



SUNLYNC SLIMCD ACCOUNT UPDATER

1. INTRODUCTION

1.1 OBJECTIVE

This document is intended as a guide to using the SunLync SlimCD Account Updater utility.

1.2 PREREQUISITES

The following prerequisites needs to be in place prior to contacting SunLync Sales to be able to access the SunLync Account Updater utility.

- Must sign Account Updater agreement with merchant provider
 - Available for Vantiv\FifthThird and TransFirst processors
 - Global Payments and FirstData functionality coming soon....
- Must be running Version 8.0.10.0 of SunLync or later
- Must have tokenized database
- Must be processing through the SlimCD gateway

1.3 SLIMCD UPDATER SERVICE

SlimCD provides a service that tries to obtain updated account information from the credit card processor. This service takes a request file which contains a list of accounts, sends these accounts to the processor to attempt to get updated information, and then generates a response file with the results.

SlimCD provides their customers with an FTP account to upload the request files to, and to store response files in for later processing. The user will need the following information from SlimCD in order to use the SunLync SlimCD Account Updater utility:

- FTP Server Address
- FTP Server Port
- FTP Username
- FTP Password
- Credit Card Processor (Vantiv\FifthThird, First Data, Global Payments, TransFirst)
- Merchant Account ID (Only if using Vantiv\FifthThird or TransFirst)
- Chain Code (Only if using Vantiv\FifthThird)

2. CONFIGURATION

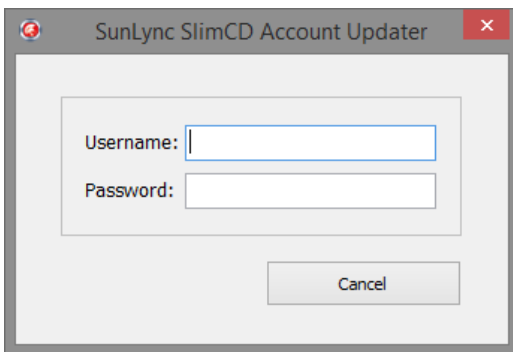
The utility is designed in a wizard format to make the process simple for the user. The user is prompted each time they use the utility to enter the required configuration parameters, but most parameters are saved locally to an INI file.

The storage of the INI file and log files are consistent with SunLync and are stored in the uses program data folder.

2.1 LOGIN

When the utility is first opened it connects to the web to verify that this customer is authorized to use this utility. If authorization is successful then the user is prompted to enter their SunLync username and password. If authorization fails then the user is notified and the application terminates.

If the user enters valid credentials and has SunLync permissions to uses this utility, then the utility opens and the user is presented with the welcome screen.



2.2 SLIMCD FTP SERVER CONFIGURATION

The utility uses FTPS to connect to the users FTP account on the SlimCD FTP server. It is not compatible with SFTP.

The user needs to obtain the following information from SlimCD:

- Server Address
- Server Port
- Username
- Password

The server address, port, and username are all stored locally but the user will have to enter their password each time they use the utility.

SlimCD FTPS Server Configuration

Server: Port:

Username:

Password:

When the user clicks next the utility first checks to see if it can connect and login in to the FTP server using the given settings, if it is successful it will progress to the next section.

2.3 CREDIT CARD PROCESSOR AND CARD TYPES

There are four credit card processors to pick from plus some additional settings dependent of which process the user uses.

- Vantiv\FifthThird – The user also has to enter their Merchant Account ID and Chain Code
- First Data – There are no additional settings for this processor
- Global Payments – **coming soon** - There are no additional settings for this processor
- TransFirst – **coming soon** - The user also has to enter their Merchant Account ID.

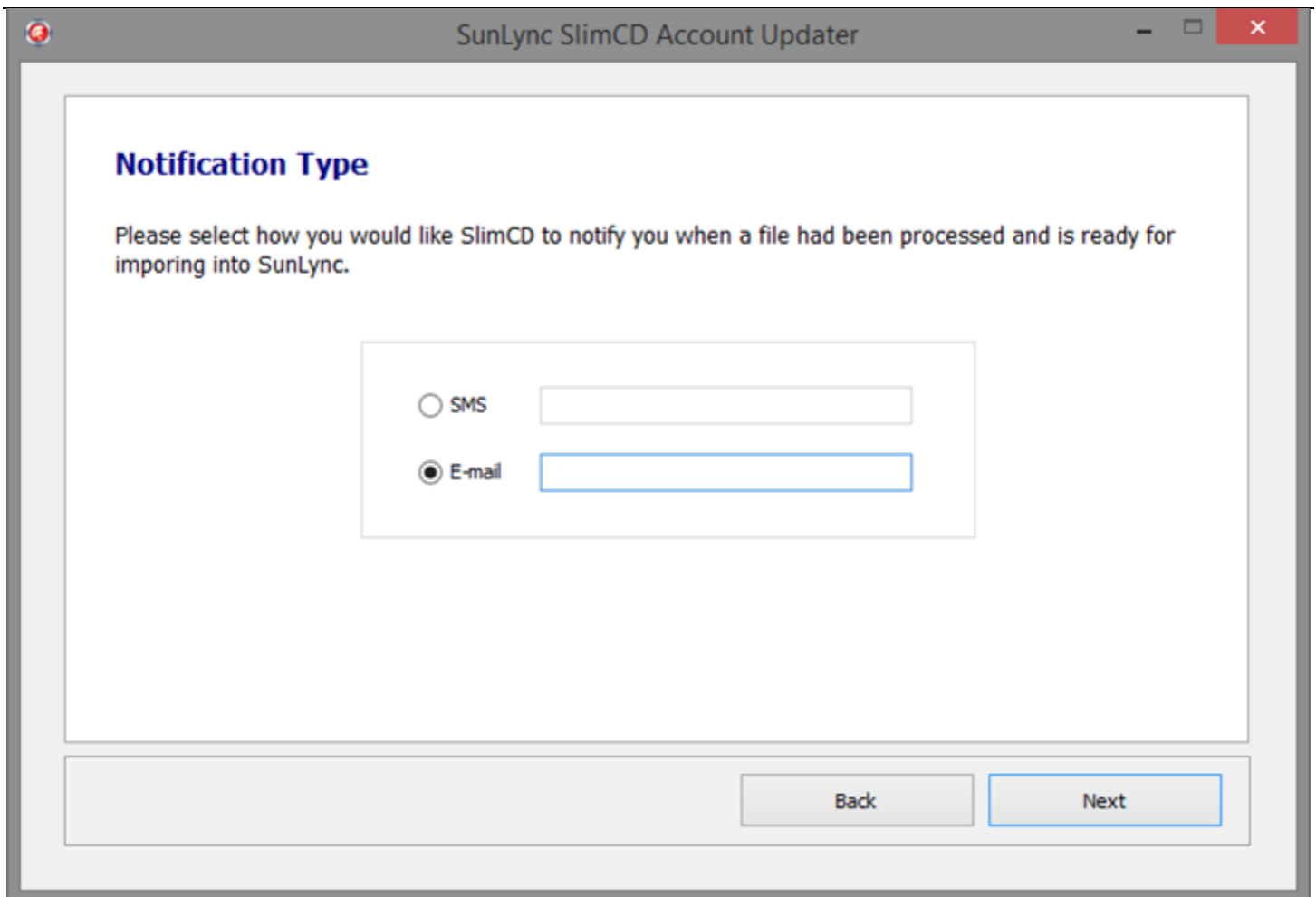
The user will need to enter which card types they wish to request updated information for. The user can pick from Visa, MasterCard and Discover. Visa and MasterCard are selected by default but Discover is not as the SlimCD documentation specifies that Discover is not supported yet but will be in the future.

The screenshot shows a window titled "SunLync SlimCD Account Updater". Inside, the section is titled "Credit Card Processor". Below the title, there is a paragraph: "Select your credit card processor and card types to upload from the list below. If the processor that you use is not listed then please contact SlimCD." The form is divided into two main columns. The left column contains four radio button options for credit card processors: "Vantiv\FifthThird" (selected), "First Data", "Global Payments", and "TransFirst". To the right of these options are two text input fields: "Merchant Account ID" with the value "12" and "Chain Code" with the value "34". The right column contains three checkbox options for card types: "Visa" (checked), "Mastercard" (checked), and "Discover" (unchecked). At the bottom right of the window, there are two buttons: "Back" and "Next".

2.4 NOTIFICATION TYPE

SlimCD provides two methods for how the user is notified when a request file has been processed and a response file is read to be import.

- SMS – If the user provides their cell phone number they will receive a text message when the response file is ready for import
- E-mail – If the user provider an e-mail address they will receive an e-mail message when the response file is ready for import.



The screenshot shows a window titled "SunLync SlimCD Account Updater". Inside the window, the section "Notification Type" is displayed. Below the title, a message reads: "Please select how you would like SlimCD to notify you when a file had been processed and is ready for imporing into SunLync." There are two radio button options: "SMS" and "E-mail". The "E-mail" option is selected, indicated by a filled circle. To the right of each radio button is a text input field. At the bottom right of the window, there are two buttons: "Back" and "Next". The "Next" button is highlighted with a blue border.

Notification Type

Please select how you would like SlimCD to notify you when a file had been processed and is ready for imporing into SunLync.

☐ SMS

☒ E-mail

Back Next

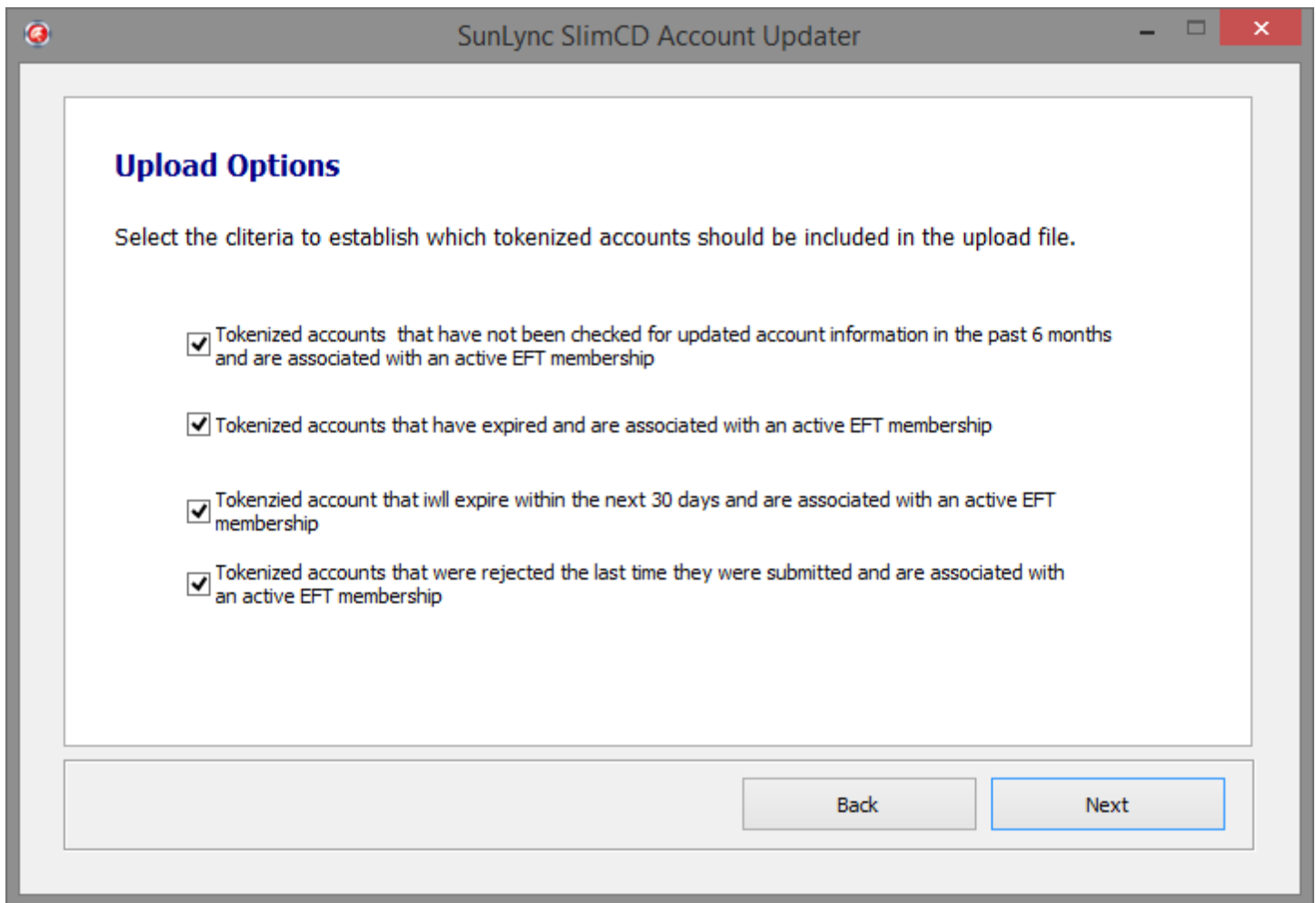
2.5 UPLOAD OR DOWNLOAD

The user should now select if they want to create a request file and upload it to their account on the SlimCD FTP server or download a response file from their account on the SlimCD FTP server and import the results into SunLync.

3. UPLOADS

There are four options the user has to specify how the list of requests is generated, all of these options are checked by default and the user's selection is not saved to the local configuration file.

- **Option 1** – Tokenized accounts that have not been checked for updated account information in the past 6 months and are associated with an active EFT membership.
- **Option 2** – Tokenized accounts that have expired and are associated with an active EFT membership.
- **Option 3** – Tokenized accounts that will expire in the next 30 days and are associated with an active EFT membership.
- **Option 4** – Tokenized accounts that were rejected the last time they were submitted and are associated with an active EFT membership.



The screenshot shows a Windows-style dialog box titled "SunLync SlimCD Account Updater". Inside the dialog, the section "Upload Options" is highlighted in blue. Below the title, a instruction reads: "Select the criteria to establish which tokenized accounts should be included in the upload file." There are four list items, each with a checked checkbox and a description: 1. "Tokenized accounts that have not been checked for updated account information in the past 6 months and are associated with an active EFT membership", 2. "Tokenized accounts that have expired and are associated with an active EFT membership", 3. "Tokenized account that will expire within the next 30 days and are associated with an active EFT membership", and 4. "Tokenized accounts that were rejected the last time they were submitted and are associated with an active EFT membership". At the bottom right of the dialog are two buttons: "Back" and "Next". The "Next" button is highlighted with a blue border.

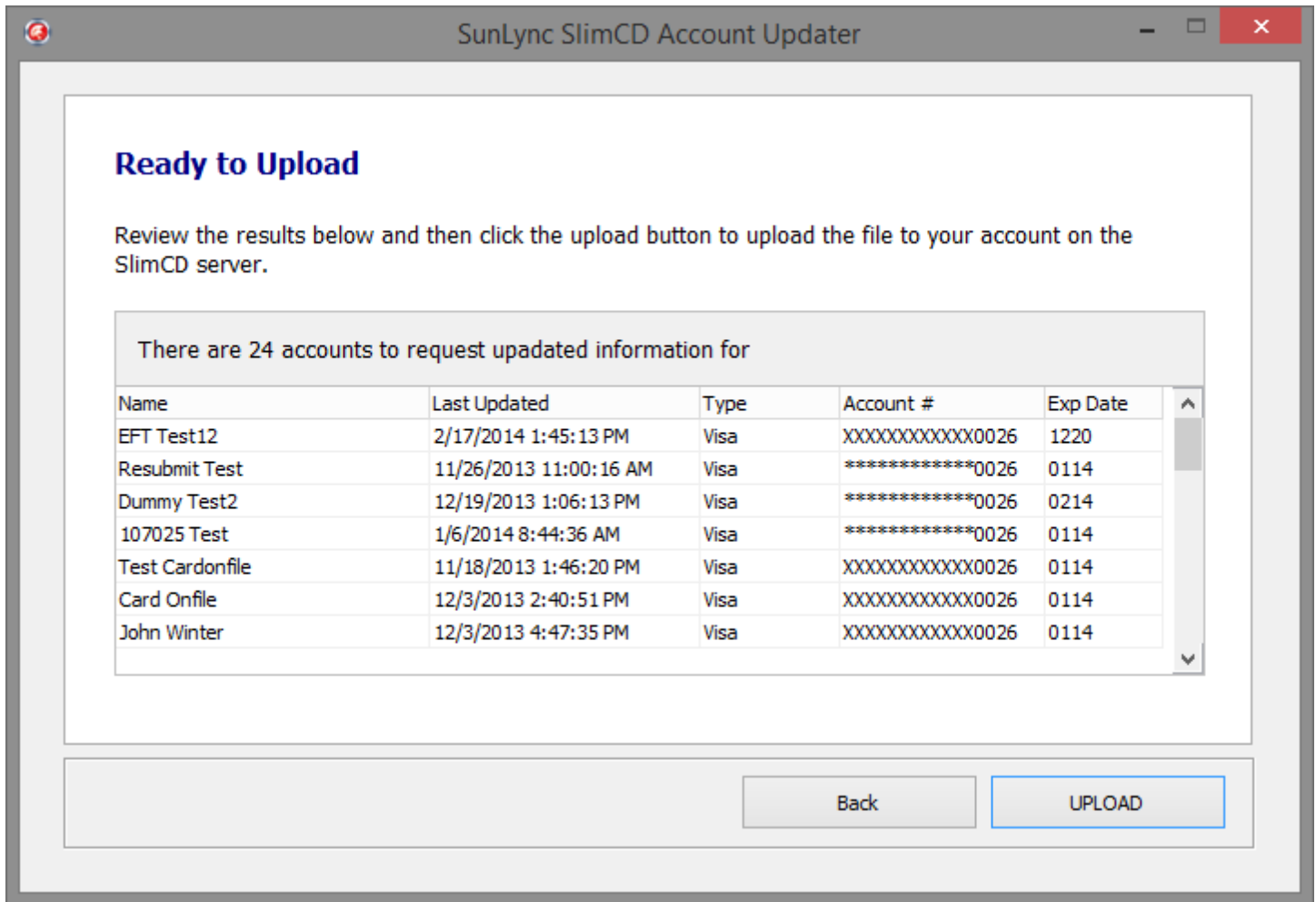
Upload Options

Select the criteria to establish which tokenized accounts should be included in the upload file.

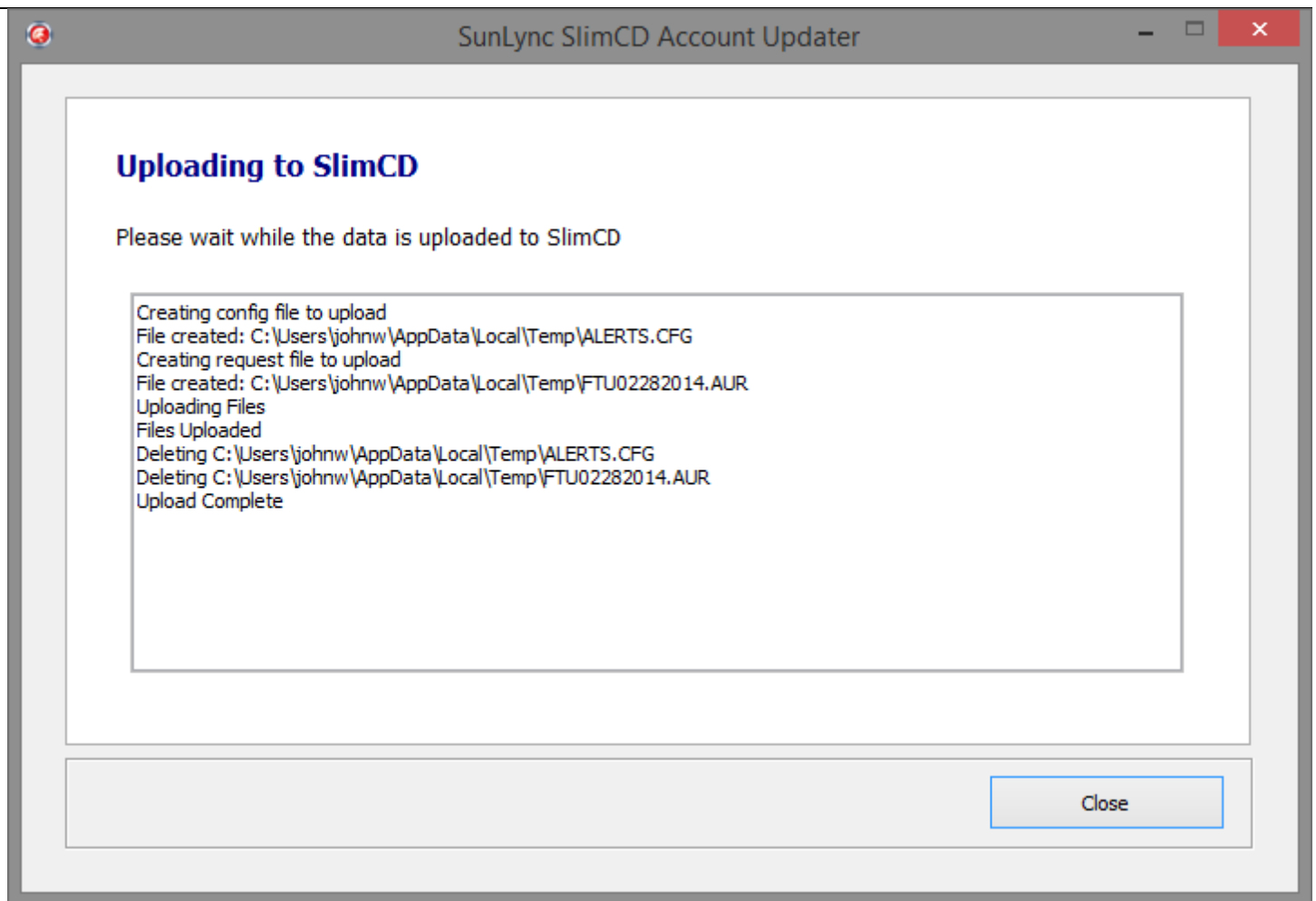
- ☒ Tokenized accounts that have not been checked for updated account information in the past 6 months and are associated with an active EFT membership
- ☒ Tokenized accounts that have expired and are associated with an active EFT membership
- ☒ Tokenized account that will expire within the next 30 days and are associated with an active EFT membership
- ☒ Tokenized accounts that were rejected the last time they were submitted and are associated with an active EFT membership

Back Next

Once the user clicks next the utility generates the list of customers and stores them in a temporary table for the user to review before continuing.



After clicking the UPLOAD button the user will be prompted to confirm that they wish to upload the data to SlimCD, once confirmed the user will be presented with the progress screen and the files are generated and upload. This process is performed in a separate thread to not lock the UI thread and give the user more smooth experience.



4. DOWNLOADS

When the user selects download and clicks next it will move directly to the download progress section as no other configuration is needed. Again this process is performed in a separate thread to prevent the UI thread from locking.

During this process the utility connects to the FTP server and checks if any files are present to download and import, these are identified by any file that has the .AUS file extension.

If there are any files present then they are downloaded and stored locally. The utility then goes through each line in the file, and update the customer's token record and billing info accordingly, but only if they file specifies that the information has updated.

Once it has finished importing all of the files it deletes the local copies of the files and deletes the files off of the users FTP account.

