

Cloud9 User Guide

Revision History

Revision	Date	Change description
1.0	07/28/2014	Initial Draft
1.1	09/24/2014	Change the merchant configuration
1.2	07/07/2015	Change the FrontEnd name to PDC and simplify the FrontEnd IP configuration

Table of Contents

1. ABOUT THIS MANUAL	4
1.1 WHO IS AUDIENCE OF THIS MANUAL?	4
2. INTRODUCTION.....	4
2.1 WHAT IS CLOUD9 PAYMENT GATEWAY?.....	4
2.2 HOW DOES IT WORK?.....	4
3. HARDWARE REQUIREMENTS	4
4. INSTALLATION & CONFIGURATION	5
4.1 POS SIMULATOR INSTALLATION	5
4.2 PDC INSTALLATION	5
4.3 PINPAD USB DRIVER	5
4.4 SETTINGS BEFORE ANY TRANSACTION	5
4.4.1 <i>Create Store</i>	6
4.4.2 <i>Create Merchant Account</i>	7
4.4.3 <i>Set Up Cards</i>	9
4.4.4 <i>Set Up Terminal</i>	9
4.4.5 <i>Merchant Account Info</i>	10
4.4.6 <i>PDC Configuration</i>	11
4.4.7 <i>POS Configuration</i>	15
5. START TRANSACTIONS.....	17
5.1 POS SIMULATOR.....	17
5.2 CLOUD9 PAYMENT GATEWAY WEB	19
6. VIEW TRANSACTIONS.....	20

1. About This Manual

This guide provides basic information regarding Cloud9 Payment Gateway, including the components introduction, application installation, configurations and transaction operations.

1.1 Who is audience of this Manual?

This document is intended for use by merchants who are using Cloud9 Payment Gateway to proceed with transactions and Management staff who needs to view and modify the transactions on Cloud9 Payment Gateway Web.

2. Introduction

2.1 What is Cloud9 Payment Gateway?

Cloud9 Payment Gateway is a multi-merchant, multi-processor payment gateway which has uniform interfaces for Multi-Processor. It has powerful report system and secured transactions with End-to-End encryption/token supplied. Cloud9 Payment Gateway is Payment Card Industry Data Security Standard (PCI-DSS) version 2.0 compliance.

2.2 How does it work?

Cloud9 Payment Gateway consists of two parts: PDC(Payment Device Controller) and Cloud9 Server.

- **PDC:** control PIN pad, receive transactions from POS and forward transactions to Cloud9 server.
- **Cloud9 Server:** process E-transactions and forward transactions to processors.

3. Hardware Requirements

Processor: 1 GHz 32-bit or 64 - bit processors

Memory: 1 GB or above

Graphics: support DirectX 9 128 m or above

Hard disk space: more than 1 G

Monitor: require resolution 1024 x768 pixels or above (Lower resolution cannot normally display features), or display device can support touch technology

4. Installation & Configuration

4.1 POS Simulator Installation

Unzip the Pos Simulator.rar.

4.2 PDC Installation

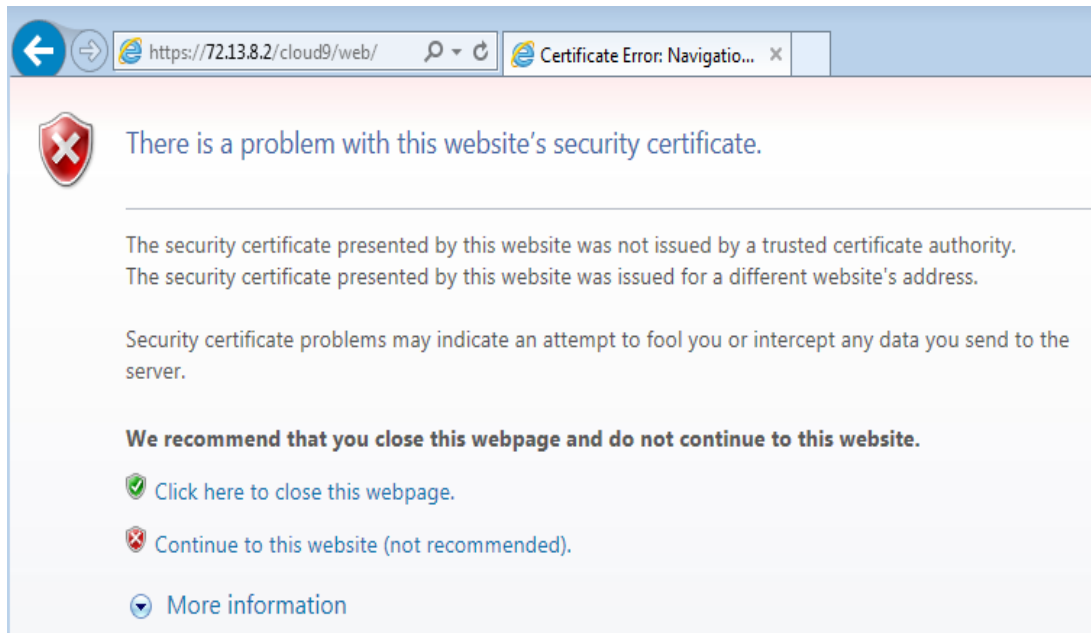
Unzip the PDC.rar.

4.3 PINPad USB Driver

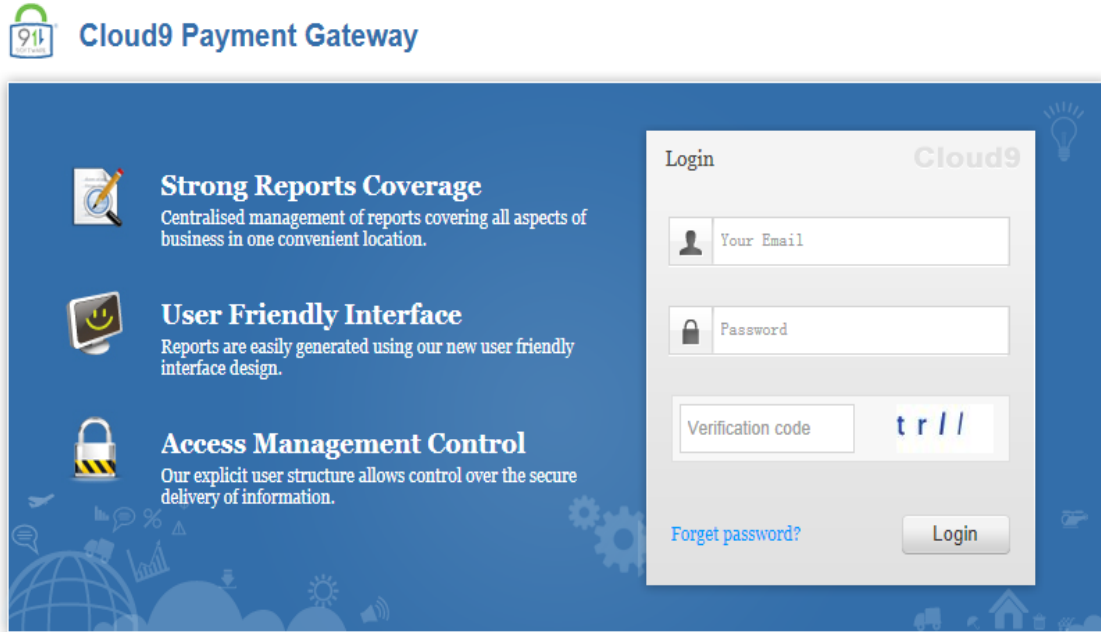
Prior any transaction, the PINPad USB Driver must be installed. Please refer to the PP790SE USB Driver User Guide for the further PIN pad installation details.

4.4 Settings before any Transaction

A registered account is required for the Cloud9 Payment Gateway web on which you can manage transactions and users, and generate reports as well. To obtain an account, please send an email to zvoldman@911software.com. Then login on <https://72.13.8.2/cloud9/web/> with the registered account. If an IE browser is used, the following page may be displayed.



Click the link Continue to this website (not recommended), and it will direct to Cloud9 Payment Gateway login page.



4.4.1 Create Store

If the email login the Cloud9 web as a dealer, it has the permission to create a store.

- a) Select the Configuration -> Business Configuration ->Store Info.
- b) Click the Create button to go to create Store page.
- c) Input the information which is required, click the submit button.

← Configuration > Store Info > Add Store

* Store Name	<input type="text" value="DA_Store01"/>
* Email	<input type="text" value="DA_Store01@163.com"/>
* Dealer	<input type="text" value="Dealer_Admin"/>
Chain	<input type="text" value="DA_Chain01"/>
Business Name 1	<input type="text"/>
Business Name 2	<input type="text"/>
Address	<input type="text"/>
Suite	<input type="text"/>

4.4.2 Create Merchant Account

If the store has no merchant account, the merchant account must be created first.

- a) Select the Configuration t-> Payment Processing ->Merchant Account.
- b) Click the Create button to go to create merchant page.

	Processor Config	Card Config	Terminal Config
* Merchant Name	DAS01_Merchant01		
* Dealer/Store	Q Dealer_Admin	Q DA_Store01	
* Industry Type	Retail		
* Credit Processor	HPS(Heartland)	Processor Config	
* Debit Processor	<input checked="" type="checkbox"/> Same As Credit		
* EBT Processor	<input checked="" type="checkbox"/> Same As Credit		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>			

For example, select 'Dealer_Admin' and 'DA_Store01' from the Dealer/Store dropdown list, select 'Retail' from the Industry Type, select 'HPS (Heartland)' from the Credit Processor dropdown list and checked the Same As Credit to make it valid for another 2 processor. If the Same As Credit checkbox aren't checked, the debit and EBT processor must be selected.

Click the Processor Config button, the processor config page will pop up. In the Basic Information, the Capture should be selected by at least one. The E2E encryption label is displayed when current processor is HPS(Heartland), otherwise, the processor is FDC(Omaha), the E2E TransArmor label is displayed. The Detailed Information should be inputted correctly.

processor
✕ Close

Basic Information	
Name	HPS(Heartland)
Capture	Host Capture
Support Industry	Retail,Restaurant,Hotel,MO/TO,eCommerce
E2E Encryption	Available
Detailed Information	
Developer ID	002914
VersionNum	1488
Device ID	1525500
Password	\$Test1234
UserName	777700006402
License ID	21126
Site ID	21129

Submit
Cancel

c) Click the Submit button to save. Click the Next button to set up cards.

Processor Config Card Config Terminal Config

1
2
3

Edit

Merchant Name	DAS01_Merchant01
Industry Type	Retail
Credit Processor	HPS(Heartland)
Debit Processor	HPS(Heartland)
EBT Processor	HPS(Heartland)

Next
Cancel

4.4.3 Set Up Cards

Cloud9 Payment Gateway is a multi-processor payment gateway, supporting large of payments currently. It is critical to set up configurations correctly to ensure transactions being processed successfully.

Enable the payment type needed by selecting 'YES' in the 'Accepted' column, click the Submit button to save the configurations.

Processor Config Card Config Terminal Config
1 ————— 2 ————— 3

Serial#	Card Type	Accepted
1	VISA	YES
2	MasterCard	YES
3	AmericanExpress	YES
4	Discover/NOVUS	YES
5	CarteBlanche	YES
6	DinersClub	YES
7	EnRoute	YES
8	JAL	YES
9	JCB	YES
10	Disney Hotel	YES
11	Disney Card	YES
12	N/A	YES
13	EBT CashBenefit	YES
14	EBT FoodStamp	YES
15	Debit Card	YES

4.4.4 Set Up Terminal

In the Terminal Config page, there is a terminal list. In the list, the information can be modified and deleted.

Processor Config Card Config Terminal Config
1 ————— 2 ————— 3

+ Create

Action	Action	Serial#	Merchant Name	GMID	GTID	Device Number
<input type="checkbox"/>	<input type="checkbox"/>	1	DAS01_Merchant01	1001394119	GT1001394120	59854717
<input type="checkbox"/>	<input type="checkbox"/>	2	DAS01_Merchant01	1001394119	GT1001394202	59854616

Click the create button, the Add Terminal page will be pop up. The Device Number must be inputted correctly.

4.4.5 Merchant Account Info

Prior any transaction, the merchant setup is required. Select the Configuration -> Payment Processing -> Merchant Account, there is a merchant list when it exists merchants.

Merchant Name	Store Name	Dealer Name	Industry Type
DAS01_Merchant01	DA_Store01	Dealer_Admin	Retail
DAS01_Merchant02	DA_Store01	Dealer_Admin	Restaurant
m112	StoreAdmin11(Tina)	Dealer Admin 1_Tina	Retail
M211 Created by DealerAdmin2	storeadmin21@163.com	dealer admin 2(Tina)	Restaurant
merchantadmin111@163.com	StoreAdmin11(Tina)	Dealer Admin 1_Tina	Retail
merchant_test	Store_test	Dealer_test	MOTO

Click the link of the Merchant Name in the list to go to the merchant detailed information page, it contains 4 parts.

- 1) The Merchant's information, such as Merchant Name, the store's name which the Merchant is belonged to, the dealer's name which the Merchant is belonged to, and the Merchant's industry.
- 2) Currently, the credit card, debit card, EBT card can be set up processor.
- 3) The accepted payment type will display in the Accepted Payment.

4) The list of GTID.

← Configuration > Merchant Account > Modify Merchant Account Edit

Merchant Name	Store Name
DAS01_Merchant03	DA_Store01
Dealer Name	Industry Type
Dealer_Admin	Retail
Credit	
HPS(Heartland)	
Debit	
HPS(Heartland)	
EBT	
HPS(Heartland)	
Accepted Payment	
VISA,MasterCard,AmericanExpress,Discover/NOVUS,DinersClub,CarteBlanche,EnRoute,JCB,JAL,Disney Hotel,Disney Card,N/A,EBT CashBenefit,EBT FoodStamp,Debit Card	

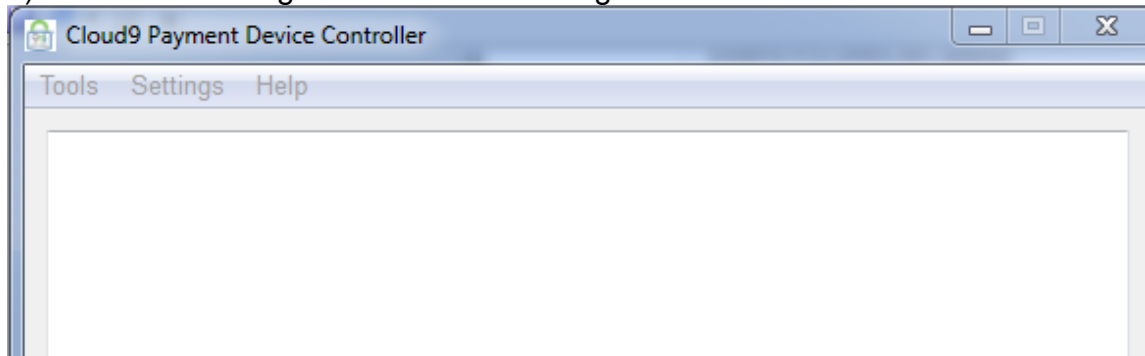
Serial#	Gateway-MID	Gateway-TID	Device Number
1	1001394119	GT1001394202	59854616

4.4.6 PDC Configuration

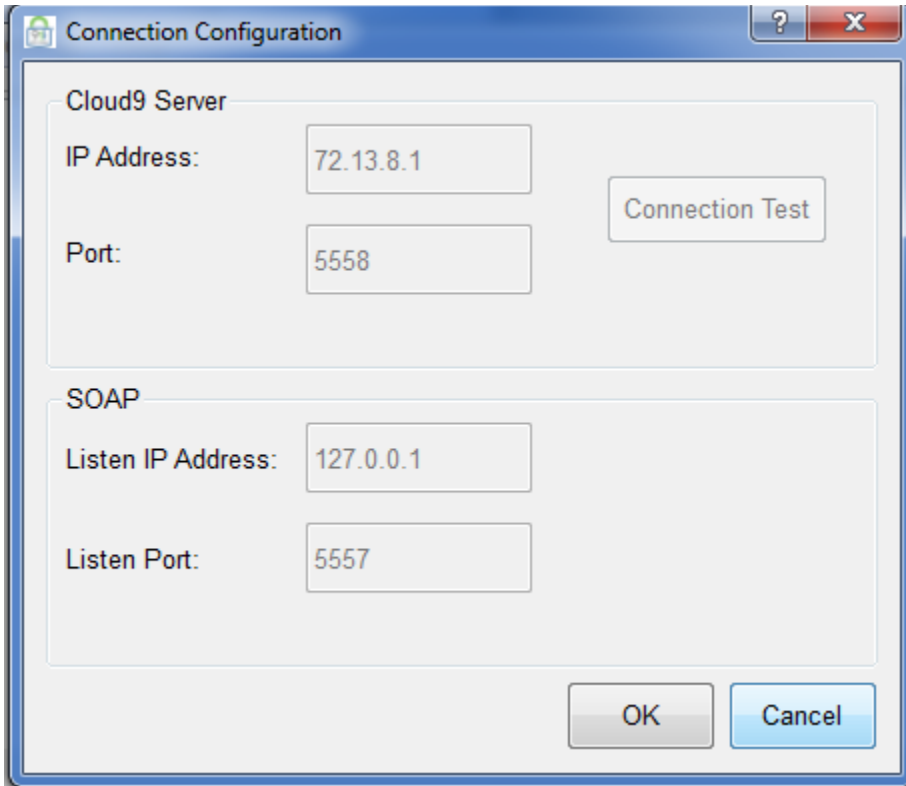
Double-click the PDC.exe to start the PDC window.

4.4.6.1 Connection Configuration

a) Click the Settings-> Connection Configuration.



- b) In the Connection Configuration dialog, input the Cloud9 Service IP address (e.g.72.13.8.1) and the listen IP address which can be considered as the local IP address.
- c) Click the OK button to save the configurations.

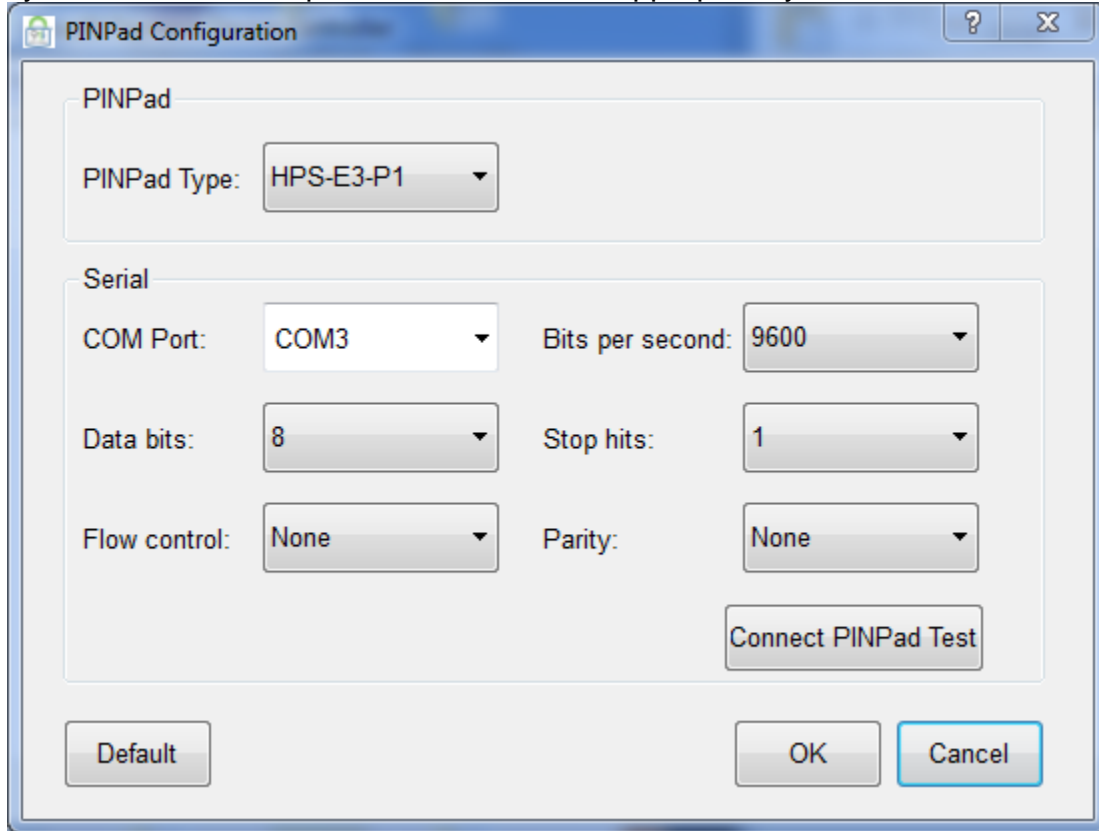


4.4.6.2 PIN Pad Configuration

Click the Settings->PINPad Configuration.

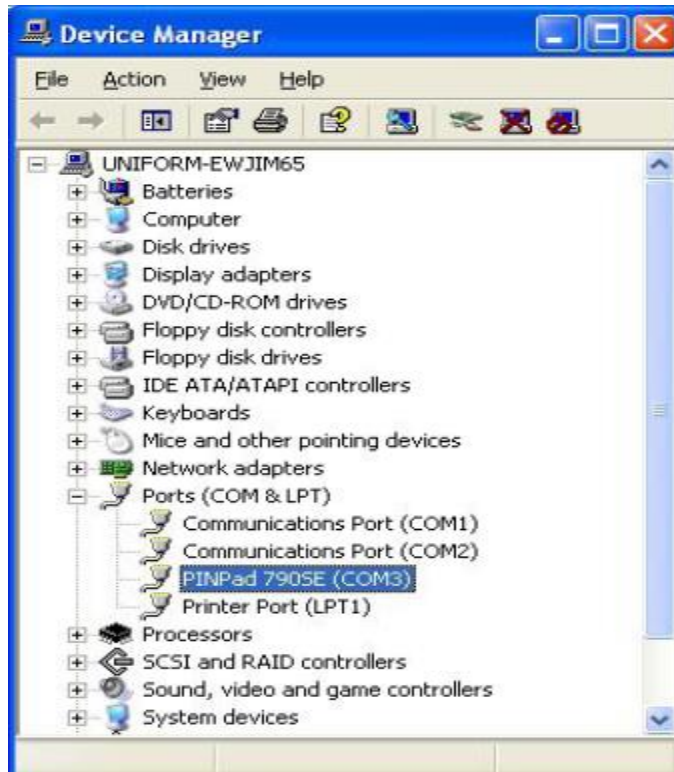
- a) Select corresponding PIN pad type in the PINpad type dropdown list.

b) The Serial information can be found in the Device Manager of the operating system after the PIN pad driver is installed appropriately.

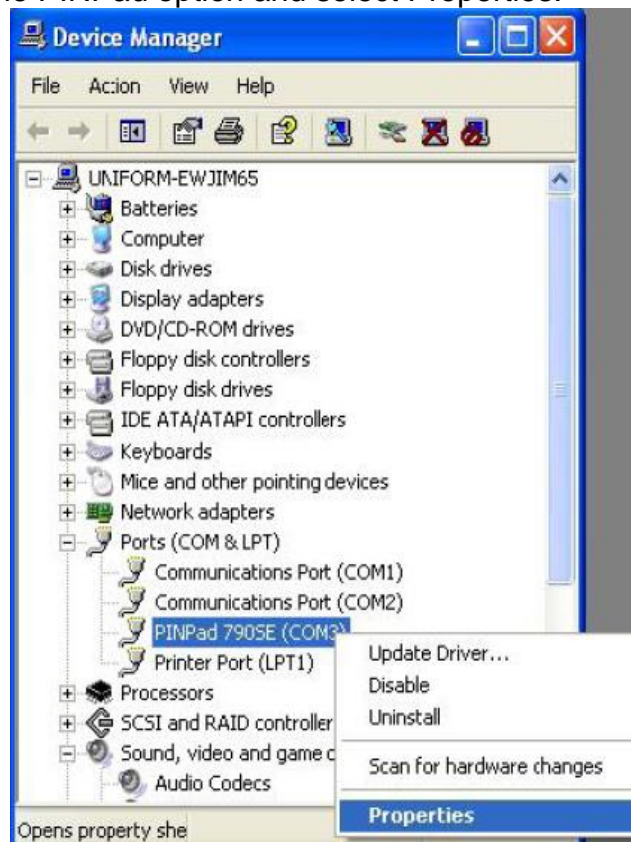


Follow the steps below to check the Serial info:

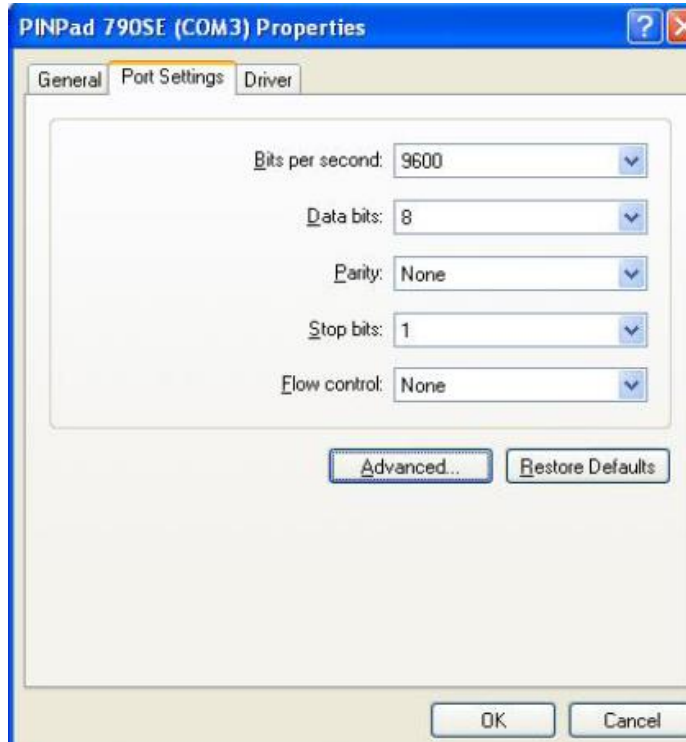
- Go to the Device Manager and find the COM port the system assigned for the PIN pad.



- Right-click the PINPad option and select Properties.



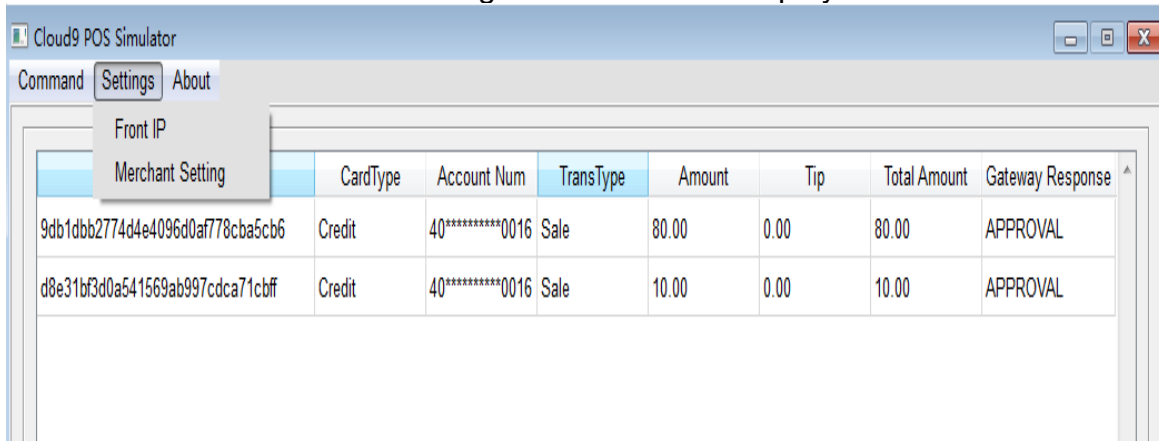
- Select the Port Settings and fill in the Serial information in the PDC PINPad configurations according to the serial information displayed in the Device Manager.



- c) Click the OK button to save the PINPad configurations.
- d) Or click the Default button to reset the configurations.

4.4.7 POS Configuration

Double-click the POS.exe. The dialog as below will be displayed.



4.4.7.1 Merchant Information

Go to Settings->Merchant Info to set up merchant information. To obtain GMID, GTID, please follow the steps below:

- a) GMID& GTID: Login on Cloud9 Payment Gateway Web and go to Configuration->Payment Processing->Merchant Account.
 In the Merchant Account list page, click the link of the Merchant Name, in the detailed information to obtain GMID and GTID.

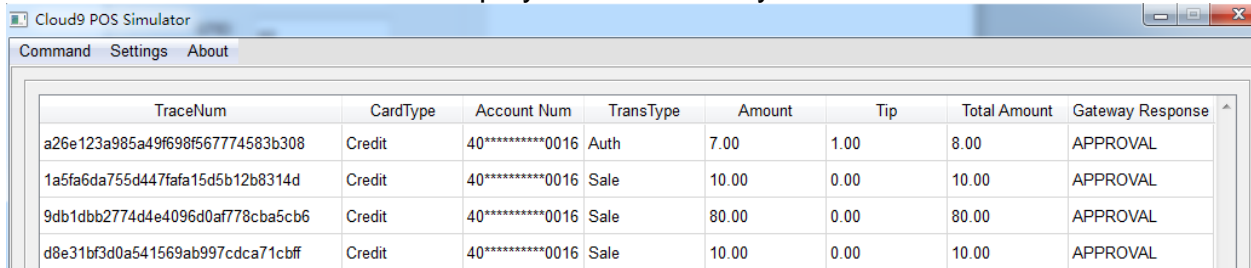
Serial#	Gateway-MID	Gateway-TID	Device Number
1	1001394119	GT1001394202	59854616

- b) GMPW: reserved for future use.
 c) Click the OK button to save the settings.
 d) Or click the Default button to reset the settings.

5. Start Transactions

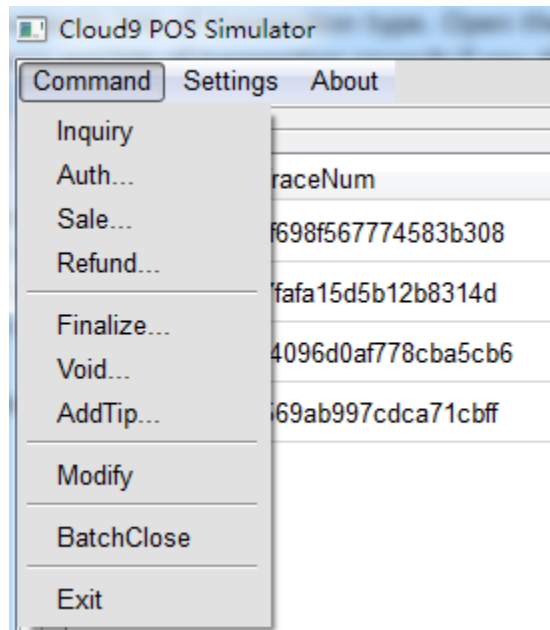
5.1 POS Simulator

The POS Simulator supports multiple transaction types. Start the POS Simulator, and the transaction records will be displayed if there is any.

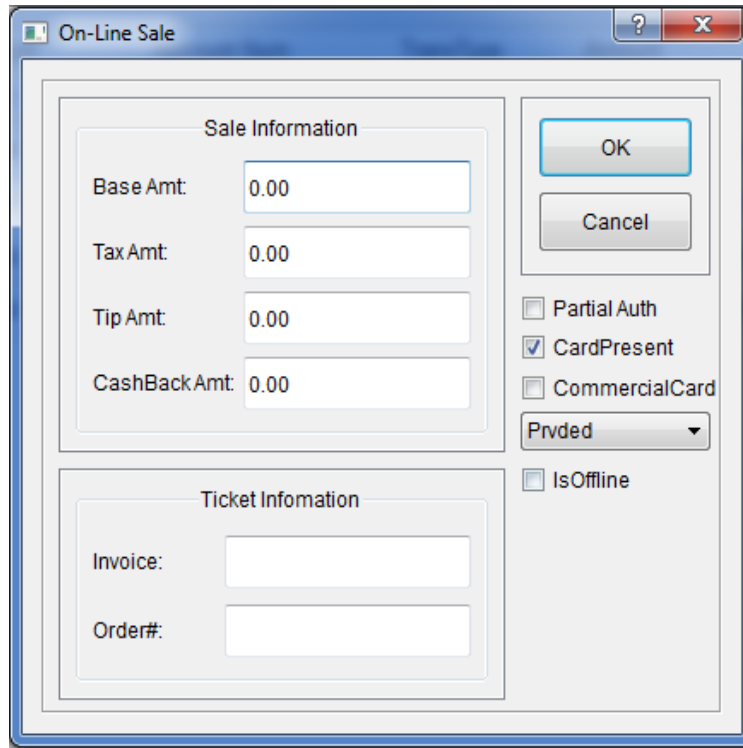


TraceNum	CardType	Account Num	TransType	Amount	Tip	Total Amount	Gateway Response
a26e123a985a49f698f567774583b308	Credit	40*****0016	Auth	7.00	1.00	8.00	APPROVAL
1a5fa6da755d447fafa15d5b12b8314d	Credit	40*****0016	Sale	10.00	0.00	10.00	APPROVAL
9db1dbb2774d4e4096d0af778cba5cb6	Credit	40*****0016	Sale	80.00	0.00	80.00	APPROVAL
d8e31bf3d0a541569ab997cdca71cbff	Credit	40*****0016	Sale	10.00	0.00	10.00	APPROVAL

Click the Command, all the transaction types supported by the POS Simulator will be displayed.

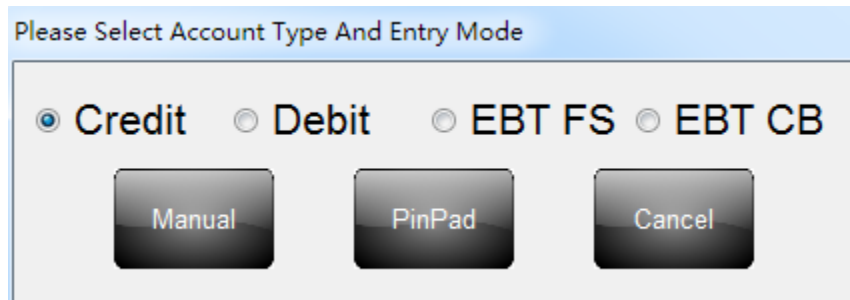


For example, select the Sale transaction. The transaction information required by sale such as BaseAmt, TaxAmt, TipAmt, and CashBachAmt will be shown in the On-Line Sale dialog. The Invoice and Order are ticket information. Also Partial Auth and IsOffline are available for Sale transactions. Click the OK button to proceed.



The 'On-Line Sale' dialog box contains two main sections: 'Sale Information' and 'Ticket Information'. The 'Sale Information' section includes four input fields: 'Base Amt' (0.00), 'Tax Amt' (0.00), 'Tip Amt' (0.00), and 'CashBackAmt' (0.00). The 'Ticket Information' section includes two input fields: 'Invoice:' and 'Order#'. To the right of these sections are several controls: an 'OK' button, a 'Cancel' button, a 'Partial Auth' checkbox (unchecked), a 'CardPresent' checkbox (checked), a 'CommercialCard' checkbox (unchecked), a 'Prvded' dropdown menu, and an 'IsOffline' checkbox (unchecked).

The Select Account Type and Entry Mode dialog showed as below will pop up after transaction information is submitted. The account type and entry mode needs to be selected to proceed. If the PinPad button is clicked, swipe card is required. If the Manual button is clicked, a manual input dialog will pop up.



The 'Please Select Account Type And Entry Mode' dialog features four radio buttons for account types: 'Credit' (selected), 'Debit', 'EBT FS', and 'EBT CB'. Below these are three buttons: 'Manual', 'PinPad', and 'Cancel'.

All the information prompted in the manual entry dialog is required. Click the OK button to proceed with the transaction.

The screenshot shows a web application window titled "FrontEnd". The interface is divided into several sections:

- Payment Information:** Includes fields for "Card Number" (with a red asterisk), "Exp MM/YY" (with a red asterisk), "CVC", "Base Amount" (pre-filled with 10.00), "Tip" (pre-filled with 0.00), and "Tax" (pre-filled with 0.00).
- Customer Information:** Includes fields for "Customer Name", "Customer Number", "Customer Address", and "Customer Zip Code".
- Input Method:** A virtual QWERTY keyboard is displayed, with the "Q" key highlighted in blue. To the right of the keyboard is a numeric keypad with buttons for digits 0-9 and a decimal point.
- Navigation:** At the bottom, there are "Space" and "Back" buttons, a "Track II Data" field, and "OK" and "Cancel" buttons.

5.2 Cloud9 Payment Gateway Web

Click the Report Center->View Reports->Current Transactions. A transactions list will be displayed. Click Rec# to view the details of each transaction. On the top right of this page, there are 4 actions for managing transactions currently.

Report Center > Current Transactions > Current Transaction Detail

Edit
 Add Tip
 Void
 Receipt

Rec#	Trans Type
1	Sale
Trans#	Invo#
19772752	
Card Type	Card Number
Credit Card	40*****0016
Brand Type	IsOffline
VISA	NO
Entry	Auth Code
Swipe	65998A
Auth Time	Finalize Time
07/21/2014 02:53	07/21/2014 02:53
Amount	Tip
10.00	0.00
Tax	Total Amount (No tax)
0.00	10.00
Cash Back	
0.00	

6. View Transactions

Go to Report Center->View Report. Cloud9 Payment Gateway provides various types of reports. Current Transactions is to display the current unsettled transactions. Archived Transactions is to display the settled transactions. Irregularities Report is to display the irregular transactions. Batch Report is used to view the settled transactions per batch. For example, click the Current Transactions to view the list of current transactions. Various searching types are available such as searching by Trans#, card type, etc. In addition, Cloud9 Payment Gateway provides various sorting methods.

Report Center > Current Transactions

Trans#: * Card Type: Card Ending 4 Digits: (Advanced Search)

Rec#	Trans Type	Card Number	Amount	Total Amount	Auth Code	Auth Time	Finalize Time						
<input type="checkbox"/>	1	Sale	19772...		Credit Card	40*****0016	Swipe	10.00	0.00	10.00	65998A	07/21/2014 02:53	07/21/2014 02:53
<input type="checkbox"/>	2	Auth	19772...		Credit Card	40*****0016	Swipe	7.00	1.00	8.00	65999A	07/21/2014 02:53	
<input type="checkbox"/>	3	Sale	19781...	3344...	Credit Card	40*****0016	Manual	11.01	0.00	11.01	72607A	07/22/2014 22:34	07/22/2014 22:34
<input type="checkbox"/>	4	Sale(Void)	00000...		Credit Card	40*****0026	Manual	480.00	0.00	480.00	000112	07/23/2014 05:15	07/23/2014 05:15
<input type="checkbox"/>	5	Sale(Void)	00000...		Credit Card	37*****1004	Swipe	330.00	0.00	330.00	000113	07/23/2014 05:15	07/23/2014 05:15
<input type="checkbox"/>	6	Sale	00000...		Credit Card	40*****0026	Manual	1.00	0.00	1.00	000031	07/24/2014 00:40	07/24/2014 00:40
<input type="checkbox"/>	7	Sale	00000...		Credit Card	40*****0026	Manual	10.00	0.00	10.00	000032	07/24/2014 00:40	07/24/2014 00:40
<input type="checkbox"/>	8	Sale	00000...		Credit Card	40*****0026	Manual	5.00	0.00	5.00	000033	07/24/2014 00:41	07/24/2014 00:41
<input type="checkbox"/>	9	Sale	19790...		Credit Card	41*****1111	Manual	10.00	0.00	10.00	76518A	07/24/2014 01:37	07/24/2014 01:37