



WUPOS Integration User Guide

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WUPOS integration at a glance

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Integration overview

This guide describes the Western Union POS integration with the ATS system. WUPOS will seamlessly be available through your existing ATS menu and be able to transact and record WU transactions in your ATS drawer.

Here are some benefits of the integration:

No more double entry.

No more extra Internet Explorer windows hogging system memory.

No more login/password issues. ATS will automatically log you into the WUPOS site in an instant.

Detailed WU transactions will be readily available in the ATS system for quick reference.

If you're an existing WU customer, the WUPOS integration with ATS is a great solution if you're looking to optimize the customer and user experience, and have potential to increase customer foot traffic.

Boarding pre-requisites and procedures

In order to sign up for the integration, the location must:

- be an existing Western Union Money Transfer Agent (see below for more details).
- location must have the DCS full POS system (Automated Teller System). For more information, please contact sales@dcsgroup.com or call 847-498-9955x1.
- fill out the 'Digital Currency Systems/WUPOS Program – New Agent' and submit it.

Note: To sign up to become a Western Union Money Transfer Agent, call 1-800-325-6000. More information can be found at: <https://agentportal.westernunion.com/ap/agentregister.do?pid=usFtBecomeAgent>

Terminal restrictions

- There are two settings each terminal can be enabled for, but not at the same time:
 - Remote Services (RSW)
 - Standalone Internet Explorer

Remote Services – Remote Services (or RSW) is the integration DCS and WU have been able to provide.

Standalone Internet Explorer – This is the method where users need to open Internet Explorer and navigate manually to the WUPOS site.

IMPORTANT

If the terminal is set to use the DCS/WU integration (Remote Services), users can NOT access the WUPOS site through Internet Explorer. This is by design. Users need to access all WUPOS site functions by opening up ATS and using the menu items to open the WUPOS window.

- Each operator can only be logged into a single WUPOS terminal at a time. This rule is true regardless of the terminal using the integration or standalone IE.

Example: John Doe is logged into ATS and in WUPOS on terminal 1
John Doe is logged into ATS on terminal 2, and tries to log into WUPOS.
John Doe will not be able to log into WUPOS on terminal 2.

So for each teller, if they want to use WUPOS at the same time at multiple windows, their ATS user must be associated with a unique WUPOS Operator ID/password.

- Only one WU transaction can be processed in ATS at a time.

Software and system requirements

If your terminal was able to run WUPOS *prior* to the integration, the integration will work as normal.

For more information on WUPOS capability click here:

<https://wupos.westernunion.com/checker/>

Initial Setup (Admin only functions)

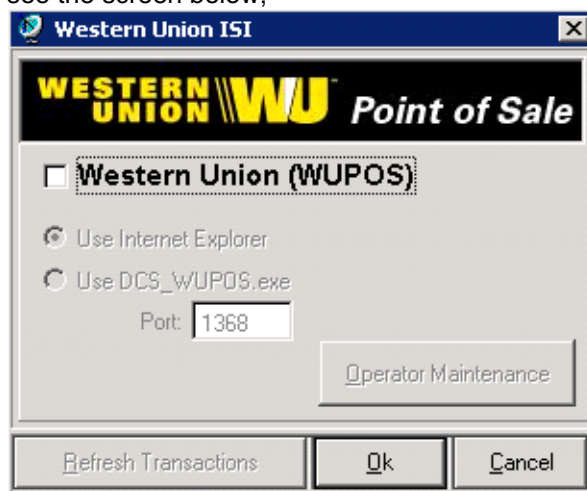
2

Enabling the integration

After being approved for the WUPOS integration and meeting all pre-requisites, the integration will need to be setup at the location.

First, let's enable the integration:

- Log into ATS Setup as *Vault Access*
- Navigate to *Setup > System Settings*, then click on 'WesternUnion (WUPOS)'. You will see the screen below;



- Check the 'Western Union (WUPOS)' box and then click on 'Refresh Transactions'. This will add the new menu items into the Teller menu.

***Tip: De-activate any old WUPOS-related menu items. As mentioned above in the Terminal Restrictions section of this document, users will not be able to access WUPOS outside of this integration and the newly created menu items.

Syncing ATS user logins with WU Operator logins

For this next step, in order for ATS to automatically log in the user into the WUPOS window, ATS will need to know their WUPOS Operator ID and Password.


- Click on 'Operator Maintenance'. You will see the screen below;


- The ATS users are listed on the left side, and have not yet been added as a WUPOS Operator (in ATS). To add an ATS user as a WUPOS Operator, highlight the ATS user, enter in their WUPOS Operator ID/Password into the 'Login' and 'Password' fields, and then click 'Add'.
- The ATS user now has a WUPOS login associated. Add all other tellers with their respective WU logins/passwords, and then click 'Exit'.

Daily sheet template setup

Next, we need to make sure the new WUPOS integration menu items will appear on the Teller and Store Daily sheets for ATS reporting and balancing. There were four new transactions created when you clicked on 'Refresh Transactions' in the previous steps.

- Send Money
- Prepaid Services
- Make Payment
- Payout Money
- Log into ATS Setup as *Vault Access*
- Go to *Daily Sheets* > then click on 'Teller Daily Sheet'

- In the bottom right section of the window that appears, click on . This will add the new items to the Teller Daily Sheet.
- Click on 'OK'.
- Now back to the ATS Setup main menu, navigate to *Daily Sheets* > then click on 'Store Daily Sheet'

- Repeat the same step as above by clicking on . This will add the new

- items to the Store Daily Sheet.
- Click on 'OK'.

Main office item setup (optional)

This step is optional. However, if your location is part of a main office, you must perform the below step.

To avoid calculation errors while viewing daily sheets at the main office, we must also activate the menu item at the main office.


To add the menu items into the main office:

- Log into DSheet
- Click on the 'ATS Setup (M.O.)' button




- Go to *Maintenance* and then click on 'Western Union (WUPOS) Initialization'.
- Select the zone to which you want to import the new menu items into. Then click 'OK'. The four new menu items are now added into that zone's menu.
- Hit 'Cancel', and then click on 'Teller Menu'
- Make any changes to WU items you may have made at the store in order for menus to sync correctly during the store's closeout (if a menu export is made from the main office).
- Click on *Daily Sheets* > select the zone, and then click on 'Teller'.



- Click on , then click 'OK'
- Click on *Daily Sheets* > select the zone, and then click on 'Store'.



- Click on , then click 'OK'

The menu items are now active and will appear correctly at the main office.


***Note: These steps must be repeated for each zone if the main office has multiple zones and has the WUPOS integration enabled across different zones.

Liability setup (optional)

Many locations previously had a liability set to the old Western Union menu item(s). Since those old items will no longer be usable, we need to set up the liability for the new items created.

- Log into ATS Setup as 'Vault Access'
- Click on the 'Teller Menu' button
- Open the 'Western Union (WUPOS)' sub-menu item

There are three new incoming items in the sub-menu

- Make Payment
- Prepaid Services
- Send Money
- Double click (or hit <Enter> while highlighted) to expand the options for that menu item
- Expand the 'Liability' property by clicking on the small  icon to the left of it.

You can now select the associated liability group for this menu item. Once selected, click 'Save' and assign the other two remaining incoming items a liability.

Using the integration

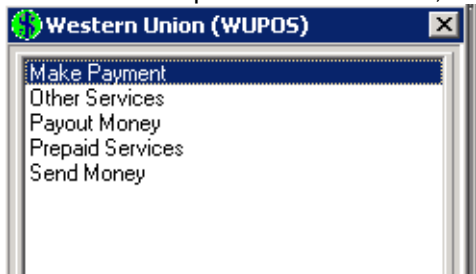
3

'Western Union (WUPOS)' sub-menu items

- Log into ATS as your user.

Remember, your user will have already had their WUPOS credentials entered in the 'Operator Maintenance' window in the previous section.

You will now notice the new sub-menu item called 'Western Union (WUPOS)' in your list of transactions. Expand this menu item, and you'll see the new transactions (below);



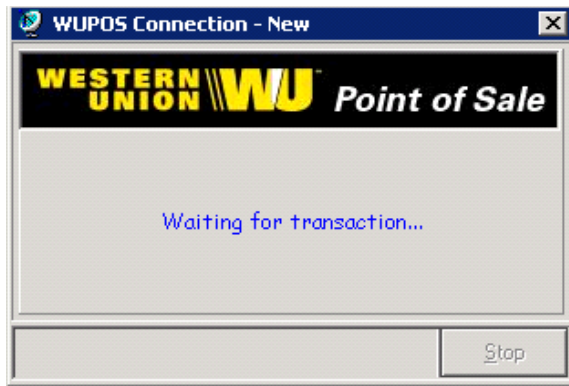
Each menu item will take you to the WUPOS site.

***Note - Regardless of what menu item you select to open the WUPOS site, ATS will always read the correct type of transaction. For example, if the user clicks on Send Money, but then decides to change their mind and perform a Make Payment transaction, the teller can perform the Make Payment without restarting the workflow.

Accessing WUPOS

To reach the WUPOS site and begin using the integration, double-click (or hit <Enter>) on any one of the 5 items listed in the 'Western Union (WUPOS)' sub-menu item.

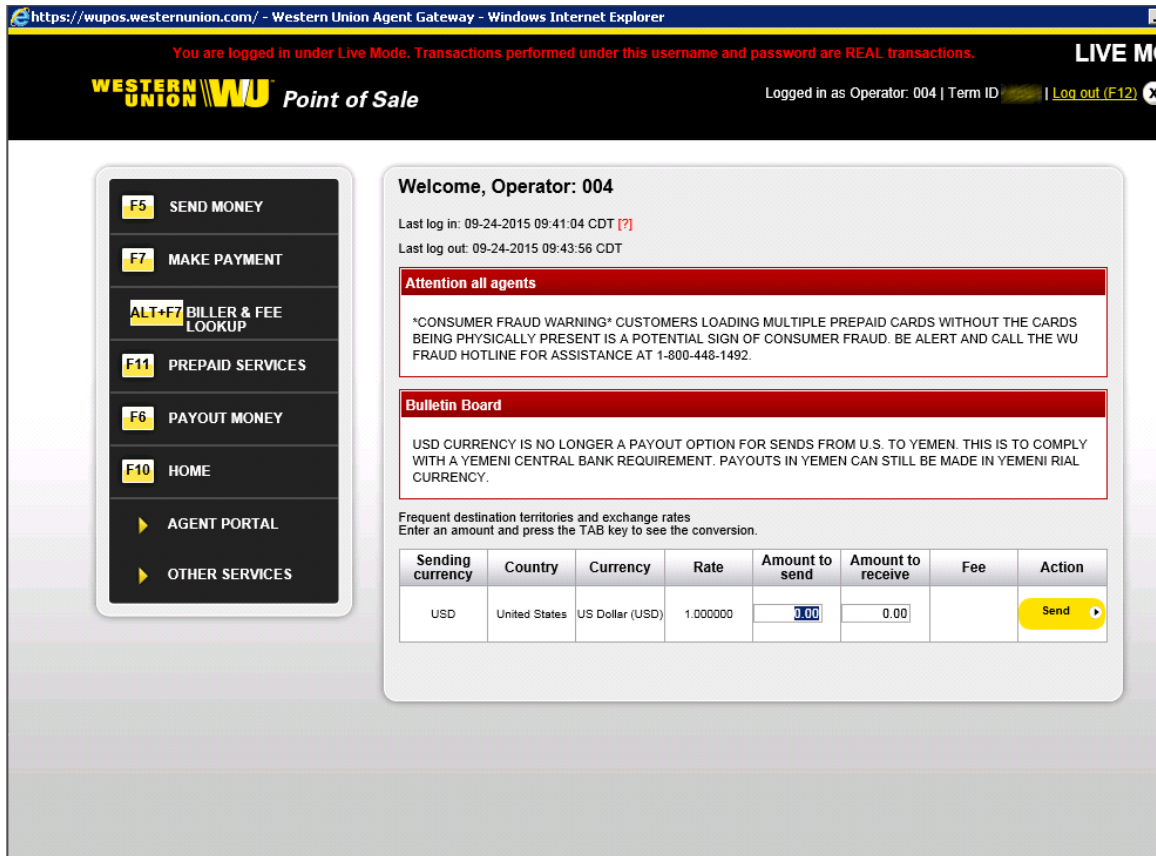
You will see the window below appear, and then hide itself from view. The integration services are now loading.



You will then see the WUPOS window become maximized and brought to the foreground for the user to navigate in.
It will briefly load, and you will see something similar to the below



This is showing that the WUPOS site is taking the WU Operator ID and password that was entered into the ATS system.
The above message will then disappear after a few seconds, and then you will see the WUPOS home page (below).



This is a barebones IE window, hiding the address bar, bookmarks, and other basic functions Internet Explorer has.

Transaction workflow

Each transaction inside of the WUPOS window will act and feel the same as it did *prior* to the integration.

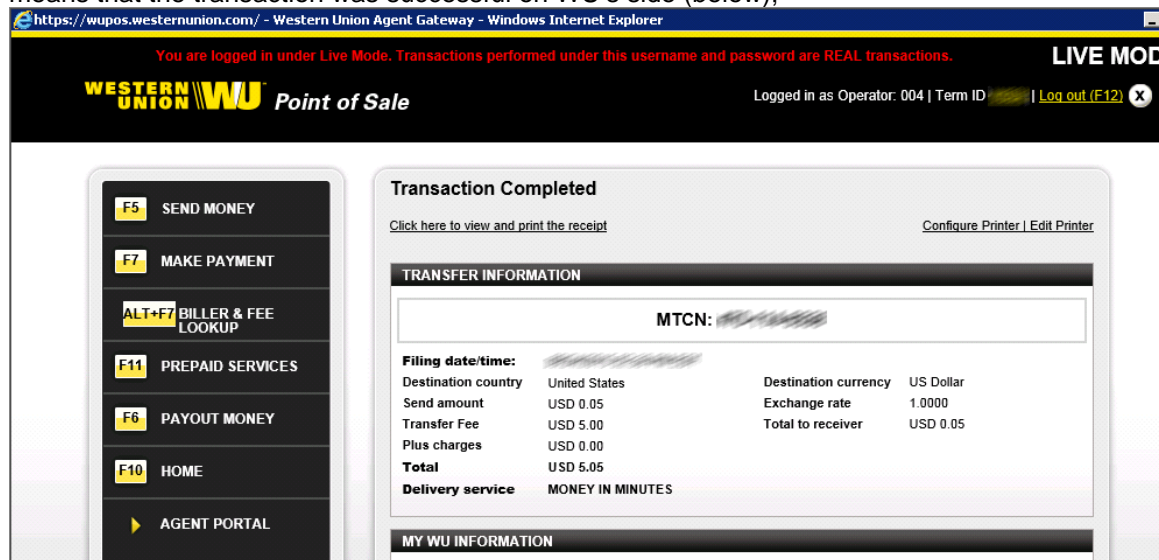
Completing transactions


Nearing completion of a WUPOS transaction (depending on the type of transaction), the WUPOS window will minimize and you'll see the WUPOS transaction on your transaction tape in ATS.

In the below example, a \$0.05 Send is being finished.

As soon as the amount is confirmed inside the WUPOS window, ATS will re-appear with the \$5.05 transaction already entered.

The WUPOS window will re-appear, and the user will be able to print the WUPOS receipt. This means that the transaction was successful on WU's side (below);



The user then needs to close the WUPOS window by clicking on the  button in the top right corner of the WUPOS window.


At this point, the ATS receipt prints out, and the transaction is now complete.

Modifying transactions

Once WUPOS transactions are near completion and in your transaction tape, they can't be modified or edited.

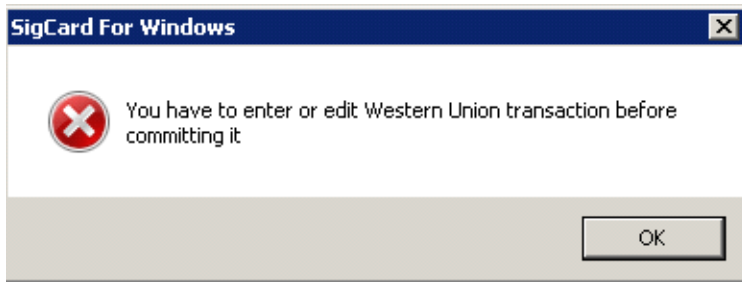
You will need to cancel the transaction entirely and re-enter it.

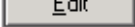
To cancel the WUPOS transaction

- Highlight the WUPOS transaction in the ATS transaction tape
- Click  in ATS

ATS will send the cancellation request to WU and the transaction will no longer exist.

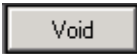
However, WU may request a correction or additional information before finalizing. In this case, you may see the window below;



Highlight the WU item in the transaction tape, and hit . This will re-open the WUPOS IE window, and you will have to make WU's necessary adjustments to the transaction before attempting to re-complete it through ATS.

Voiding transactions

To void/cancel a pending Western Union transaction you must:

- Contact Western Union Support at 1-800-325-6000 and explain you wish to void/cancel a pending transaction. You may also navigate here: <https://www.westernunion.com/us/en/customer-care/cc-by-phone.html>
- Void the transaction in ATS;
 - Log into ATS as the user who performed the WU transaction
 - Go to Daily Work > click on 'Void Transaction'
- Locate the transaction in the list, and then click on  to void the transaction in the DCS system.

****Reminder* – Voiding the transaction in ATS does *not* affect the status of the transaction to Western Union. You *must* contact WU Support and have the transaction cancelled for the transfer to actually be cancelled.

Reporting in ATS

There are 3 new incoming transactions, and 1 new outgoing transaction that can appear on your store and teller daily sheets. There are no fees associated with these menu items.

Incoming:

- Send Money
- Make Payment
- Prepaid Services

Outgoing:

- Payout Money

Here is an example of a Teller Preliminary Daily Sheet after performing a few sample transactions;

Teller Teller Preliminary Daily Sheet

Dcs Test Store

1 of

Friday, September 25, 2011

9:21:12 AM

Work Day From: 9/8/2015 10:17:05 AM To: 9/25/2015 9:20:46 AM

Transactions From: 9/25/2015 8:45:08 AM To: 9/25/2015 9:20:46 AM

Cash @ Open: 369.4

Incoming:

Send Money	470.65	3
Make Payment	364.75	1
Prepaid Services	26.40	1
Western Union (WUPOS)	861.80	

Total Incoming 861.8

Fees:

Total Fees 0.0

Outgoing:

Payout Money	0.05	1
Western Union (WUPOS)	0.05	

Total Outgoing 0.0

Cash @ Close: 1,231.1

***Note – for additional and in depth details of location-wide WUPOS transactions (Manager only function):

- Log into ATS as 'Vault Access'
- Go to Reports > click on 'Western Union – WUPOS Log'

This is a detailed look at the location's WUPOS transactions in a given date/time period. It will show every user's actions (opening WUPOS, logging out of WUPOS, transactions performed, the terminal they performed it on, dates/times, etc).

Reporting in WUPOS

You will be able to view WUPOS transaction history on their website the same way as you did before. Only this time, you need to use ATS to access WUPOS.

To view WUPOS reports, simply:

- Log into ATS as any user



- Click
- Open the 'Western Union (WUPOS)' sub menu

- Double click (or <Enter>) on 'Other Services'
This will launch the WUPOS window for the user.

- Click on  inside of the WUPOS window
- Click on 

Common procedures and help

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Updating your WUPOS password in ATS

Western Union forces a password change for each Operator ID every 90 days.

In order for ATS to be able to log you into WUPOS automatically, after changing your WUPOS password inside of WUPOS, you *must* update that password in ATS.

After changing your password in WUPOS, change your password in the DCS system by:

- Log into ATS as the user that changed their WU password
- On the main ATS window, go to Maintenance > click on 'WUPOS password reset'. You will see the below;



The image shows a Windows-style dialog box titled "WUPOS Login Reset". At the top is the Western Union logo. Below the logo, there are three input fields: "Current Password:" (with a masked password "XXXXXXXX"), "Enter new password:", and "Re-Enter:". To the left of the "Enter new password:" field is an icon of a hand typing on a keyboard. At the bottom of the dialog are three buttons: "Ok", a button with a yellow padlock icon, and "Cancel".

Your current WUPOS password is hidden for security purposes.

- Enter the updated WUPOS password in both fields in this window and click on 'Ok' once

done.

The updated WU password for your Operator is now stored in the DCS system, and ATS will use that password to auto log in you into the WUPOS integration.

Credentials not accepted message in WUPOS

If your WUPOS password is incorrect, you will see this message when attempting to log in:



There are a couple of reasons why you may see this message.

- Western Union did not accept the password that is currently set in the DCS system for your ATS user. You can close the window, and try again.

****Note* – too many unsuccessful attempts may lock out your Operator ID. It is recommended that you retry once, and if it still doesn't work, contact WU Support to have them reset your Operator ID's password, and then update it in the ATS system (see above section titled 'Updating your WUPOS password in ATS')

- You recently changed your WUPOS password, and need to update it in ATS.

Accessing the 'Other Services' section

To access the 'Other Services' section in WUPOS, simply:

- Log into ATS as any user



- Click
- Open the 'Western Union (WUPOS)' sub menu
- Double click (or <Enter>) on 'Other Services'

This will launch the WUPOS window for the user.

- Click on  **OTHER SERVICES** inside of the WUPOS window