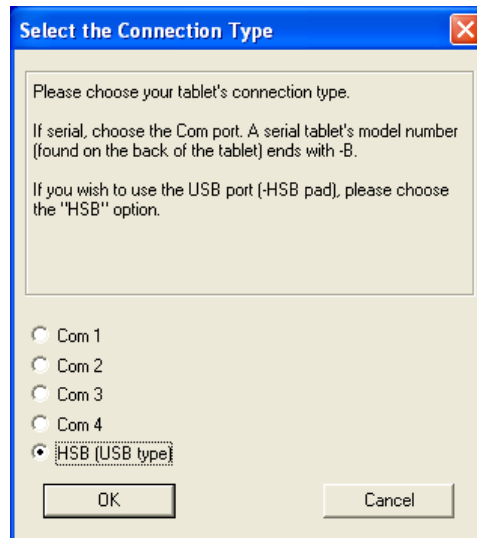


NOTE: This CD will only need to be installed on the AVImark computers that will be used to process credit cards through AVImark.

- Selecting the option ***Install SigPlus eSignatures (must be installed first)*** will begin the installation.
- Follow all on-screens prompts to the display indicating you must choose the Topaz device you have received. The appropriate model number can be located on the back of the device.




- Please select one of the three options listed below and proceed:
 - **Siglite 1x5 (T-S460 or T-S461)**
 - **Siglite LCD 1x5 (T-L460)**
 - **SignatureGem LCD 1x5 (T-L462)**
- Once you have selected the appropriate device, the appropriate type of connection will need to be selected. From this display, select the ***HSB (USB type)***.



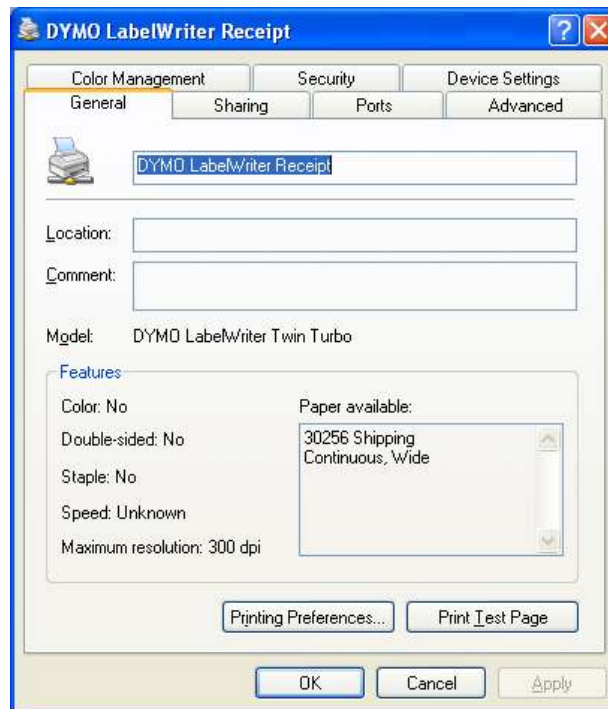
- The Topaz device will be active upon completing this installation.

AVImark Setup

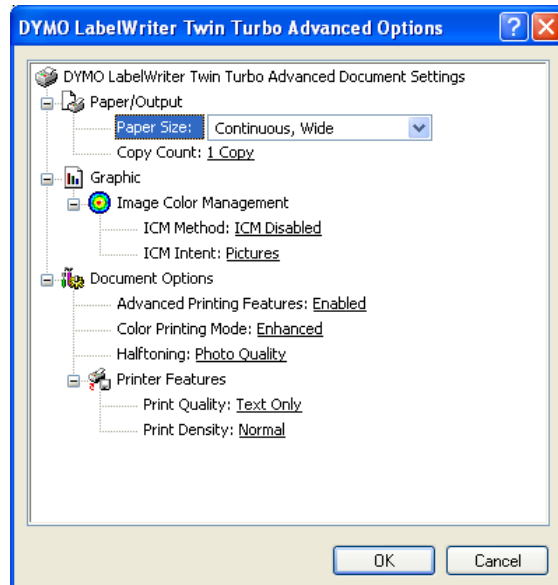
- ◆ Once your MPS account has been approved and opened, the MPS feature will need to be activated from within AVImark.
- ◆ Log into AVImark using an Administrator password (access to security option *System-wide Authority*)
- ◆ Select the Advanced Options tool bar button  and search for *Process Credit*. This will display the option **Process Credit Transaction Using** which will need to be set to **MPS**.
- ◆ From the AVImark CID, press and hold the **Ctrl** and **Shift** keys while selecting the **Utilities** menu option. A **Setup MPS** option will be displayed at the very bottom of the Utilities menu.
- ◆ Select this **Setup MPS** option to display the **MPS Login** window.
- ◆ From the MPS Login window, the following information is required:
 - **Username:**
 - Require a minimum of at least six characters
 - **Password:** According to the PCI-DSS security standards
 - Require a minimum length of at least eight characters
 - Require both numeric and alphabetic characters
 - Require a new password that is not the same as any of the last four passwords used
 - **Email:**
 - This email address will be used to send a temporary MPS password to should your MPS username and/or password ever be lost or forgotten.
 - **Security Question and Your Answer:**
 - This question and answer will be used as a security measure should the MPS username and/or password ever be lost or forgotten, and a temporary password is needed.
 - Before the MPS username and/or password can be reset and a temporary password emailed, the user will be


required to supply the correct answer to the security question.


- ◆ The **Email Setup** information will be required in order for a temporary MPS password to be sent should the MPS username and/or password ever be lost or forgotten.
 - **SMTP Server:**
 - **SMTP Port:**
 - **Username:** This username will only be needed if the SMTP server requires a user to login before email can be sent.
 - **Password:** This password will only be needed if the SMTP server requires a user to login before email can be sent.
- ◆ Selecting **OK** on the MPS Login window will save the MPS settings and display a message indicating: **"MPS is now setup. Please restart AVImark for changed to take effect."**
- ◆ When restarting AVImark, a user-login (administrator or non-administrator) must be used before the installation of MPS will be completed.
- ◆ Once AVImark is restarted, you are ready to proceed to the **MPS Setup** instructions listed below.
- ◆ If using a **Dymo Labelwriter** to print credit card signature slips, the following setup will need to be accomplished once the printer is installed and able to print a test page through Windows.
 - The appropriate continuous-feed paper, which will be used to print the credit card receipts, will need to be selected within the printer properties.




- Within the Properties window, selecting the **Printing Preferences** button...the **Paper/Quality** tab...**Advanced** button, will allow you to select the **Continuous, Wide** paper size.



- Within AVImark, using the Option Maintenance tool bar button , search for **Signature**. Set the located option **Print Signature Slip on Credit Card Transactions** to **TRUE**.

- Accessing the AVImark Printer Setup through the **Utilities** menu option, select the appropriate Dymo printer within the **Receipt** printer. The Quality of this printer will need to remain **Letter Quality**.
- ◆ If using a Topaz signature capture device to digitally capture and retain your credit card authorizations, the following setup will be required once the installation of the Topaz device as mentioned earlier in these instructions is complete:
 - Within AVImark, using the Option Maintenance tool bar button , search for **Topaz**. Set the located option **Enable the Topaz Signature Capture Device** to **TRUE**.

MPS Setup

- ◆ Once the MPS feature has been activated within AVImark and AVImark has been rebooted and logged into as mentioned above, a new icon  will be displayed within your system tray. Double-clicking on this icon will display the **MPS** window.



- ◆ As soon as your MPS account is approved, you will receive an email to the address provided on your Merchant Application which will provide access to required information specific to your clinic. This email will contain your user name (Merchant ID) and a temporary password.
- ◆ Logging onto the website www.coremanagementsystem.com will allow you to create your permanent password and obtain the following account information which will be used within AVImark:
 - **Acceptor ID**
 - **Account ID**
 - **Account Token**

- ◆ The above account information will be inserted into MPS.EXE by accessing the **Options** button.
- ◆ Selecting the **Options** button will require the user to enter their MPS username and password which was specified earlier within the AVImark setup instructions.

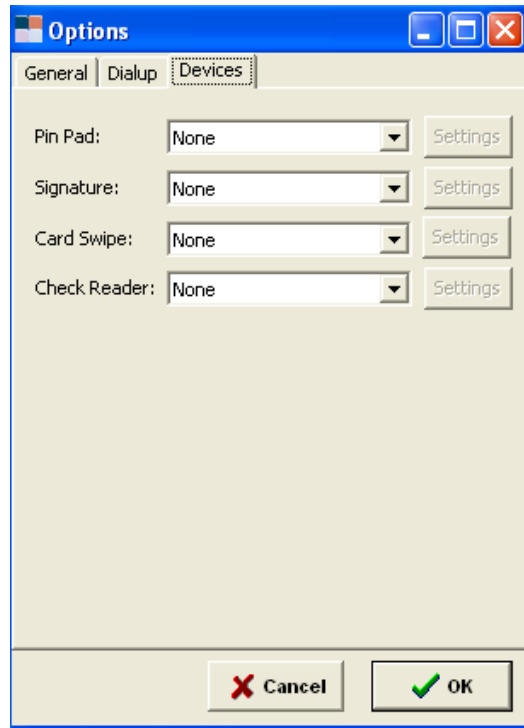
- ◆ The **Acceptor ID, Account ID, and Account Token** information must be taken from the above mention website and copied into the corresponding MPS.EXE fields listed in the Options window.
- ◆ Additional options that will be used during the setup of MPS:
 - **Enable AVS Authorization:** This option is used when a credit card is not present and must be hand-keyed. It enables the client's street number and zip code to be entered as added security and to lower the risk of fraud.

When this option is checked the hand-keyed window will display as in the example below:

- **Attempt Dialup If Needed:** This option is checked when a dial-up internet connection is wished to be used as an automatic backup to a failed broadband connection. Selecting this option will display a confirmation message at the time of processing if an internet connection cannot be located.

NOTE: If this option is checked, the information included on the **Dialup** tab will be required.

- **On Account Type Mismatch:** Select the desired response when a swiped or hand-keyed card type does not match the selected card type.
- ◆ The processing hardware which was installed earlier will now need to be specified within the **Devices** tab of MPS.EXE.



- Since the processing hardware is workstation specific, the processing hardware which will be used on each AVImark workstation will be required to be selected on each individual workstation.
- **PIN Pad:**
 - **VeriFone MX850:** Selecting this device for the PIN Pad option will auto-select it for the Signature and Card Swipe options. Select the **Settings** button and specify the appropriate COM port which was located earlier in these instructions. All other values can be left as default.
 - **VeriFone PIN Pad:** Select the **Settings** button and specify the COM port which was located earlier in these instructions.
- **Signature:**
 - **VeriFone MX850:** Selecting this device for the Signature option will auto-select it for the PIN Pad and Card Swipe options. Select the **Settings** button and specify the appropriate COM port which was located earlier in these instructions. All other values can be left as default.
- **Card Swipe:**

- **VeriFone MX850:** Selecting this device for the Card Swipe option will auto-select it for the PIN Pad and Signature options. Select the **Settings** button and specify the appropriate COM port which was located earlier in these instructions. All other values can be left as default.
 - **Magtek Card Swipe:** Selecting this device will not require any settings to be specified.
- ◆ From within the MPS **Options** window, the **Edit Login** button can be used to access the required MPS information specified during activation of MPS.

The screenshot shows a window titled "Options" with three tabs: "General", "Dialup", and "Devices". The "General" tab is active. It contains a section for "Account Information" with three text input fields: "Account ID", "Account Token", and "Acceptor ID". Below these are two checkboxes: "Enable AVS Authorization" and "*Attempt Dialup If Needed". There is also a dropdown menu labeled "On Account Type mismatch:" with "Show Message" selected. A note at the bottom of the window reads: "* - This is only required if you want to use dialup when broadband connection fails." At the bottom of the window are three buttons: "Edit Login...", "Cancel", and "OK".

- ◆ If the MPS username and/or password are ever lost or forgotten, contact the AVImark Technical Support for assistance with resetting these pieces of information.
- ◆ If you are using the AVImark Site feature, each site can be setup within MPS to process credit cards to a unique merchant ID keeping all of your credit card transactions separate for each site.
 - To setup the AVImark site feature to process using unique merchant IDs, with AVImark open, double-click the MPS icon displayed in your system tray.

- Selecting the **Site** menu option will display all sites that are currently setup in AVImark. Selecting one of these sites, and open the **Options** window using the Options button to specify the appropriate Acceptor ID, Account ID, and Account Token for this site.
- All options available within the General and Dialup tabs will be specific to the selected site. The information selected within the Devices tab will be workstation specific rather than site specific.
- Once all options have been set for the selected site, select **OK** to proceed to the setup of your next site.

Before the installation and configuration of the required processing hardware, McAllister Payment Solutions (MPS), and AVImark, the *McAllister Payment Solutions PA-DSS Implementation Guide* must be reviewed in its entirety and referenced during the installation and configuration.