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Retail and Restaurant Solutions

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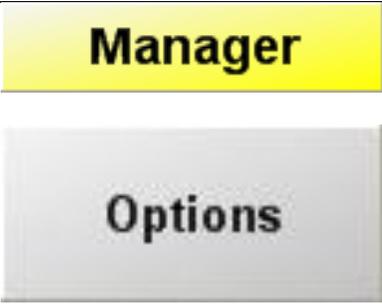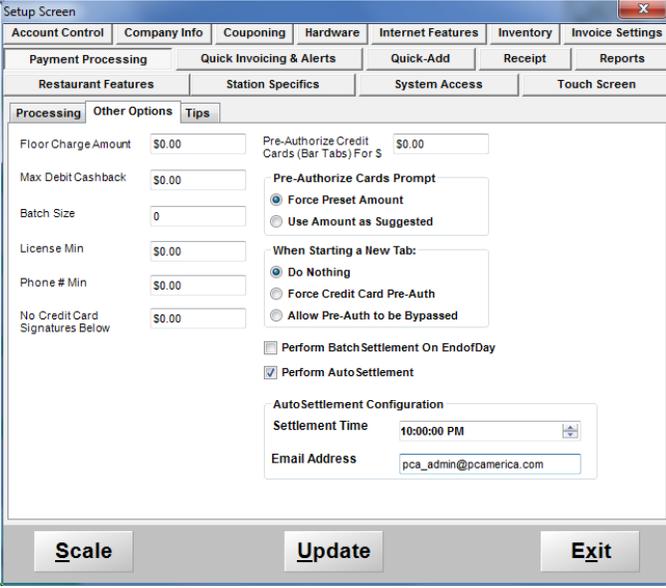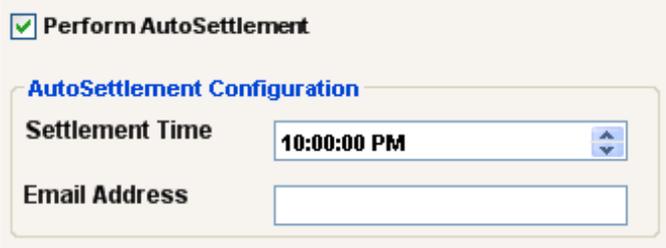
Auto-Settlement Feature

Both Cash Register Express and Restaurant Pro Express have the ability to Auto-Settle your terminal capture transactions.

This document will cover configuring the Auto-Settlement feature as well as configuring email settings.

The Perform AutoSettlement feature will need to be configured on all stations performing transactions.

Note: Any transactions waiting to have a tip applied to them will not be settled. These transactions require that a tip be manually applied to them. Optionally, a manual settlement can be done where you can add a zero tip to the transactions waiting for a tip.

Creating the Customer Account with a Valid Email Address

	1. Select the **Manager** or **Options** button. 2. Enter the administrator password (default: admin) where applicable. 3. Select **Setup** then, **Setup Screen**. 4. Select the **Internet Features** tab.
	5. Select the **Other Options** tab.
	6. If **Perform AutoSettlement** is checked: A **Settlement Time** will be requested (Default 10:00:00 PM). This time should be set to a time after your business is closed. An **Email Address** will also be requested which will send the settlement status to the address provided.

The Perform AutoSettlement feature will need to be configured on all stations performing transactions.

In order to email the settlement results the email settings must first be configured below.

Email Setup

	1. Select the **Manager** or **Options** button. 2. Enter the administrator password (default: admin) where applicable. 3. Select **Setup** then, **Setup Screen**. 4. Select the **Internet Features** tab.

5. At the Left of this screen under SMTP E-mail Options the following information will need to be entered in order for the mass emails to be sent.

Note: This information can be acquired by contacting either the network administrator (who runs your email) or the company who is in charge of your email account (e.g. AOL, Yahoo, Gmail, etc…).
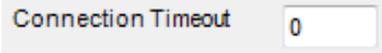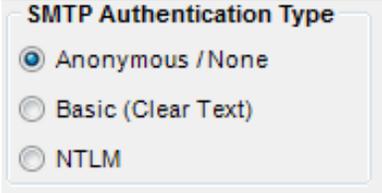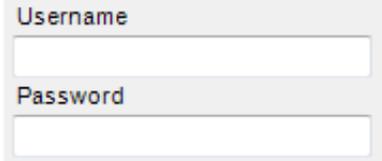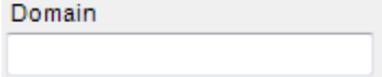
	6. Under **SMTP Server** enter the address of your outgoing mail server. For example: If you are using Gmail, this field should contain **smtp.gmail.com**.

SMTP Server Port 120	7. Under **SMTP Server Port** enter the port used to communicate with your outgoing mail server. If you are using Gmail, this field should contain **587** or **465**.
Connection Timeout 0	8. Under **Connection Timeout** enter a value (in seconds) that the program will attempt to connect to the server. **Note**: If the value is left at **0** then the connection attempt will not timeout, and will continuously try to connect to the server.
SMTP Authentication Type ◉ Anonymous / None ◯ Basic (Clear Text) ◯ NTLM	9. Under **SMTP Authentication Type** select the server's authentication method. If you are using Gmail, **Basic (Clear Text)** should be selected.
☐ Use SSL	10. Check **Use SSL** if the server requires the use of a Secure Sockets Layer to communicate with it. If you are using Gmail, check this.
Username Password	11. These fields should contain a valid username and password for an email address on the mail server. If you are using Gmail, your username is your full email address.
Domain	12. This field should contain the domain that you are a part of. For more information please contact your network administrator.
Send As Address	13. This field should contain the email address you would like displayed in outgoing emails.
Bcc	14. If you would like to Blind Carbon Copy the email to another address enter the email address under **BCC**.
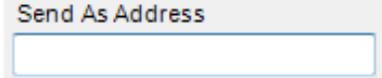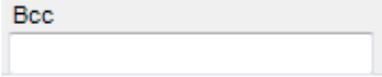
Emailing the Settlement Status

If an email address was provided then you should receive an email with the settlement status:

Settlement completed Successfully.

PaymentProcessor : Mercury

PaymentMethods: CreditCard