FasTraxPOS

Gift Card Setup and Configuration Guide

Gift Card Setup and Configuration

Requires

POS w567 (and newer)
GiftCardLoader.exe
TenderProcessor webservice folder
TenderProcessorDatabaseCreation.SQL script

<div style="background:cyan">

POS w567 should contain:

POS.exe
Fastrax.data.dll
IpadMercuryDll.dll
Newest **Register.bat**
Newest **UnRegister.bat**

</div>

<div style="background:yellow">

TenderProcessor contains:

App_Data folder (empty)
bin folder
TenderProcessor.asmx
Web.config

</div>

1. Create "**Gift Card**" department and tender via **FasTrax Director->Maintenance**
   a. Gift Card department number is not specific; any number is acceptable
      i. *Confirm if department is taxable*
   b. Gift Card tender ID should be **710**

2. Create "**TenderProcessor**" Database

   > - If this is a multi-store/Corporate setup, **TenderProcessor** database only needs to be added on the corporate server.
   > - If this is a single store setup, **TenderProcessor** database will need to be setup on the main SQL machine.

   a. Open **SQL Management Studio**
   b. Log in as "**SA**"
      i. *Password "**Password0&**"*
   c. Right-click "**Databases**" under the "**Object Explorer**" and choose "**New Database**"
   d. Enter "**TenderProcessor**" as the **Database name**; choose "**OK**"
   e. Under "**Object Explorer**", open "**Security**" then "**Logins**"
   f. Double-click "**Fastrax**" and choose "**User Mapping**" from the **Login Properties – Fastrax** window
   g. Check "**TenderProcessor**", then check "**db_owner**" from the **Database role membership** window
   h. Choose "**OK**"
   i. Choose "**New Query**"; located above **Object Explorer**
   j. From the available databases dropdown, choose "**TenderProcessor**"
   k. Choose "**File**", then "**Open**", then "**File**"
   l. Navigate to the location you have placed the "**TenderProcessorDatabaseCreation.sql**" script
   m. Choose "**Open**"
   n. Once the query screen is populated with the script, choose "**Execute**"

3. Set up and configure the TendorProcessor webservice

- If this is a multi-store/Corporate setup, **TenderProcessor** webservice only needs to be added on the corporate server.
- If this is a single store setup, **TenderProcessor** webservice will need to be setup on the main SQL machine.

   a. Copy the TendorProcessor folder to inetpub ->wwwroot
   b. Configure the "TenderProcessorConnectionString" information in the Web.config
       i. Match the Data Source, ID & Password with the Web.config in FTCorpWebservice directory
   c. Open IIS Manager and "*Right Click*" on the TenderProcessor folder and choose convert to application
   d. Confirm the assigned Application Pool is set to enable 32 bit applications.
       i. If necessary, create a new pool for the TenderProcessor; choose to enable 32 bit applications
   e. Via the Command Window, reset IIS
       i. Choose the Windows "Start" button
       ii. Type "cmd" in the "Run" box (could be "Search programs and files"); press "Enter"
       iii. In the black command box, type "iisreset";press "Enter"
       iv. IIS will reset
   f. Once IIS is reset, test the site - http://127.0.0.1/tenderprocessor/tenderprocessor.asmx

4. Move the "GiftCardLoader.exe" to C:/FasTrax/POS, if not already present

5. Setting up TenderProcessor on POS
   a. Add/Edit the following settings in POS.ini

       [GiftCardProcessor]
       Host=localhost   - *IP of machine running TenderProcessor*
       HostPort=80   - *port of machine running TenderProcessor*
       HostUsesSSL=false   - *use of SSL on the of machine running TenderProcessor*
       ForceGCSwipe=false   - *used by POS forces cashier to swipe the gift cards*

   - If this is a multi-store/Corporate setup, "Host" is the Public IP of the corporate server.
   - If this is a single store setup, "Host" should be either "localhost" or the Local IP of the main DB machine

   b. Add the following buttons to the POS
       i. Ensure POS is version 567 or higher
       ii. GiftCard Balance button from the Misc Tab; *used to get Gift Card Balance*
       iii. Prog Dept Button and set the Department Number to the newly created Gift Card department. Set the "ISGIFTCARD" value to "True"
       iv. GiftCard Tender button from the Tenders Tab and set the GiftCardTendID to 710
           - *New tender is created in step 1 of this doc; 710 is suggested ID*

Director Settings

Even though **Gift Cards** can be sold, redeemed and checked via the **POS**, to fully utilize **Gift Cards**, customers will want the ability to track and view their **Gift Cards** in a more efficient manner.

FasTrax Director offers an interface that enables customers to fully view and track transactions sold on **Gift Cards** via a couple of simple settings.

Even though these settings are not necessary for **Gift Cards** to be sold and function, this feature **is** required to complete the module.

1. Set **Director Settings** to Enable Gift Cards
   a. Once logged into **FasTrax Director**, click the "**settings**" hyper link at the bottom right of the window.
   b. From this new window, click "**Show Gift Cards Tab**".
      i. This will enable the **Gift Cards Director** interface where cards, balances and transactions can be checked.
      ii. This section is found under the "**Maintenance**" module.
   c. This can also be enabled by adding "**ShowGiftCards=1**" to the **FasTraxDirectorSettings.ini** under **[Settings]**

2. Create/Set **FasTraxGiftCards.UDL**
   a. This should already be located in the "**Installer Files**" folder.
      i. Move from the "**Installer Files**" folder to **C:/FasTrax**
      ii. Configure to point to the "**TenderProcessor**" database.

If the **FasTraxGiftCards.UDL** is not located in the "**Installer Files**" folder, or on the machine –

1. COPY an existing .UDL (e.g. **FasTraxSQL.UDL**)located in **C:/FasTrax/**
2. Rename to "**FasTraxGiftCards.UDL**"
3. Place new **FasTraxGiftCards.UDL** in **C:/FasTrax/**
4. Configure to point to "**TenderProcessor**" database

Cashier Gift Card Functions

Sale of a Gift Card

1. Enter the intended dollar amount of **Gift Card** and choose the **Gift Card Sale** button
   a. *This is the newly created **Prog Dept Button***
2. Choose **SubTotal** and tender with the correct payment type.
3. Now the POS will prompt the cashier to swipe or enter the **Gift Card Number.**
   a. *Cashier can manually input **Gift Card Number** via on screen keypad.*
   b. *A local MSR/Card Scanner is necessary to load gift cards via swipe.*
      Mercury pin pads and external card swipes are not compatible.
4. Once the Gift Card information has been filled out correctly, press the "**Submit**" button.
5. Sale will complete and print the **Gift Card Number** with the **Card Balance** on the receipt.

Redeem Gift Card

1. Cashier enters items for sale.
2. Cashier chooses **SubTotal** when ready to tender sale.
3. Choose the **Gift Card Redeem/Tender** button.
   a. *This is the newly created **GiftCard Tenders** button.*
4. POS will prompt for the **Gift Card Number** at which point the cashier will swipe or enter the **Gift Card Number**
   a. *Cashier can manually input **Gift Card Number** via on screen keypad.*
   b. *A local MSR/Card Scanner is necessary to load gift cards via swipe.*
      Mercury pin pads and external card swipes are not compatible.
5. Once the Gift Card information is entered, press the "**Submit**" button
   a. This will cash out the sale and deduct the balance from the card via the database.

Partial Tenders

Gift Cards can be partially tendered.
However, if you "**Cancel Sale**" the POS will prompt you to refund the already tendered amount to the card.

This is handled like a normal refund, only when the "**Gift Card Sale**" button is chosen, you will have to enter the card number or swipe the card when tendering to credit the refund.