Monetra® Payment Software

Fast Start: Installation and Configuration Guide

Revision: 3.0

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Main Street Softworks, Inc.

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1 Fast Start: Overview

1.1 System Requirements

The Monetra Payment System (v7 and higher) requires the following system configuration.

Minimum	Recommended
Pentium III 700	Pentium IV
128 MB RAM	256 MB RAM
100 MB Available Disk Storage Space (for full Monetra Package)	
Network Card or Modem	
A vendor supported version of Microsoft Windows, such as Windows 7	

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.

> Note: Before continuing, you must have access to the Merchant Setup information (merchant-ID, terminal-ID etc.) as provisioned by your Merchant Services Provider.
>
> 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 before starting the procedure.

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: 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.monetra.com/downloads.html
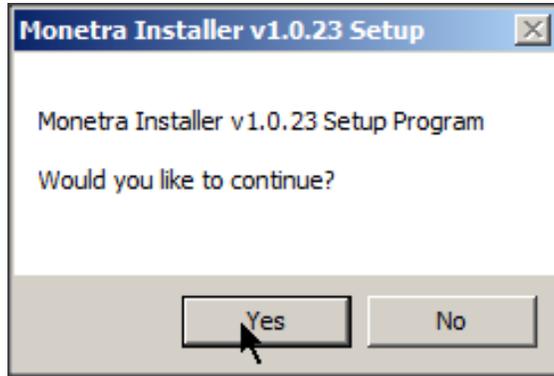
2.1 Extract the Monetra Installer

Run Installer

- Once you have downloaded the Monetra Installer package, double click the icon to extract and install the utility.
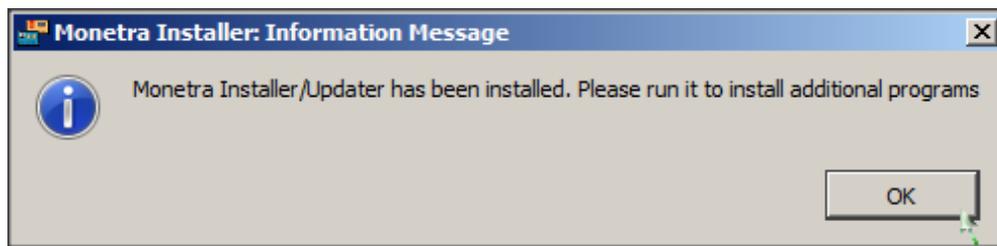
2.2 Setup the Monetra Installer

Setup Installer

Monetra Installer v1.0.23 Setup

Monetra Installer v1.0.23 Setup Program

Would you like to continue?

Yes   No

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

2. You will be presented with a software license agreement that you must accept to continue.

3. You will be asked to verify the install path. C:\program files\Main Street Softworks \Monetra\... Leave this setting unchanged.

2.3 Finalize Installation of the Monetra Installer

Finish Up

Monetra Installer: Information Message

Monetra Installer/Updater has been installed. Please run it to install additional programs
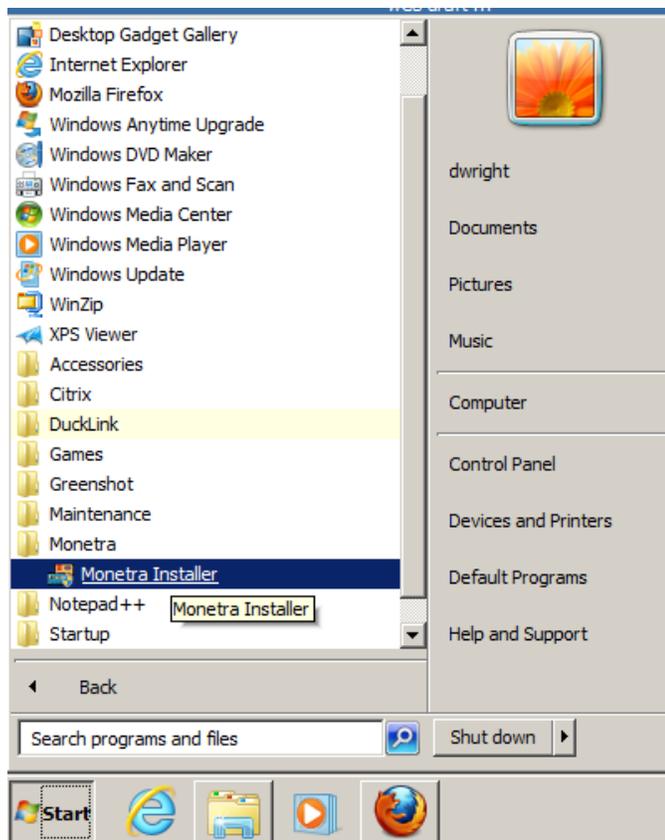
OK

1. Upon successful installation you should see a window similar to the one above.

2. You now have the Monetra Installer application on your computer and should use it to Add/Update or remove any further Main Street applications.

3 Download and Install Monetra Software

3.1 Run the Monetra Installer Application

Run Installer

1. To install additional Main Street software products you will run the Monetra Installer application. To execute the Installer application perform one of the following procedures.

2. A) Double Click the Monetra Installer icon on the desktop. OR B) START-->Programs-->Monetra-->Monetra Installer from the START menu (as illustrated above).

3.2 Monetra Installer 'Welcome'

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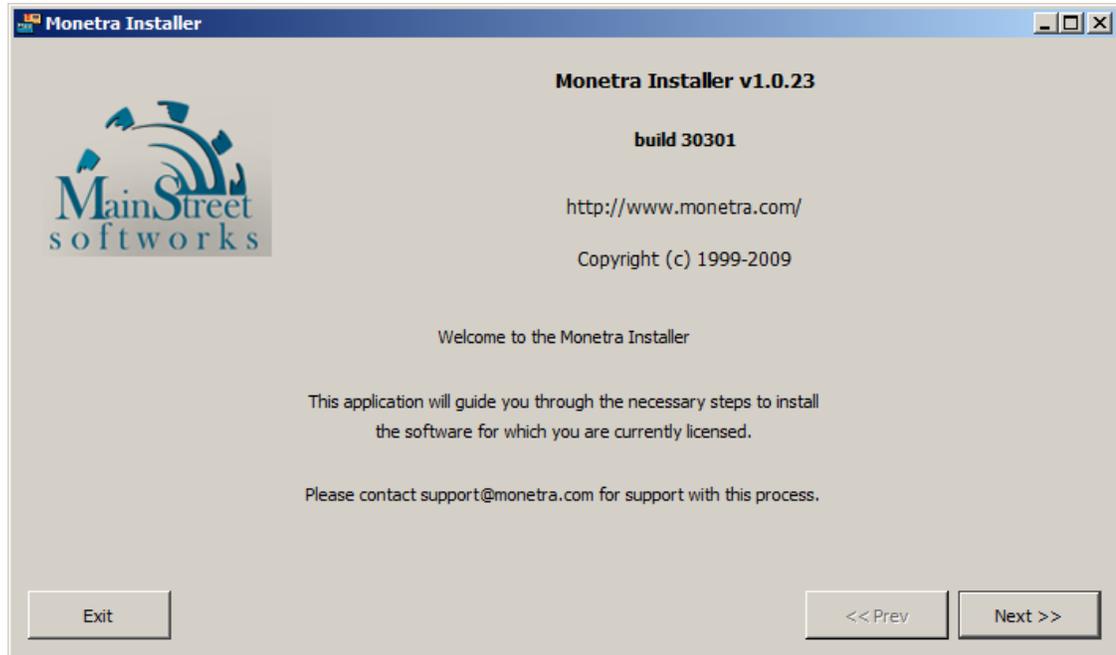
- You will be presented with a Welcome screen. Choose [Next].

3.3 Monetra Installer Login

Login

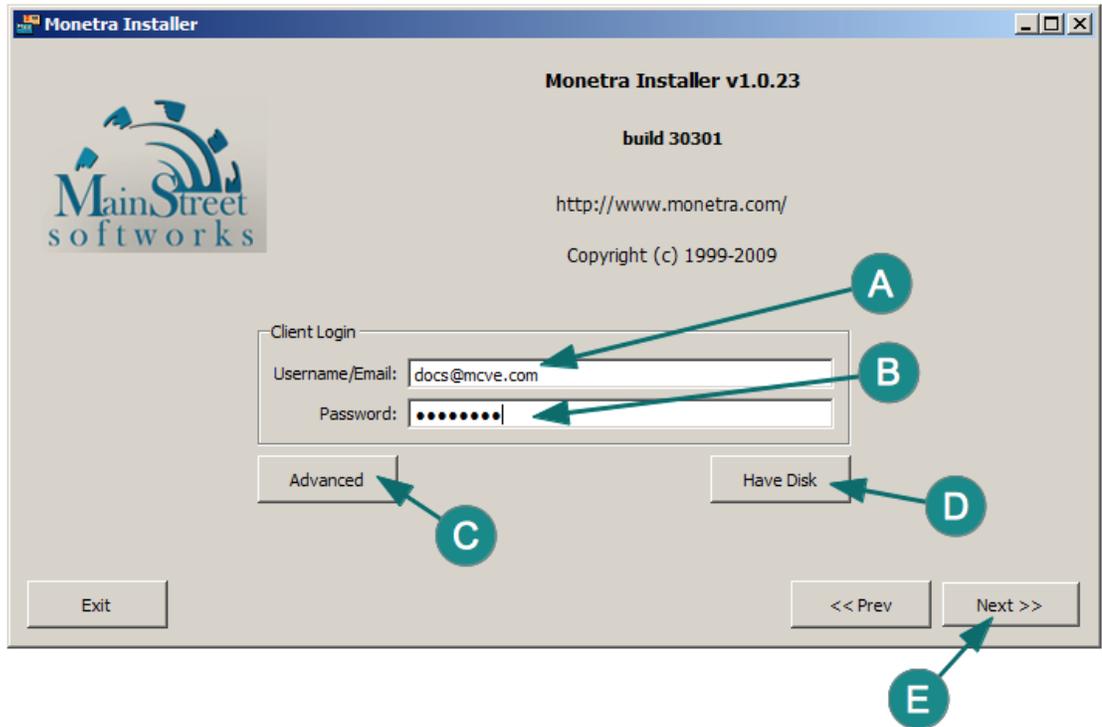1. A contact 'Username/Email' should have been supplied to you by Main Street Softworks or one of our authorized vendors. Enter the supplied Username into the filed [A].

2. A contact 'password' should have been supplied to you by Main Street Softworks or one of our authorized vendors. Enter the supplied password into the filed [B].

3. If your network uses a proxy server for Internet access you can click the Advanced [C] button and enter your proxy information.

4. If you have downloaded an offline package (not described in this document or procedure) you would choose the 'Have Disk' [D] button.

5. Once you have entered your user credentials click the Next [E] button.

Note: The credentials assigned by Main Street are used to access the www.monetra.com website and the installer application.

3.4 Available Software

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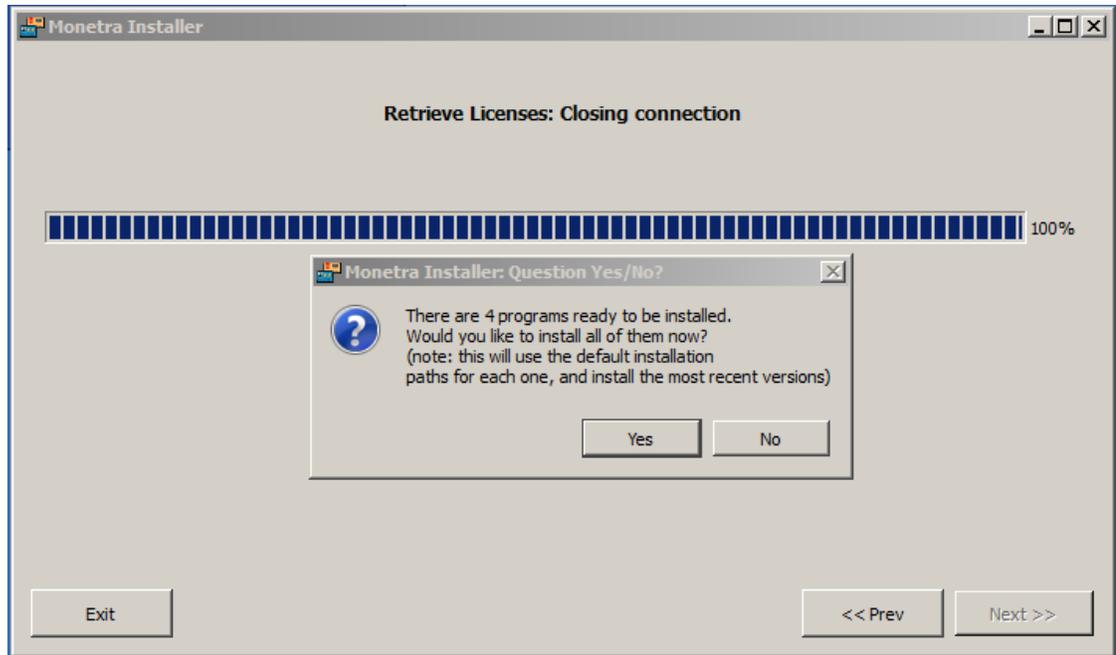
1. The installer will connect to Main Street Softworks and display a table presenting the Payment Engine and associated utility applications. Also at this point, an Install prompt should ask to install 'X' number of new products. Click yes.

2. 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

Finish Base Install
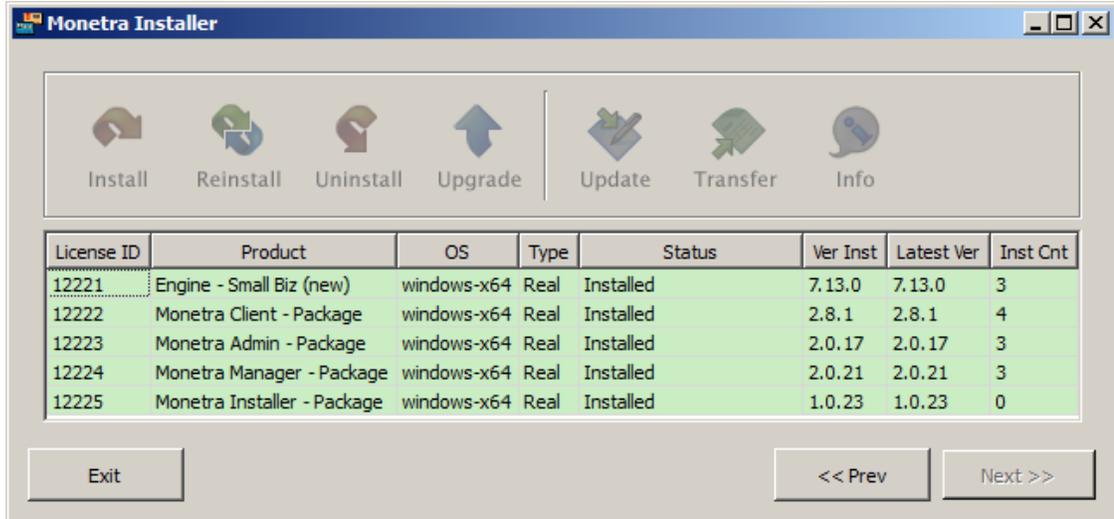
1. When the download is complete you should see a table (similar to the above image) notifying you of the items you installed.

2. You should now have the following products installed on your machine.

   - **Monetra Installer** – The software distribution and update tool you just used.
   - **Monetra Payment Engine** – This is the core 'Server/Engine' that's actually certified with the various processors to move data from any Client applications to your configured 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 transaction and batch administration. Examples would be voids, returns, batch settlement evolutions 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. Note: This application must reside on the same physical machine as the Payment Engine.
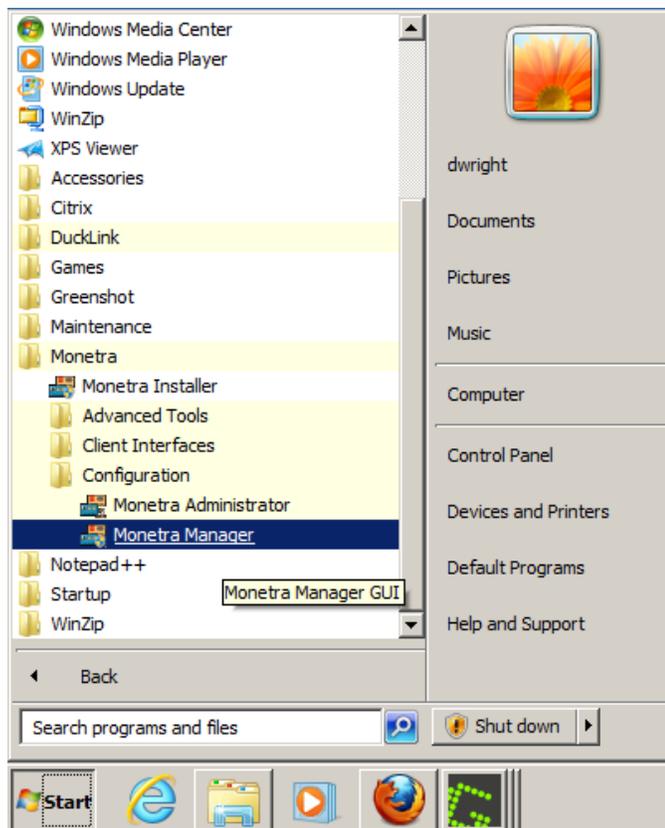
If all applications were successfully installed, it is now time to configure the remaining software applications.

4 Configure the Monetra Payment Server

4.1 Run the Monetra Manager Utility

Run Manager

- Run the Monetra Manager via the START-->All Programs-->Monetra-->Configuration-->Monetra Manager.
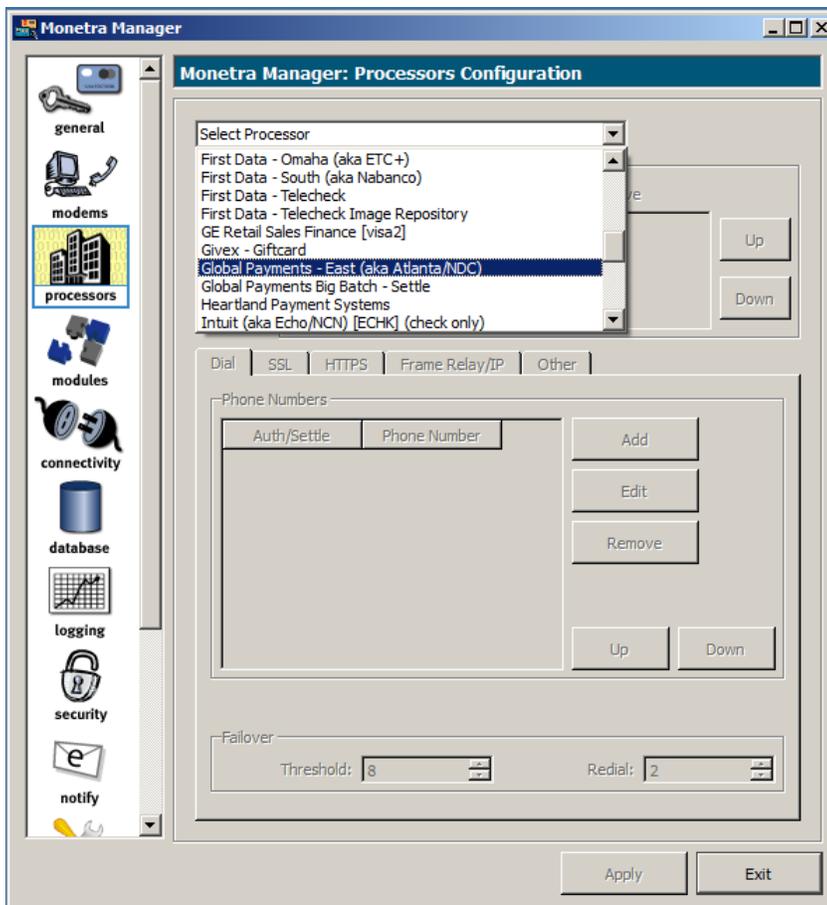
4.2 Generate Encryption Key

Gen Key

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

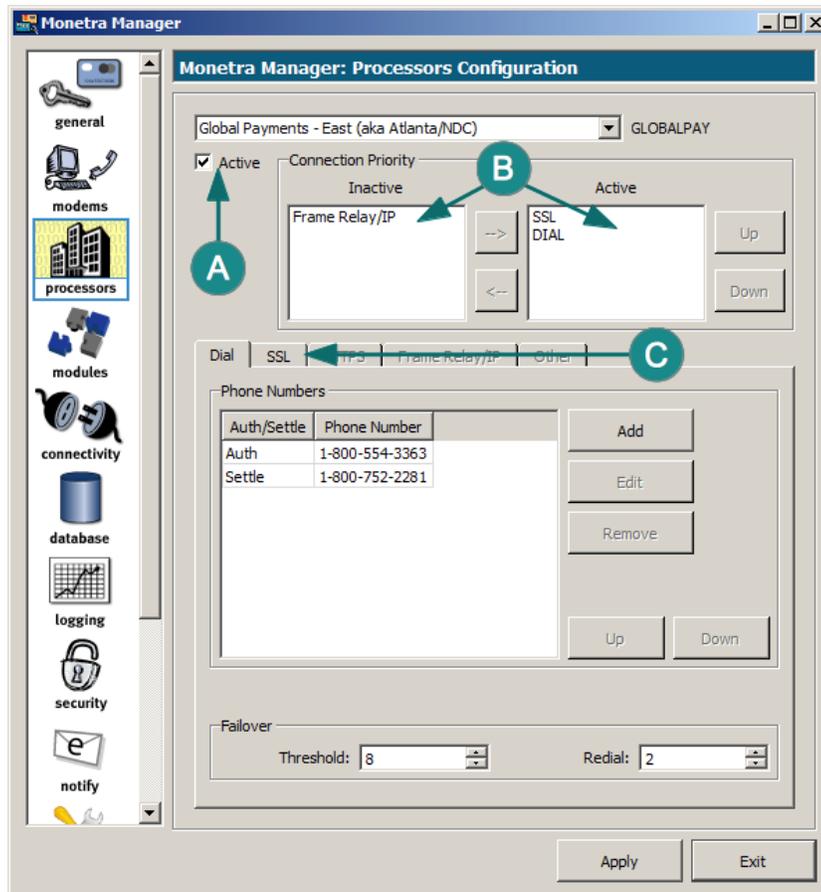## 4.3 Payment Processor(s) Configuration: Select

Processor Activate

1. Select the 'Processors' icon (left hand bar) to configure processor connectivity.

2. Choose your corresponding processor from the drop-down list.

## 4.4 Payment Processor(s) Configuration: Settings

Processor Connection

1. Place a check mark in the 'Active' [A] setting.

2. Move any items that are in the ACTIVE [B] 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 (right hand) column.

3. If you use a modem to connect, verify (and set if needed) the Auth and Settle phone numbers. [C]. Note: Your processor should supply this information to you. Also, if you use a modem, please configure the modem section via the Modem icon (left hand navigation panel).

4. Verify and/or set any Internet (HTTPS) settings [C]. Again supplied by processor.

5. Click APPLY on the bottom right of the Manager Utility.

4.5 Save Settings: Restart Monetra Server

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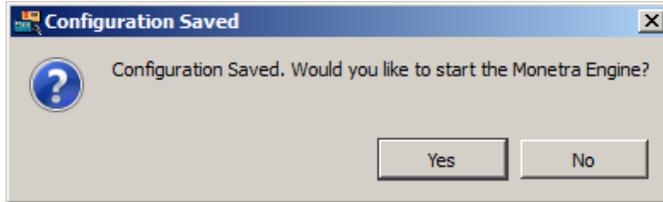
- Once a configuration is changed/edited you will be presented with a window asking to restart Monetra engine. Click YES.

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

5 Add Your Merchant Profile
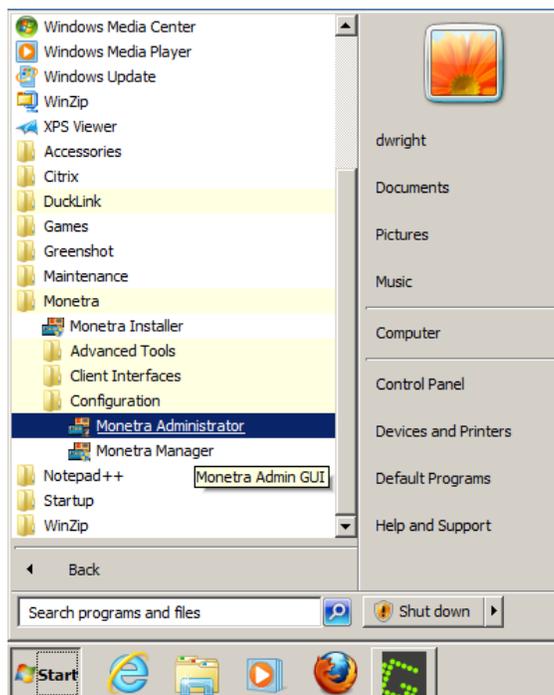
5.1 Run the Monetra Administrator

Note: 1. More detailed instructions are available for this procedure via the Monetra Installation Guide.

2. 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.monetra.com/documentation.html and clicking on the 'Monetra User Setup Worksheets' link.

3. 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 [http://www.monetra.com/content/faq.html]for more details.
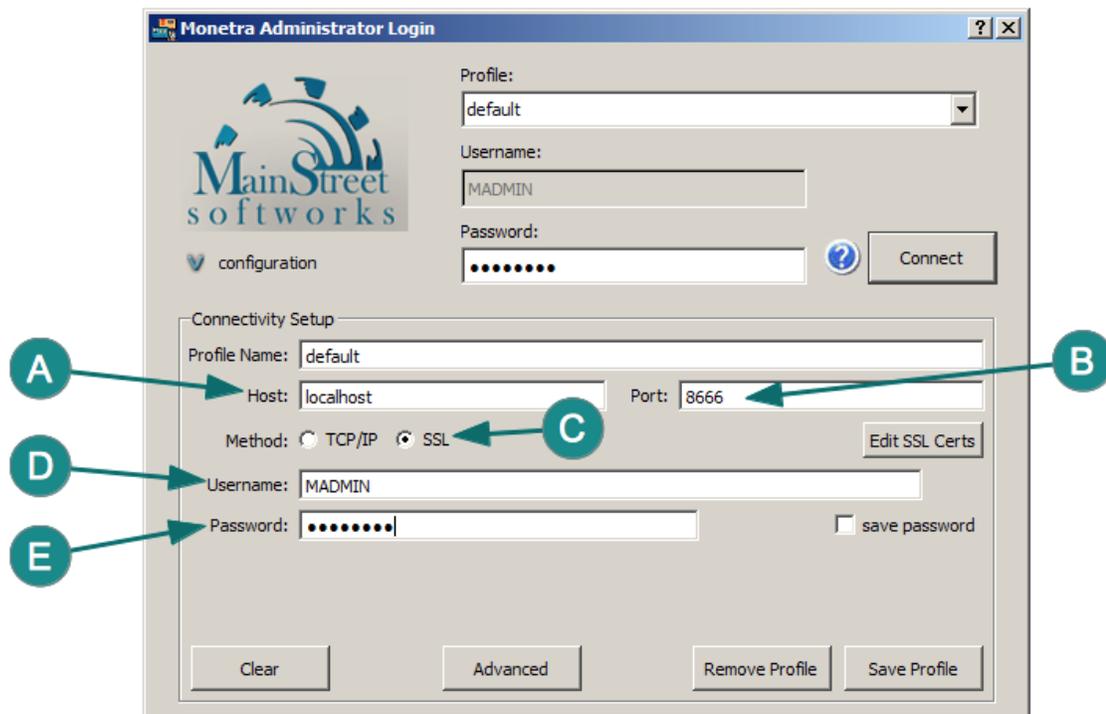
Launch Administrator

- Run the Administrator via the START-->All Programs-->Monetra-->Configuration-->Monetra Administrator.

## 5.2 Administrator Application Login

Administrator Login

1. For the HOST [A] enter **localhost**.

2. For the PORT [B] enter **8666**

3. DO NOT change the default Engine Admin UserName from **MADMIN**

4. For the default Password enter **password** (note! Upon initial login to the Administrator utility, you will be warned, and should change/remember the default application administrative (MADMIN) password.)

5. Once the information above has been entered, click Connect.

## 5.3 Monetra Administrator: Change Password

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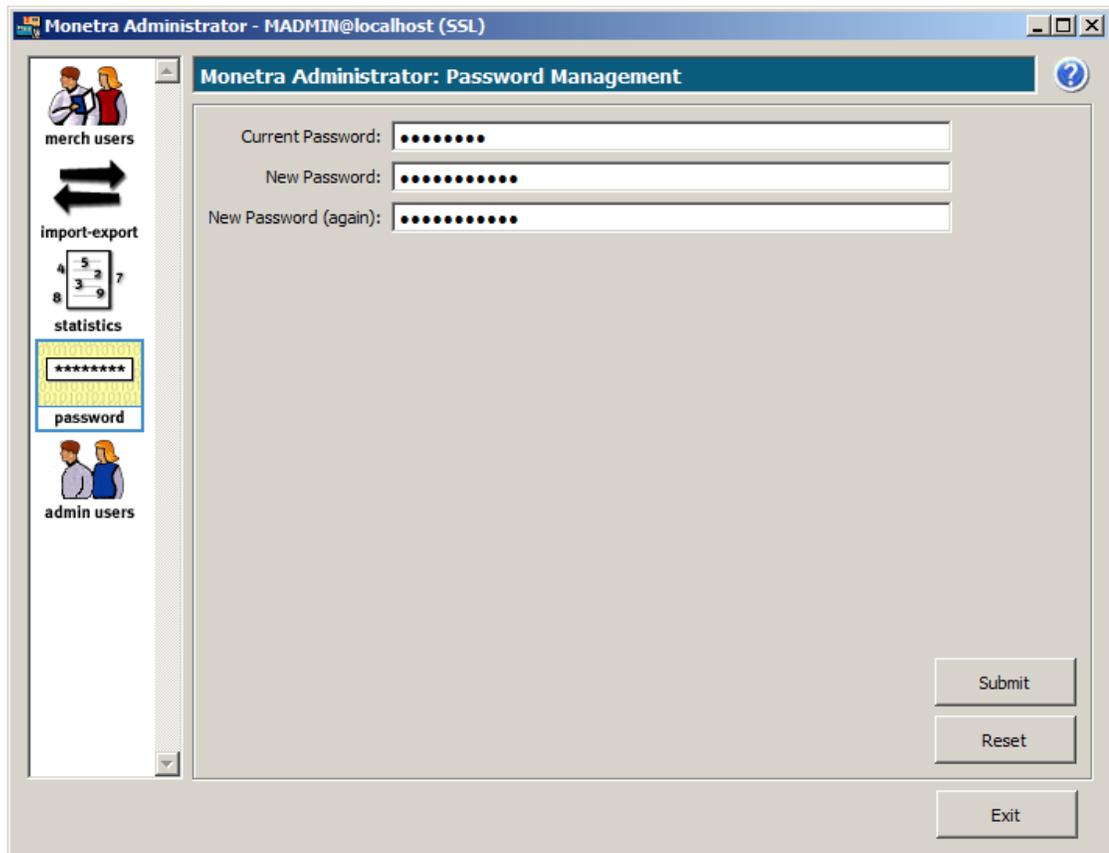
1. You should now be logged into the Administrator utility and presented with a warning about the default password. To change the default password, click OK.

2. 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

3. Click the 'Submit' button.

5.4 Monetra Administrator: Add Merchant(user)

Add User
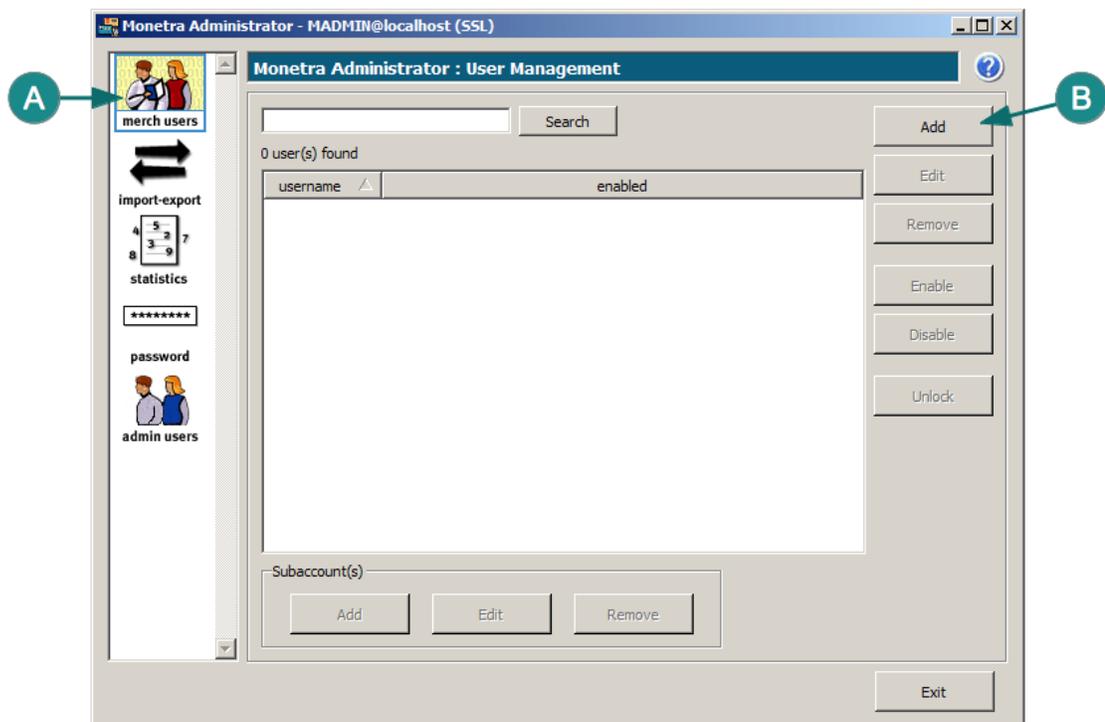
1. Choose the 'User Admin' icon [A] on the top left.

2. Click the 'Add' button [B] in the upper right hand side.

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

## 5.5 Monetra Administrator: Enter Merchant Parameters

Add User

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 profile configurations, so please keep it handy.

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 Monetra Client profile configurations, so please keep it handy.

3. Select the Processor that supports the merchant-ID information.

4. 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.

5. For the Card-Types click the button to the right and check off all supported card types.

6. Enter the remaining merchant fields. Note1: This information should have been supplied by your ISO or account rep. Note2: The fields in red are REQUIRED and all information (such as field length, alpha/numeric will be displayed below).

7. Click Submit. You should now have an active merchant profile on the Payment Server. The next step will be to configure and test the Monetra Client.

6 Configure the Monetra Client Software

6.1 Run the Monetra Client

Run Client Application
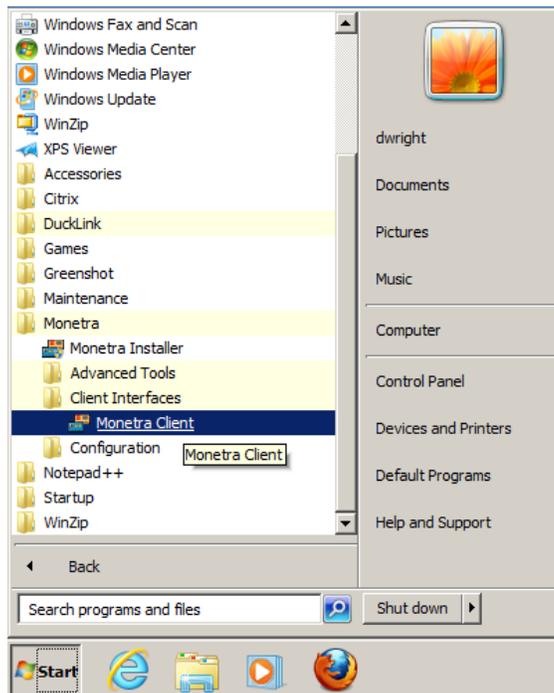
- Run the Monetra Client application via the START-->All Programs--> Monetra--> Client Interfaces--> Monetra Client.

6.2 Monetra Client: Profile/Login

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

Client Login

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

2. For the HOST enter **localhost**.

3. Select the SSL [radio] connectivity method setting.

4. For the PORT enter **8665**.

5. For the UserName use the entry assigned in the previous step.

6. Click the 'Save Profile' button.

7. For the Password use the entry assigned in the previous step.

8. Once the information above has been entered click Connect.

6.3 Monetra Client: Configure Functionality

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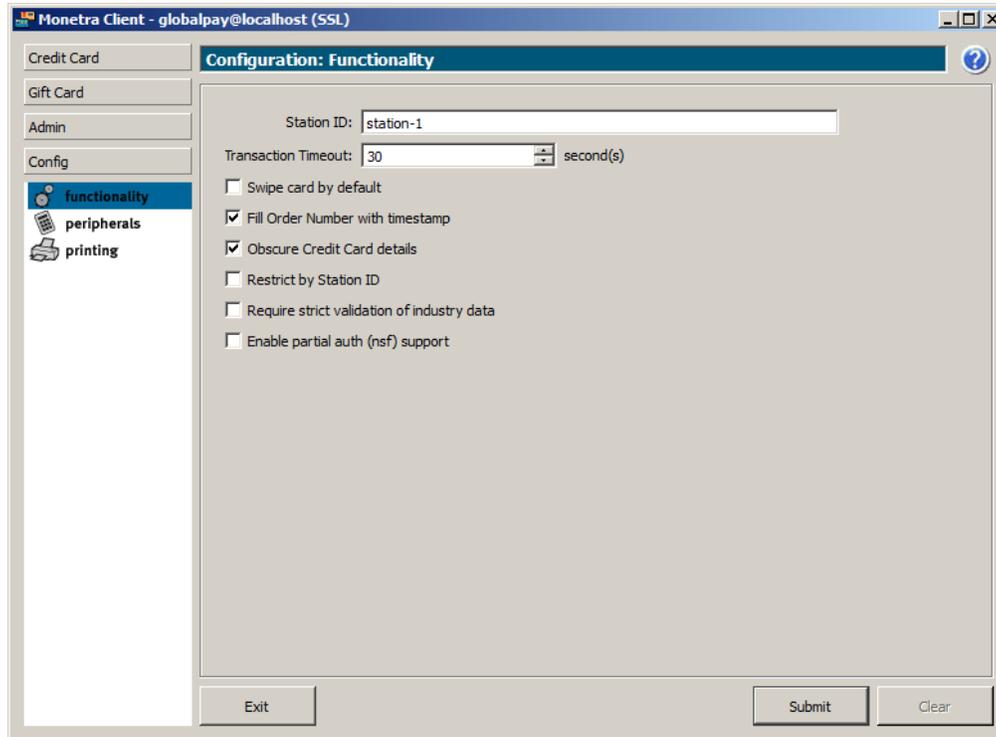
1. Once logged into the Client application click the 'Config' toolbox-bar (on left hand side) then select the functionality icon. You should see a window similar to the one pictured above.

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

3. Click the 'Submit' button.

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 QUESTION MARK. 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.
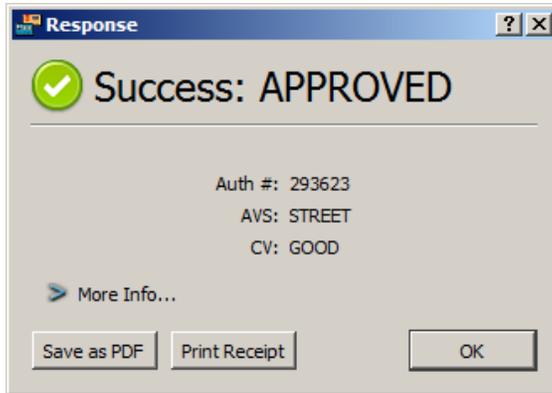
6.4.1 Credit Transaction: Test Sale

Run Sale

1. Select the Credit Card toolbar-button (left hand side).

2. Select the Sale icon (below toolbar).

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). Note: If you are using a **real** merchant account you will need to use a **real credit card**.

4. Click the 'Submit' button.
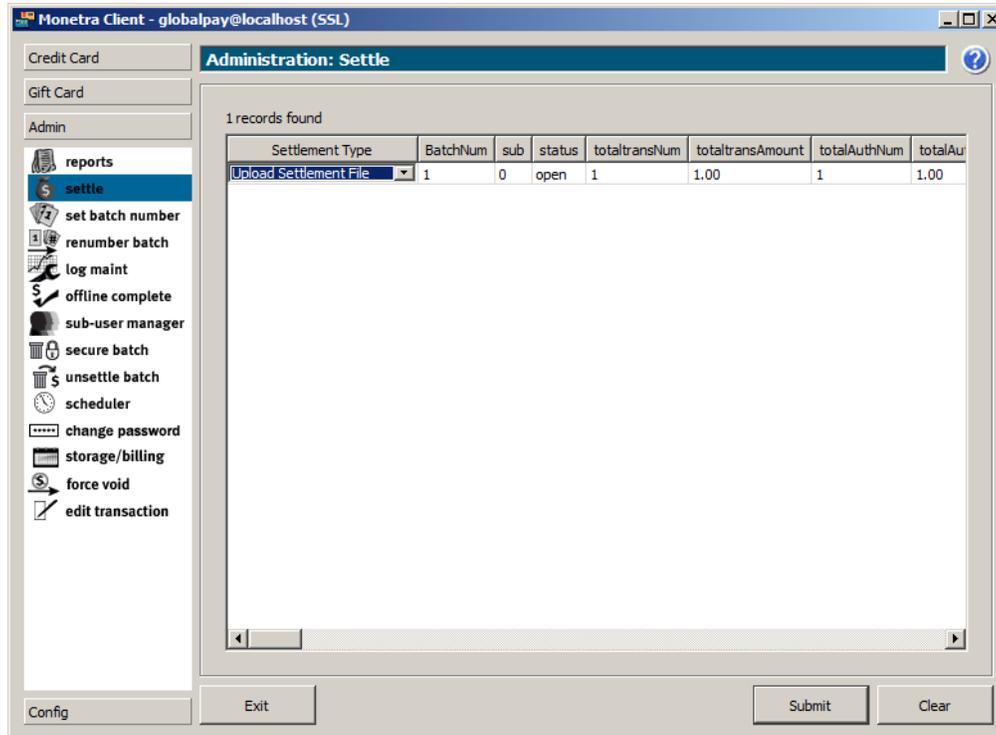
6.4.2 Transaction Response: Sale

Response

- If everything was configured properly, you should get a status window with an AUTH # and verbiage APPROVED.
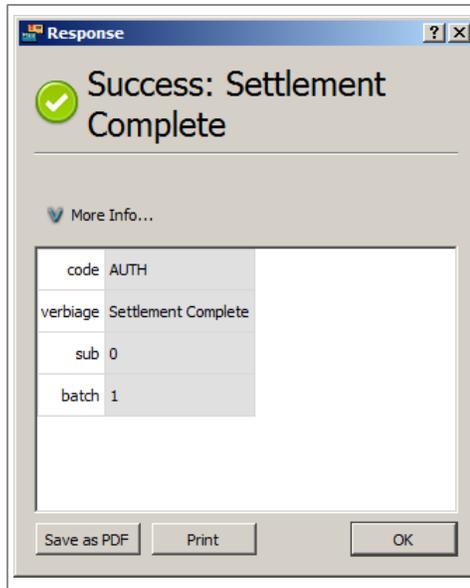
6.4.3 Credit Transaction: Test Settle

Response

1. Choose the 'Admin' tool-bar tab, on the left.

2. Choose the 'settle' icon, left side below tab.

3. Each batch will be represented by a row in the table. Choose the 'Upload Settlement File' option from the drop-down.

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 of the available functions, please view the in-line help files for the Monetra Client and/or the Monetra Protocol guide located online at...

http://www.monetra.com/documentation.html