
GIFTePay XML
Installation & Configuration Guide

Chockstone

Version 4.00

Part Number: 8662.65 (ML)
8662.66 (SL)

GIFTePay XML Installation & Configuration Guide

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Version Support

This document supports the following application versions:

- GIFTePay XML, Version 4.00 (Chockstone)
- DSIClientX, Version 3.85
- DSIClient Transaction Utility, Version 2.50

Note: All components of the release package 20091204 are Windows VISTA™ and Windows 7 compliant.

Payment Processor Support

This document supports the following payment processor:

Chockstone

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OVERVIEW

Introduction

About GIFTePay

Developed by Datacap Systems, *GIFTePay* enables retail, restaurant and other businesses to perform reliable gift card or prepaid card authorizations via the Internet or other TCP/IP Virtual Private Network (VPN) services in as little as two seconds or less.

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 rates from their payment service

About Datacap

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

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

What's Included on your CD

The *GIFTePay* CD-ROM includes client and server applications for Windows NT/2000/XP/Vista operating systems for both single and multi-pay point users.

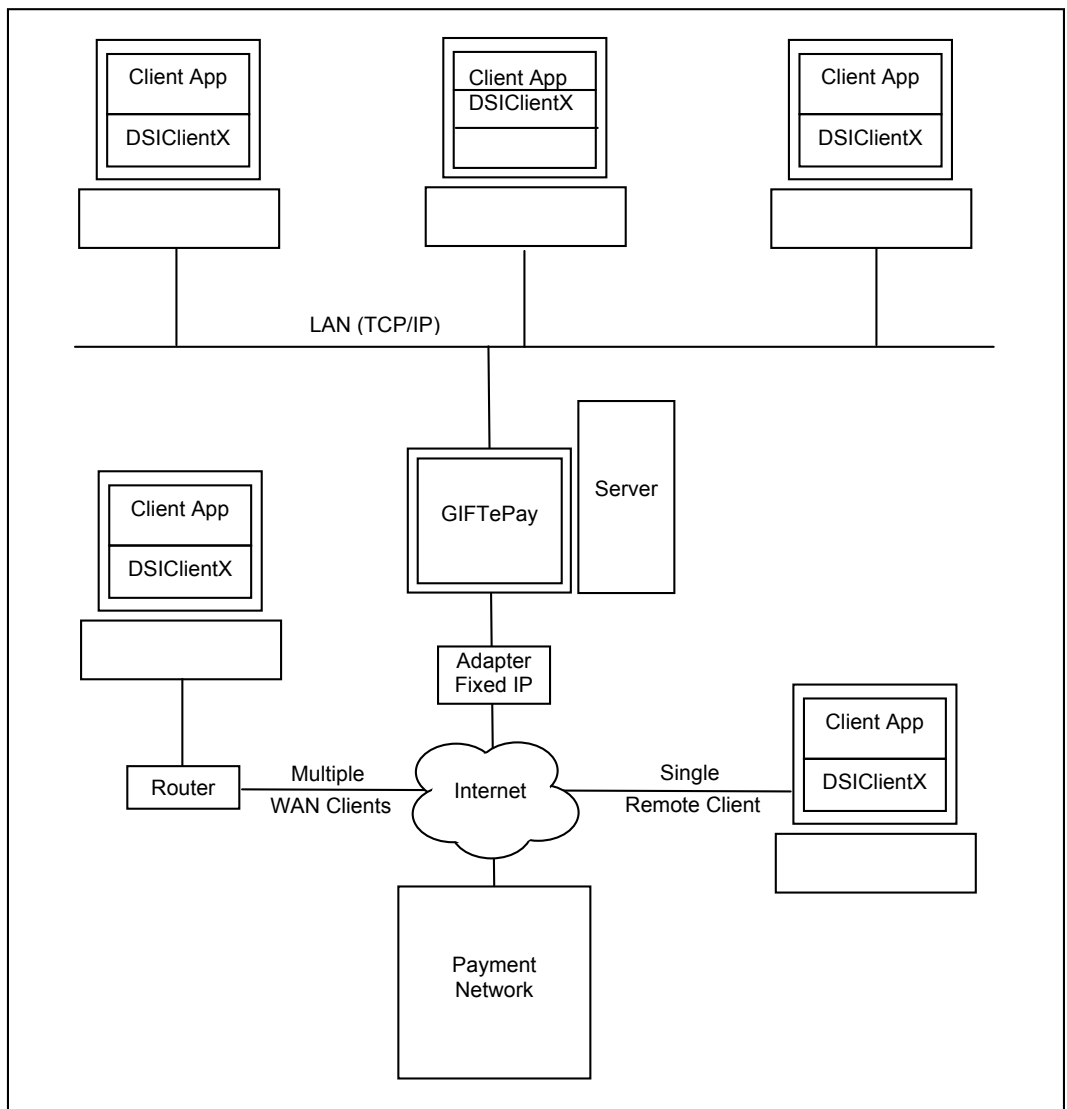
- ***GIFTePay*** – server-side software that enables you to process gift card or prepaid card authorization requests via the Internet or other TCP/IP Virtual Private Network (VPN) services.
- ***DSIClientX***– an XML ActiveX control that integrates into a Point of Sale or Restaurant application and sends encrypted gift card or prepaid card authorization requests from client machines on a LAN to *GIFTePay* for processing. *DSIClientX* also includes a utility program to enter payment transactions
- ***Microsoft Internet Explorer 6.0*** – this version (or later) of Microsoft Internet Explorer will ensure that you can install the necessary encryption capability required for *GIFTePay*.

How it works

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 *DSIClientX*, Datacap's XML ActiveX control.

When *GIFTePay* receives an encrypted gift card or prepaid card transaction request from a client machine, it sends the request to the bankcard processor 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. *GIFTePay* makes use of 128-bit encryption to provide secure transactions over the Internet.

GIFTePay configurations are based on the capabilities of the various payment processors.



INSTALLATION

Introduction

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

- *GIFTePay Server*
- *DSIClientX*
- *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 *DSIClientX* 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 2000 Professional with Service Pack 4, Windows XP Pro with Service Pack 2, Windows Vista Business Edition, Windows 7, Windows Server 2003 or 2008. All latest updates and hotfixes should be applied.
- 1 GB of RAM minimum, 2 GB or higher recommended
- 5 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.

You should also make port 9100 on the *GIFTePay* server available for incoming traffic if you are behind a firewall and connected to the default port.

If you are using a port other than the default IP port (9100), make sure you know the port on which the server is listening.

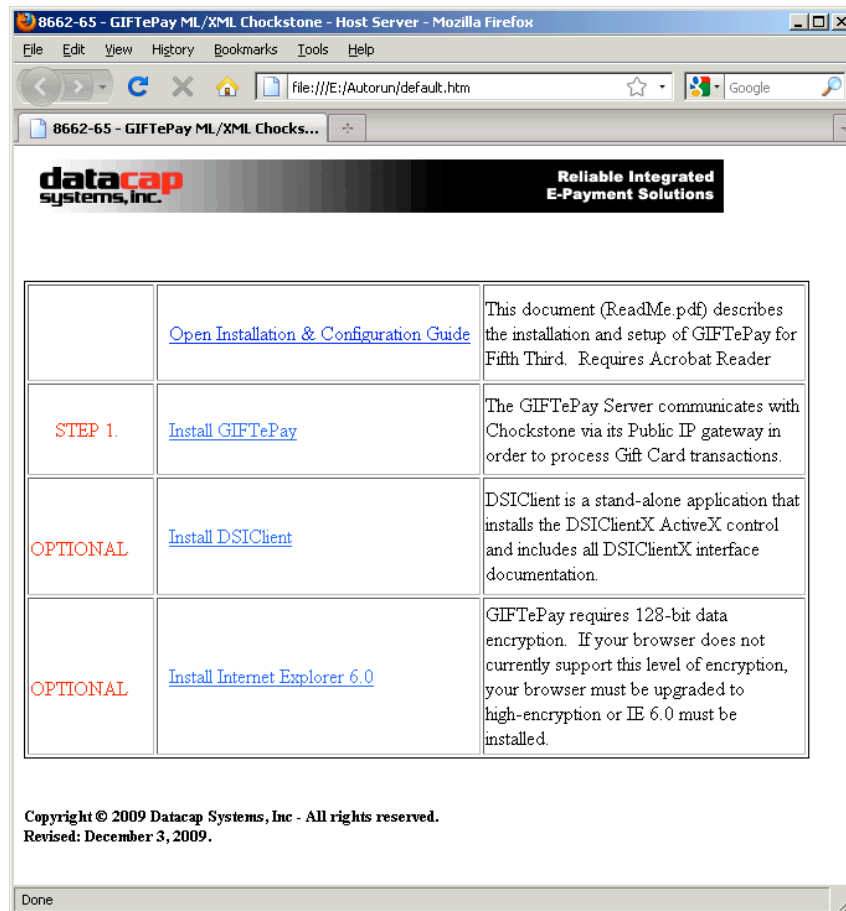
Installation Procedures

Accessing the GIFTePay CD-ROM

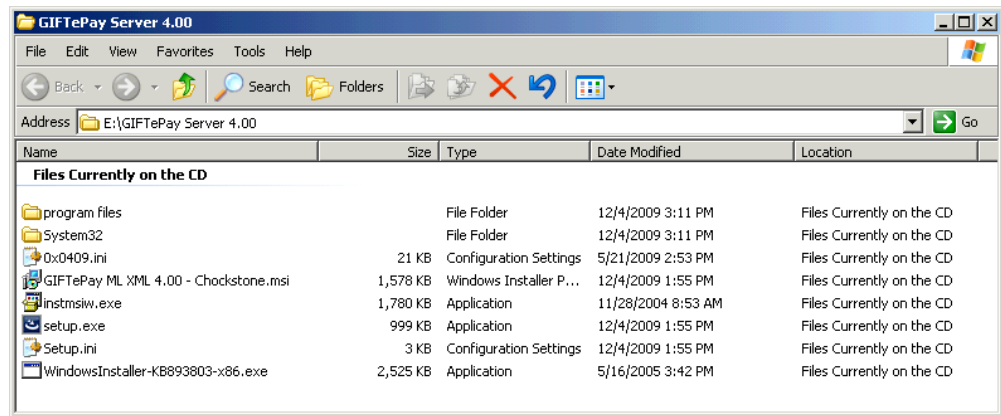
Before you begin installing *GIFTePay* and its components, you should close all unnecessary programs and disable any anti-virus software.

Use either of the following procedure to access the folders that contain the setup programs for *GIFTePay* and its components:

1. Insert the CD-ROM labeled “*GIFTePay*” into the server’s CD-ROM drive.
If you have Window’s AUTORUN feature enabled for your CD/DVD, then you will be presented with the following window:



2. If AUTORUN is not enabled on your system, then you should open **My Computer**, and then double-click the drive that contains the *GIFTePay* CD-ROM. The following window appears:



From this window, you can install *GIFTePay* and its components.

Installing/Upgrading Microsoft Internet Explorer

If needed, you can 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, you can use the Windows Update on each PC to upgrade an existing version, or install a copy of Microsoft Internet Explorer 6.0 (or later) included on the *GIFTePay* CD-ROM.

Determining the Encryption Strength

To determine if a PC has the necessary encryption to run *GIFTePay*:

1. Launch **Internet Explorer**.
2. From the Internet Explorer menu bar, select **Help** and choose **About Internet Explorer**. The following window (or something similar), should appear:



3. The Cipher Strength should indicate 128-bit. If not, you must update your version of Internet Explorer.
4. Click **OK** to close the window.

Installing Microsoft Internet Explorer

To install Microsoft Internet Explorer 6.0:

1. Open the Microsoft Internet Explorer folder on the *GIFTePay* CD-ROM and double-click the **Microsoft Internet Explorer 60 High Encryption** folder.
2. Double-click the **i386** folder.
3. Double-click **setup.exe**.
4. Click **Install Internet Explorer 6 and Internet Tools**.
5. Follow the on-screen instructions.

Installing GIFTePay

To install the GIFTePay Server software:

1. Open the GIFTePay Server folder on the *GIFTePay* CD-ROM 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.

Installing DSIClientX

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

1. Open the DSIClient folder on the *GIFTePay* CD-ROM 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. Read the notes pertaining to *DSIClient* installation and click **Next**.
5. Enter your User Name and Organization.
If available on your operating system, make the application available to all users.
6. Click **Next**, then click **Install**. The installation wizard will then begin installing the necessary files on your computer.
7. Click **Finish** to complete the installation. A pop-up message will then appear and inform you to restart the computer.
8. Click **Yes** to restart the computer.

NOTE: You may install *DSIClientX* (and the *DSIClient Transaction Utility*) on another computer(s) that are on a local area network with the computer running the *GIFTePay* server.

GIFTePay CONFIGURATION & TESTING

Introduction

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

GIFTePay is sent to you as a fully functional software application for 10 calendar days before requiring entry of an activation code by Datacap Systems.

If *GIFTePay* has not been activated by Datacap within those 10 days, it will decline all requests and return a “Must Activate GIFTePay” message to the POS terminal, indicating that the initial activation period has expired.

You will then have the option to extend the activation period for one additional 10-day period via the activation screen. If an activation code is not entered during the second activation period, *GIFTePay* will decline all requests and return a “Must Activate GIFTePay” message until an activation code is entered.

Activation

During installation, *GIFTePay* generates a Session Code and Machine ID that are unique to that PC and required for permanent operation of *GIFTePay* on that machine.

Simply submit those numbers to Datacap by using one of the following methods to obtain an activation code:

- Contact the Sales Department at (215) 997-8989 and provide the two uniquely generated numbers. Datacap will register your software and provide you an individualized activation code.
- E-mail the numbers to Datacap and receive your activation code via return E-mail.

Send an email message to activate@dcap.com with **GIFTePay Activation** in the Subject line. The body of the message should contain:

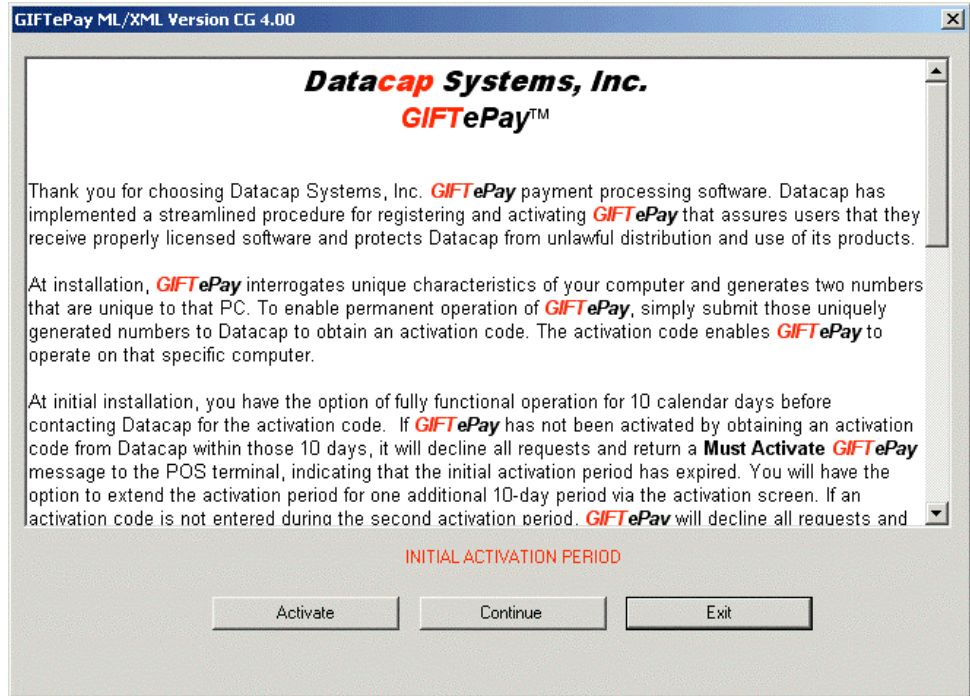
1. Your Name
2. Telephone Number
3. Serial Number
4. Session Code
5. Machine ID

The Serial Number, Session Code and Machine ID appear in the Activation dialog box and can be copied and pasted into the body of the E-mail message.

Configuration

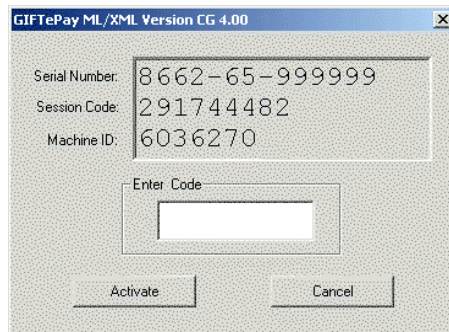
To activate and set up *GIFTePay* for use:

1. From the Desktop, double-click the **GIFTePay icon** The Initial Activation dialog box appears.

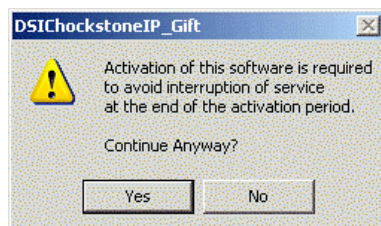


NOTE: The Initial Activation dialog box will appear each time you start *GIFTePay* until you activate it.

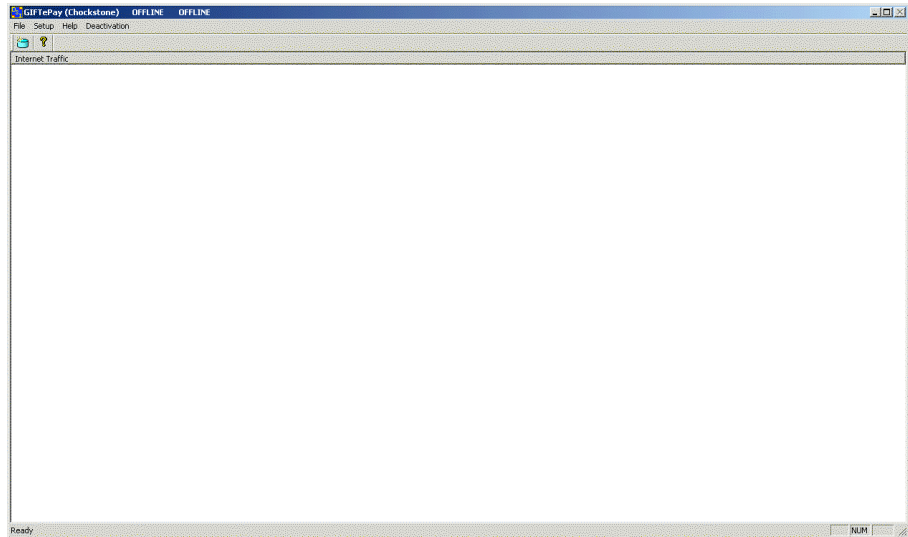
2. To enter the activation code, click **Activate**. When the activation dialog box appears, type the activation code in the box provided and click **Activate**



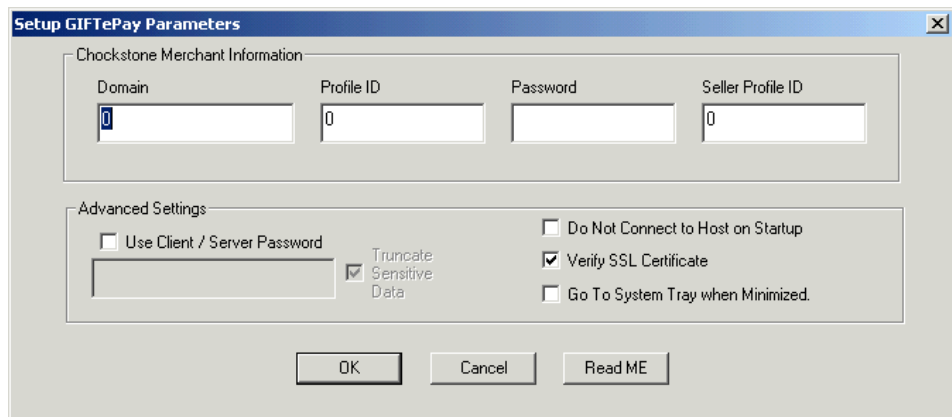
3. To proceed without activation, click **Continue**. When the message indicating that activation is required to avoid interruption of service appears, click **Yes** to continue.



- In either case, *GIFTePay* appears.



- From the *GIFTePay* menu bar, select **Setup** and choose **Merchant Parameters**. The **Setup GIFTePay Parameters** dialog box appears.



- In the **Chockstone Merchant Information** section, enter the information for Domain, Profile ID, Password and Seller Profile ID exactly as provided by Chockstone.
- Under the **Advanced Settings** section, you may select whether you want to use a password protection on communications between clients and the server. If you are using *GIFTePay* in a Wide Area Network (WAN) that uses an Internet connection, you should enable Client/Server password protection to prevent unauthorized use of *GIFTePay*. If you want to enable Client/Server Password operation, click the **Client/Server Password** box and enter the password to be used by the server in the box below the checkbox.
NOTE: You must also configure *DSIClientX* for Client/Server password protection using the same password to use this function.
- Under the **Advanced Settings** section, the selection box **Do Not Connect to Host on Startup** is unchecked by default. When this option is unchecked, *GIFTePay* will check that it can establish a connection to the Chockstone host before starting. If this box is checked, *GIFTePay* will start without testing the connection to the Chockstone host.

9. Under the **Advanced Settings** section, the selection box **Verify SSL Certificate** is checked by default. If you want to have the GIFTePay skip verification of the SSL certificate, you may uncheck this box. If you experience errors on startup with SSL certificate authentication, contact your Chockstone representative to determine if you should disable this feature.
10. Under the **Advanced Settings** section, the selection box **Go To System Tray when Minimized** is unchecked by default. If you want to have the GIFTePay icon appear in the System Tray rather than in the Toolbar when minimized, check this option.
11. After completing the configuration settings, click **OK** to save the settings and exit the dialog box. If you want to quit without any changes being applied, click **Cancel**.

Networking Information

The *GIFTePay* server listens for transactions requests from clients on TCP port 9001. If your network employs firewalls and/or routers which restrict certain traffic, verify that access to that port is allowed.

Testing

Important! - Before You Start

You should arrange with your bank and payment processor 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 payments after verification that all test transactions have been successfully deposited.

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.

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