

# SmartPay integration

## SmartPay Integration

As part of the Point of Sale feature in Standard ERP and Standard POS, the SmartPay integration is available for Australia and New Zealand. With SmartPay, it enables users to sell items and receive payments through EFTPOS terminals. This is the first integration in HansaWorld products that supports Cash Withdrawal and Purchase with Cash Withdrawal.

This document will describe the technical requirements, including all the necessary details and settings required to enable the feature.

## Settings in Standard ERP

1. Go to **System module >> Settings >> Company Info.** Go to Fonts card and ensure that in the GST Law field it either says Australian or New Zealand only.

**SAMPLE: Company Info: Inspect**

Company Name HansaWorld Sample Company  
Business Name \_\_\_\_\_

Address Reg Email **Fonts**

Character Set 311 **GST Law New Zealand**  
DB Encoding \_\_\_\_\_ Def. Mail Encoding \_\_\_\_\_  
Report Font Size 0 Language NZE  
Edit Font \_\_\_\_\_  
Report Font \_\_\_\_\_  
Company Logo File \_\_\_\_\_

2. Go to **System module >> Settings >> Access Groups** to manage the access rights for this feature.

In the relevant access group, input the following information in a new row to allow for Cash Withdrawal:

**Type:** Action  
**Item:** Allow Cash Withdrawal  
**Level:** Full  
**Open Type:** 0

In the same access group, input the following information in a new row to allow for Negative Cash Out Amount:

**Type:** Action  
**Item:** Negative Amount on Cash Out  
**Level:** Full  
**Open Type:** 0

In the same access group to ensure access in Point of Sales module, input the following information in a new row:

**Type:** Module  
**Item:** Point of Sales  
**Level:** Full  
**Open Type:** 0

Then quit the application and re-launch it again.

Type	Item	Level	Open Type
1 Module	Point of Sales	Full	0
2 Action	Allow Cash Withdrawal	Full	0
3 Action	Negative Amount on Cash Out	Full	0
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			

3. Go to **User Settings module >> Settings >> Local Machine.** In the Code field, select the code of the relevant Till Terminal. Then, go to the POS card. In the Terminal ID field, type a unique ID.

**Local Machine: Inspect**

Code T01

Defaults Fonts Hotel Integrations User Defined **POS** POS Appearance

Supervisor \_\_\_\_\_  
Bagger \_\_\_\_\_  
Price List \_\_\_\_\_  
**Terminal ID 1** Selected row Page 0  
POS Button Group \_\_\_\_\_  
Fiscal Printer Elect. Journal Path \_\_\_\_\_  
Fiscal Printer Elect. Journal Path 2 \_\_\_\_\_  
Table View \_\_\_\_\_  
Bar Tab Class \_\_\_\_\_  
Default Restaurant Item Class \_\_\_\_\_  
Kitchen Order Screen Department \_\_\_\_\_  
Kitchen Order Screen Refresh Interval \_\_\_\_\_  
 Detailed Kitchen Order Screen  
 One Active Bar Tab

Bluetooth Name \_\_\_\_\_  
Bluetooth MAC Addr \_\_\_\_\_

Item Pictures in POS Invoices  Default Bagger and Supervisor on POS Invoice  
 Use Cash Display  Show Bagger on POS Invoice  
 Use Customer Display  Require Authorization Code for Credit Card Payments  
 Open NumPad  Hide Quantity in POS Invoices and Bar Tabs  
 Paired  Hide Item Code in POS Invoices and Bar Tabs  
 Incremental Receipt Printing

4. Go to **Accounts Receivable (Sales Ledger) module >> Settings >> Payment Modes.** To allow for Cash Withdrawal Payment Modes, in a new row, add a Code and Comment. Then fill in the following fields as described:  
**Account:** The relevant account for the Cash Withdrawal Payment

Code	Account	Comment	Bank A/C No.	Bank Name	Bank
1 B1	11110	ANZ	11111111	HansaWorld D...	ANZ
2 B2	11115	Common...	22222222	HansaWorld D...	CBA
3 CA	11140	Cash			
4 CQ	11110	Cheque			
5 DD	11110	Direct D...			
6 VI	11110	Visa			
7 MC	11110	Master C...			
8 AM	11110	America...			
9 GS	21150	Gift Vou...			
10 GR	21150	Gift Vou...			
11 LR	21170	Loyalty P...			
12 TP	21160	Tips			
13 HT	11170	Tempora...			
14 CW	11140	Cash Wit...			
15					

# SmartPay integration

- Go to Accounts Receivable (Sales Ledger) module >> Settings >> Default Payment Modes. Fill in the following fields as described:

**Cash Withdrawal:** Input the Payment Mode created in Step 4 (CW in this example).

SAMPLE: Default Payment Modes: Inspect

Cash Pay. Mode CA  
 Cash Pay. Term CA  
 Cred. Card Pay. Mode VI  
 Gift Vouch. Sold Pay. Mode GS GST Z  
 Gift Vouch. Recv. Pay. Mode GR GST Z  
**Cash Withdrawal CW**  
 Return Pay. Mode  
 Specify  
 Force Return Pay. Mode

- Go to Point of Sales module >> Settings >> Local Machine Payment Modes.

To add a Cash Withdrawal Payment Mode, input the following information in a new row:

**Code:** Input the Payment Mode code created in Step 4 (CW in this example)

**Machine:** Input the Terminal machine used in Step 3's Code field (T01 in this example)

**Colour:** Any of your choice

**Payment Type:** Cash

**Credit Card. Type:** Other

**Label:** Any of your choice

Code	Machine	Colour	Payment Type	Credit Card Type	Label	Drawer	Currency
1 CA	T01	Default	Cash	Other	Cash		
2 VI	T01	Default	Credit Card	Visa	Visa		
3 MC	T01	Default	Credit Card	MasterCard	MasterCard		
4 CW	T01	Default	Cash	Other	Cash Withdrawal		
5							
6							
7							
8							
9							
10							
11							
12							

- Go to Point of Sales module >> Settings >> Local Credit Card Terminal.

Specify the following information:

**Terminal Type:** SmartPay (REST API)

**IP address/COM Port:** api.smart-connect.cloud

**IP Port:** 443

Tick the corresponding settings that you want under General Settings.

Local Credit Card Terminal: Inspect

Terminal Type SmartPay (REST API)  
 IP address/COM port api.smart-connect.cloud IP Port 443  
 Baud rate  
 General settings  
 Always print retailer name on ticket  
 Print without signature field  
 Log terminal communication  
 Terminal prints Receipt  
 Terminal cuts Receipt

- Go to Point of Sales module >> Settings >> Merchant ID. Create a new Merchant ID record and specify the following information:

**Code:** SMARTPAY

**Partner:** SmartPay

**Radio Button - Type:** Live

SAMPLE: Merchant ID: Inspect

Code SMARTPAY  
 Comment SmartPay  
 Partner SmartPay  
 Type  
 Test  
 Live

- Go to Point of Sales module >> Settings >> Payment Gateways.

Create a new Payment Gateway record, add a Code and Comment. Fill in the following fields as described:

**Misc Card**

**Local Machine:** Input the Terminal machine used in Step 3's Code field

**Currency:** NZD or AUD

**Merchant ID:** The merchant ID created on Step 8

**URL:** api.smart-connect.cloud

**Radio Button - Type:** POS

SAMPLE: Payment Gateway: Inspect

Code SMARTPAY  
 Comment SmartPay  
 Misc  SDP  Swish  PayPal  M-Pesa  Costs  
 Account No./Phone No.  
 Local Machine T01  POS  Web  
 Currency NZD  
 Refund Password  
 Merchant ID SMARTPAY  
 Key  
 URL api.smart-connect.cloud  
 Serial No.  
 Terminal ID  
 Seconds for disallowing duplicate transactions  
 Options  
 Send Invoice Address  
 Send Delivery Address  
 Send Invoice Information  
 Send Data for Corporate Cards

- Go to User Settings module >> Settings >> Local Machine. Select the Operations menu and select the option "Pair with SmartPay"

Local Machine: Inspect

Pair with Smartpay Code T01

Default Customer WHS Branch  
 Default Location WHS Default Return Location WHS  
 Default Printer  
 Default Export Codepage UTF-8 (Unicode)  
 GMT Offset  
 Item Paste Special  
 System Default  
 Without Classifications  
 With Classifications  
 No Coverflow  
 Acc. Class. Paste Special  
 System Default  
 Without Classifications  
 With Classifications  
 Tag/Object Paste Special  
 System Default  
 Without Types  
 With Types  
 Mailbox Paste Special  
 Contact Relations  
 Customers  
 Suppliers  
 Mailboxes/Conferences  
 Activity Type Paste Special  
 System Default  
 Act. Type per Act. Class  
 Favourite Activity Types  
 Prompt when deleting  
 Don't display Tool Tips  
 Remove Background  
 Wide Scroll Bars  
 No Server Mode when Idle  
 Enable offline Email  
 Auto Display Cust. Status on Incoming Calls  
 Approval Type Activity Window  
 Edit Font  
 Report Font  
 Report Font Size 0

# SmartPay integration

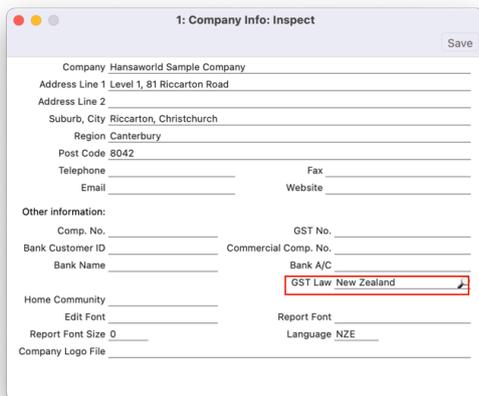
- To Connect with the SmartPay POS Terminal, select the Menu button in the SmartPay POS Terminal. Select the CONFIG option (Number 3). Then input the code "833767" and press Enter. Select the POS Integrations and choose "Authorise POS" option. You will then get a new pairing code. Enter this code into the Pairing Code window that appears in Standard ERP.



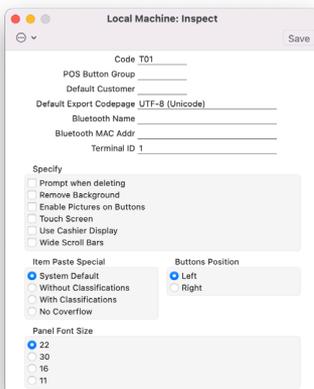
If the pairing was successful, a confirmation message would appear stating that the pairing was successful.

## Settings in Standard POS

- Go to **System module >> Settings >> Company Info**. In the GST Law field, ensure that it says Australian or New Zealand only.



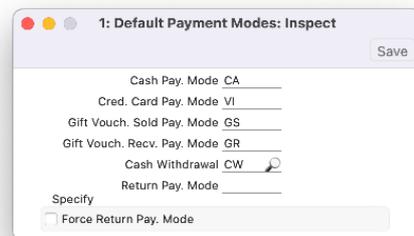
- Go to **Point of Sales module >> Settings >> Local Machine**. In the Code field, select the code of the relevant Till Terminal. Then, in the Terminal ID field, type a unique ID.



- Go to **Accounts Receivable (Sales Ledger) module >> Settings >> Payment Modes**. To allow for Cash Withdrawal Payment Modes, in a new row, add a Code and Comment for Cash Withdrawal mode.

Code	Comment	Bank A/C No	Bank Name
1 BT	Bank Transfer		
2 DB	Debit Card		
3 CA	Cash		
4 CK	Cheque		
5 VI	Visa		
6 MC	MasterCard		
7 AX	AMEX		
8 HT	Hotel Transfer		
9 GR	Gift Voucher Redeemed		
10 GS	Gift Voucher Sold		
11 CW	Cash Withdrawal		
12			
13			
14			

- Go to **Point of Sales module >> Settings >> Default Payment Modes**. Fill in the following fields as described:  
**Cash Withdrawal:** Input the Payment Mode created in Step 3 (CW in this example).



- Go to **Point of Sales module >> Settings >> Local Machine Payment Modes**. To add a Cash Withdrawal Payment Mode, input the following information in a new row:  
**Code:** Input the Payment Mode code created in Step 3 (CW in this example)  
**Machine:** Input the Terminal machine used in Step 2's Code field (T01 in this example)  
**Colour:** Any of your choice  
**Payment Type:** Cash  
**Credit Card. Type:** Other  
**Label:** Any of your choice

Code	Machine	Colour	Payment Type	Credit Card Type	Label	Drawer	Currency
1 BT	T01	Red	Other	Other	Bank Transfer		
2 DB	T01	Red	Credit Card	Other	Debit Card		
3 CA	T01	Red	Cash	Other	Cash		
4 CK	T01	Red	Cheque	Other	Cheque		
5 VI	T01	Red	Credit Card	Visa	Visa		
6 MC	T01	Red	Credit Card	MasterCard	MasterCard		
7 AX	T01	Red	Credit Card	American Express	AMEX		
8 HT	T01	Yellow	0	Other	Hotel Guest		
9 GR	T01	Red	Gift Voucher	Other	Gift Voucher R...		
10 GS	T01	Red	Gift Voucher	Other	Gift Voucher S...		
11 CW	T01	Red	Cash	Other	Cash Withdraw...		
12							
13							

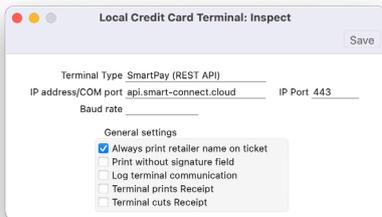
# SmartPay integration

- Go to Point of Sales module >> Settings >> Local Credit Card Terminal.

Specify the following information:

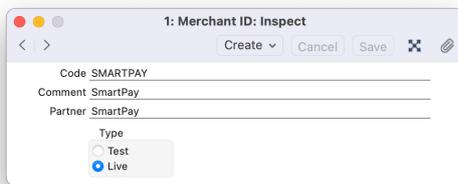
**Terminal Type:** SmartPay (REST API)  
**IP address/COM Port:** api.smart-connect.cloud  
**IP Port:** 443

Tick the corresponding settings that you want under General Settings.



- Go to Point of Sales module >> Settings >> Merchant ID. Create a new Merchant ID record and specify the following information:

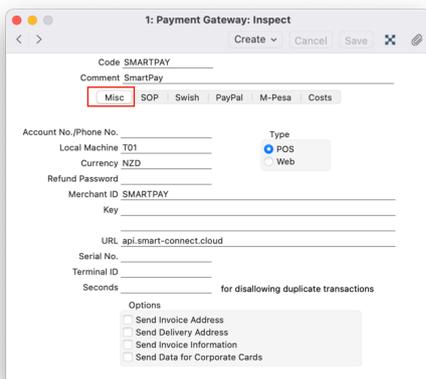
**Code:** SMARTPAY  
**Partner:** SmartPay  
**Radio Button - Type:** Live



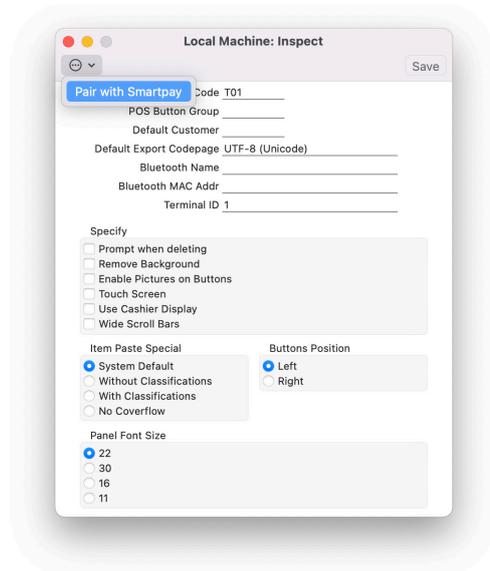
- Go to Point of Sales module >> Settings >> Payment Gateways.

Create a new Payment Gateway record, add a Code and Comment. Fill in the following fields as described:

**Misc Card**  
**Local Machine:** Input the Terminal machine used in Step 3's Code field  
**Currency:** NZD or AUD  
**Merchant ID:** The merchant ID created on Step 7  
**URL:** api.smart-connect.cloud  
**Radio Button - Type:** POS



- Go to Point of Sales module >> Settings >> Local Machine. Select the Operations menu and select the option "Pair with SmartPay"



- To Connect with the SmartPay POS Terminal, select the Menu button in the SmartPay POS Terminal. Select the CONFIG option (Number 3). Then input the code "833767" and press Enter. Select the POS Integrations and choose "Authorise POS" option. You will then get a new pairing code. Enter this code into the Pairing Code window that appears in Standard ERP.



If the pairing was successful, a confirmation message would appear stating that the pairing was successful.