

Elavon Checklist

1. Preinstall by Oneir

- Has the latest version of OneirFinTechInstall.exe been uploaded to the Linux account server?
- Has Elavon Account been created?
- Has the admin user logged into Elavon portal and changed the default password?
- If card present transactions are supported, has the Card Present terminal been Created by Elavon?
 - Non-admin userid provided?
 - PIN provided?
- Is Card Present terminal also used for eCommerce? If not:
 - Has eCommerce (internet) terminal been created by Elavon?
 - Non-admin userid created?
 - PIN provided
- eCommerce terminal configuration
 - Change the terminal name to something more meaningful.
 - Under Settings – System Setup Support, configure as follows
 - HTTP Options
 - Off
 - Nextgen UI IP Address Whitelist
 - Off / blank
 - Processing Options
 - Enable EMV Chip Cards
 - o Click to enable
 - CVV Signature Override
 - o Select 'Enabled All'
 - Clearing File Time
 - o 9:00 PM
 - All other settings leave blank
 - Device Options
 - None
 - Export Options
 - Enable Export Scripts
 - o On

- Has Approval link been configured?
 - <https://ngenerp.com/fintechapi/txApproved.php>
- Has Declined link been configured?
 - <https://ngenerp.com/fintechapi/txDeclined.php>
- Has Error link been configured?
 - <https://ngenerp.com/fintechapi/txError.php>
- Leave all other settings as is.
- Under Settings – Terminal Information
 - Other Options
 - Tokenizaton
 - Confirm this is Enabled
- Under Settings - Hosted Payment
 - Do not configure Hosted payment modal setup
 - For Configure Hosted payment page setup
 - Has Cancel link been configured on Payment Page?
 - <https://ngenerp.com/fintechapi/txCancelled.php>
 - Select POST
 - Include Transaction Data
 - ON
 - Enable CAPTCHA
 - OFF
 - Is Payment Page configured to only show the following?
 - Order Summary Tab
 - Amount
 - Invoice Number
 - Payment Tab
 - Credit Card
 - Card Number
 - Expiration Date
 - CVV2
 - Billing Address
 - First Name
 - Last Name
 - Address1
 - Postal Code
 - Shipping Address
 - First Name
 - Last Name
 - Address1
 - Postal Code
 - Accessibility Statement
 - Off

- Is Response Page – Approval Page configured to only show the following?
 - Confirmation
 - Amount
 - Card Short Description
 - Approval Code
 - Order Summary
 - Amount
 - Billing Address
 - All fields
 - Shipping Address
 - On
 - Is Complete link configured?
 - <https://ngenerp.com/fintechapi/CloseTab.htm>
 - Select POST
 - Include Transaction Data
 - ON
 - Response Page – Decline Page
 - Has the Return to Merchant link been configured?
 - <https://ngenerp.com/fintechapi/txCancelled.php>
 - Response Page – Redirect URL
 - Accept defaults
-
- Card Present terminal configuration
 - Has debit card processing been configured in the portal?
 - Has contactless been enabled?
 - Review terminal configuration and escalate issues with Elavon.
 - Use the Setup Editor to create the JSON file needed during the install.
 - Has the JSON file been emailed to the client?

2. Preinstall by Merchant

- Has the public IP Address of every computer where the software is being installed been whitelisted with Elavon?
- Has OneirFinTechInstall.exe been downloaded from the Oneir website and a copy saved on every computer where it is being installed?
 - <https://www.oneirsolutions.com/wp-content/uploads/2021/10/OneirFinTechInstall.exe>

- Has the JSON file required for installation been received from Oneir?
- Create the folder structure C:\fintech\setup on every computer where the software is being installed and copy the JSON file from the previous step to the setup folder.
- If a card reader is being used, is it plugged into a USB port on the computer and turned on?
 - Has the card reader been configured for USB? Do not configure for WiFi. The card reader may update its software and reboot before it can be used.
 - <https://developer.elavon.com/na/docs/commerce-sdk/1.0.0/cardreaders/link2500#10305-usb-cnnct>

3. Install

- Run OneirFinTechInstall.exe as Administrator. Right click on the file in Windows explorer and select 'Run as Administrator'. This step is done on the computer where the software is being installed.
- Follow onscreen prompts.
- If Card Present transactions are supported, run the setup program for CWS.
 - Open the CWS monitor and confirm the card reader is recognized by CWS and is selected for use.
- Open the start menu, navigate to the Oneir FinTech group, and click on Start FinTech.
 - Open a cmd window and type this command at the prompt: `pm2 list`
 - Confirm the application is shown as online.

4. Post Install

4.1. Linux Configuration

- Have the Linux users changed the DIAL-UP option to Elavon?
 - To set up credit card in Oneir, ask the manager with highest level of password to go to POS menu, then Utility Menu, then Set up Dial-Up.

Choose Elavon, the first question is the local IP address, then the port number, then the time out in seconds, then whether to use pin pad, then they had to say Y to log the entries, then a log

action code (they need to add one if there is none set up already), the remaining account info are not used. Don't clear any values you are specifically changing them as per above.

- Has each user confirmed his/her Windows computer local IP address?
- Has the port number been changed to 8080?

4.2. For eCommerce:

- Perform a transaction to request a token from Elavon.
- Use the token received in the previous step to perform a sale.

4.3. For Card present:

- Perform a sale using a credit card.
- Perform a sale using a debit card.
- If contactless entry is supported, perform a transaction, and tap with a credit card.
- If contactless entry is supported, perform a transaction, and tap with a debit card.

5. Elavon Support Requirements

1-800-377-3962 option 2, option 2

When calling for tech support, have the following available as you likely will be requested to supply some of these to be allowed access software technical support

- Business name
- Merchant id
- Elavon Account number
- Business Tax Number
- Last 5 digits of Business Bank Account