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# *GIFTePay XML*

## *Installation & Configuration Guide*

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*Version 3.02*

*For Concord EFSnet*

*Part Number: 8662.50 (ML)  
8662.51 (SL)*

# ***GIFTePay XML Installation & Configuration Guide***

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## ***Version Support***

This document supports the following application versions:

GIFTePay XML, Version 3.02

DSIClientX, Version 3.60

DSIClient Transaction Utility, Version 2.50

## ***Payment Processor Support***

This document supports the following payment processor:

***Concord EFSnet***

### **Note:**

This Version 3.02 release of GIFTePay for Concord EFSNet is Windows VISTA™ Business Edition compatible.

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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 operating systems for both single and multi-pay point users.

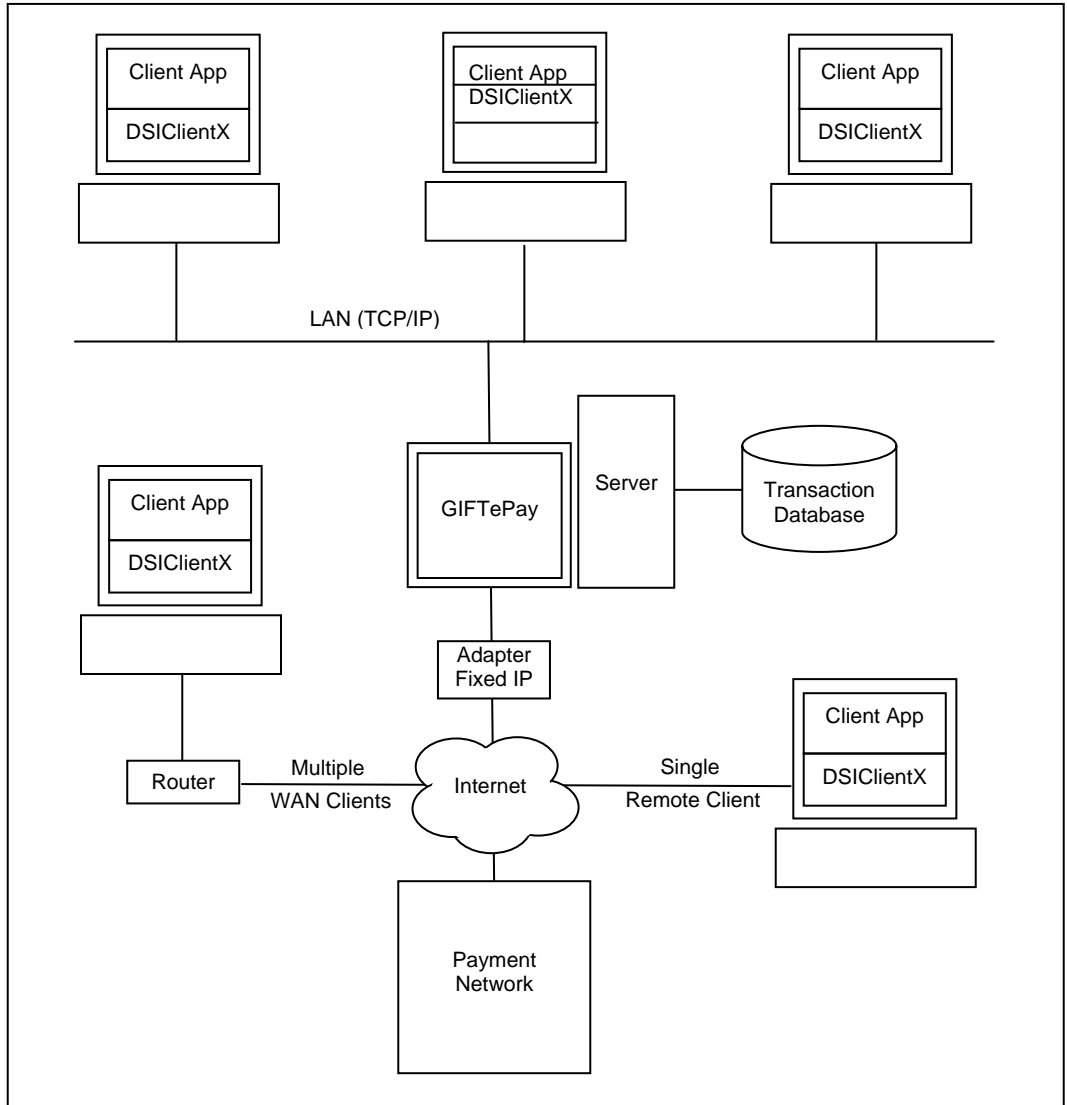
- ***GIFTePay*** – server-side software that enables you to process gift card or prepaid card authorization requests via the Internet or other TCP/IP Virtual Private Network (VPN) services.
- ***DSIClientX***– an XML ActiveX control that integrates into a Point of Sale or Restaurant application and sends 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*
- *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**

### **Server Requirements**

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

- Microsoft Windows NT 4.0 (SP6), Windows 2000 Professional (SP4), or Windows XP or Windows VISTA Business Edition
- 512MB minimum, 1GB or higher recommended
- 20 GB of available hard-disk space
- Microsoft Internet Explorer 5.1 (or later) with 128-bit encryption, Microsoft Internet Explorer 5.5 or higher recommended
- TCP/IP network connectivity
- Persistent Internet Connection (DSL, cable, frame relay, etc.)

**NOTE:** *Dial access that holds an open line will also work due to low bandwidth requirements.*

## 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.

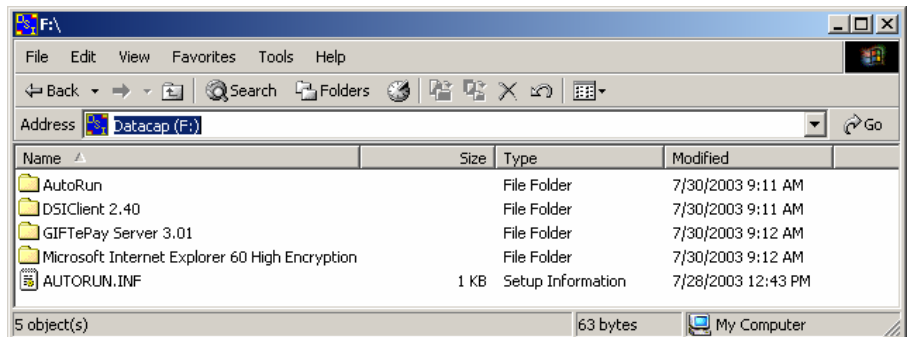
## Installation Procedures

### 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 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.
2. On your desktop, 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***

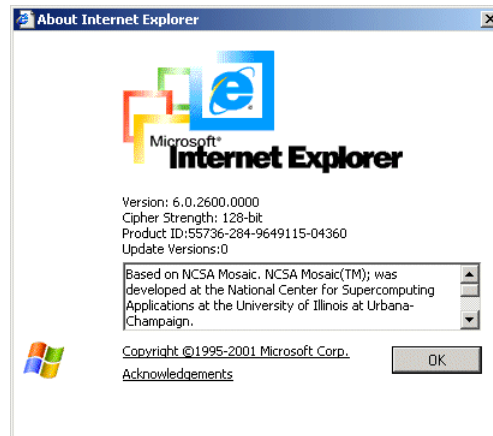
If needed, you can install or upgrade your server and each computer on the LAN with a version of Microsoft Internet Explorer that supports 128-bit encryption.

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](mailto:activate@dcap.com) with **GIFTePay Activation** in the Subject line. The body of the message should contain:

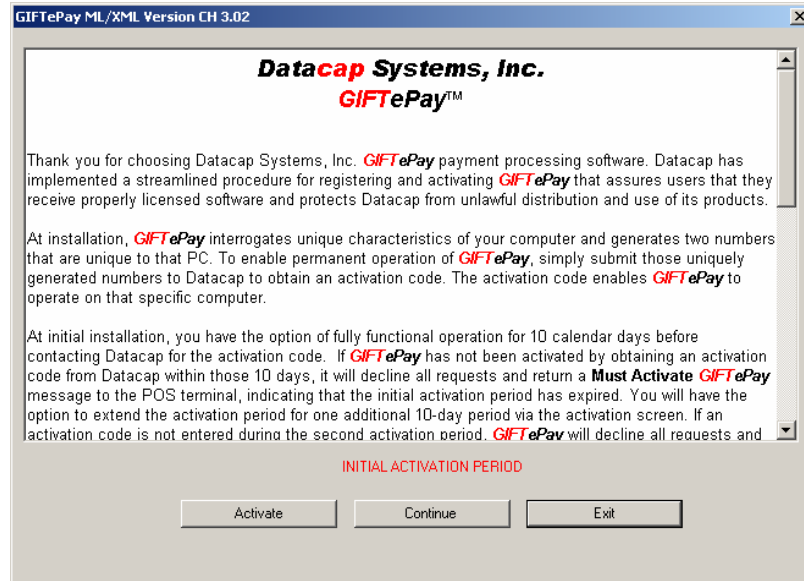
- a. Your Name
- b. Telephone Number
- c. Serial Number
- d. Session Code
- e. Machine ID

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

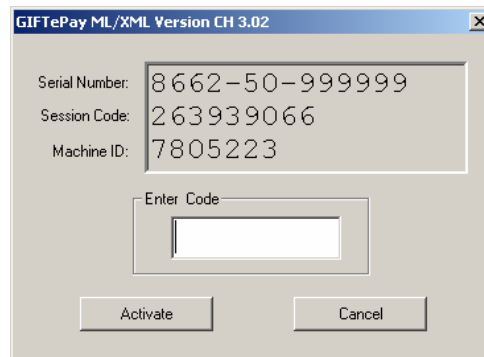
To activate and set up *GIFTePay* for use:

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

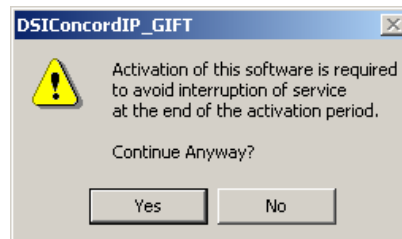


**NOTE:** The Initial Activation dialog box will appear each time you start *GIFTePay* until you activate it.

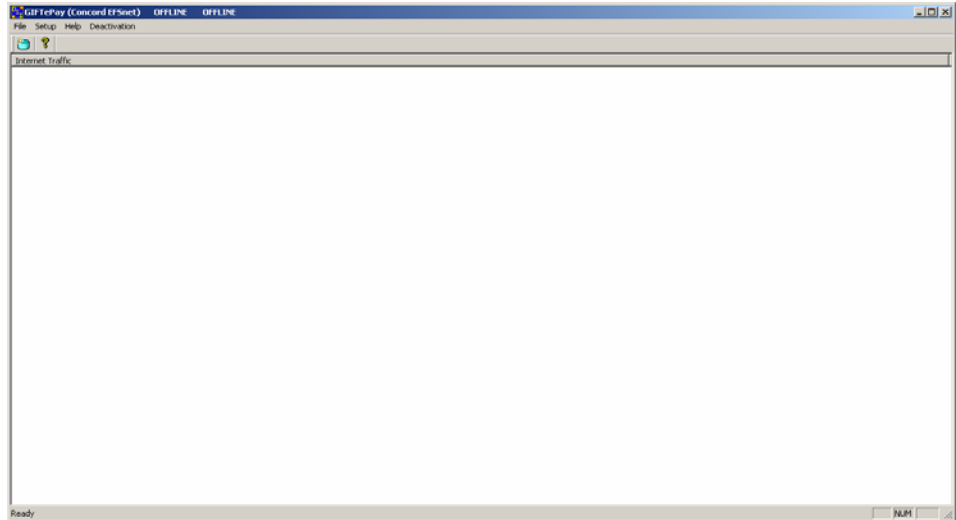
2. To enter the activation code, click **Activate**. When the activation dialog box appears, type the activation code in the box provided and click **Activate**



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.



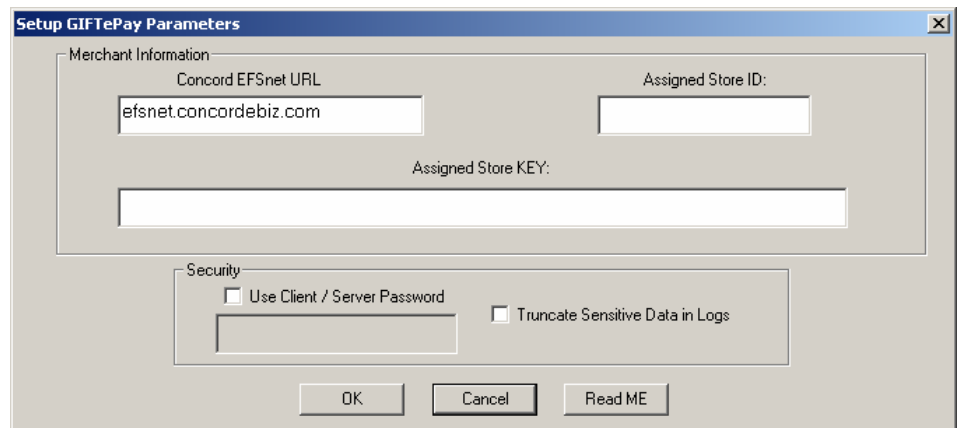
4. In either case, *GIFTePay* appears.



**NOTE:** During your initial access of GIFTePay, the following message will appear indicating that configuration is required. Click **OK** to continue.



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



**NOTE:** You may click the *Read Me* button at any time to view the *Read Me* file with additional information on setting your configuration.

6. Under **Merchant Information** section, enter the **Concord EFSnet URL**, **Assigned Store ID** and the **Assigned Store Key** in the boxes provided. This information is supplied by your merchant services provider.
7. If you want to use the Client/Server Password feature, select the **Use Client/Server Password** check box and enter the password to use in the text box.
8. For security, the option to truncate account numbers which are recorded in all log files is available. If you select the **Truncate Account Number in Log** check box, then all account numbers are recorded in the log with only the leading four digits intact and the

remaining digit positions replaced with X's. The leading four digits can be used to determine the type of card (i.e. MasterCard, VISA, AMEX, etc).

9. 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**.

## **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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