

# **Monetra<sup>®</sup> Payment System**

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## ***Fast Start Guide for Apple Mac OS X***

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# 1 Installation Overview

## 1.1 System Requirements

The Monetra Payment System (v 6.0 and higher) requires the following system configuration.

<i>Minimum</i>	<i>Recommended</i>
128 MB RAM	256 MB RAM
100 MB Available Disk Storage Space (for full Monetra package)	
Network Card or Modem	
Apple Mac OS X version 10.3 or higher	

You will need to have installed and configured any communication devices and/or software, such as broadband (high-speed/always-on) Internet connections and/or modems for processing card transactions.

Before continuing, you must have access to the Merchant Setup information (merchant-ID, terminal-ID etc.) as provisioned by your Merchant Services Provider. Note: Worksheets for all supported processors can be downloaded from our website. Visit the *Support->Documentation* page and click on the *Monetra User Setup Worksheets* link.

## 1.2 Installation Overview

The installation and configuration of the Monetra Payment System package can typically be completed in less than 10 minutes from start to finish. This assumes you have all the required information (i.e. setup worksheets) on hand.

Below is the list of steps to be performed;

1. Download and run the Monetra Installer
2. Download and install the Monetra software.
3. Configure the Monetra Payment Server.
4. Add your merchant profile.
5. Configure the Monetra Client software.

NOTE 1: These instructions assume that the Monetra Payment Server and all associated software will operate on the same computer. For network configurations please reference the Monetra Installation and Configuration Guide.

## 2 Download and Run the Monetra Installer

The following procedure describes software download via an online/automated system using the Monetra Installation utility. Note: Alternate distribution methods such as package download do exist. Please reference the most current Monetra Installation guide, Monetra Configuration guide and our on-line F.A.Q.'s for more detailed information.

Note: Monetra Installation Utilities can be found in the General Support-->Downloads section of our website

<http://www.mainstreetsoftworks.com/downloads.html>

### 2.1 Extract the Monetra Installer



Once you have downloaded the Monetra Installer .bz2 file, double click the file to extract and install the package.

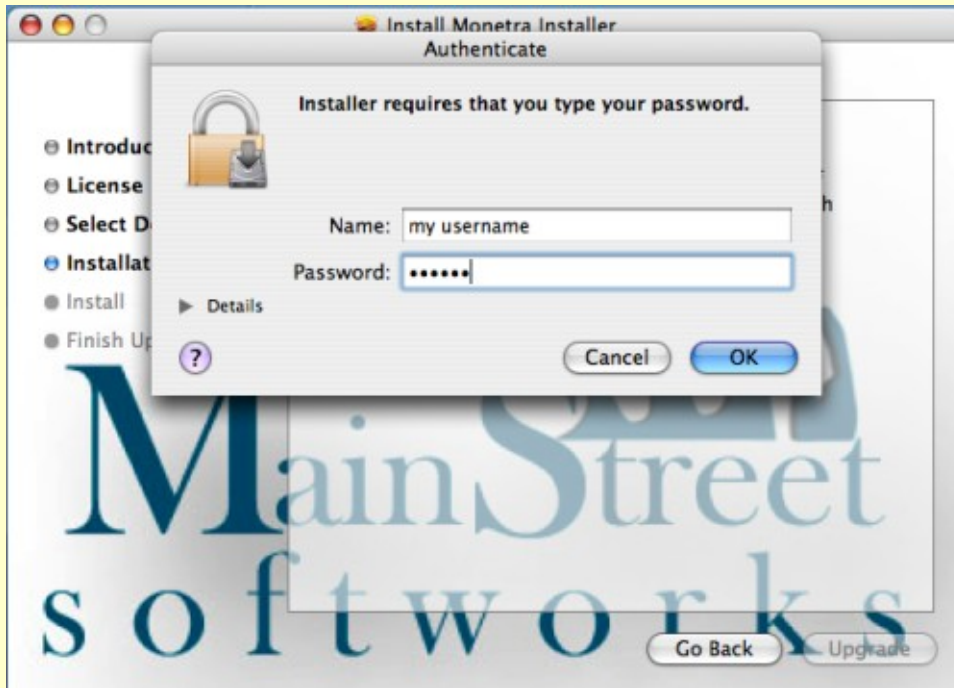
### 2.2 Setup the Monetra Installer



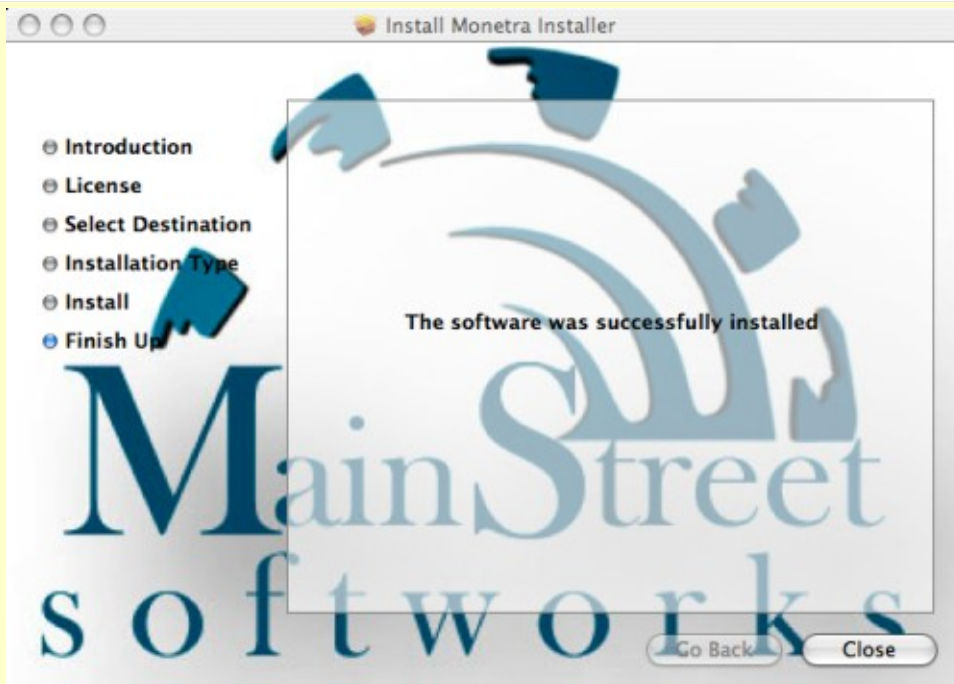
You should see a dialog box similar to the one above. Click Continue.

Note: You will have to enter the Mac Administrative password to install this application.

## 2.3 Finalize Installation of the Monetra Installer



Note: You will be asked to enter the Administrative Password for authentication. Upon successful installation you should see a window similar to the one below.



## 3 Download and Install Monetra Software

### 3.1 Run the Monetra Installer Application



When you run the 'Finder' application, and choose Applications, you should see a Monetra folder. Navigate into the Monetra folder.



Click the Monetra Installer icon to start the installation process for all additional Main Street software.

### 3.2 Monetra Installer Welcome



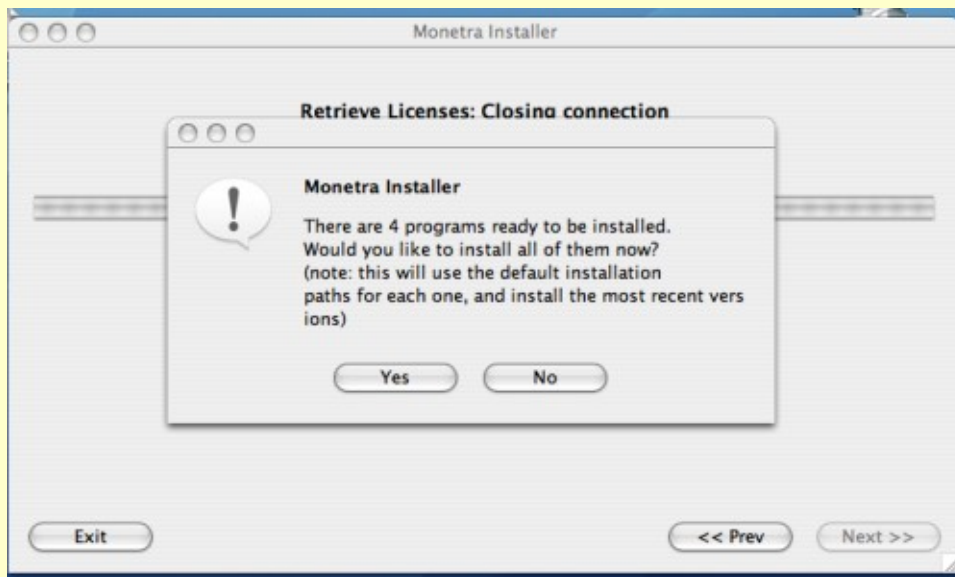
You will be presented with a Welcome screen. Choose [Next].

### 3.3 Monetra Installer Login



A contact **email address** and **password** has been assigned to you by Main Street Softworks or one of our authorized vendors. Once you have entered the information click Next.

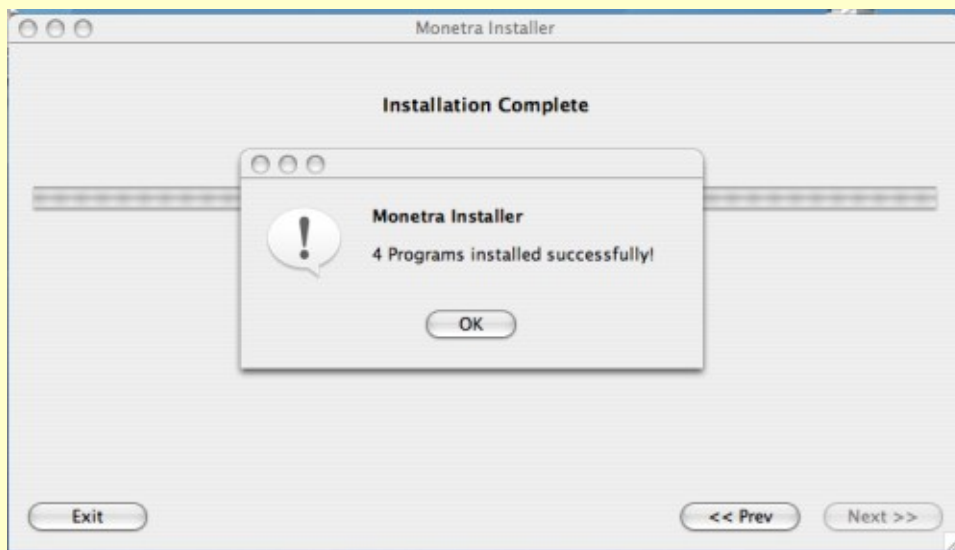
### 3.4 Available Software



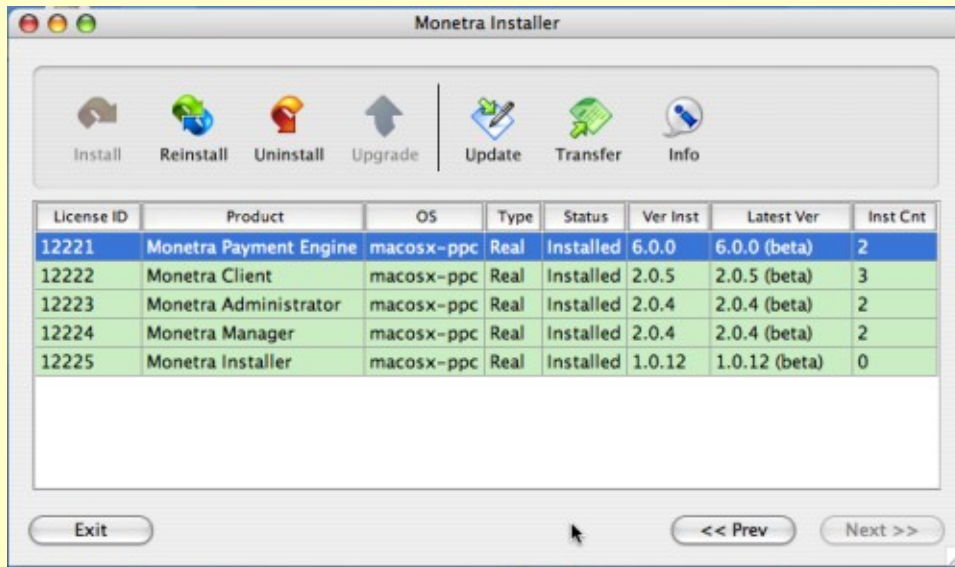
The installer will connect to Main Street Softworks and display a table presenting the Payment Engine and associated utility applications. Also at this point, an Install prompt should ask to install **X** number of new products. Click yes.

For each application installed you will need to accept the Software License Agreement to continue. Note: For packaged installations on a single computer you should install All Applications.

### 3.5 Complete Software Installation



When the download is complete you should see a notification, and then be presented with a table (similar to the image below) notifying you of the items that have been installed.



**Monetra Installer** – The software distribution and update tool you just used.

**Monetra Payment Engine** – Actual certified payment engine that moves data from Client applications to your payment processor.

**Monetra Administrator** – Utility for setting merchant profiles and engine administrative tasks such as system trace and auditing.

**Monetra Client**- Full soft terminal for day-to-day tasks such as trans/batch administration. Examples would be voids, batch settlement and reporting.

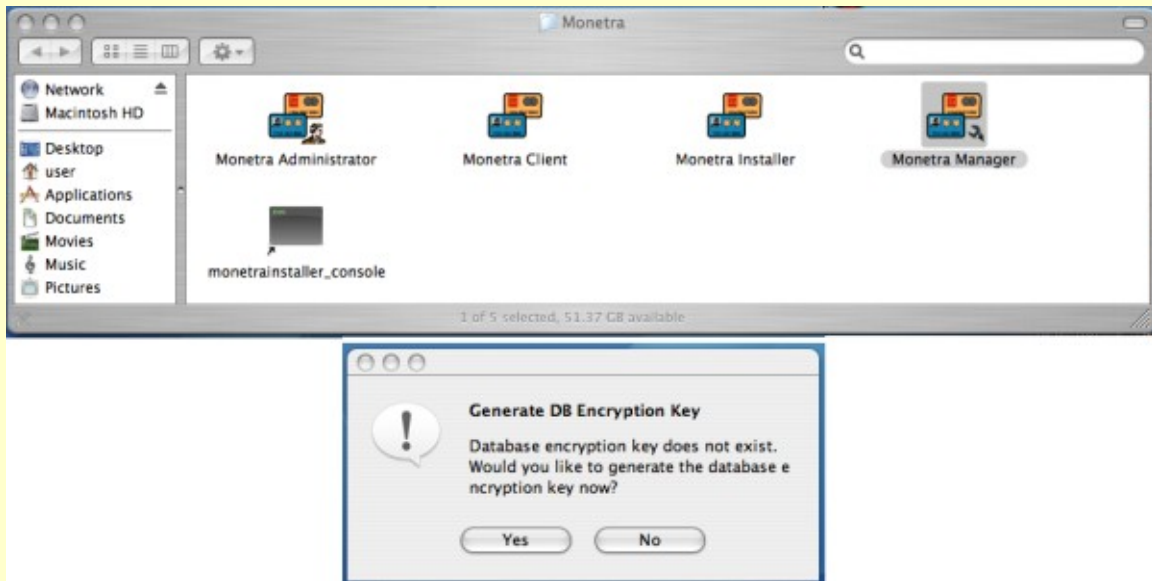
**Monetra Manager**- Utility to manage the Payment Server, perform tasks such as start/stop, log review, support inquiries and configure the Base Payment Server runtime parameters.

If all applications were successfully installed, it is now time to configure the remaining software applications.

## 4 Configure the Monetra Payment Server

The first application to be configured should be the Monetra Payment Server.

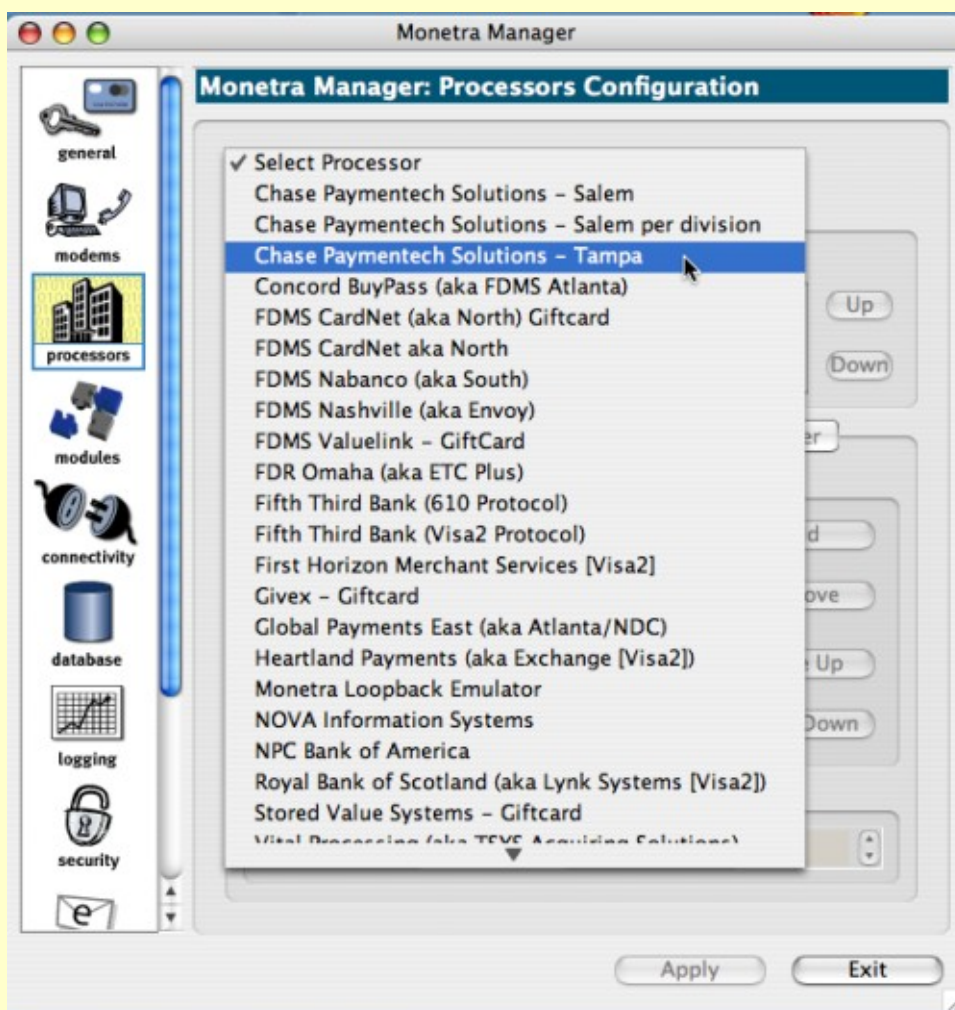
### 4.1 Run the Monetra Manager



Run the Monetra Manager via the Finder-->Applications-->Monetra-->Monetra Manager.

On initial startup, you will be presented a warning that an encryption key is missing, and you need to generate one. Click Yes.

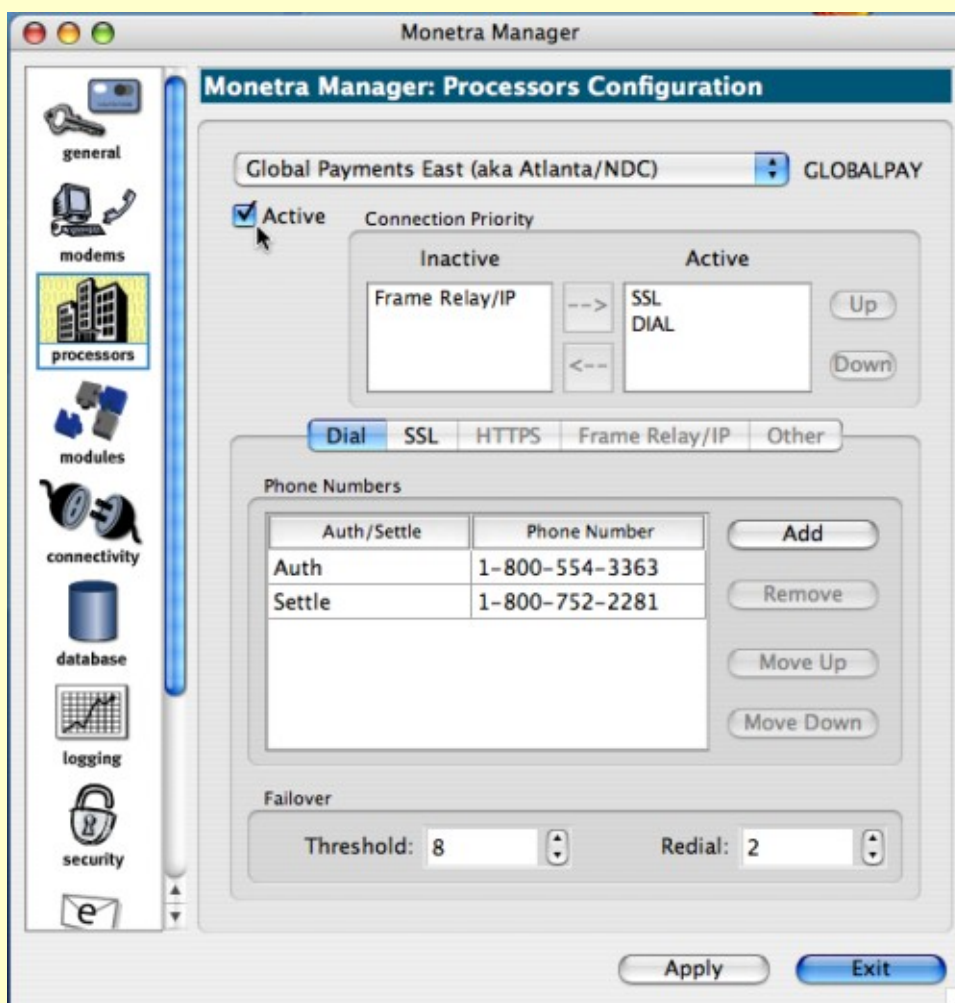
## 4.2 Payment Processor(s) Configuration: Select



Next, select the processor icon (left hand bar) to configure the processor connectivity.

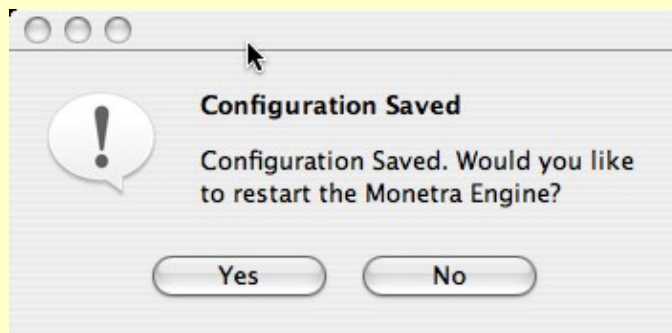
Choose your corresponding processor from the dropdown list.

## 4.3 Payment Processor(s) Configuration: Settings



- Step 1 Place a check mark in the ACTIVE checkbox setting.
- Step 2 Move any items that are in the ACTIVE list to the Inactive list that will not be used by highlighting them and using the arrows in the middle to change columns. Make sure only the connection priorities used are in the Active column.
- Step 3 If you use a modem to connect, verify (and set if needed) the Auth and Settle phone numbers. (DIAL tab). Note: Your processor should supply this information to you. Also, if you use a modem, please configure the modem section via the Modem icon.
- Step 4 Verify and/or set any Internet (HTTPS) settings. Again supplied by processor.
- Click APPLY on the bottom right of the Manager Utility.

## 4.4 Save Settings: Restart Server



Once a configuration is changed/edited you will be presented with a window asking to restart monetra engine. Click YES.

If the engine is running at this point, we are done here and you can exit this utility.

## 5 Add Your Merchant Profile

- Note1: More detailed instructions are available for this procedure via the Monetra Installation Guide.
- Note2: Your merchant account provider should have given you a setup worksheet with an associated merchant processing profile. You must have 100% of this information to proceed. You can download the latest worksheets by visiting <http://www.mainstreetsoftworks.com/documentation.html> and clicking on the "Monetra User Setup Worksheets" link.
- Note3: If you have a DEMO license of Monetra and are simply testing the software you should use the Monetra Loop-Back (test) processor. See our on-line FAQ for more details.

### 5.1 Run The Monetra Administrator

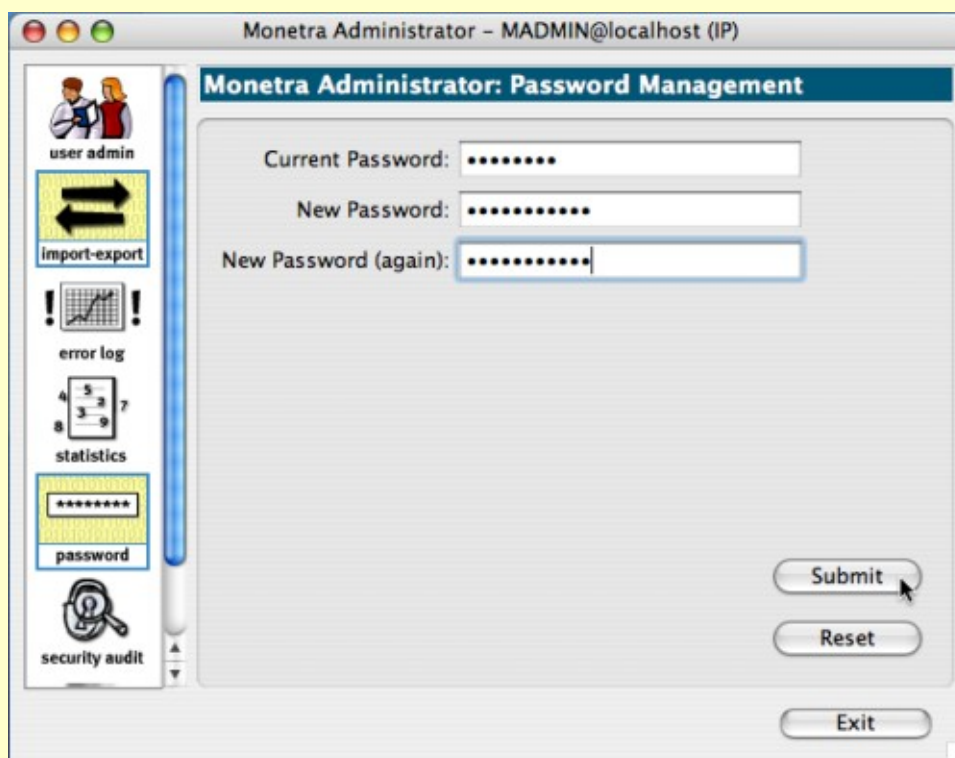
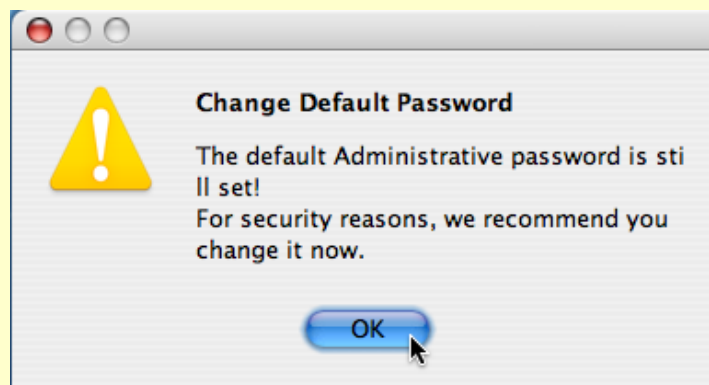


Run the Administrator via the Finder-->Applications-->Monetra-->Monetra Administrator.

## 5.2 Administrator Application Login

	You will need to log in as the default administrative user as follows.
Step 1	For the HOST enter <b>localhost</b>
Step 2	For the PORT enter <b>8333</b>
Step 3	Select the <b>TCP/IP</b> [radio] connectivity method setting
Step 4	DO NOT change the default Engine Admin UserName from <b>MADMIN</b>
Step 5	For the default Password enter <b>password</b> (note! Upon initial login to the Administrator utility, you will be warned, and should change/remember the default application administrative (MADMIN) password.)
Step 6	Once the information above has been entered, click Connect .

## 5.3 Monetra Administrator: Change Password

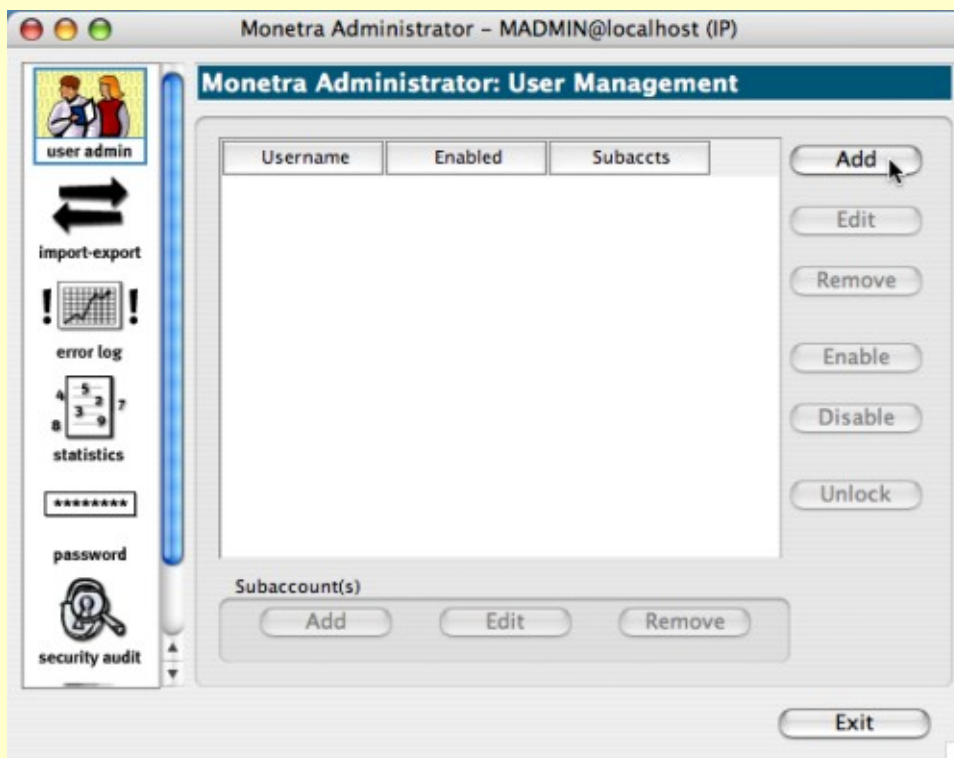


You should now be logged into the Administrator utility and presented with a warning about the default password. To change the default password, click OK.

Enter the new pass code information. Note: This will require a strong password, as identified by PCI-DSS as having at least 7 characters, both letters and numbers or special characters.

Click the 'Submit' button.

## 5.4 Monetra Administrator: Add Merchant (user)



Choose the 'User Admin' icon on the top left

Click the 'Add' button in the upper right hand side

Note: In the next procedure, we will show an example of adding a Paymentech Retail merchant account. For more detailed information, please reference the User Setup Guide.

## 5.5 Monetra Administrator: Enter Merchant Parameters

User Dialog

Username:  Profile Id: (none)

Password:

Email:

Processor:

Proc Name: PAYMENTECH Help Desk Phone: 800-254-9556

Industry:

Card Types:

Field	Value
Client Number	1234
Terminal ID	001
Auth-User	mainstr435th789
Auth-Pass	pAEURHTP3594R[WF]

Field Information

Field Name: AUTHPASS Required: None

Field Length: 1 - 16 character(s) Field Type: Any

Description: Authorization Password assigned for NetConnect HTTPS Internet Gateway

Advanced Clear Submit Cancel

- |        |  |
|--------|--|
| Step 1 | Enter a UserName for this profile. Note: this name is created by you and must be unique across any other merchant profiles associated with this Payment Server. Note you will need this UserName for the Monetra Client and Payment Connector profile configurations, so please keep it handy. |
| Step 2 | Enter a Password for this profile. Note: this password is created by you and must be unique across any active UserName/profile associated with this Payment Server. Note you will need this Password for the client and Payment Connector profile configurations, so please keep it handy.     |
| Step 3 | Skip the email address entry for now.  |
| Step 4 | Select the Processor that supports the merchantID information.   |
| Step 5 | Select the Industry Code associated with your merchant account profile. Warning! Please verify and test these settings as they can directly affect your processing interchange message structures.   |
| Step 6 | For the CardTypes click the button to the right and check off all supported cardtypes.   |
| Step 7 | Enter the remaining merchant fields.<br>Note1: This information should have been supplied by your ISO or account rep.<br>Note2: The fields in blue are REQUIRED and all information (such as field length, alpha/numeric will be displayed below).   |
| Step 8 | Click Submit.  |

## 6 Configure the Monetra Client Software

### 6.1 Run the Monetra Client



Run the Monetra Client application via the Finder--> Applications--> Monetra--> Monetra Client.

## 6.2 Monetra Client: Profile/Login

Monetra Client Login

Main Street softworks

configuration

Profile: My Mail Order Company

Username: Paymentech

Password: \*\*\*\*\*

Connect

Connectivity Setup

Profile Name: My Mail Order Company

Host: localhost Port: 8333

Method:  TCP/IP  SSL Edit SSL Certs

Username: Paymentech  prompt for username

Password: \*\*\*\*\*  save password

Clear Advanced Remove Profile Save Profile

You will log into the system as the user that was just added in the above step.

In the 'Profile Name' field, enter a friendly name to associate with the login details below.

For the HOST enter **localhost**

For the PORT enter **8333**

Select the **TCP/IP** [radio] connectivity method setting

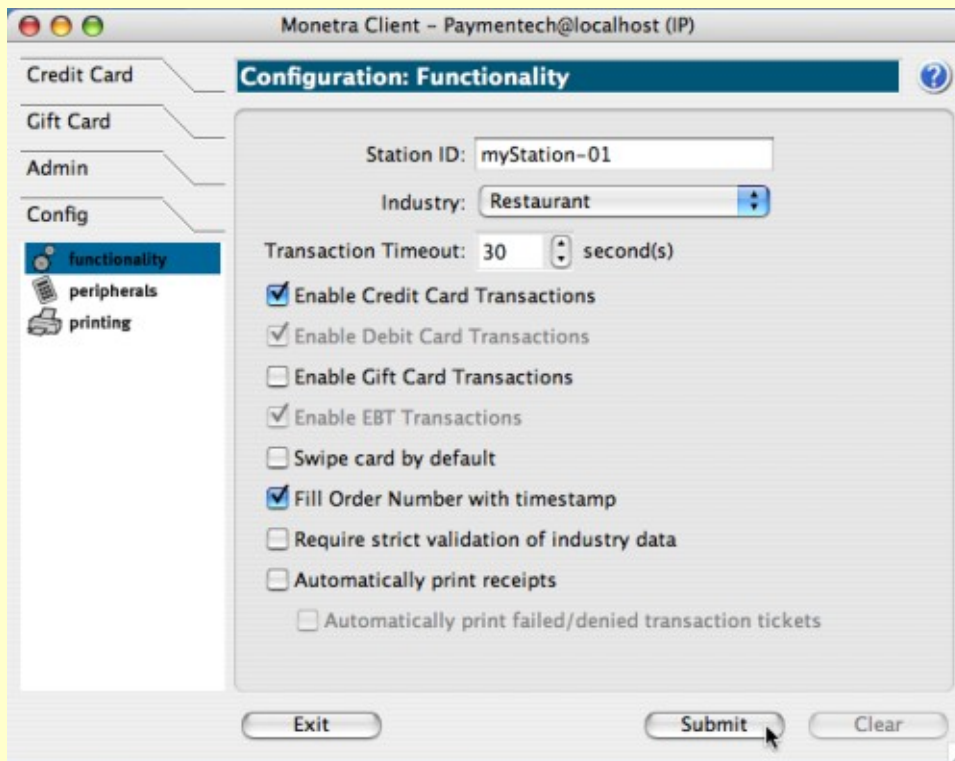
For the UserName use the entry assigned in the previous step ([5.5 adding the merchant profile](#)).

Click the 'Save Profile' button.

For the Password use the entry assigned in the previous step ([5.5 adding the merchant profile](#)).

Once the information above has been entered click Connect.

## 6.3 Monetra Client: Configure Functionality



Once logged into the Client application click the Config(uration) toolbox-bar (on left hand side) then select the functionality icon. You should see a window similar to the one pictured above.

Set the station ID to something unique (like station-1)

Set the industry dropdown to match your Merchant account Industry code (retail, mail/phone/ecommerce etc.)

Put a checkmark in each of the supported Transaction type boxes.

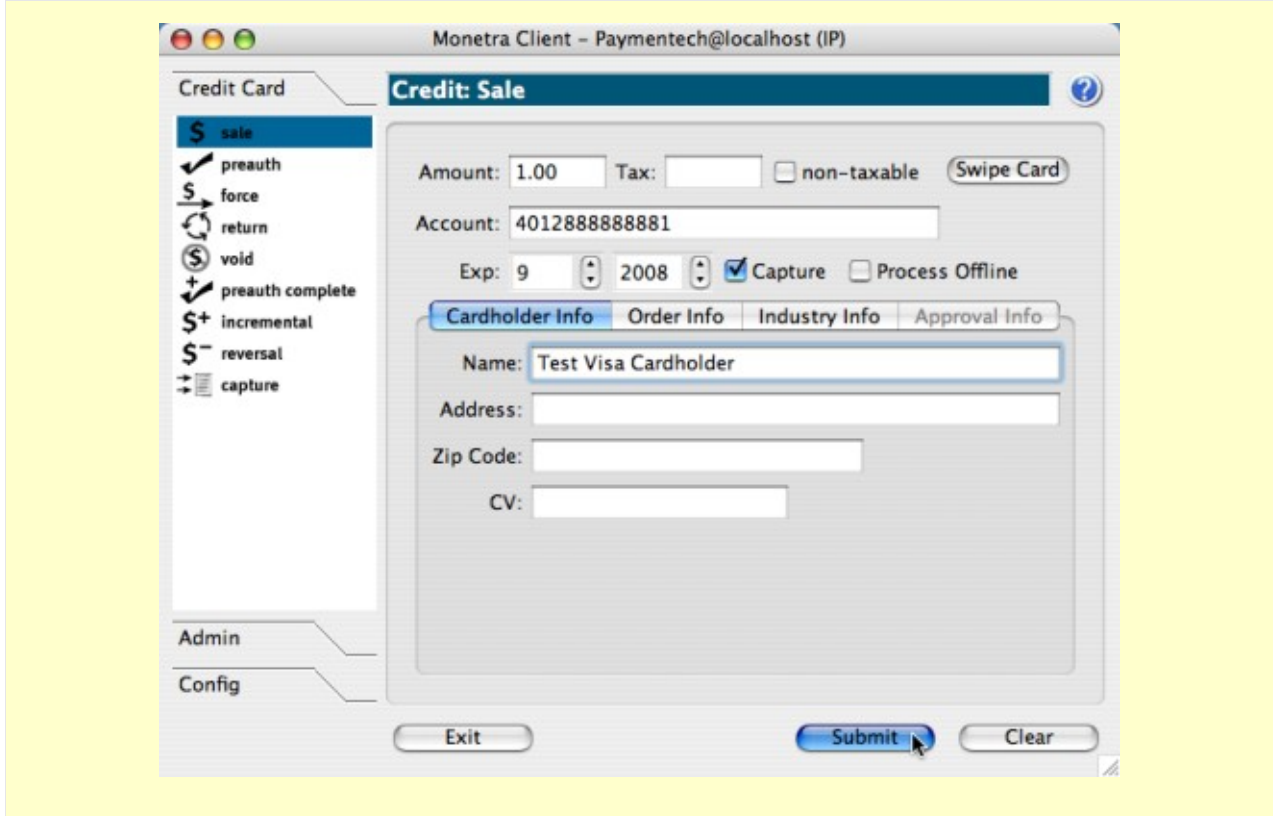
Click the 'Submit' button to save settings

Note: At any time you need help, or more documentation with the Client application, help is only a click away. In the upper right hand corner of each window you will see a BLUE QUESTIONMARK. This is the in-line help documentation system.

## 6.4 Test System Settings

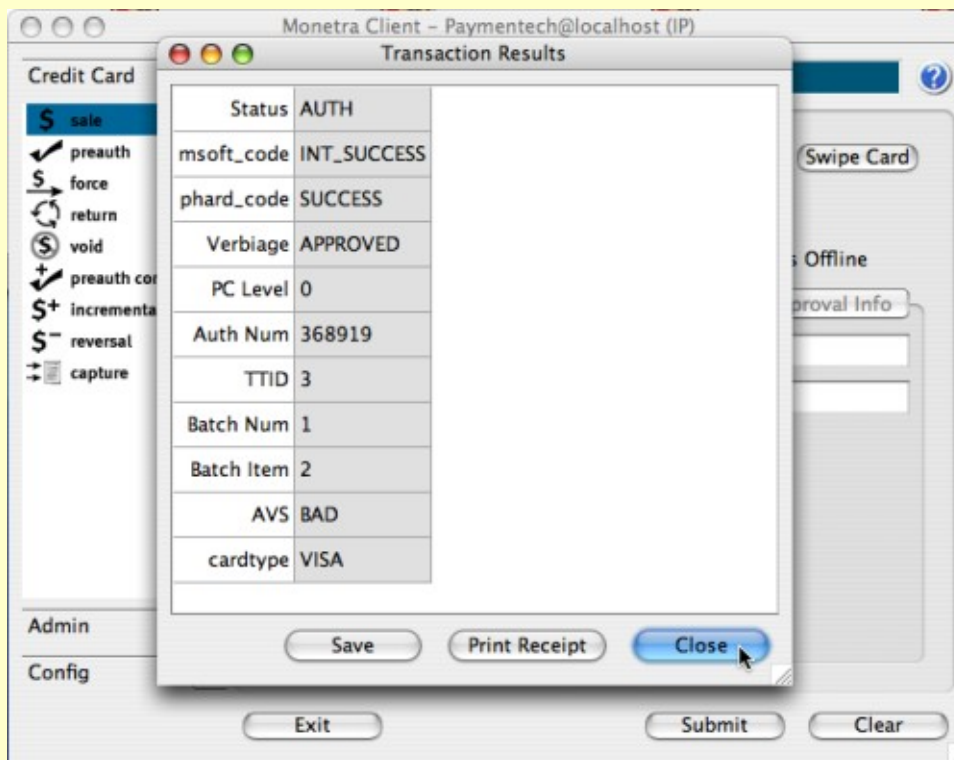
Upon initial configuration, and prior to going into a production environment, it is recommended to run a live transaction with your processor and verify the transaction went through the system with proper interchange messaging.

### 6.4.1 Credit Transaction: Test Sale



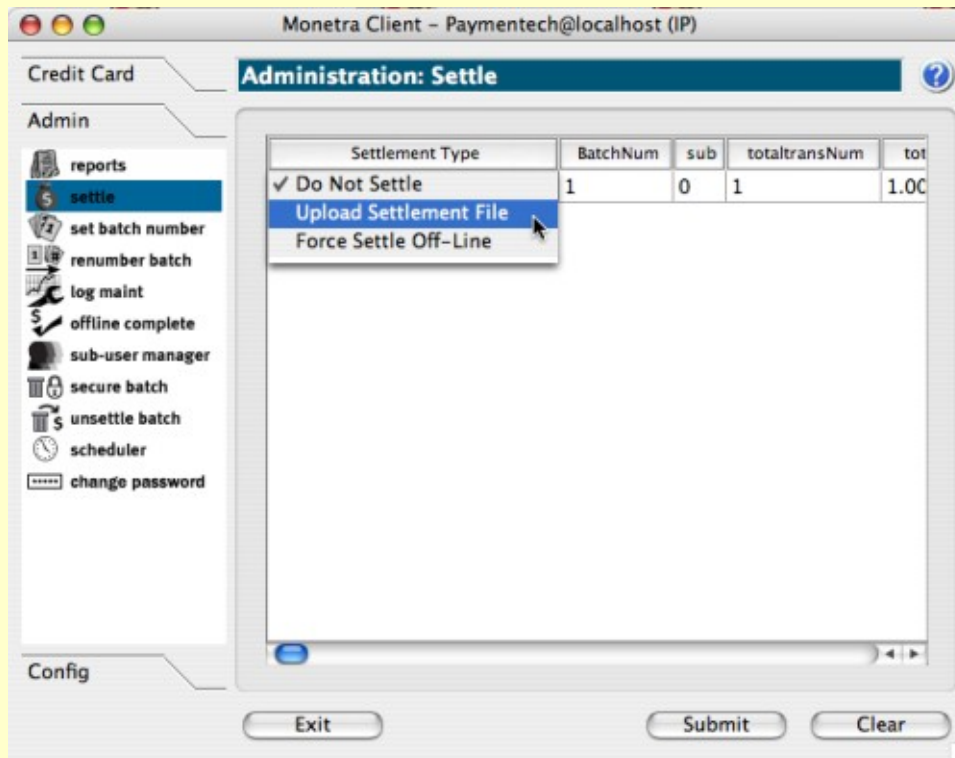
	Follow the steps below, to run a standard Credit Card Sale transaction.
Step 1	Select the Credit Card toolbar-button (left hand side)
Step 2	Select the Sale icon (below toolbar)
Step 3	Enter the transaction details: Sale amount (example: 1.00), Tax: (for reporting), Card Number(account) , Expiration date, the billing address and the security code(CV) (if keyed). <b>Note: If you are using a real merchant account you will need to use a real credit card.</b>
Step 4	Click the 'Submit' button and verify response.

## 6.4.2 Transaction Response: Sale



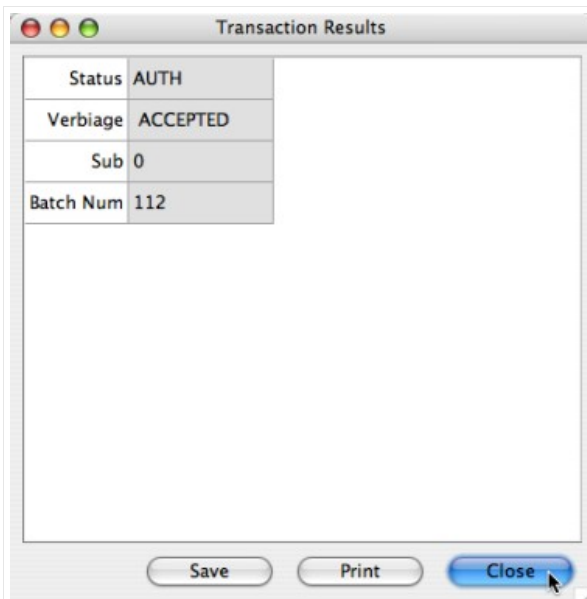
If everything was configured properly, you should get a status window with an AUTH verbiage APPROVED.

### 6.4.3 Credit Transaction: Test Settle



If the transaction response above was an Authorization, then you should have a transaction in an Open batch. To upload(settle) this batch, follow the procedures below.

- Step 1 Choose the 'Admin' tool-bar tab, on the left.
- Step 2 Choose the 'settle' icon, left side below tab.
- Step 3 Each batch will be represented by a row in the table. Choose the 'Upload Settlement File' option from the drop-down.
- Step 4 Click the 'Submit' button.



If you received a response to the settlement request similar to the one on the left, then the Monetra Payment System has been fully configured.

For more detailed information on all the available functions, please view the in-line help files for the Monetra Client and/or the Monetra Protocol guide located online at...

[www.mainstreetsoftworks.com/documentation.html](http://www.mainstreetsoftworks.com/documentation.html)