EVO Integration Guide

Introduction:
The Evo integration requires Touch v11.0.002 or above and a minimum dotnet version 4.7.2.

Touch Licence:
- Touch needs to be licenced for the **Chip & Pin** module

Touch Settings:
- Search in settings for **Chip &** to locate the two settings below.
- Select the **'EVO'** option for the Chip & Pin Reader Type setting
- Select the tender used for the Chip & Pin Reader on Tender setting

- Search in settings for **EVO** to locate the setting below and enter the IP Address of the EVO Payment terminal.
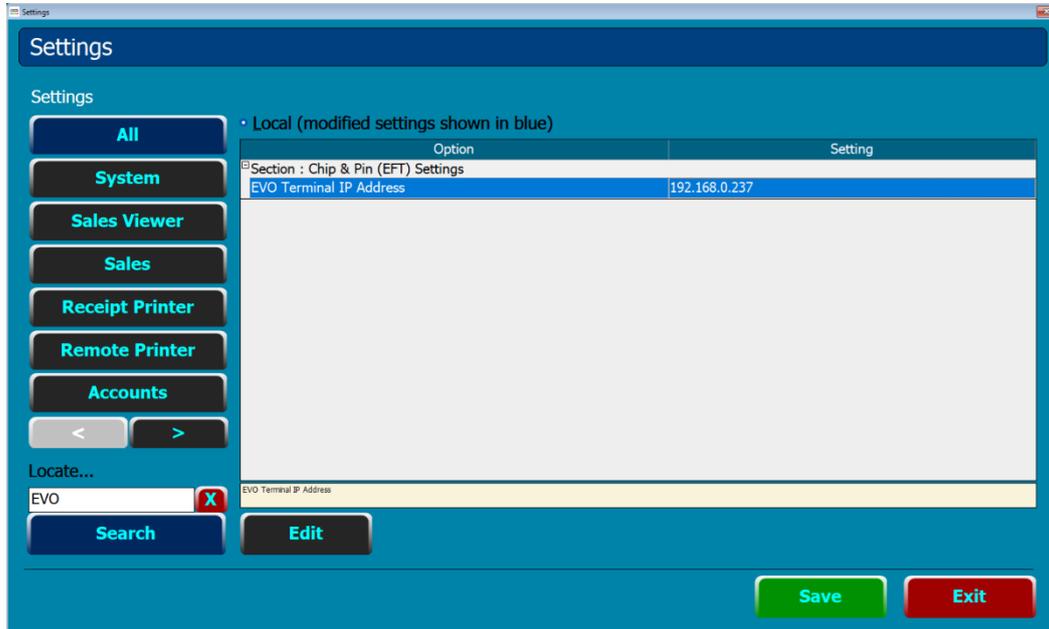
EVO button Commands:

The button commands below are used for the EVO integration.

EVOCONNECTIONTEST	Does a test connection to the payment terminal.
EVOTMS	Runs a TMS call on the payment terminal.
EVOPREAUTH	Opens the EVO Pre Auth screen.
EVOSETTLEMENT	Runs the end of day settlement.

Connection Test:

Set up a button in sales mode with the command EVOCONNECTIONTEST. Make sure the terminal is powered on with the Diamond Cloud app running and press the EVOCONNECTIONTEST button, the message below will show if the connection test is successful.
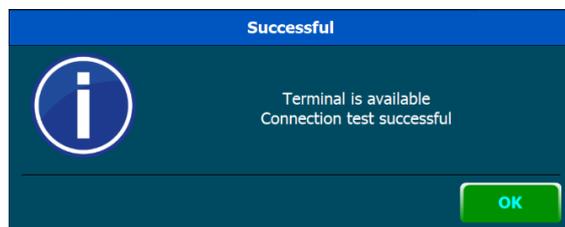
If the connection test is not successful, the message below will be displayed.
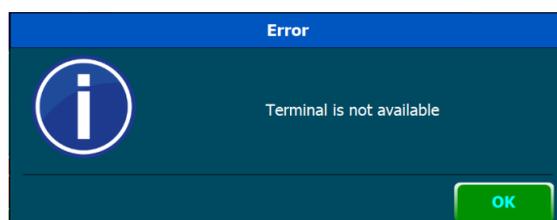
Print on POS Settings:

Printing on the payment terminal is controlled by EVO/Bank of Ireland. They need to be contacted to turn the printing on or off on the terminal.

The 4 settings below were updated on Touch v11.0.019 and are generic for all payment integrations that support print on POS.

Card Payments Print Customer Copy on POS Printer - Set to YES to print Customer Copy on POS
Card Payments Print Merchant Copy on POS Printer - Set to YES to print Merchant Copy on POS
Card Payments Print on POS Printer - Set to YES to enable printing on the POS Printer.

Note: Printing can be enabled on the POS printer and the payment terminal.

Card Payments Prompt for Contactless Customer Receipt – This setting is not used on the EVO integration as it will prompt for the customer receipt for every transaction. The print customer receipt prompt works on both print on POS and printing on the payment terminal.
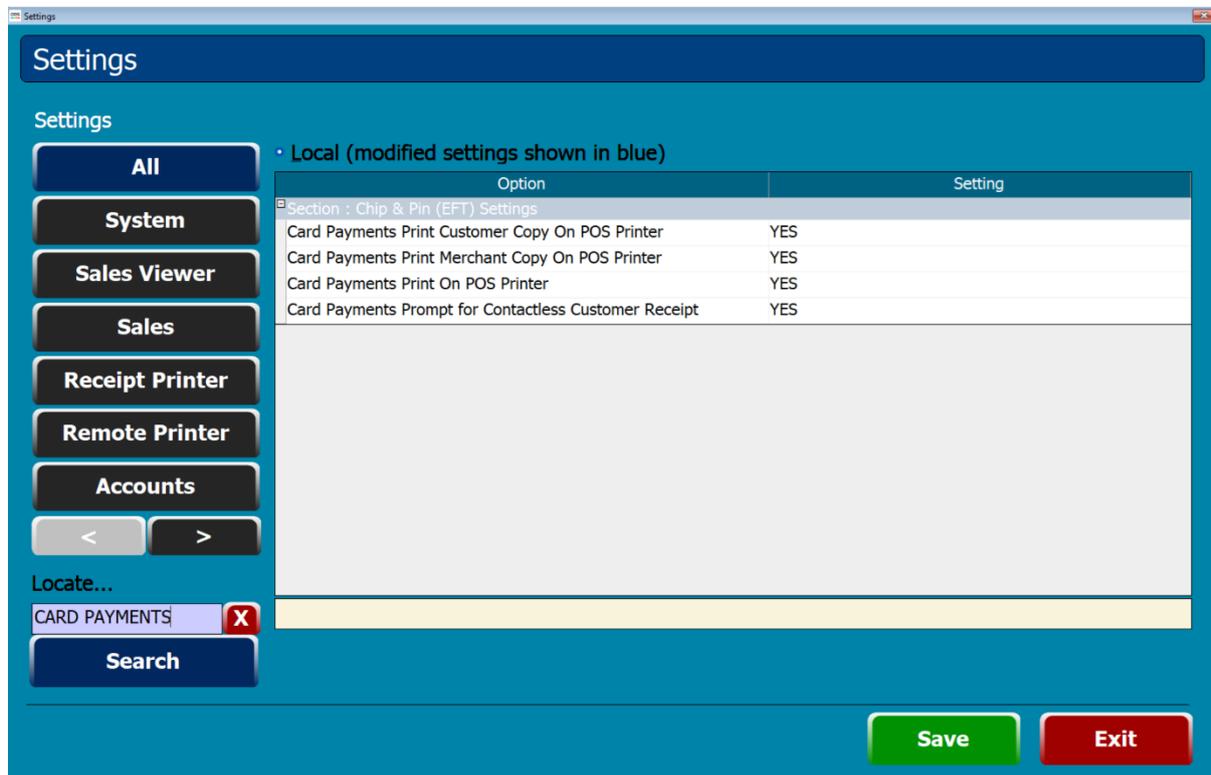
Processing Sales:

Finalise sales using the Chip & Pin tender and follow the on-screen prompts.
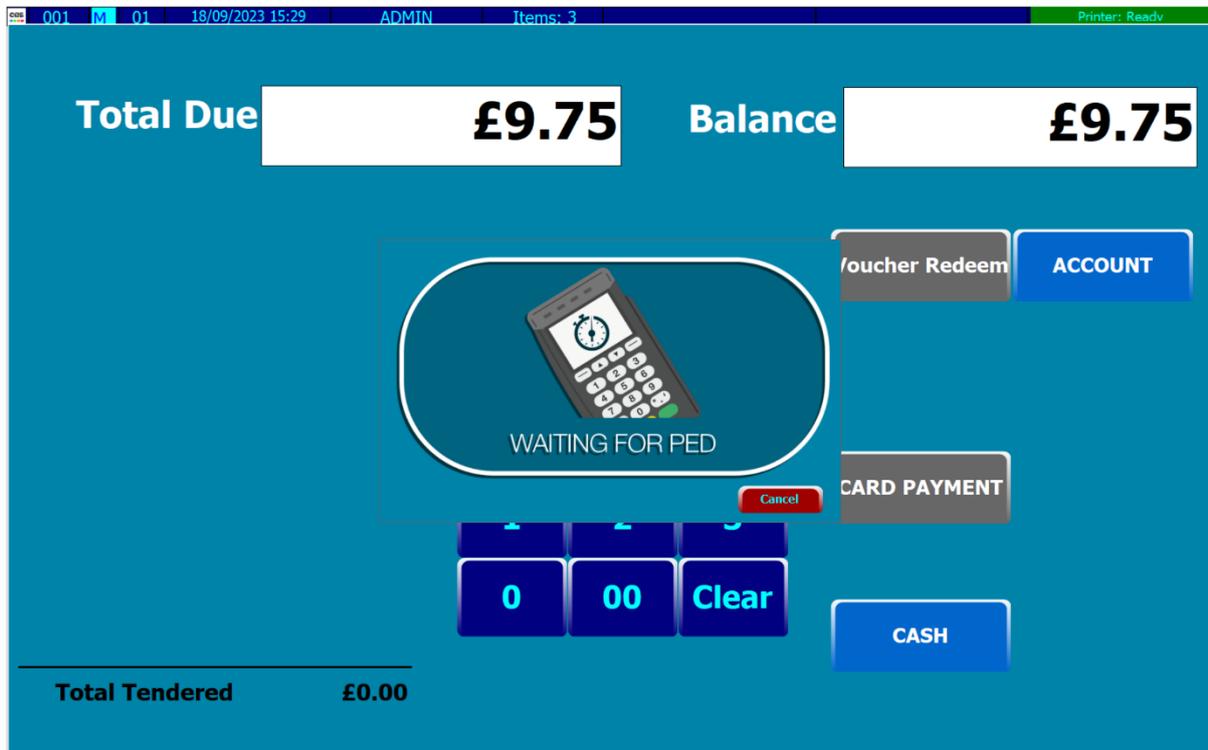
Once the transaction value hits the payment terminal the prompt below will show until the transaction to be complete on the Payment Terminal
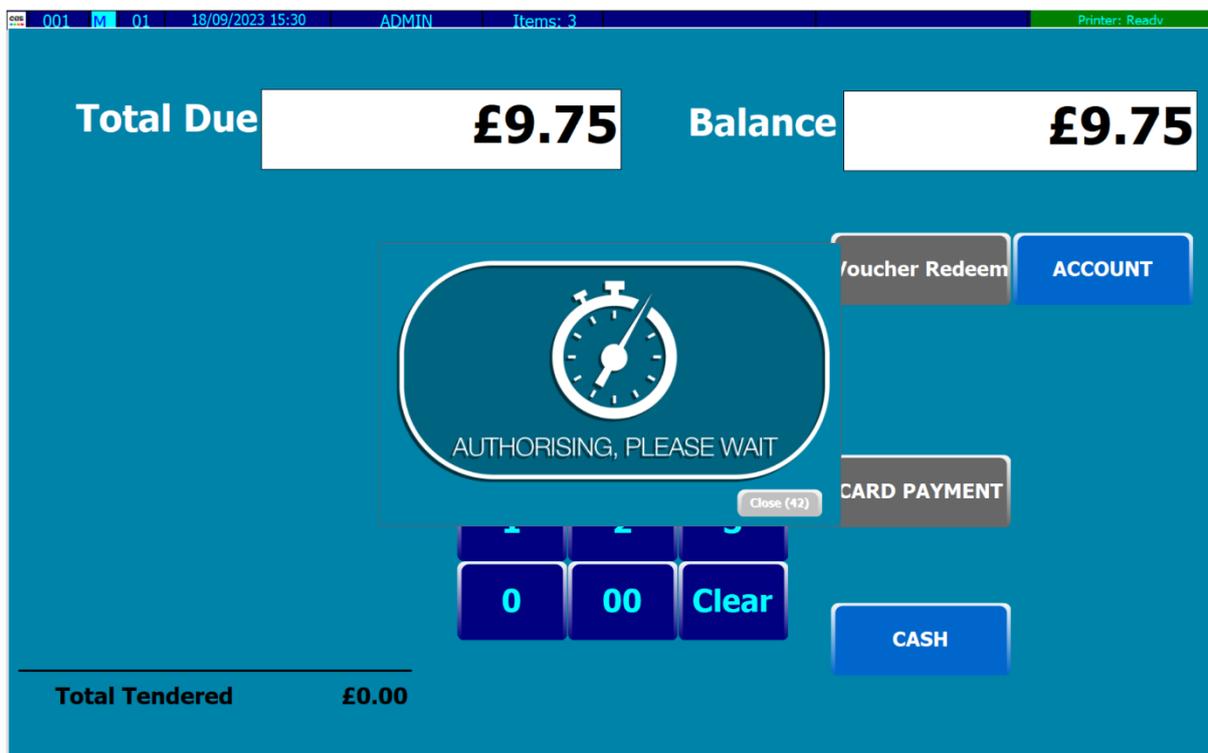
If the transaction is successful, the sale will get finalised and show the screen below.
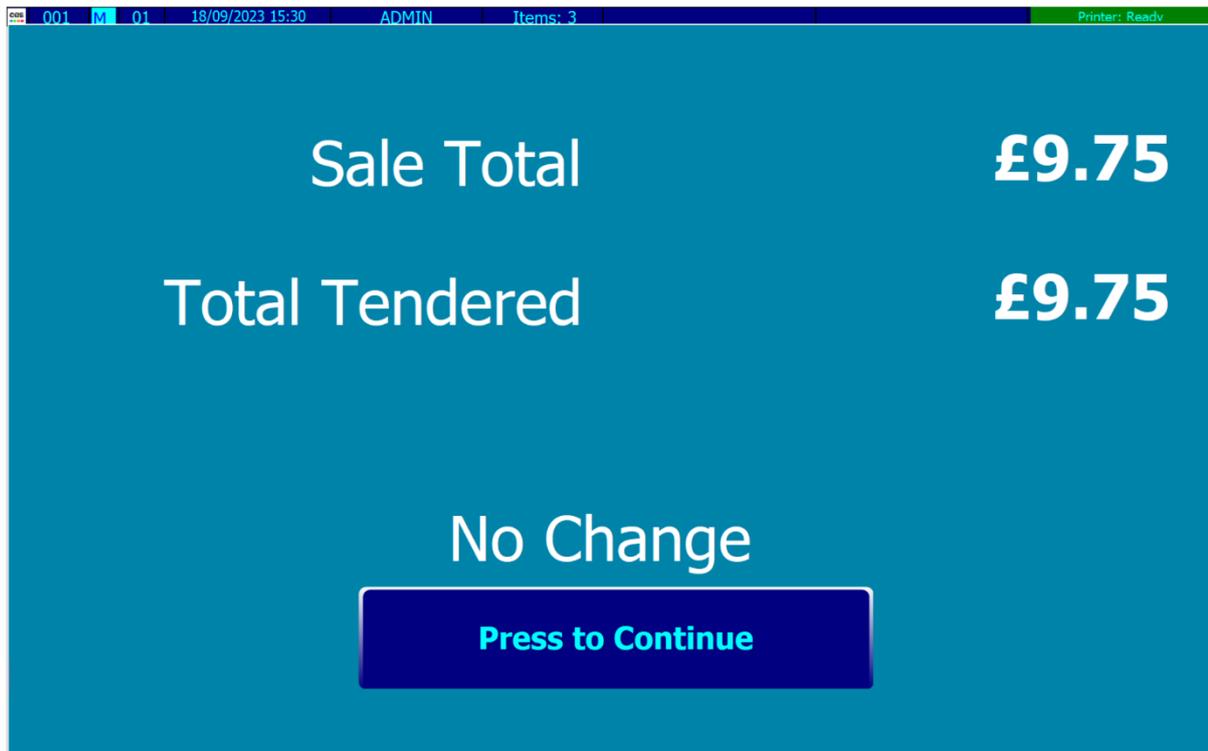
If the transaction is declined the terminal will show a Transaction Rejected message and prompt to print the customer receipt and the message below will show. At this stage you can press **Close** and try with a different card or different method of payment or void the transaction if the customer has no other means to pay.
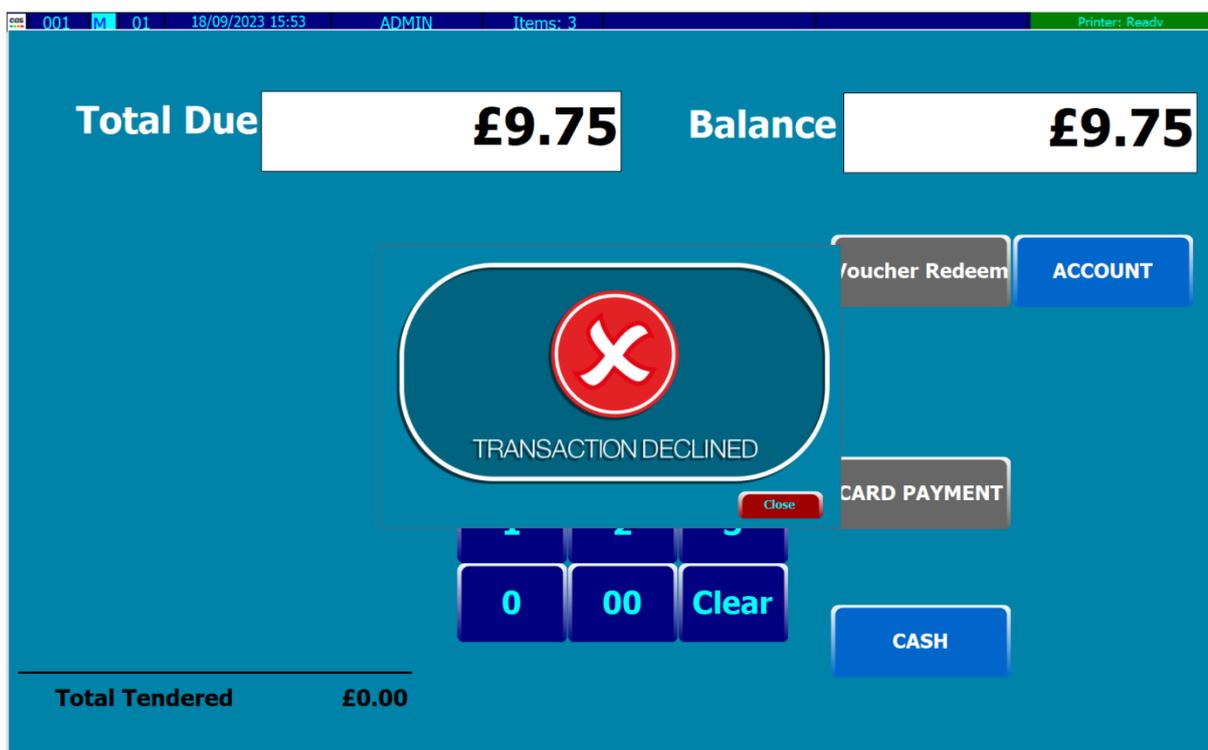
Customer not Present:

For Customer not Present transactions when the amount has gone to the payment terminal press the keypad icon on the terminal screen as highlighted below.

The screen below will then display where the card number is entered on the keypad, type in the card number and press Confirm.
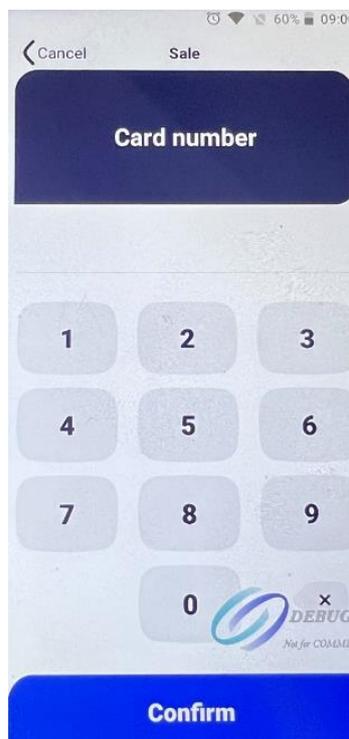
Next enter the Expiry Date, enter as 4 digits MMYY and press confirm.
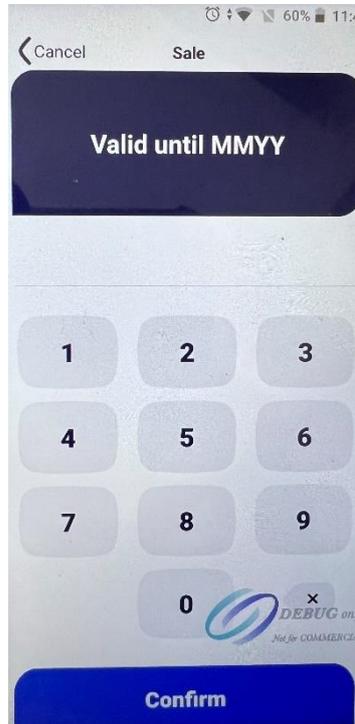
Next select one of the MOTO type options below.
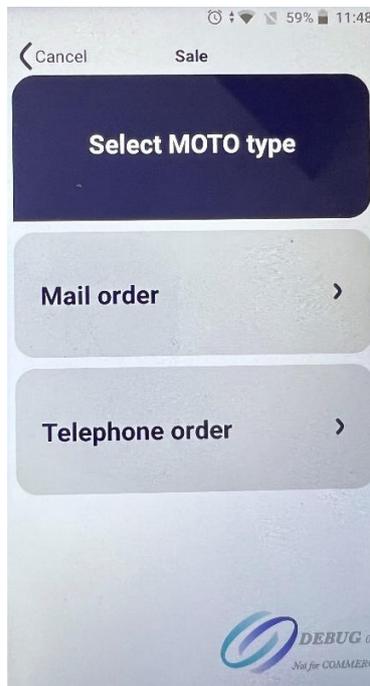
Now enter the 3 digit CVC2 code and press confirm

The terminal will then go to the authorisation process and pass the result back to the POS.

Cancel Transaction:

Once a transaction amount has been sent to the payment terminal to cancel it you need to press the cancel button on the card terminal. Once cancel is pressed the screen on the right will be displayed on the terminal.

The screen below will be displayed once the cancel comes back from the terminal.
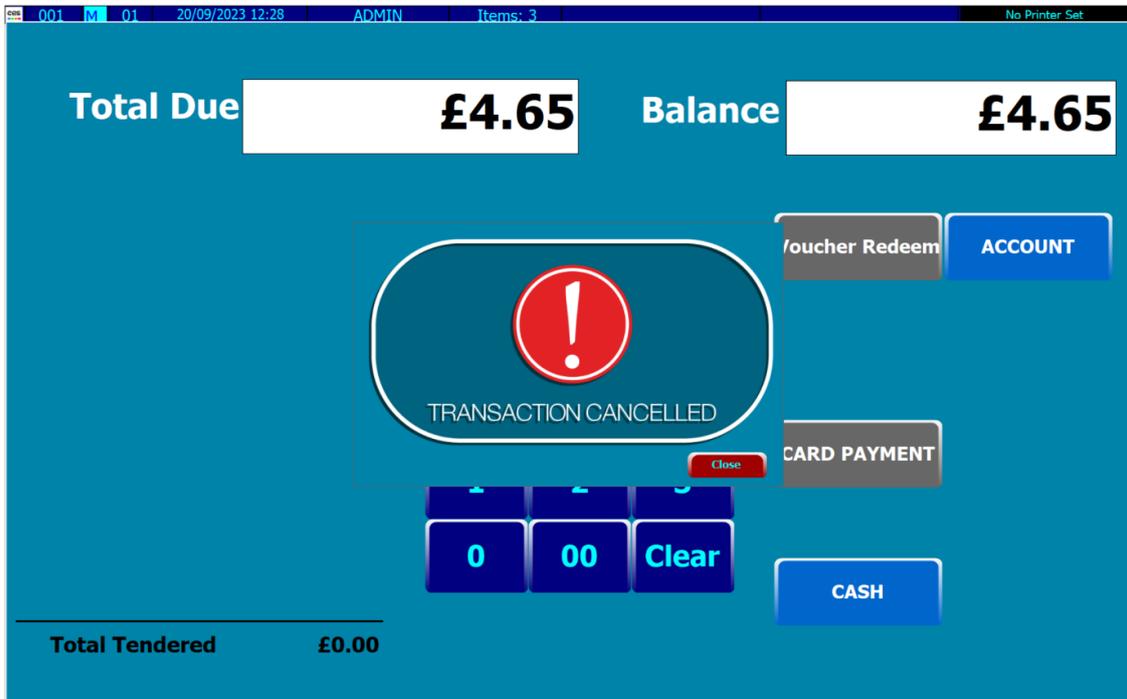
Terminal Not Available:

The message below will show when sending a transaction if there is an issue with the payment terminal where it cannot receive the transaction amount. If this message shows check the terminal and make sure it is powered on and connected to the internet.,
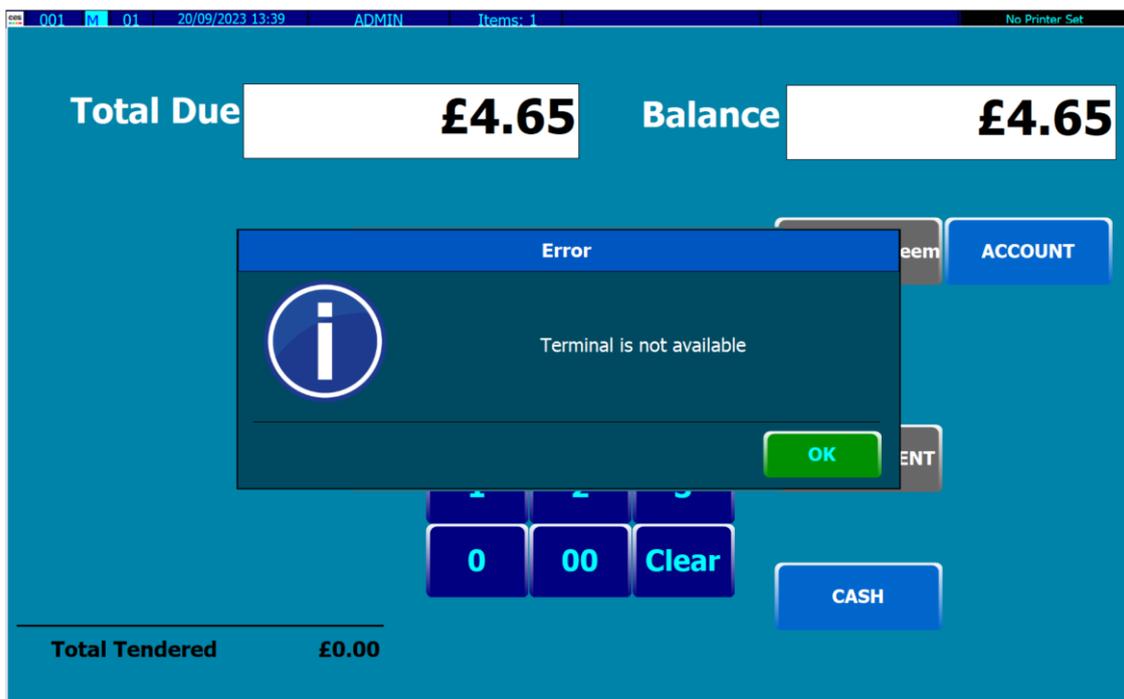
Refunds/Void Transactions.

There are 2 options that can be used for refunds with the EVO integration.

(1) Open refunds where items are refunded and the transaction is finalised using the card payment tender. After presenting the card the payment terminal will prompt for the administrator password.

(2) Any transaction for the current day before the settlement has run can be voided. The original transaction can be found in the Sales Review screen, highlight the transaction and press the refund option in the sales review screen. When the transaction is finalised and goes to the payment terminal it will be voided automatically without prompting for the card to be presented and the payment terminal will print the refund receipts.

Tips:

If enabled the terminal will prompt for Tips when it receives a transaction. When a tip has been added Touch will prompt the message below when it completes the transaction. The tips will report as Gratuity on the Touch terminal reports.

DCC (Direct Currency Conversion):

If enabled the terminal will prompt for DCC when a foreign card is used giving the option of which currency to pay with. If the foreign currency is used the transaction will complete on Touch as normal, the DCC details showing conversion rate etc will print on the receipts.

When doing refunds the payment terminal will prompt change currency, if YES is pressed the payment terminal will prompt a list of currencies, select the currency and it will then prompt for the exchange rate and amount in foreign currency (you will need the original card receipt to get those details). Follow the prompts to the terminal to complete the refund.

Pre Auth:

The pre auth function works with customers and requires a customer record to be open before it can be used. The screen below is accessed using the **EVOPREAUTH** button command.
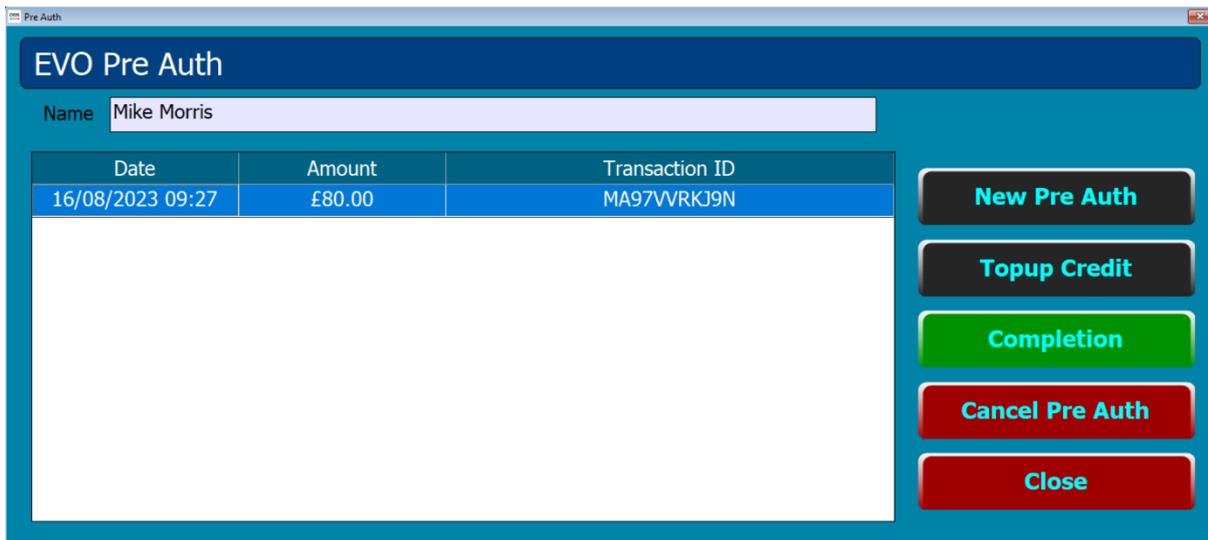
The pre auth functions are as follows.

- **New Pre Auth**
  Press the New Pre Auth button, enter the amount on the number pad and press the Accept button. Then follow the prompts on the terminal to insert the card and enter the PIN, the Pre Auth receipts will print.

- **Top Up Credit**
  Highlight the Pre Auth and Press the Topup Credit button, enter the top amount on the number pad and press the Accept button. The terminal will process the Top Up and print the receipts without the card being required.

- **Completion**
  When completing a Pre Auth highlight the Pre Auth and press the Completion button, the Pre Auth will be active in the background for when the card tender is pressed. Complete the transaction as normal pressing the card payment tender and the pre auth details will be sent to the payment terminal. **Note:** the transaction amount cannot be higher than the pre auth value, if it is the payment terminal will reject it.

- **Cancel Pre Auth**
  Highlight the Pre Auth to be cancelled and press the Cancel Pre Auth button, the payment terminal will display VOIDED and print Pre Auth cancelled receipts.
  Note: if there is an issue cancelling a Pre Auth such as the Pre auth has expired the payment terminal will display No transactions on Terminal.

The message box below will prompt giving the option to remove the Pre Auth from the list.
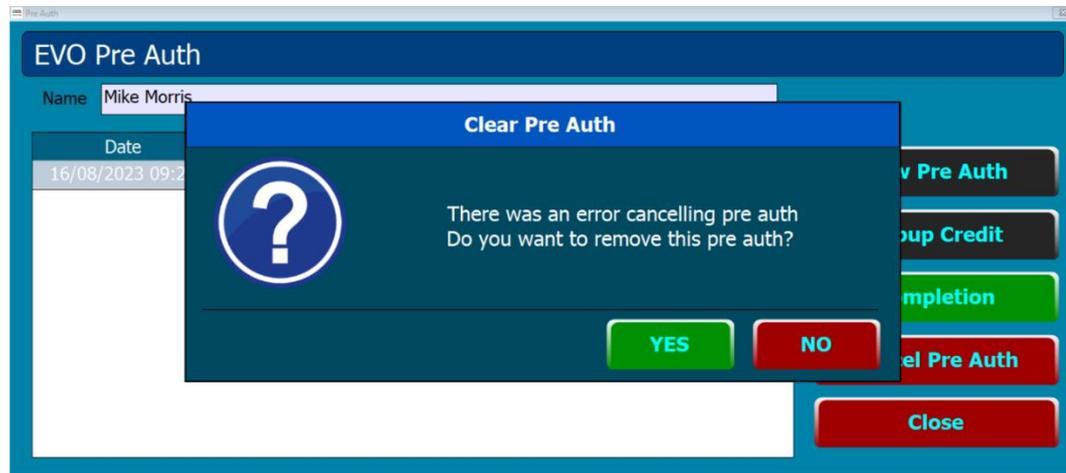
Notes:

Things to be aware of

- The payment terminal needs a minimum of 20% battery charge to work.
- Print on POS is not supported.
- Cancel from POS is not supported.