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# ***GIFTePay 5.0***

## ***Installation & Configuration Guide***

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***TruRating***

***Part Number: 8662.16***

# ***GIFTePay 5.0 Installation & Configuration Guide***

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## ***Version Support***

This document supports the following application versions:

GIFTePay 5.0 - TruRating - V5.05

dsiPDCX, Version 1.56 (or later)

## ***Payment Processor Support***

This document supports the following payment processor:

***TruRating***

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# **OVERVIEW**

## **Introduction**

### ***About GIFTePay***

Developed by Datacap Systems, *TruRating GIFTePay* enables all types of retail businesses and other businesses types to perform reliable loyalty affinity transactions via the Internet.

*GIFTePay* is multi-threaded to accept simultaneous requests from multiple clients, and scalable so that customers can configure their store and enterprise system to fit their requirements and get the most favorable performance from the loyalty service provider.

### ***About Datacap***

Datacap Systems, Inc. develops and markets electronic payment interfaces that enable cash register and business systems developers to add electronic payment acceptance and loyalty affinity activity to their systems.

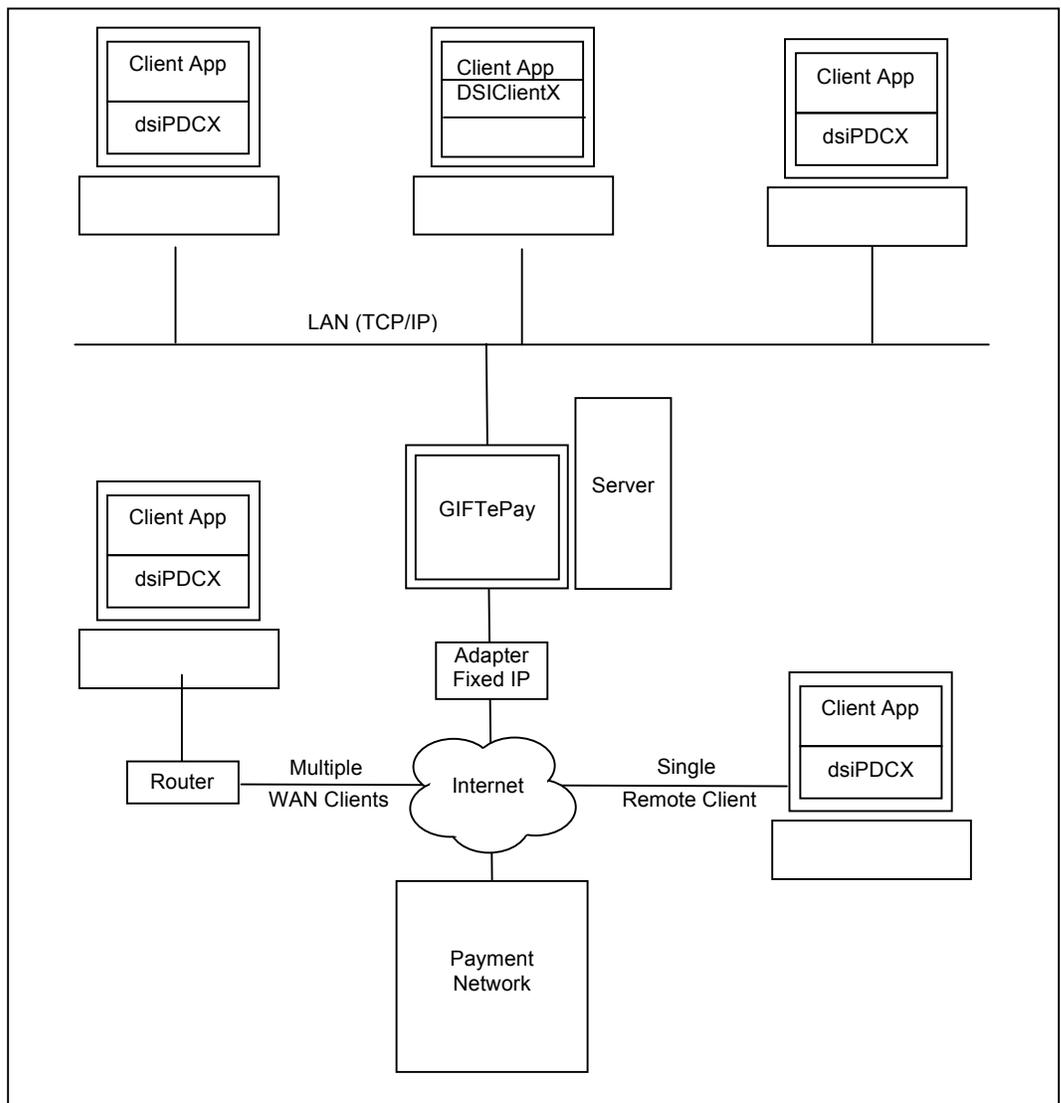
Datacap has various solutions that interface to virtually any hardware or software platform and send transactions to all major transaction processors via most common communications technologies including dial, wireless, and Internet.

## How it works

*TruRating GIFTePay* is an application that executes on a server (either at the store level or remotely, at the enterprise level) monitors encrypted transaction requests from client machines using a POS or restaurant application integrated with *dsiPDCX*, Datacap's XML ActiveX control.

When *TruRating GIFTePay* receives an encrypted loyalty transaction request from a client machine, it sends the request to the TruRating host system for approval via the Internet or other TCP/IP Virtual Private Network (VPN) services. The transactions are then stored in a database that resides on the server. *TruRating GIFTePay* makes use of 128-bit encryption to provide secure transactions over the Internet.

*GIFTePay* configurations are based on the capabilities of the TruRating processing system.



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# **INSTALLATION**

## **Introduction**

This chapter explains how to install and configure the following *GIFTePay* components.

- *TruRating GIFTePay Server*
- *dsiPDCX*
- *Microsoft Internet Explorer 6.0 (or later) with High Encryption*

You will need to install all the components on the server.

Each client machine will require that *dsiPDCX* be installed.

If you are using version 5.1 (or later) of Microsoft Internet Explorer that already has high encryption, installation of Microsoft Internet Explorer 6.0 (or later) with High Encryption is optional. If you are using a version prior to 5.1, you must upgrade your Internet Explorer installation.

## **Requirements**

### **Baseline System Configuration**

To successfully install and run *GIFTePay* on your server, it should meet or exceed the following system requirements:

- Microsoft Windows Server 2008, Windows Server 2012, Windows 7, Windows 8 or Windows 10. All latest service packs, updates and hotfixes must be applied.
- 4 GB of RAM minimum, 8 GB or higher recommended
- 50 GB of available hard-disk space
- Microsoft Internet Explorer with 128-bit encryption, Microsoft Internet Explorer 6.0 or higher recommended
- TCP/IP network connectivity.
- Persistent Internet Connection (DSL, cable, frame relay, etc.)

## **Network Requirements**

- Before installing *GIFTePay* or any of its components, you should know the names and IP addresses of the servers receiving transactions. For remote servers or enterprise systems, it may be necessary to contact your network administrator or your merchant service provider
- IP port 9200 on the TruRating *GIFTePay* server must be accessible for incoming traffic; if the TruRating *GIFTePay* server is behind a firewall, assure that incoming traffic is allowed on port 9200.

## **Installation Procedures**

### **Downloading the GIFTePay Software**

All components required for a *GIFTePay* 5 installation are available for download from Datacap's Software Download website at:

<http://www.datacapepay.com>

After agreeing with the Terms of Use, select **Proceed to Software Download Menu**. From the **GIFTePay 5.0** section of downloads Select **GIFTePay 5 for TruRating**. From the **Client Controls** section of downloads, select the ActiveX client for your installation (**dsiPDCX**). Each download is an automatic self-extracting installer, just double click to install each required component and follow on-screen instructions.

**Note:** After installation, your copy of *GIFTePay* 5 must be activated before it can be used to process transactions. Chapter 4 details the steps for activation.

### **What's Included in the GIFTePay Installer Package**

Note: Before you begin installing *GIFTePay* and its components, you should close all unnecessary programs and disable any anti-virus software.

The *GIFTePay* installer package is supplied as a self-extracting executable and includes the *GIFTePay* server application for Windows 7, Windows 8, Windows 10, Windows Server 2008 or Windows Server 2012 operating systems for both single and multi-pay point users.

- **dsiPDCX** – XML ActiveX control downloaded separately integrate into a Point of Sale application and sends encrypted payment authorization requests from client machines on a LAN to *GIFTePay* for processing.
- **You must be logged in as an 'Administrator' to install GIFTePay and all of it's components.** Installations performed when logged on as another user with rights less than 'Administrator' will not operate correctly.

## ***Installing/Upgrading Microsoft Internet Explorer***

GIFTePay uses Windows encryption services and requires that Internet Explorer with 128 bit encryption strength be installed on each system in the LAN. If needed, you must install or upgrade your server and each computer on the LAN with a version of Microsoft Internet Explorer that supports 128-bit encryption.

If needed, use the Windows Update on each PC to upgrade an existing version of IE to one that supports at least 128 bit encryption.

## ***Installing GIFTePay***

**Note:** *You must be logged in as an 'Administrator' to install GIFTePay and all of its components.* Installations performed when logged on as another user with rights less than 'Administrator' will not operate correctly.

To install the GIFTePay Server software:

1. Open the GIFTePay downloaded installation folder and double-click, **setup.exe**.
2. The installation wizard will start. When the Welcome screen appears, click **Next**.
3. Read and accept the End User License agreement and click **Next**.
4. Enter your **User Name** and **Organization**.  
If available on your operating system, make the application available to all users.
5. Click **Next**, then click **Install**. The installation wizard will then begin installing the necessary files on your computer.
6. Click **Finish** to complete the installation. A pop-up message will then appear and inform you to restart the computer.
7. Click **Yes** to restart the computer. ***It is very important to restart at this time to avoid configuration problems!***

## ***Installing dsiPDCX***

**Note:** *You must be logged in as an 'Administrator' to install GIFTePay and all of its components.* Installations performed when logged on as another user with rights less than 'Administrator' will not operate correctly.

## ***Installing the client control (dsiPDCX) (Required)***

To install ***dsiPDCX*** (includes the DSIClient Transaction Utility):

1. Separately download the ***dsiPDCX*** installer and double-click the **exe** to start installation.
2. The installation wizard will start. When the Welcome screen appears, click **Next**.
3. Read and accept the End User License agreement and click **Next**.
4. Read the notes pertaining to ***DSIClient*** installation and click **Next**.
5. Enter your User Name and Organization.
6. If available on your operating system, make the application available to all users.

7. Click **Next**, then click **Install**. The installation wizard will then begin installing the necessary files on your computer.
8. Click **Finish** to complete the installation. A pop-up message will then appear and inform you to restart the computer.
9. Click **Yes** to restart.

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# GIFTePay CONFIGURATION & TESTING

## Introduction

This chapter explains how to activate and configure *TruRating GIFTePay 5.0* for use.

*TruRating GIFTePay* is activated and programmed over the Internet so a working Internet connection is required for the process.

GIFTePay must complete two actions on the Internet before it is ready to process transactions. The first is to obtain a license file from Datacap's PSCS (Payment Systems Configuration Server) system. The second is to retrieve merchant parameters from Datacap's PSCS server.

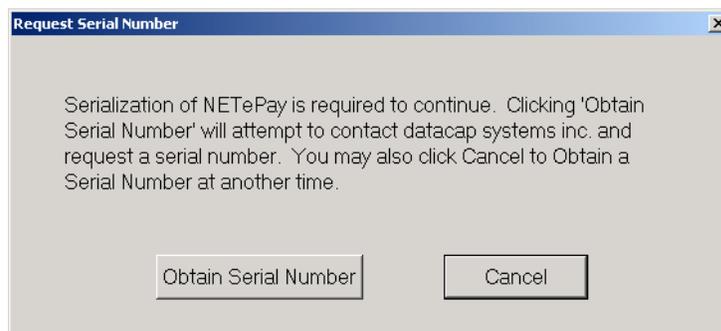
Merchant account parameters used by GIFTePay are entered on Datacap's web utility referred to as PSCS (Payment Systems Configuration Server) at [www.dsipscs.com](http://www.dsipscs.com). GIFTePay will download the parameters created on PSCS as part of the installation process. It is not possible to edit or change merchant specific parameter values from within the GIFTePay software.

### Note

Firewalls, routers or other systems which can block IP network traffic must allow GIFTePay to accept traffic on port 9200.

## Activation and Parameter Download

1. On the first program launch after installation, *GIFTePay* must obtain a license file over the Internet from Datacap's PSCS (Payment Systems Configuration Server) system. When GIFTePay detects that a serial number is required, it presents the following dialog:



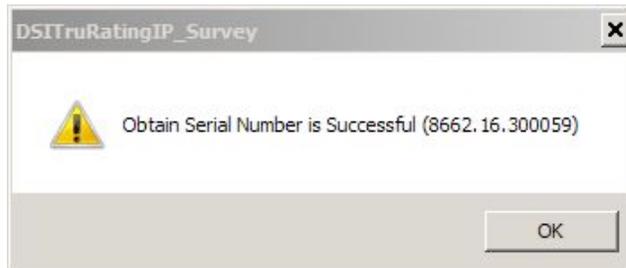
Click 'Obtain Serial Number' to enable GIFTePay to contact PSCS for a serial number.

2. If GIFTePay is unsuccessful in obtaining a serial number, it will present the following dialog:

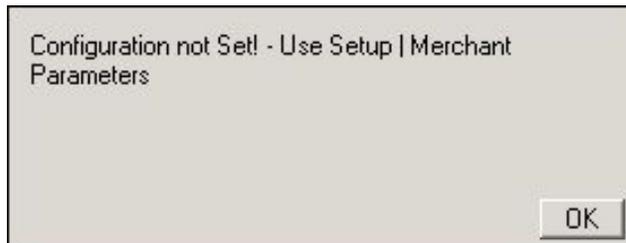


Click 'OK' and GIFTePay will close. Failure to successfully obtain a serial number means that GIFTePay was not able to contact Datacap's PSCS server over the Internet to obtain a serial number. Assure that the Internet connection is operating properly by using the default web browser on the machine where GIFTePay is installed to contact [www.datacapystems.com](http://www.datacapystems.com). If you are successful in contacting Datacap's website, close the browser, restart GIFTePay and click 'Obtain Serial Number' again. If you continue to experience difficulties in obtaining a serial number, contact your network administrator to assure that there are no firewall or DNS issues.

3. At this point, GIFTePay could present two possible responses. If *GIFTePay is successful in obtaining a serial number but is unable to locate merchant parameters for the assigned serial number*, you will see the following dialog:

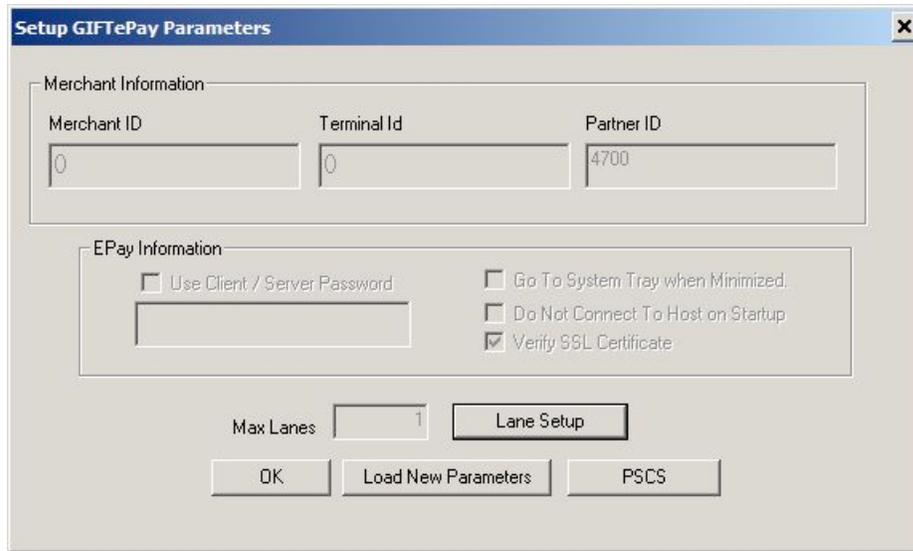


The dialog contains the 10 digit serial number that was automatically assigned to GIFTePay. Click 'OK' to continue and then you will see the following dialog:

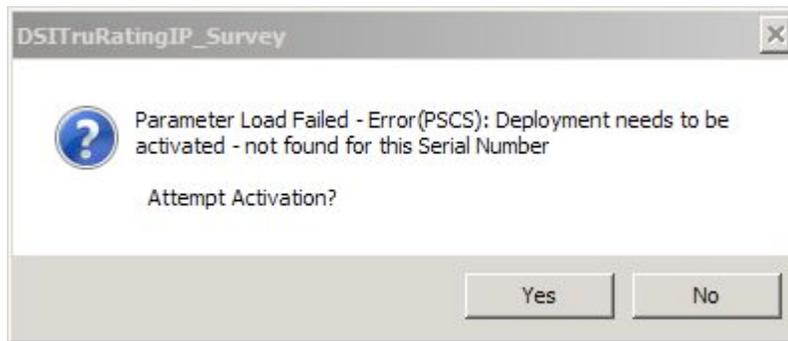


This dialog indicates that GIFTePay has not yet retrieved merchant parameters from Datacap's PSCS server and cannot operate until parameters are downloaded.

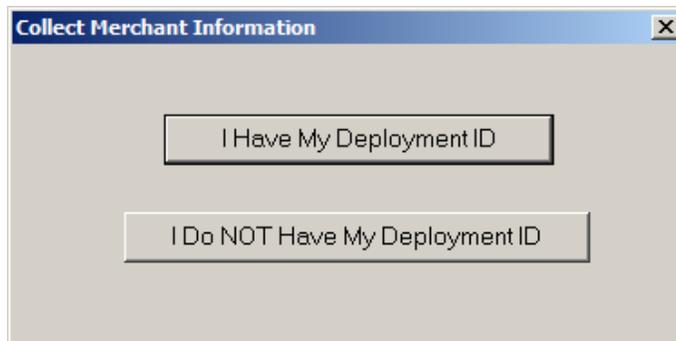
If a parameter file has been created on Datacap's PSCS server for the merchant account, then select 'Merchant Parameters' from the 'Setup' drop down menu. You will then see the following screen:



This setup screen displays the current values for the merchant parameters which are all 0's indicating that merchant parameters have not yet been loaded from Datacap's PSCS server. Click 'Load New Parameters' and you will see the following screen:



Click 'Yes' to attempt activation and you will see the following screen:



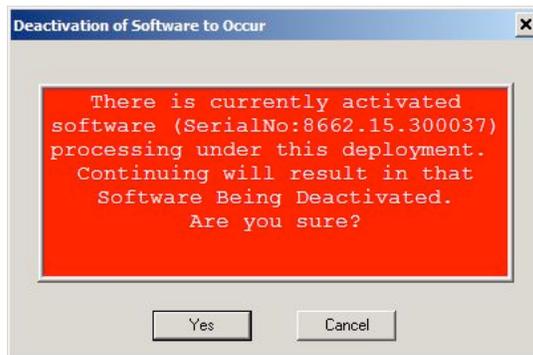
To continue, you must verify that you or someone else has created a Merchant Deployment on Datacap's PSCS server. If a deployment was created you may have been given a Deployment ID, which is typically an eight character code that has been assigned to the merchant's parameters. If you have a Deployment ID for the merchant, click 'I Have My Deployment ID'. If the merchant's parameters were created on PSCS but you do not have the Deployment ID, proceed to step 4.

When you click 'I Have My Deployment ID', you will see the following dialog:



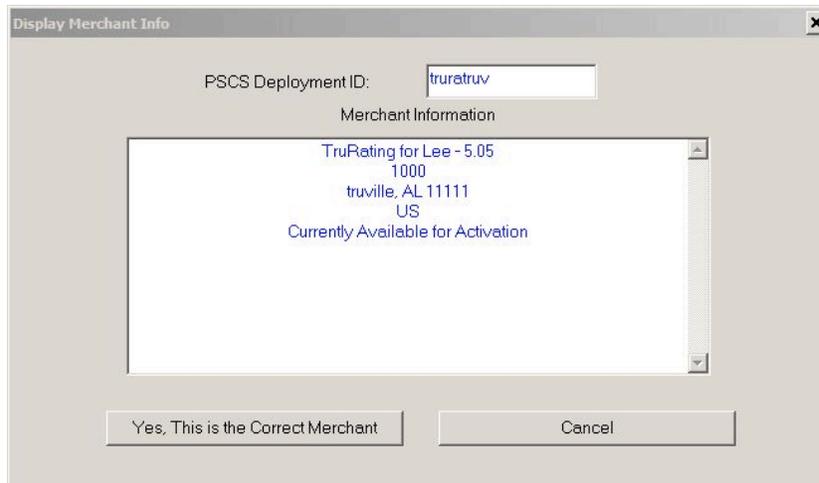
Enter the Deployment ID for the merchant parameter file and click 'OK'.

If GIFTePay detects that the Deployment ID is already in use by another serial number, you will see the following dialog:



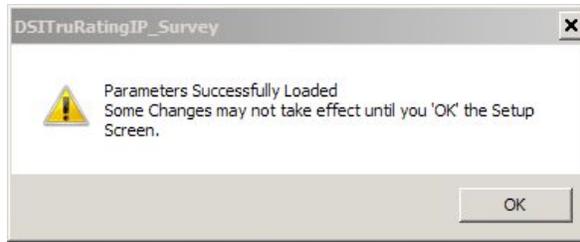
If you see this Deactivation Warning dialog, proceed to step 5.

GIFTePay will display a screen with merchant demographic data for you to verify as follows:

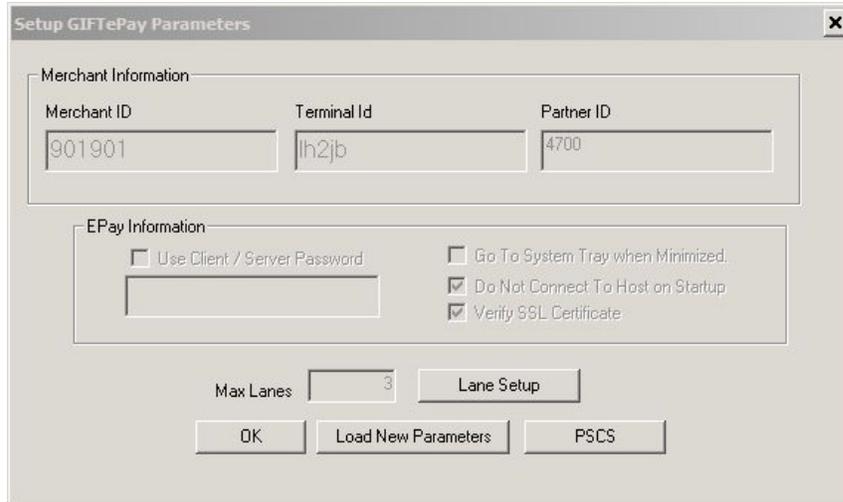


If the displayed information is not correct for the merchant site, click 'Cancel' and retry entry from the beginning of step 4. If the displayed information correctly identifies the merchant site, click 'Yes, This is the Correct Merchant'.

If GIFTePay successfully retrieves the parameters associated with the entered Deployment ID from the PSCS server, you will see the following dialog:

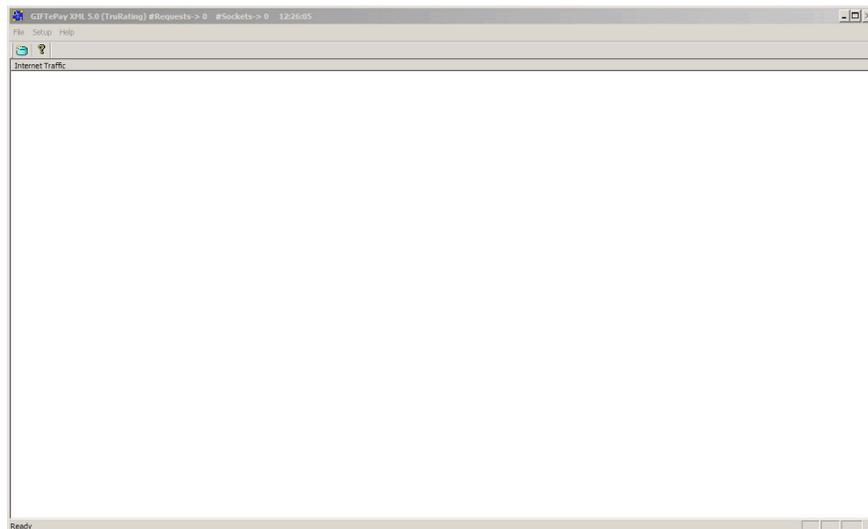


Click 'OK' and will then again see the setup screen as follows:



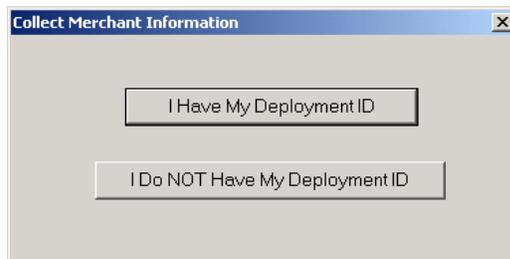
Lane Setup allows you to optionally change the description associated with each lane that was authorized in the PSCS parameter file. You cannot alter the number of lanes in GIFTePay; changes to the number of lanes must be done by editing the deployment file in PSCS.

The setup screen now contains non-zero values in the text boxes throughout the screen indicating the values retrieved from Datacap's PSCS server. You should verify that the parameters are correct and then click 'OK' to complete the setup process. You will then see the GIFTePay main status window indicating that GIFTePay is now programmed and ready to process transactions.

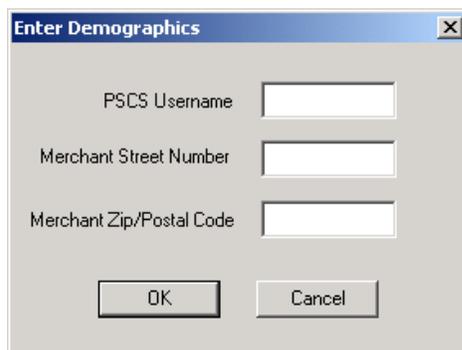


**GIFTePay setup is complete.**

4. If you don't have the PSCS Deployment ID for the merchant, click 'I Do NOT Have My Deployment ID' in the following dialog:



You will then see a dialog that will allow you to retrieve the PSCS merchant parameters from Datacap's PSCS server using merchant demographic information as follows:

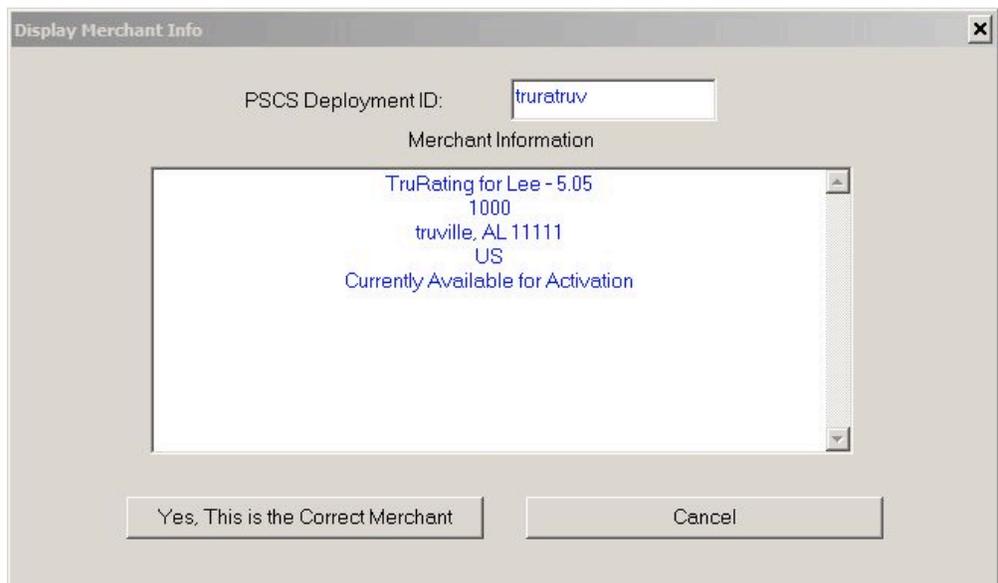


You need the following information to complete the demographics dialog entries:

- The PSCS user under which the merchant parameter file was created on the PSCS server
- The merchant location street number (e.g. enter '123' for 123 Main St.)
- The merchant location 5 digit zip code or 6 character Canadian postal code

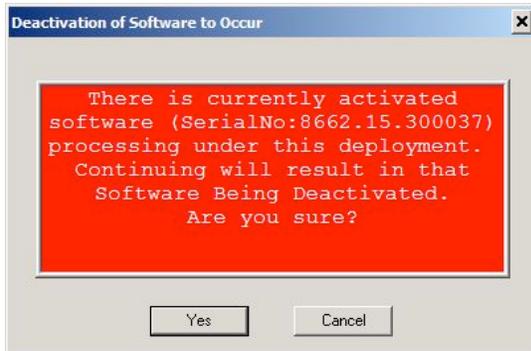
After entering this information, click 'OK'.

If GIFTePay is successful in retrieving the merchant parameters from Datacap's PSCS server, then you will see the following screen:



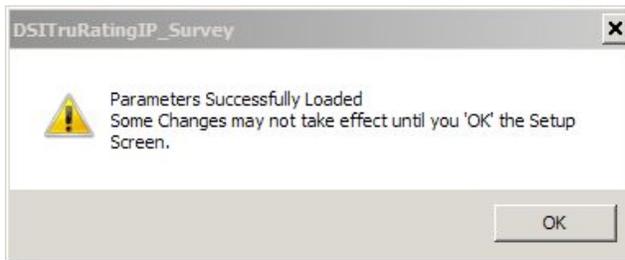
If the displayed information is not correct for the merchant site, click 'Cancel' and retry entry from the beginning of step 4. If the displayed information correctly identifies the merchant site, click 'Yes, This is the Correct Merchant'.

If GIFTePay detects that the selected merchant is already in use by another serial number, you will see the following dialog:

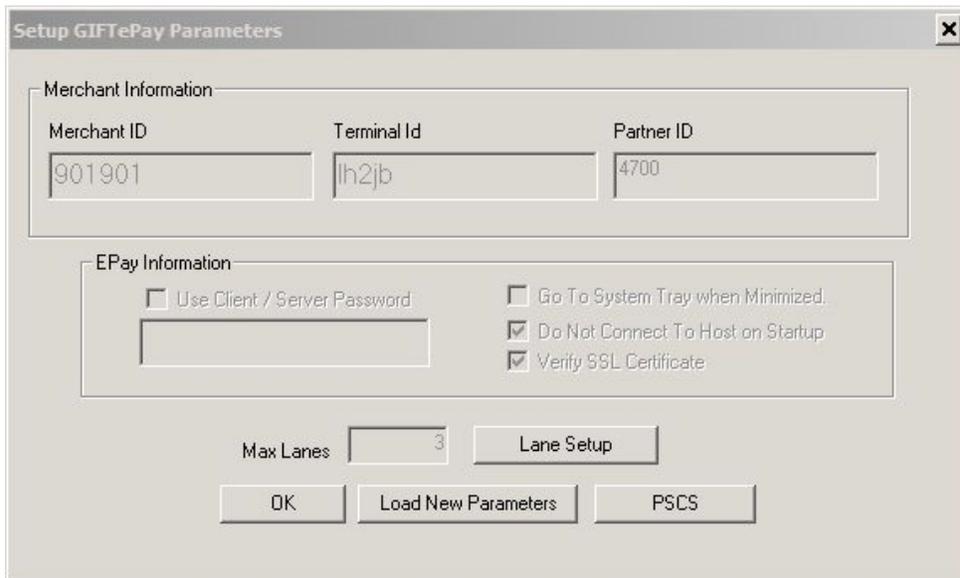


If you see this Deactivation Warning dialog, proceed to step 5.

If the parameters are successfully loaded, you will see the following dialog:



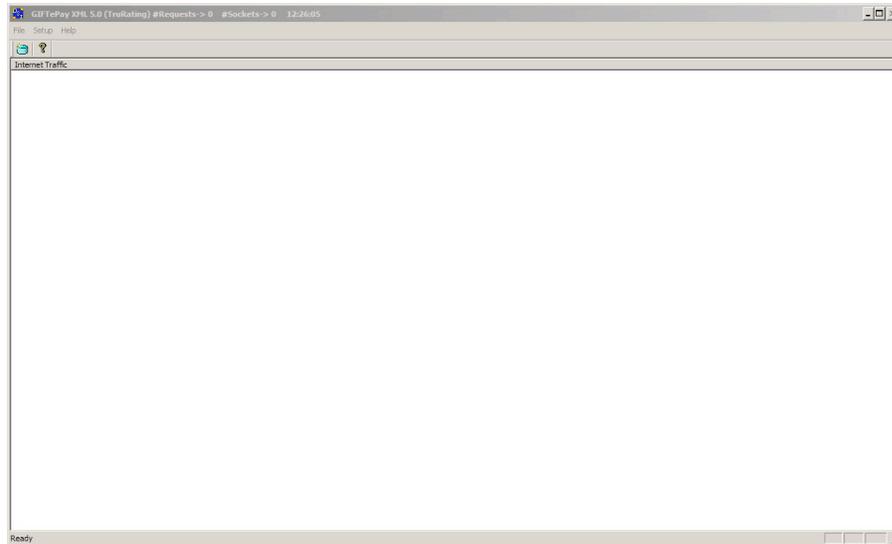
Click 'OK' and you will then see the setup screen as follows:



The setup screen now contains non-zero values in the text boxes throughout the screen indicating the values retrieved from Datacap's PSCS server. You should verify that the parameters are correct and then click 'OK' to complete the setup process.

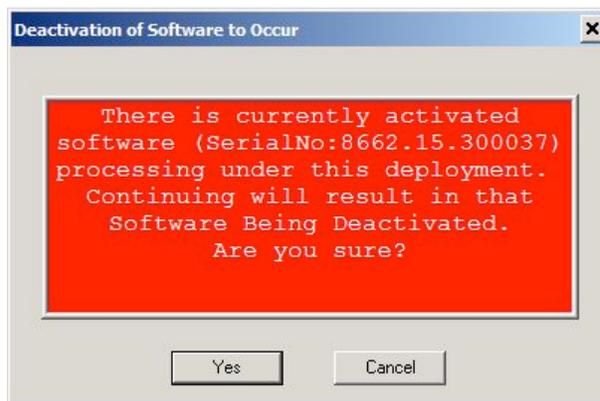
Lane Setup allows you to optionally change the description associated with each lane that was authorized in the PSCS parameter file. You cannot alter the number of lanes in GIFTePay; changes to the number of lanes must be done by editing the deployment file in PSCS.

You will then see the GIFTePay main status window indicating that GIFTePay is now programmed and ready to process transactions.



**GIFTePay setup is complete.**

5. If you receive the following Deactivation Warning dialog when entering a Deployment ID or Merchant Demographic Information that means another installation of GIFTePay is already using the merchant parameters associated with the Deployment ID or demographic information.



Verify that the Deployment ID or demographic information entered is correct; if not click 'Cancel' and retry the entry.

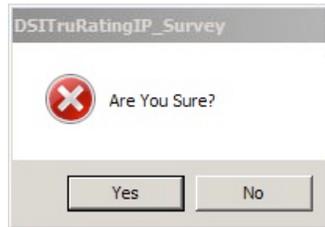
If the Deployment ID or merchant demographic information is correct and you want to force the parameters to load into GIFTePay, you should be aware that the GIFTePay with the serial number listed in the dialog box will be deactivated and will no longer be able to process transactions.

This dialog is typically encountered when the current GIFTePay is a replacement for a GIFTePay already activated for the same merchant who may have had a computer problem or hard disk failure that no longer allows them to use that earlier GIFTePay installation. This process will allow the new GIFTePay installation to use the existing merchant parameters associated with the entered Deployment ID without the need to create a new parameter file on Datacap's PSCS server.

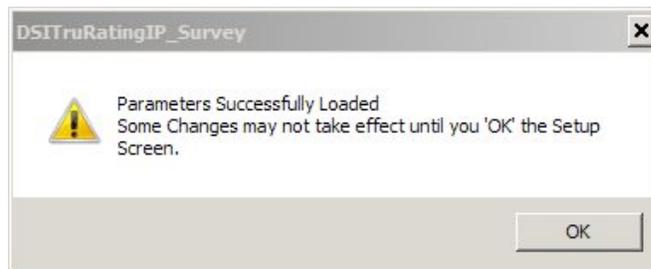
**WARNING:**

***Do not select 'Yes' unless you are certain that the GIFTePay with the serial number listed in the dialog box should be deactivated.***

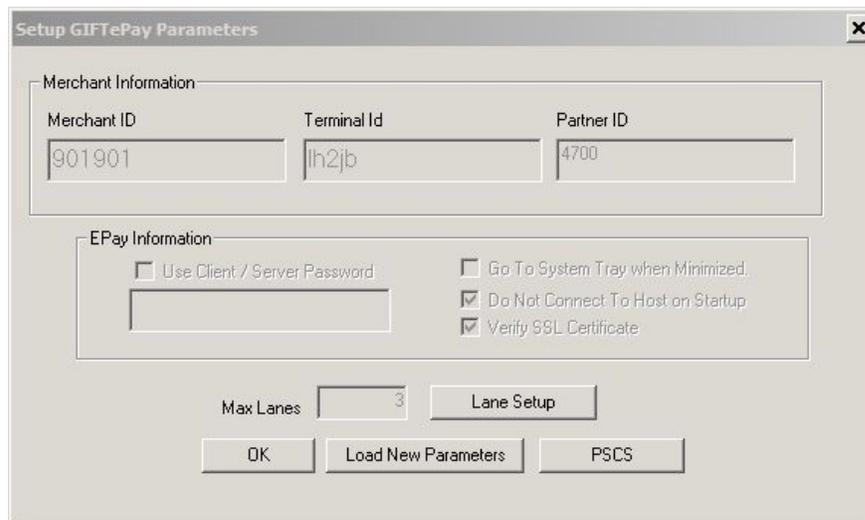
If you are certain that you want to deactivate the GIFTePay serial number listed in the Deactivation Warning dialog and use it with the new GIFTePay, then click 'OK'. You will see the following dialog which verifies your choice:



Click 'Yes' to if you are certain that you want to deactivate the GIFTePay serial number listed in the Deactivation Warning dialog and use it with the new GIFTePay. You will then see the following screen if the parameter download from Datacap's PSCS server is successful:



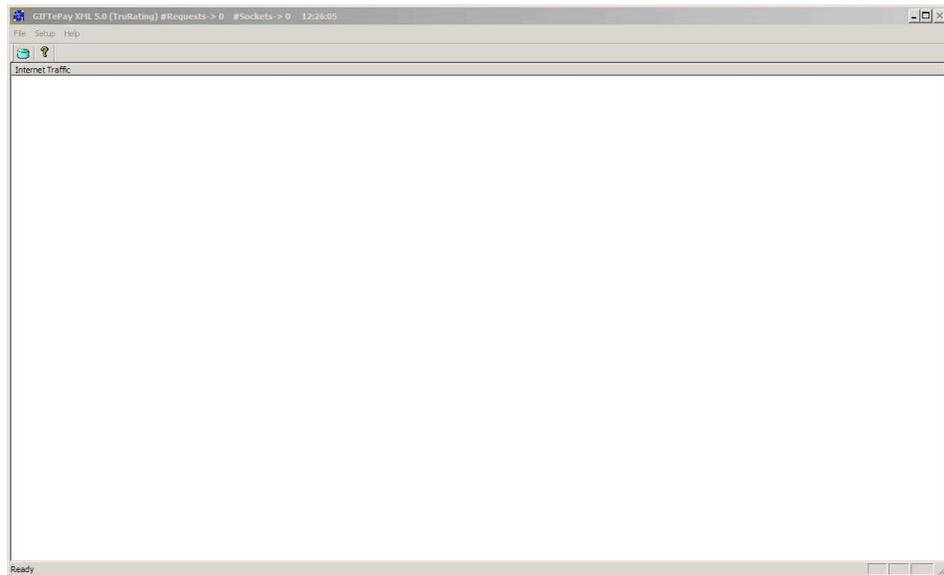
Click 'OK' and will then again see the setup screen as follows:



The setup screen now contains non-zero values in the text boxes throughout the screen indicating the values retrieved from Datacap's PSCS server. You should verify that the parameters are correct and then click 'OK' to complete the setup process.

Lane Setup allows you to optionally change the description associated with each lane that was authorized in the PSCS parameter file. You cannot alter the number of lanes in GIFTePay; changes to the number of lanes must be done by editing the deployment file in PSCS.

You will then see the GIFTePay main status window indicating that GIFTePay is now programmed and ready to process transactions.



GIFTePay setup is complete.

## ***Verifying Your Serial Number and Activation***

You can verify the serial number assigned to your copy of GIFTePay by selecting **About** from the **Help** menu item in the main status window. You will see a dialog box containing the serial number and some additional information of the activation that you may need to supply in certain support situations. An example of the dialog box information is as follows:



## Testing

### **Important! - Before You Start**

You should arrange with your TruRating for testing *GIFTePay* and all other related components before going live.

**It is the sole responsibility of the merchant account holder to verify that the merchant information entered into *GIFTePay* is correct.**

**You should only process actual loyalty transactions after verification that all test transactions have been successfully processed.**

Datacap Systems is not responsible for typographical errors, data entry errors or any other inaccuracies arising out of the creation and/or downloading of merchant data.

Furthermore, Datacap Systems shall not be liable for any errors or for incidental or consequential damages in connection with the use of the software or other programmed information, including customer supplied or Datacap supplied information.

## Operational Considerations

### **Important!**

GIFTePay relies on numerous services provided by Windows and other Microsoft software. **Proper computer operation is imperative to ensure reliable GIFTePay operation and prevent possible loss and/or corruption of transaction data.**

The following operational guidelines *must* be observed to ensure reliable GIFTePay operation:

- *Always* quit GIFTePay from the File|Exit pull down menu before restarting or shutting down Windows.

- *Always* quit GIFTePay and then shut down Windows before turning off the computer power. Never turn off the computer power without first quitting GIFTePay and shutting down Windows.
- *Always* quit GIFTePay and shut down Windows before pressing the reset button on the computer.
- If the computer is subject to unplanned power losses, the use of an UPS (Uninterruptible Power Supply) is *highly recommended*.
- If you operate a backup copy of GIFTePay, you *must* procure unique terminal and/or merchant account information for each copy of GIFTePay from your processing provider. Operation of multiple copies of GIFTePay with identical merchant setup information may cause transactions to be lost or duplicated at your processing provider.

## ***Networking Information***

The ***GIFTePay*** server listens for transactions requests from clients on TCP port 9200. If your network employs firewalls and/or routers which restrict certain traffic, verify that access to that port is allowed.