NODUS Technologies, Inc.

ePay Advantage Installation Guide

ePay Advantage Version 6

May, 2016

ePay Advantage
Integrated Bill Pay Portal

NODUS Technologies, Inc.

Introduction

This installation guide provides the step-by-step process on installing and configuring the necessary components for Nodus ePay Advantage (ePay). To meet the needs of varying environments and installations, this guide is intended to be read on a PDF viewer to take advantage of the links within the document to direct the reader to the specific steps for their installation.

Nodus ePay Advantage offers the latest online payment technology for enterprises to streamline online billing and payment collection. The ePay Advantage solution allows customers to view their open invoices against the online bill presentment portal and pay them with a credit card or an electronic check. The ePay Advantage solution integrates with Microsoft Dynamics GP to automate billing processes and provide real-time payment processing. This document covers the prerequisites, and installation steps for the implementation of the ePay Advantage website.

Please review the Copyright section and the End User License Agreement for more detailed information on the use the use of ePay and this guide.

For information regarding specific ePay functionality, administrative setup and maintenance, refer to the **ePay User's Guide**. This guide can be obtained from the below link:

http://www.nodus.com/documentation/ePay-6-User-Guide.pdf

1. PA-DSS

EPay Advantage is a certified application that meets the Payment Application – Data Security Standard (PA-DSS) to help merchants to achieve PCI-DSS compliancy. The needed security measures to help the business achieve PCI compliancy with ePay Advantage are described in the **PA-DSS Implementation Guide for ePay Advantage**. This guide can be obtained from the below link:

http://www.nodus.com/documentation/ePay-PA-DSS-3.2-Implementation-Guide.pdf

2. Product Support

For additional questions or assistance during the installation, please contact Nodus Support.

- **Web** – http://www.nodus.com/support.html

- **Email** – Support@nodus.com

- **Phone** – (909) 482-4701 option 2

Preparation

1. Choose a Transaction Processing Option

ePay Advantage has three different options for Transaction processing: PayFabric, Tokenization and Encryption. Please be aware of which option has been chosen for this installation. This decision is generally determined during the purchase of ePay Advantage.

 Click here for details about the Transaction Processing Options

2. Understand the ePay System Requirements and Components

The complete ePay Advantage solution has several components which work with each other to allow the solution to properly function and communicate with Dynamics GP. It is very important to understand which systems the ePay Advantage solution will be deployed to the environment before proceeding.

Click here for Information about the System Requirements and Components for the deployment of ePay Advantage

3. Ensure Credit Card Advantage is prepared

Nodus Credit Card Advantage is a third party add on to Microsoft Dynamics GP that allows credit card and eCheck transactions to be processed directly from Dynamics GP. In order for ePay Advantage to function properly, Credit Card Advantage must be installed and configured prior to the ePay installation. If the Encryption option is chosen, then the Encryption Key Services will also be configured during the Credit Card Advantage DSS installation. Please confirm with Nodus Support if the installed version of Credit Card Advantage is compatible with the version of ePay Advantage that is to be installed or if any documentation on installing Credit Card Advantage is needed

4. Choose New Installation or Upgrade

New Installations and Upgrades to ePay Advantage involve different steps and procedures. Please select one of the below options for the installation.

New Installation Procedure

Upgrade Procedure

New Installation Procedure

Please ensure to use the links below to navigate through the Installation Guide to ensure the proper steps are followed in the correct order.

ePay Website Installation
Complete the following steps on the system where the ePay website will be installed.

1. If using the Encryption or Tokenization Option, Install Nodus Framework
2. If using the Encryption or Tokenization Option, Install Transact Advantage
3. If using the Encryption Option, Install the Nodus Encryption Client
4. Configure the Payment Gateway Connection
5. Install ePay Advantage

Integration Services
Complete the following steps on the system where the Integration Services will be installed

6. Install Nodus Framework
7. Install Transact Advantage
8. Install eStore Advantage
9. Configure the Transact Service Connection
10. Install and Configure Nodus Synchronizer

Website Configuration
11. Configure ePay Advantage

3. Upgrade Procedure

Please ensure to use the links below to navigate through the Installation Guide to ensure the proper steps are followed in the correct order.

Preparation

1.   Preparing for the upgrade

ePay Website Upgrade

Complete the following steps on the system where the ePay website will be installed.

2.   Install Nodus Framework
3.   If using the Encryption Option, Install the Nodus Encryption Client
4.   If using the Encryption or Tokenization Option, Install Transact Advantage
5.   Upgrade ePay Advantage
6.   Migrate the ePay Advantage Sitefiles

Integration Upgrade

Complete the following steps on the system where the Integration Services will be installed

7.   Install Nodus Framework
8.   Install Transact Advantage
9.   Install eStore Advantage
10. Configure the Transact Service Connection
11. Install and Configure Nodus Synchronizer

Website Configuration

12. Configure ePay Advantage

Transaction Processing Options

PayFabric® Option

The **PayFabric Option** utilizes the Nodus Cloud Processing Solution, PayFabric®, to dramatically reduce the scope of PCI compliance by removing the credit card storage, the credit card transmission and potentially the credit card entry point from the merchant's environment. The PayFabric Option supports multiple payment gateways and can easily be integrated into any application that needs to accept credit card or eCheck Transactions.

Tokenization Option

The **Tokenization option** utilizes a service from the PayPal PayFlowPro Payment Gateway account where the Payment Gateway will store credit card numbers and return a token value for each credit card number. EPay then stores the token instead of the credit card number for future processing. This option can help merchants reduce the scope of PCI Compliance since Credit Cards are no longer stored in the company databases. If this option is chosen, ePay has additional functionality available to remove the transmission and entry of credit card information on the environment as well. The Tokenization Option is available for companies using the PayPal PayFlowPro Payment Gateway when the account has been setup through Nodus. Please contact Nodus for assistance in setting up a PayPal PayFlowPro Payment Gateway account.

Encryption Option

The **Encryption Option** is where the credit card information is stored (in encrypted format) on local premise. With the Encryption option, ePay is bundled with Nodus Encryption, a service that encrypts credit cards in a format that has been approved to meet PCI Data Security Standards. This method of credit card storage supports multiple Payment Gateways and Processors.

Return to the Preparation Section

ePay System Requirements and Components

In order to create a complete solution, ePay Advantage contains different components that can be deployed across multiple systems. The following section contains information on the components, examples of how the components can be deployed and the system requirements.

Components

ePay Website – The web portal the users would browse to perform the various tasks available through ePay Advantage

ePay SQL Database – The database containing the data for the ePay website to function such as data relating to customers, invoices, payments, etc. With the Encryption Option Only, encrypted credit card data is stored in this database

Integration Services – The services that manage the data being sent to and from Dynamics GP

Dynamics GP SQL Database – The database containing the Microsoft Dynamics GP data

Encryption Key Service – The services for encrypting and decrypting data (Only applicable to the Encryption Option)

Architecture

The ePay solution can be deployed in a number of different ways based on the company security practices. The following section provides information to consider when deciding how the website should be deployed.

Example 1 (See Image Below): The recommended 4 system environment for when the ePay website is located on a hosted environment or on the DMZ. This 4 system deployment is typically used when it is needed for the ePay website to be in an environment separate from the internal Dynamics GP environment to protect the internal environment from outside internet traffic.

1. The ePay SQL Database and Dynamics GP SQL Database are on a system that is not accessible from the internet to provide protection for the data.
   a. If the ePay Website is located on the DMZ, the ePay SQL Database could be within the Internal GP environment for better protection and can be combined with the GP SQL Database if necessary.
   b. If the ePay Website is located in a hosting environment away from the Internal Dynamics GP Environment, the ePay SQL Database should be in close proximity to the ePay Website
2. The Integration Services must reside in the same domain as the Dynamics GP SQL Database with no blocked ports between for communication using the MSDTC protocol.
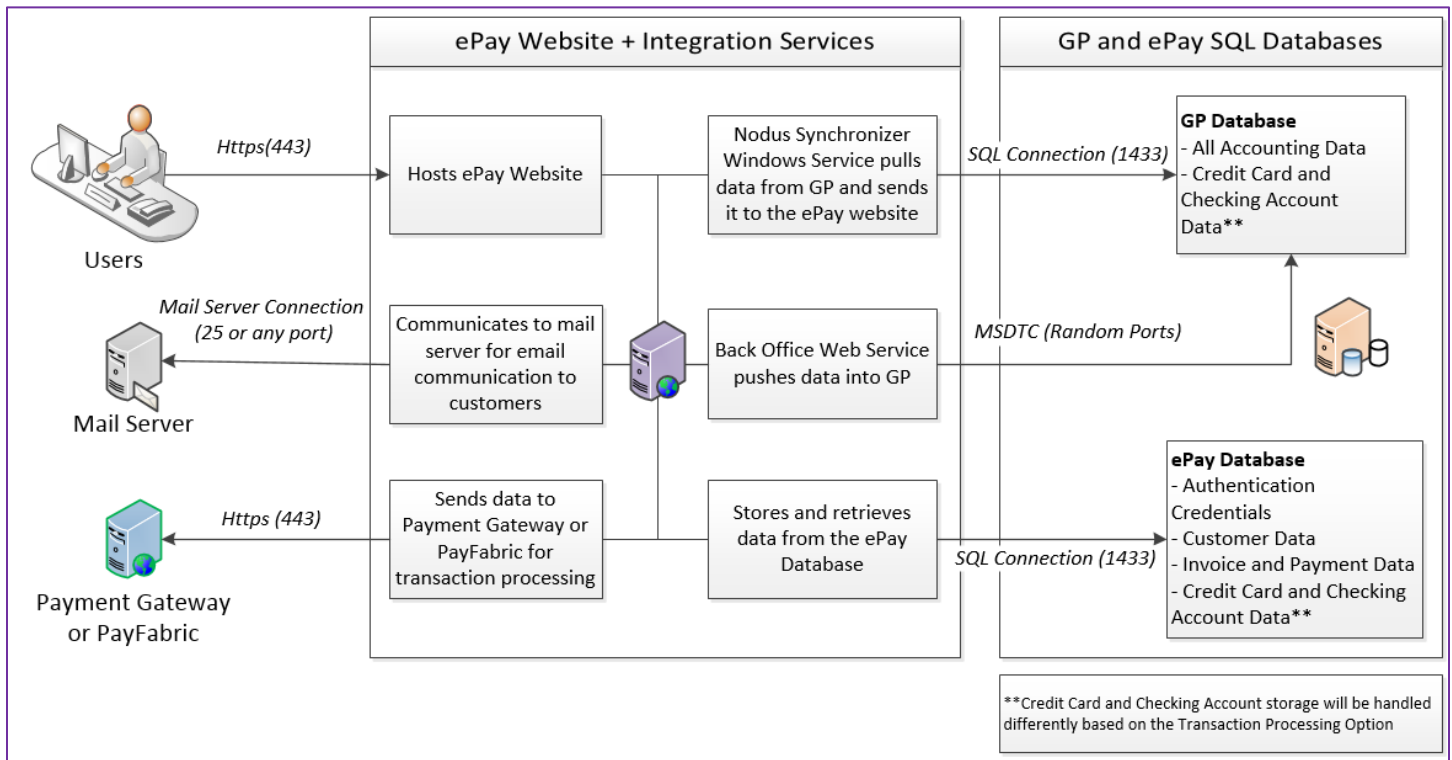
3. For the <u>Encryption Option only</u>, The Encryption Key Service (Not included in the diagram) is generally placed on the same system as the Integration Services and requires an open port (Usually 8003) for communication from the ePay Website and the Dynamics GP SQL Database
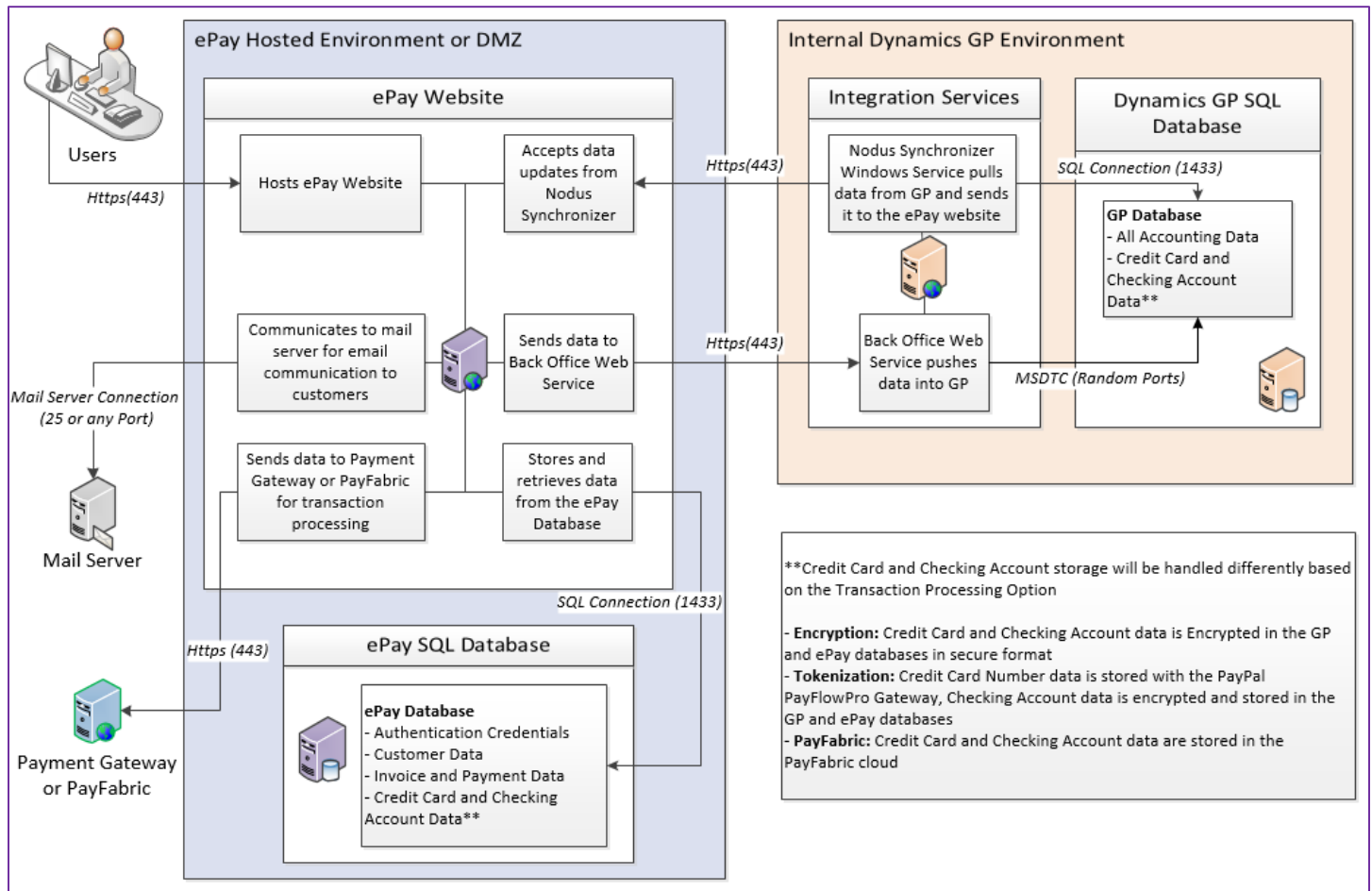
Example 2 (See Image Below): A two system configuration where ePay is within the local environment. This type of configuration is usually used when there is not a need to have the ePay website in a separate environment.

1. Since ePay is in the local environment, the ePay Website can easily be combined with the Integration Services since they share similar requirements
2. The ePay SQL Database and GP SQL Database are on the same system and the data is not on system that is not accessible from the internet.
3. For the <u>Encryption Option only</u>, The Encryption Key Service would likely be placed on the same system as the GP and ePay SQL Databases. (Not included in the diagram)

System Requirements

ePay Website Requirements

	REQUIREMENTS
Operating System	Windows Server 2008 R2, 2012, or 2012 R2
Processor	2.5 GHZ Dual Core or more
Memory (RAM)	2 GB or more
Connection	*Inbound* • The ePay Website should be accessible by ePay users. Production implementations would use port 443 for https communication *Outbound* • Connection to a Mail Server. • SQL Connection to ePay SQL Database system. (Typically on port 1433)

	• Communication to Back Office Web Service on system hosting the Integration services • <u>Encryption Option Only</u>, communicate to system hosing the Encryption Key Service over an open port (Typically port 8003)

Install the following **Server Roles** and **Features** from the **Windows Server Manager.**

Windows Server 2008 R2	**Windows Server 2012 or 2012 R2**

<u>Server Roles</u>
❖ Application Server Role
   ➢ Web Server (IIS) Support
   ➢ HTTP Activation
❖ Web Server (IIS) Role
   ➢ Application Development
      ▪ ASP.Net
      ▪ .Net Extensibility
   ➢ IIS Management Console
   ➢ IIS Management Scripts and Tools
   ➢ IIS 6 Scripting Tools
<u>Features</u>
❖ .NET Framework 3.5 Features
   ➢ .Net Framework 3.5.1
   ➢ WCF Activation
      ▪ HTTP Activation
	<u>Server Roles</u>
	❖ Application Server Role
	   ➢ .NET Framework 4.5
	   ➢ Web Server (IIS) Support
	❖ Web Server (IIS) Role
	   ➢ Web Server
	      ▪ Common HTTP Features
	         • Default Document
	         • Directory Browsing
	         • HTTP Errors
	         • Static Content
	         • HTTP Redirection
	      ▪ Application Development
	         • .Net Extensibility 4.5
	         • ASP.NET 4.5
	   ➢ Management Tools
	      ▪ IIS Management Console
	         • IIS 6 Management Compatibility
	            ♦ IIS 6 Scripting Tools
	         • IIS Management Scripts and Tools
	<u>Features</u>
	❖ .NET Framework 4.5 Features
	   ➢ .NET Framework 4.5
	   ➢ ASP.NET 4.5
	   ➢ WCF Services
	      ▪ HTTP Activation

ePay SQL Database Requirements

	REQUIREMENTS
SQL Version	Microsoft SQL Server 2008 R2, 2012 or 2014

	- For PCI Compliancy, the Microsoft SQL Server should be on a version that supports TLS 1.2. The following Microsoft article provides information on the versions of SQL Server that support TLS 1.2 https://support.microsoft.com/en-us/kb/3135244
Hardware requirements	Refer to SQL Server's requirements
Connection	<u>Inbound</u> Open for SQL communication from the system hosting the ePay Website (Typically port 1433)
User	Create a SQL User with the 'dbcreator' Server Role. This user will be referred to as the '**ePay SQL User'** during the installation

Integration Services Requirements

	REQUIREMENTS
Operating System	Windows Server 2008 R2, 2012 or 2012 R2
Processor	2.5 GHZ Dual Core or more
Memory (RAM)	2 GB or more
Software	• Microsoft eConnect Runtime and Dexterity Shared Components for Microsoft Dynamics GP 2010, 2013 or 2015 (based on the GP version) • SQL Server Native Client for the SQL Server version on the GP SQL Server

Required Components	**Windows Server 2008 R2**
	
	1. Application Server Role
	   1.1. Net Framework 3.5.1
	   1.2. Web Server (IIS) Support
	   1.3. HTTP Activation
	2. Web Server (IIS) Role
	   2.1. Application Development
	       2.1.1.1. ASP.Net
	       2.1.1.2. Net Extensibility
	     2.1.2. IIS Management Console
	     2.1.3. IIS Management Scripts and Tools

	Windows Server 2012 or 2012 R2
	
	1. Application Server Role
	   1.1. Web Server (IIS) Support
	2. Web Server (IIS) Server Role
	   2.1. Web Server
	      2.1.1. Common HTTP Features
	         2.1.1.1. Default Document
	         2.1.1.2. Directory Browsing
	         2.1.1.3. HTTP Errors
	         2.1.1.4. Static Content
	         2.1.1.5. HTTP Redirection
	      2.1.2. Application Development
	         2.1.2.1. .Net Extensibility 3.5
	         2.1.2.2. ASP.NET 3.5
	      2.1.3. Management Tools
	         2.1.3.1. IIS Management Console
	         2.1.3.2. IIS Management Scripts and Tools

Connection	<u>Inbound</u> • Open port for web service that will be utilized by ePay Website <u>Outbound</u> • No blocked ports with the system containing the GP SQL Database for Microsoft eConnect to utilize MSDTC Protocol. • Access communicate to ePay Website
User	Prepare a Domain User with local administrative permissions to this server. This user will be used to run the Microsoft eConnect Windows Service and communicate with the Dynamics GP SQL Database.

Dynamics GP SQL Database Requrements

	REQUIREMENTS
Operating System	Windows Server 2008 R2, 2012 or 2012 R2
GP Version	GP 2010, GP 2013, GP 2013 R2, GP 2015, GP 2015 R2, or GP 2016

Database	Refer the SQL requirements for Dynamics GP - For PCI Compliancy, the Microsoft SQL Server should be on a version that supports TLS 1.2. The following Microsoft article provides information on the versions of SQL Server that support TLS 1.2 https://support.microsoft.com/en-us/kb/3135244
Hardware Specs	Refer to the requirements for Dynamics GP
Connection	*Inbound* No blocked ports for communication from the Integration Server
User	Create a SQL user that will be used for the Integration Server to connect to the GP database. This user will need the database role membership of 'db_owner' and 'DYNGRP' in both the GP company database and the DYNAMICS database. This user will be referred to as the '**GP SQL User**' during the installation.

Encryption Key Service

This service is only required if using the Encryption Option. If using the Tokenization or PayFabric options, this service is not applicable to the installation.

	REQUIREMENTS
Operating System	Windows Server 2008 R2, 2012, or 2012 R2
Processor	2.5 GHZ Dual Core or more
Minimum (RAM)	2 GB or more
Connection	*Outbound* SQL Connection to the system with the Dynamics GP SQL Database (Typically on port 1433) *Inbound* A port for communication from the system with the ePay Website, the Dynamics GP SQL Database and any GP client workstations (Typically 8003)

TLS 1.2

The PCI-DSS standard requires the use of strong cryptography protocols during communication between systems. SSL and TLS versions 1.0 and 1.1 are not considered strong cryptography protocols and should be disabled on all systems that would come in contact with credit cards. Please note that disabling older encryption methods can cause serious impacts on the environment if not tested properly. It is highly recommended to perform proper testing to ensure systems and software support TLS 1.2.

Disabling SSL and TLS versions 1.0 and 1.1
The below article from Microsoft contains steps to disable SSL and TLS versions 1.0 and 1.1.

https://support.microsoft.com/en-us/kb/187498

Enabling TLS 1.2
TLS 1.2 is not enabled by default on Windows Server 2008 R2. The below Microsoft article contains information on how to enable this protocol.

https://technet.microsoft.com/en-us/library/dn786418.aspx#BKMK_SchannelTR_TLS12

Return to the Preparation section and proceed to the next step

Preparing for the Upgrade

To prepare for the upgrade it is important to ensure all the data has been backed up and services are stopped. The following section should assist in preparing for the upgrade.

Before with the upgrade, please make sure to read the following information.

There are certain cases in which the upgrade procedure may require additional procedures not mentioned in this guide. Please contact Nodus Technologies Support if the upgrade meets any of the following requirements:
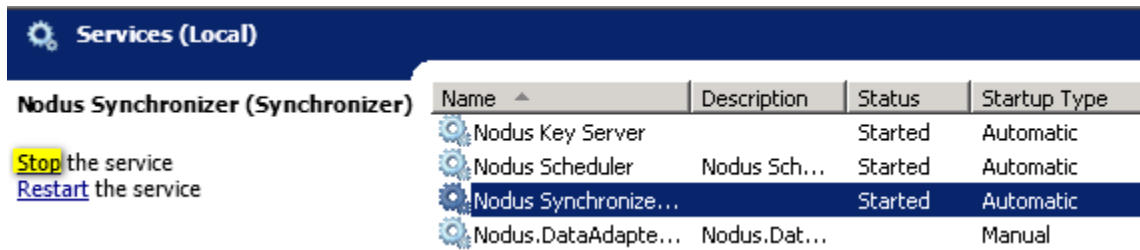
- If the current ePay Advantage installation is a version less than 4.0.
- If there are multiple ePay Advantage websites that need to be upgraded.
- If the Transaction Processing Option is to be changed such as moving from the Encryption Option to the PayFabric Option.
- If there is any customization applied against the current ePay Advantage website.
- If it cannot be determined if any of the above conditions apply to this installation.

GP SQL Database Preparation

1. Backup the DYNAMICS database and any GP company databases involved with ePay.
2. If the Encryption Option is selected, backup the Nodus Encryption Database

Integration Services Preparation

1. Create a backup copy of the following folders
    a. C:\Program Files (x86)\Nodus
        i. On a 32-bit system, this would be at C:\Program Files\Nodus
        ii. This is the program file path for the Nodus Programs installed on this system. This could have been modified during the original installation.
    b. C:\Program Files (x86)\Common Files\Nodus
        i. On a 32-bit system this would be at C:\Program Files\Common Files\Nodus
    c. C:\Program Data\Nodus
        i. On Windows Server 2003 systems, this folder would be at C:\Documents and Settings\All Users\Application Data\Nodus
        ii. On older versions of the Nodus products, this folder may not exist so it would not need to be backed up.
2. Stop all Nodus Synchronizer Services on this system
    a. Open the 'Run' window from the windows start menu
    b. Type "Services.msc" to open the 'Services' window
    c. Locate the 'Nodus Synchronizer' service.
    d. Click the 'Stop' link to stop the service.

3. Remove the Nodus Synchronizer Configuration
   a. If there is any Filter or Special configuration for the Nodus Synchronizer, please make sure to back up the filter. If needed, please check with Nodus Support on how to verify if there is any Synchronizer Filter in place.
4. Open the Nodus Synchronizer Configuration window by navigating to 'Start → Programs → Nodus Technologies → Nodus Synchronizer → Nodus Synchronizer Configuration'

5. Click the 'Database Setup' button to open the 'Database Setup' window.
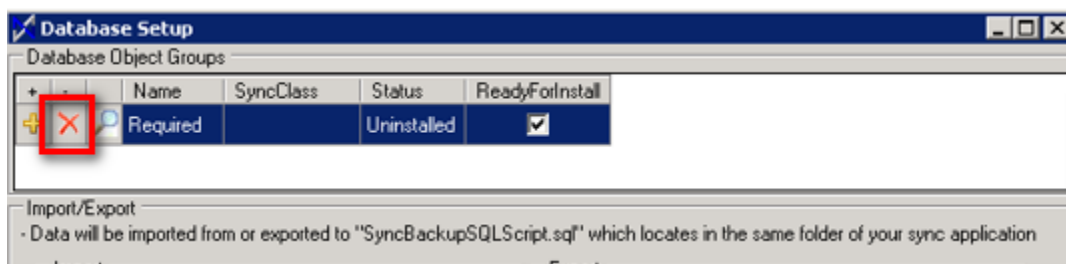
6. Under 'Database Object Groups' section, click the red 'X' icon in the upper left corner to uninstall the Synchronizer Objects from the Dynamics GP company database. (Make sure the backup of the Dynamics GP company database has already been made.

ePay SQL Database Preparation
1. Backup all ePay company databases on the Website SQL Server instance.

ePay Website Preparation
1. Create a backup copy of the following folders
   a. C:\Program Files (x86)\Nodus
      i. On a 32-bit system, this would be at C:\Program Files\Nodus

   ii. This is the program file path for the Nodus Programs installed on this system. This could have been modified during the original installation.

  b. C:\Program Files (x86)\Common Files\Nodus
   i. On a 32-bit system this would be at C:\Program Files\Common Files\Nodus

  c. C:\Program Data\Nodus
   i. On Windows Server 2003 this folder would be at C:\Documents and Settings\All Users\Application Data\Nodus
   ii. On older versions of the Nodus products, this folder may not exist so it would not need to be backed up.

  d. The ePay Sitefiles folder. To find this folder, use the following instructions
   i. Log into the system hosting the ePay Website
   ii. Open the 'Run' Window (Start -> Run or Window key + R)
   iii. Type "Inetmgr" in the 'Open:' field and push Enter. This will open the 'Internet Information Services (IIS) Manager' window
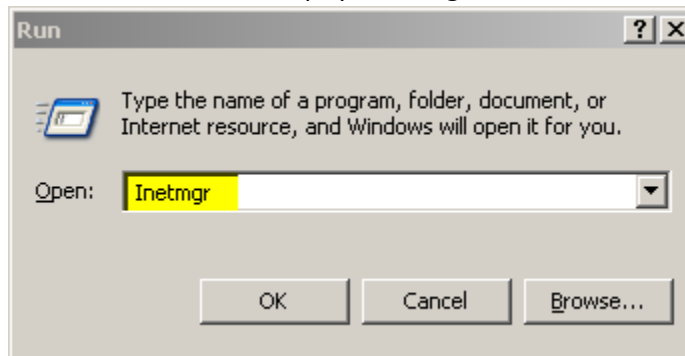

   iv. Expand the directories to locate the ePay website in the 'Sites' section
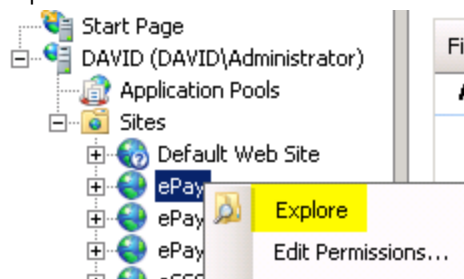
   v. Right click the website and choose the 'Explore' option to be directed to the website files.

2. Stop the Nodus Scheduler Service on this system
  a. Open the 'Run' window from the windows start menu
  b. Type "Services.msc" to open the 'Services' window
  c. Locate the 'Nodus Scheduler' service.
  d. Click the 'Stop' link to stop the service.
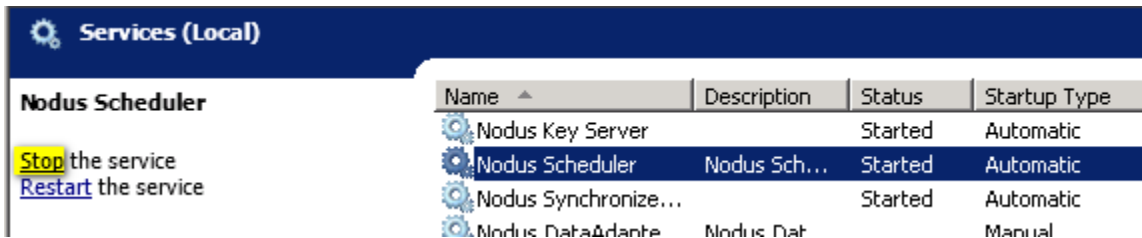
Uninstall software

1. Before proceeding to uninstalling any software, please review the following process for information on how to uninstall the programs.

   a. Open the '**Run**' Window from the Windows start menu (or push the 'Windows Key' + R)

   b. Type "**Appwiz.cpl**" in the 'Open:' field and push Enter to open the 'Programs and Features' window.

   c. Locate the desired software to uninstall and click the '**Uninstall**' button
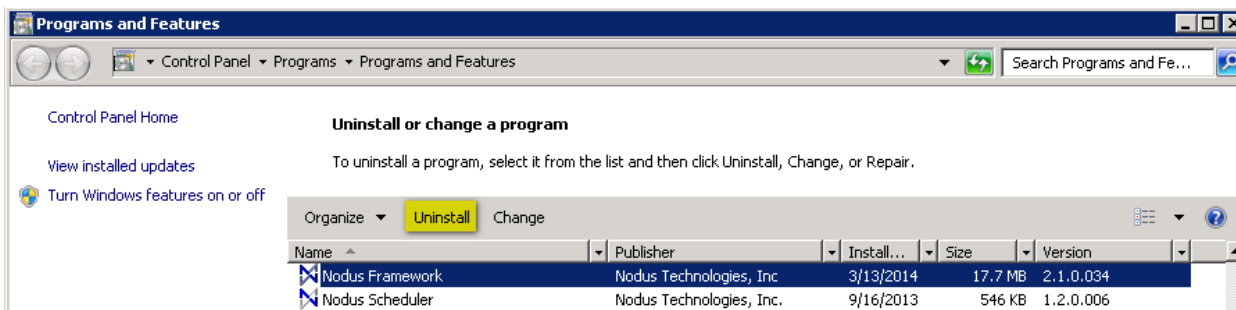
2. Uninstall the following software from the system running the Integration Services and the ePay Website. The below software are listed in the order recommended for the uninstallation.

   a. Nodus Scheduler

   b. Nodus Synchronizer

   c. eStore Advantage

   d. Transact Advantage

   e. Nodus Framework

3. For the Encryption Option, if the system containing Integration Services or the ePay Website is **NOT** running the Key Encryption Service and only contains the Nodus Encryption Client, uninstall Nodus Encryption.

   The Nodus Encryption Key Service should have been upgraded during the Credit Card Advantage DSS Upgrade process.

System Migration

Often during an upgrade, certain systems will be replaced. For any new systems that will be hosting any ePay components during the upgrade, please make sure they meet the system requirements

18

and ports are open in the same manner as the existing environment. Please follow the steps below to prepare for a new ePay installation on these systems.

If new systems are being added, review the System Requirements and Setup section to confirm the new systems meet the requirements for the ePay components

If all existing systems will be remaining in the environment, return to the main upgrade instructions and proceed to the next step | For Upgrade |
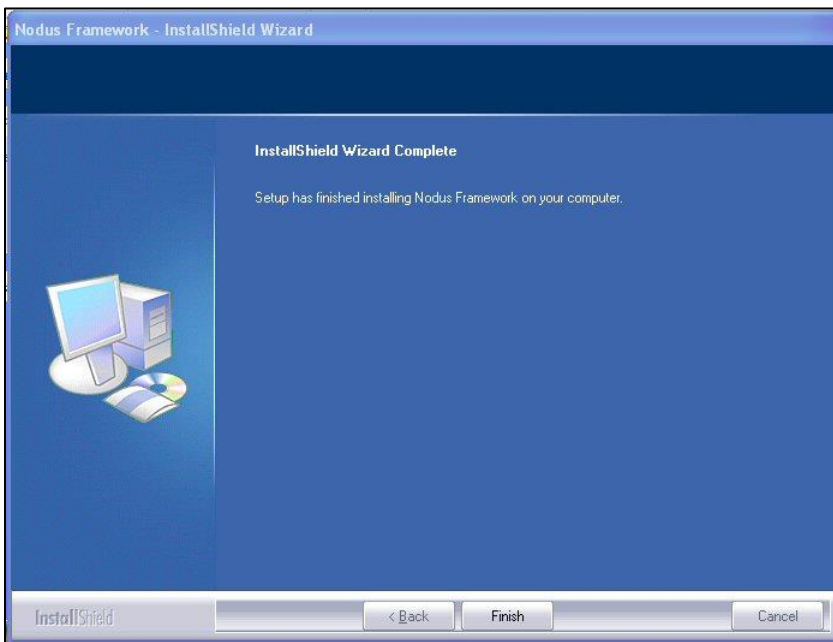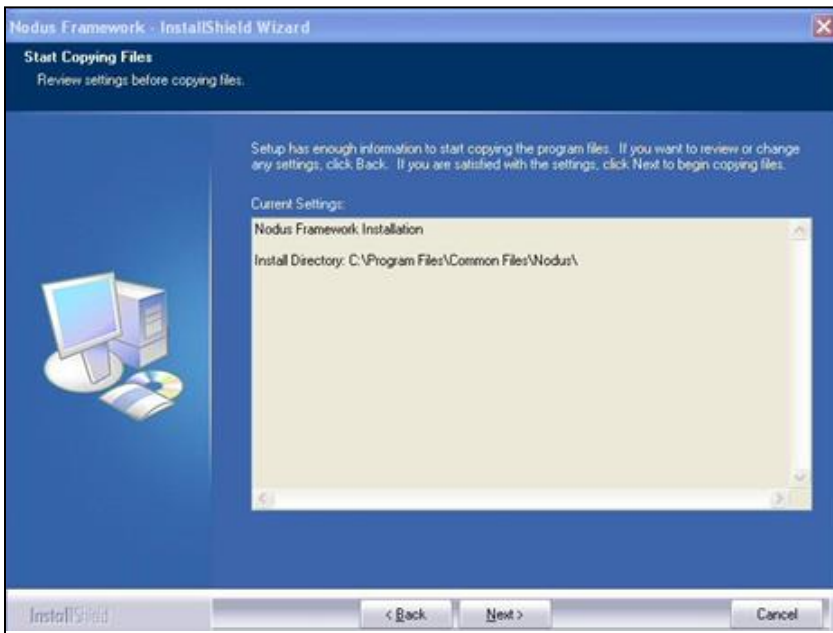
19

Nodus Framework Installation

1. **If Nodus Framework is already installed on this system**, please return to the main installation page and proceed to the next step. |For New Installation | For Upgrade |
2. The user logged in for the installation must be in the Administrators group for the computer where Nodus Framework is being installed
3. Navigate to the folder where the Nodus Framework installation file is located
4. Right click the Nodus Framework installation file and choose to run the installation file as an administrator user
5. After a few seconds, the welcome screen will open. Click the '**Next >'** button to continue
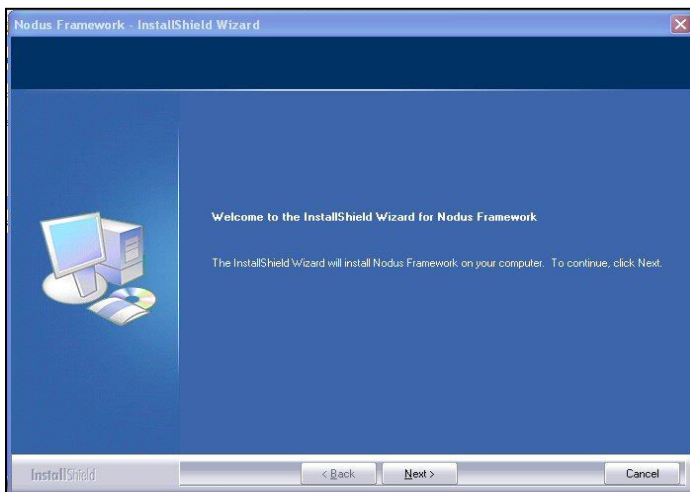
6. After reviewing the license agreement, click the **Yes** button to accept the agreement and continue
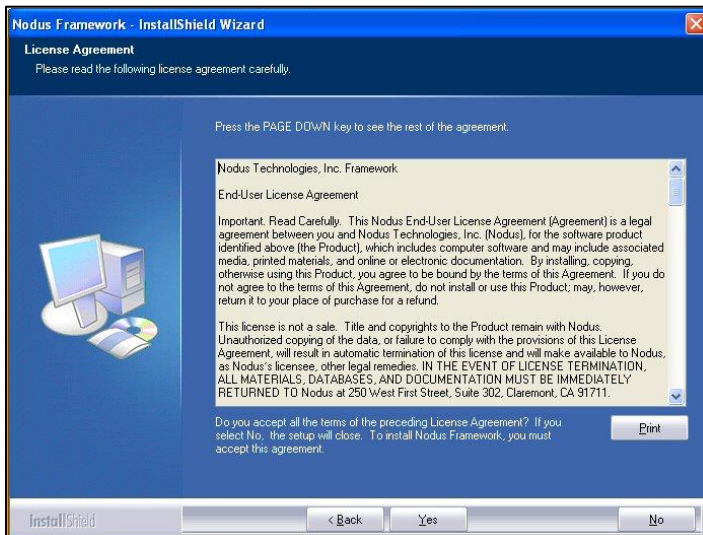
7. Nodus Framework will be installed to the location shown on the **Start Copying Files** screen. Click the '**Next >'** button for the installer to start the installation process

8. Once the installation is completed, click the '**Finish'** button to close the installer

9. **Return to the main instructions and proceed to the next step** | For New Installation | For Upgrade |

Nodus Encryption Client Installation

1. **If Nodus Encryption is already installed on this system**, please return to the main installation procedure and proceed to the next step. | For New Installation | For Upgrade |
2. Navigate to the folder where the Nodus Encryption install file is located and double click the install file.
3. The install wizard should open with a welcome screen. Click the '**Next >**' button to continue

4. Review the license agreement and if you accept, choose the option 'I accept the terms in the license agreement'
5. Click the '**Next >**' button to continue
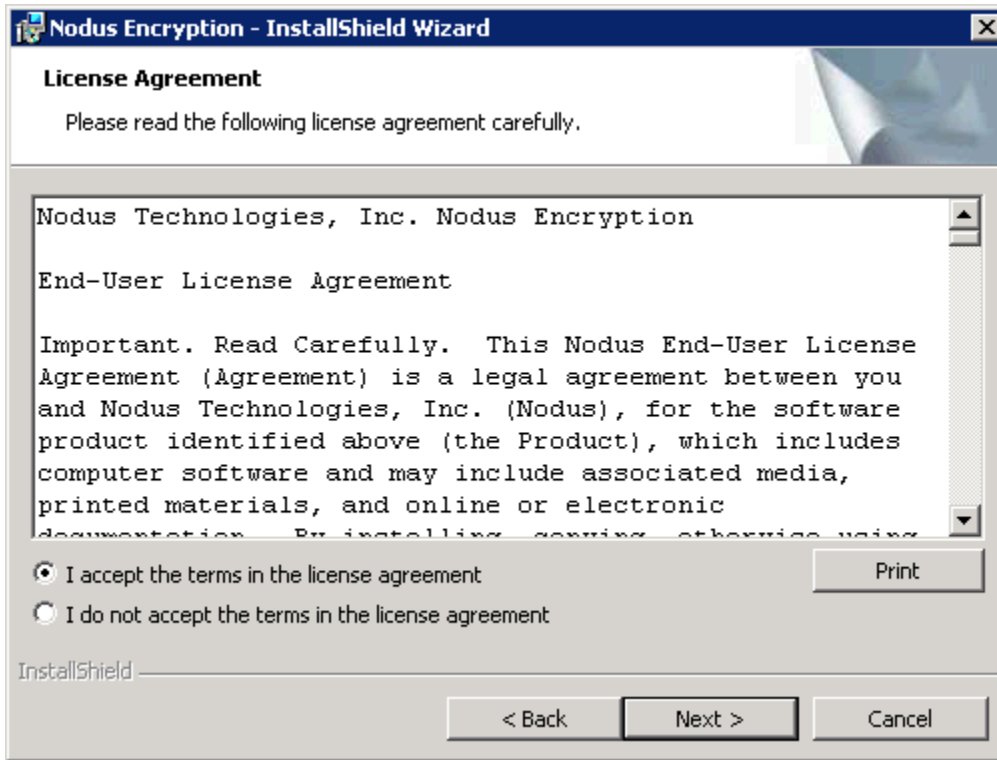
6. The next screen allows the folder where the program files are stored to be changed. If the shown folder path is not acceptable for installation, click the '**Change…**' button to browse to a different location
7. Click the '**Next >**' button to continue
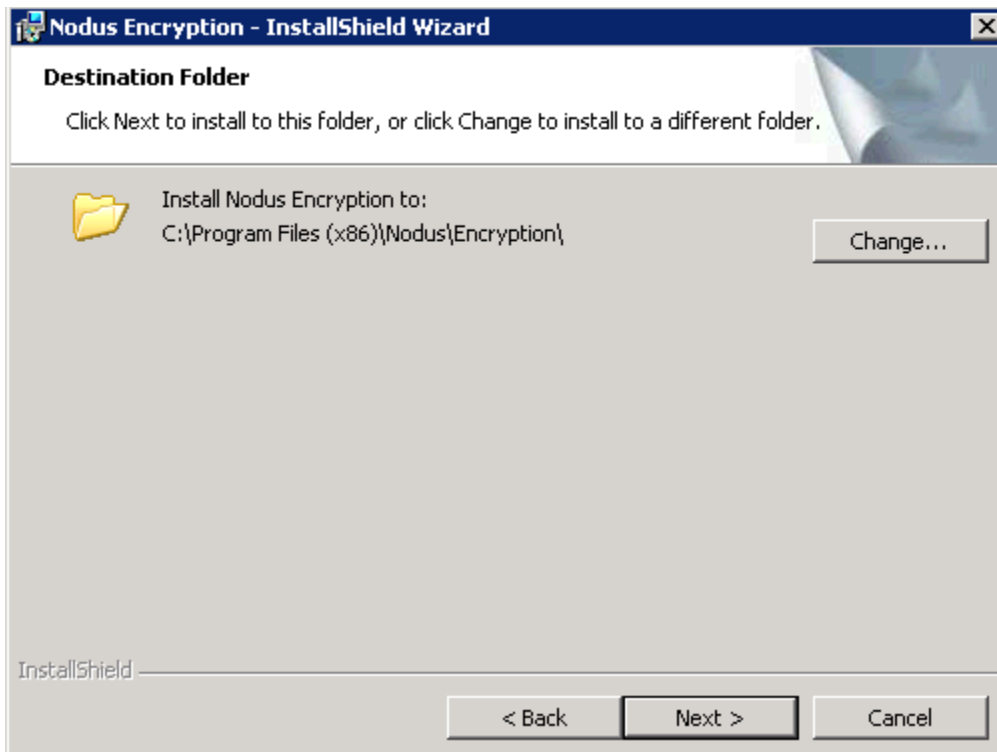
8. On the Setup Type screen, choose a '**Custom**' installation and click the '**Next >**' button to continue
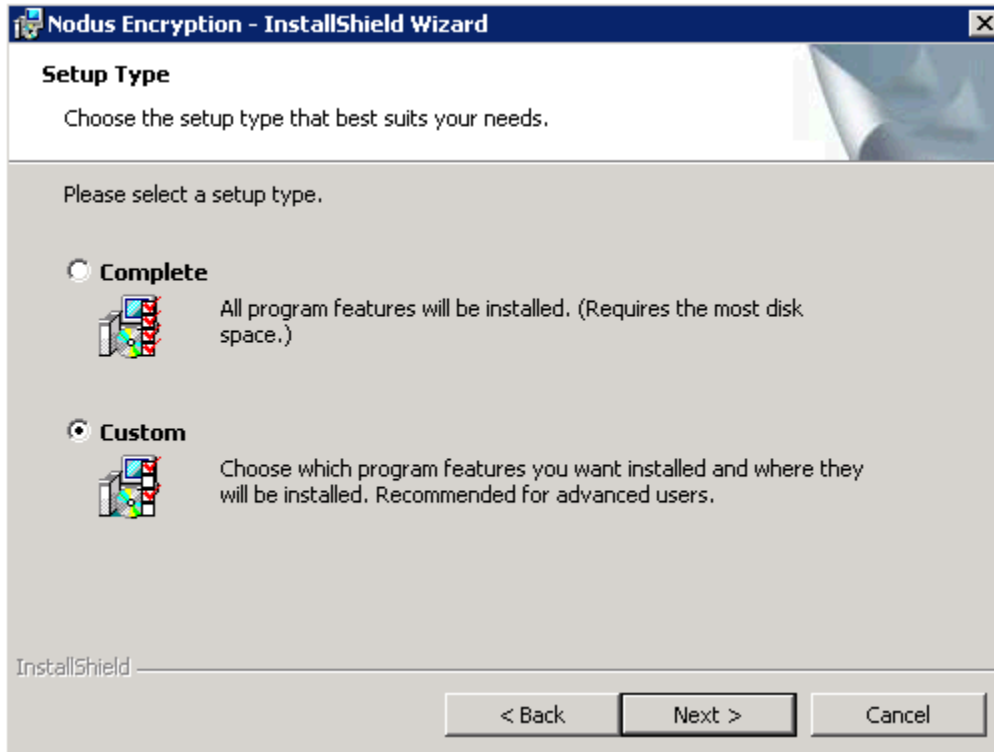
9. On the Custom Setup screen, use the dropdown arrow next to '**Key Encryption Server**' and choose '**This feature will not be available'**
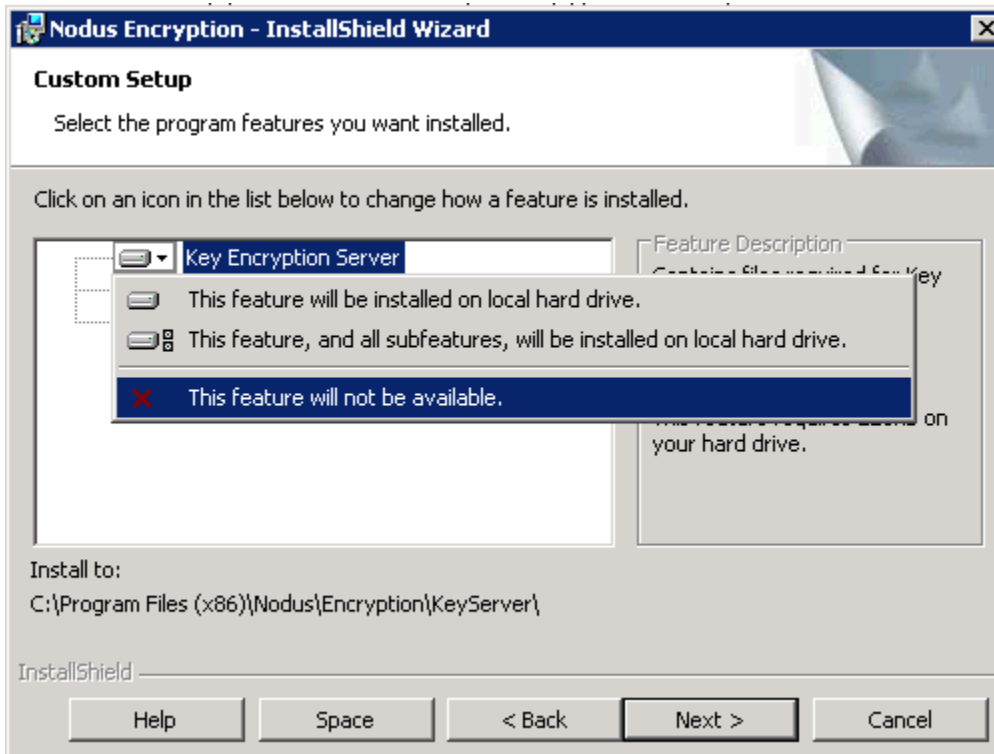
10. Use the dropdown arrow next to '**Data Encryption Key Rotator Service'** and choose '**This feature will not be available**'
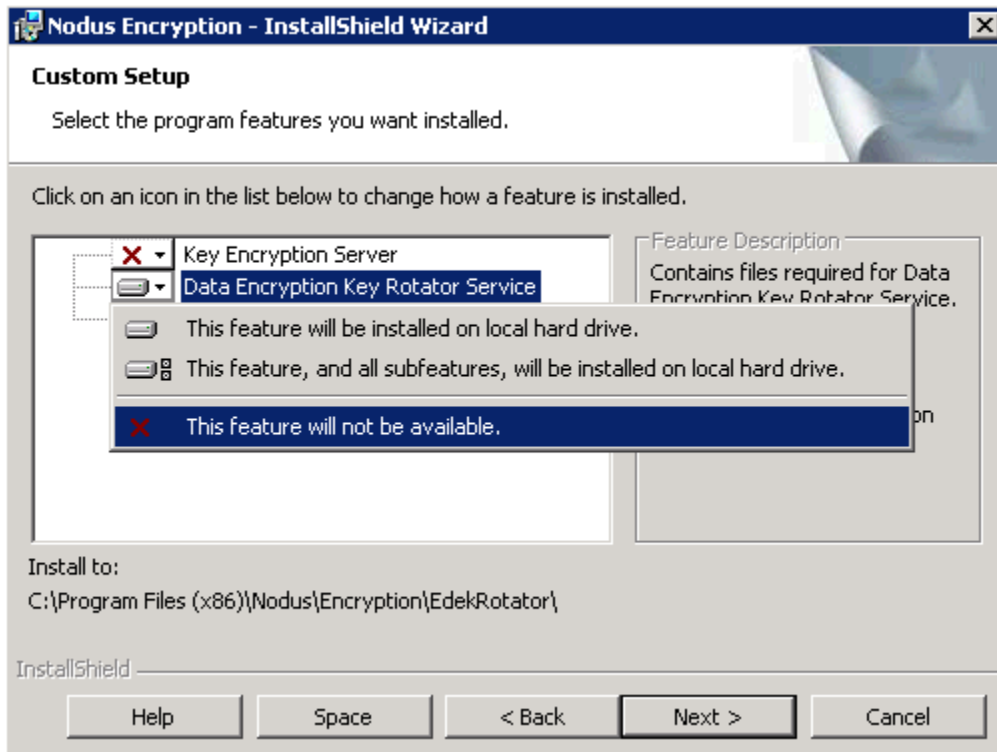
11. With only the '**Client**' option available click the '**Next >**' button
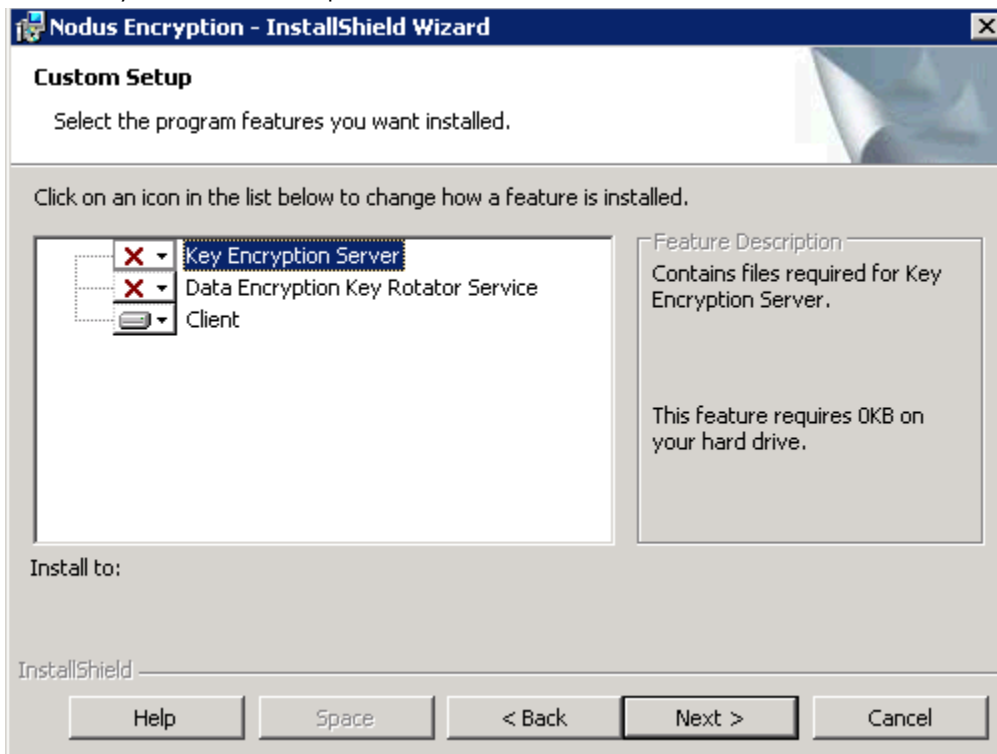
12. On the next screen, click the '**Install**' button to begin the installation

13. After the install is complete, click the '**Finish**' button to close the install wizard.
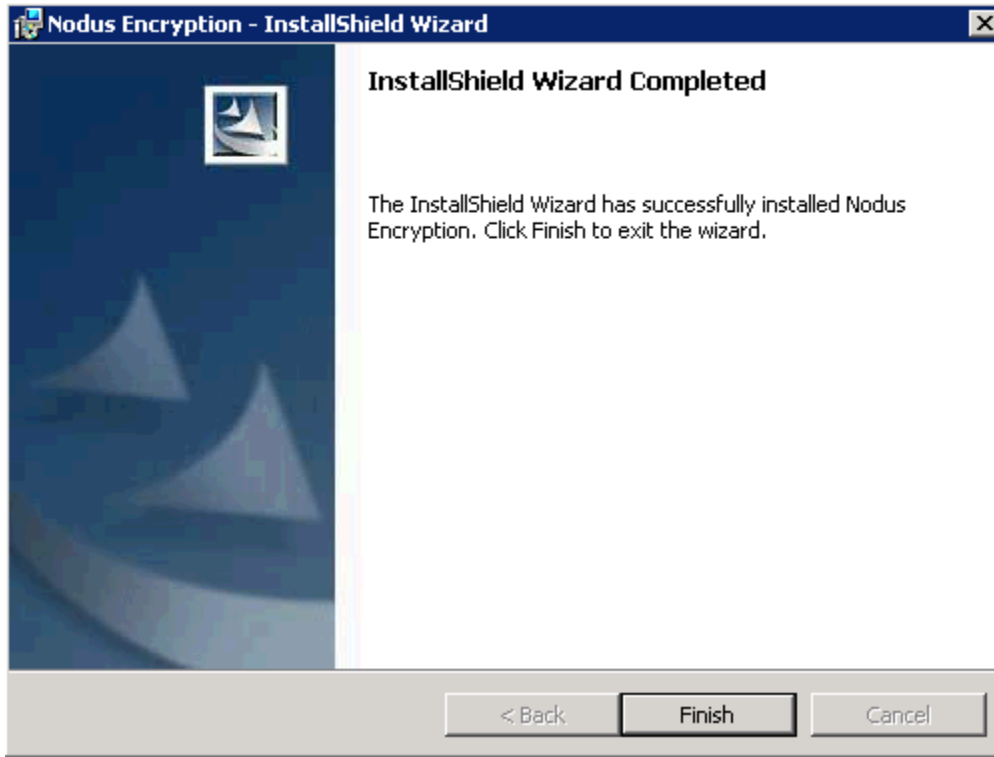
14. The Nodus DSS Configuration Utility should be automatically opened
   a. If you need to open this window manually, you can find it in the Start Menu under 'Programs →
       Nodus Technologies → Nodus Encryption → Nodus DDS Configuration Utility'.
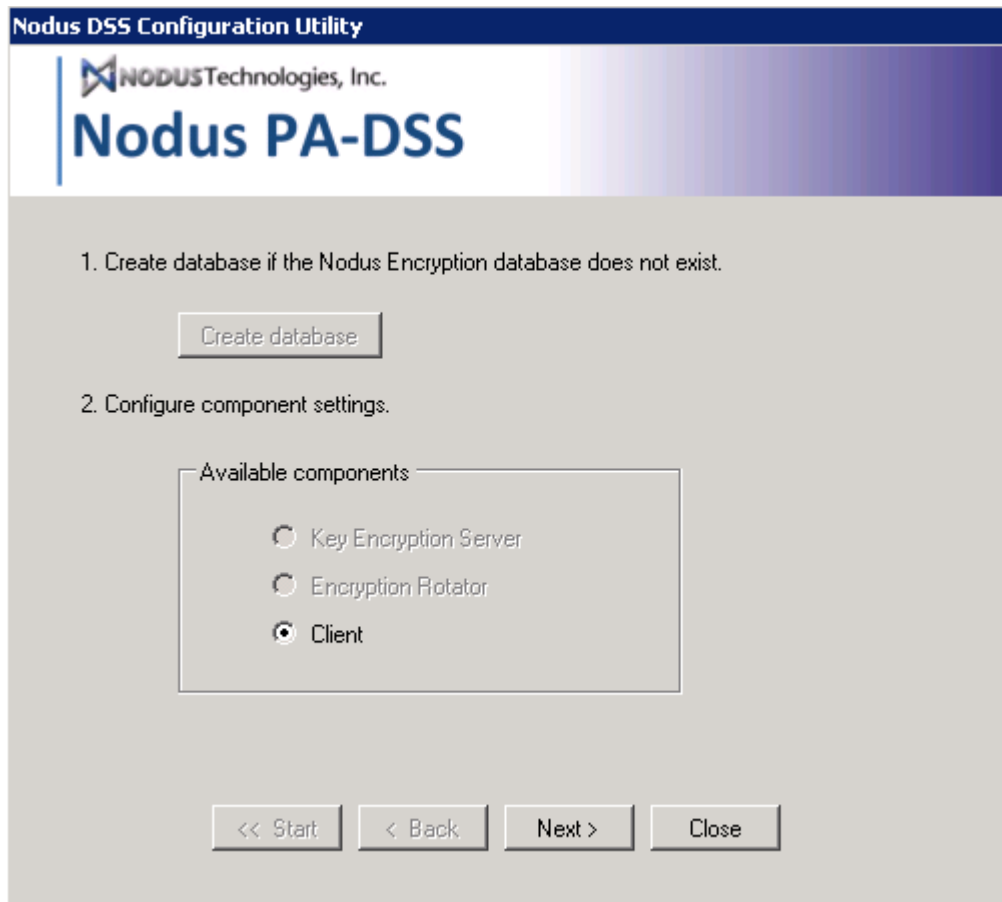
15. The '**Client**' radio button should be the only available option from the 'Available components' section of the Nodus DSS Configuration Utility

16. Press the '**Next >**' button

17. Type in the machine name or IP of the system hosting the Encryption Key Services in the '**Server:**' field
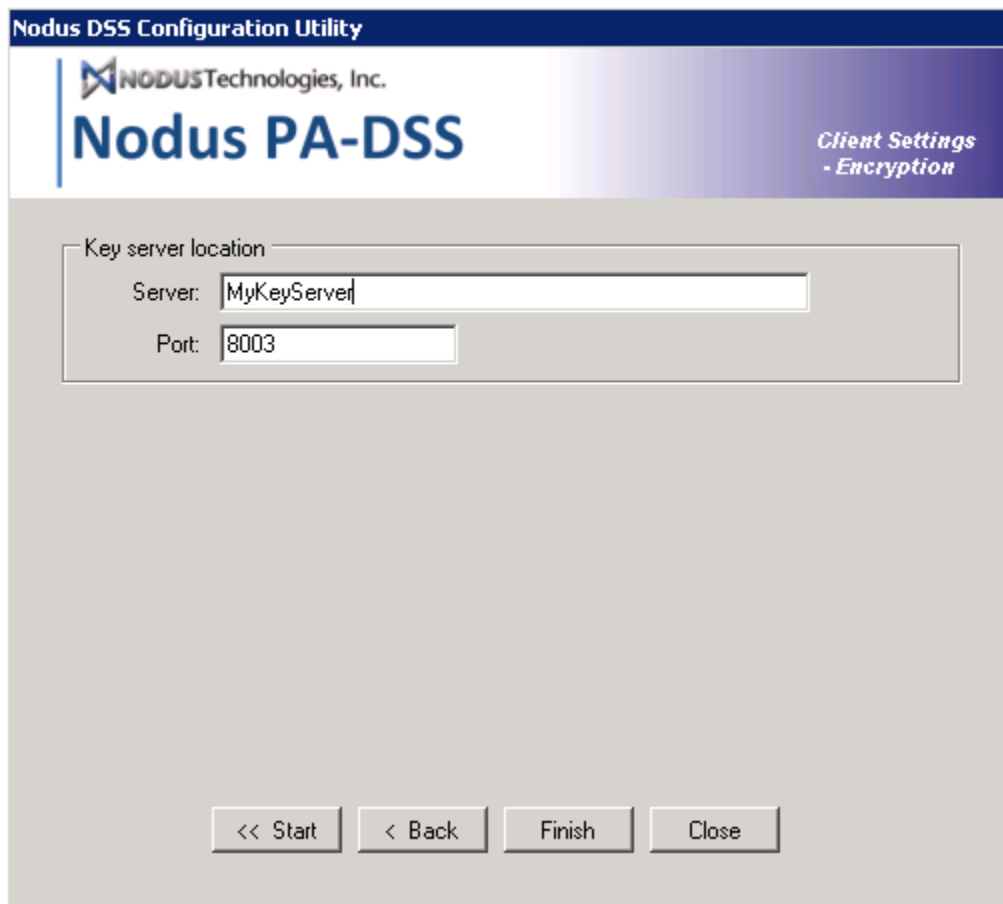
18. If the port used by the system hosting the Encryption Key Services is a port besides the default of 8003, change the '**Port**:' field accordingly

19. Click the '**Finish**' button and click '**Yes**' when asked to launch the client tester
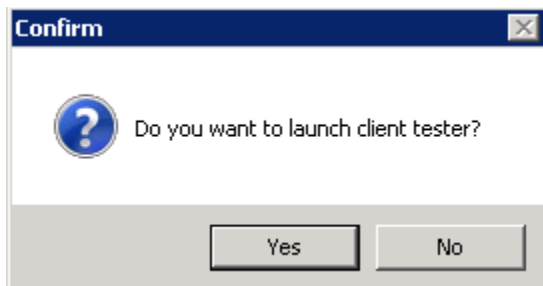
20. In the Nodus Encryption Tester window that appears, click the '**Test**' button
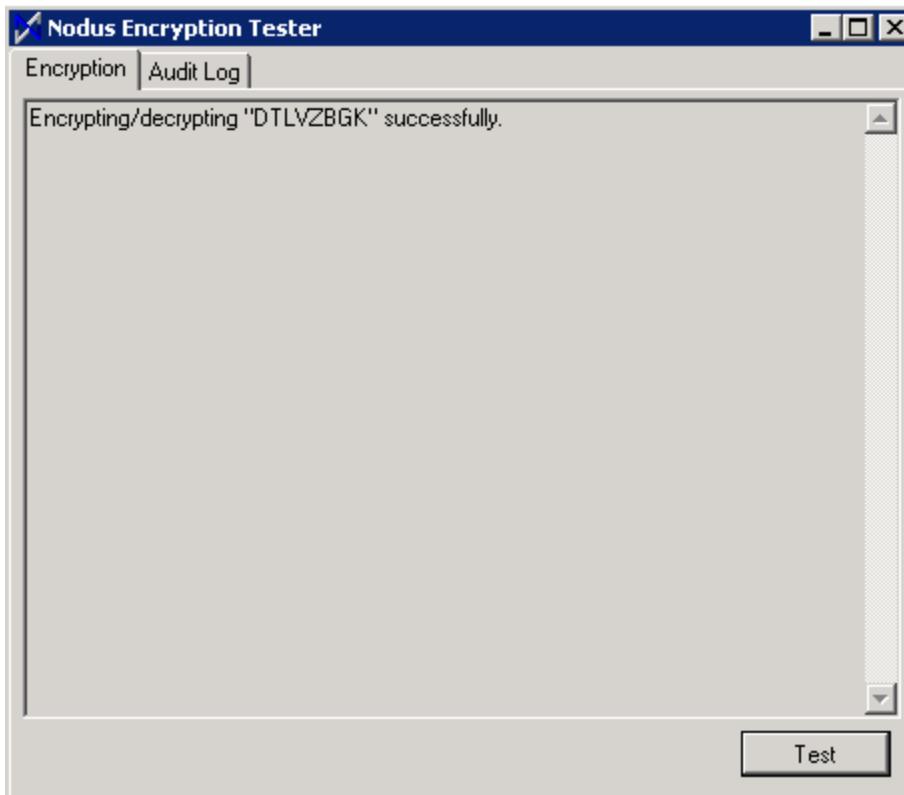
21. If the message, "Encryption/decrypting "[Random Letters]" successfully" appears, close the Nodus Encryption Tester
    a. If an error appears, start from the above step #9 and confirm the server name is correct
    b. If it is still not working, try using the IP of the system instead of the name
    c. Make sure that port 8003 or the port is being used in the above step #18 is open on the system hosting the Encryption Key Services
22. Close the Nodus Encryption Tester and the Nodus DSS Configuration Utility
23. **Return to the main instructions and proceed to the next step** |For New Installation | For Upgrade|

Transact Advantage Installation

1. **<u>If Transact Advantage is already installed on this system</u>**, please return to the main installation procedure and proceed to the next step. | For New Installation | For Upgrade |
2. The user logged in for the installation must be in the Administrators group for the computer where Nodus Transact Advantage is being installed
3. Navigate to the folder where the Transact Advantage installation file is located
4. Right click the Transact Advantage installation file and choose to run the installation file as an administrator user
5. When the Welcome page opens, click the **'Next >'** button
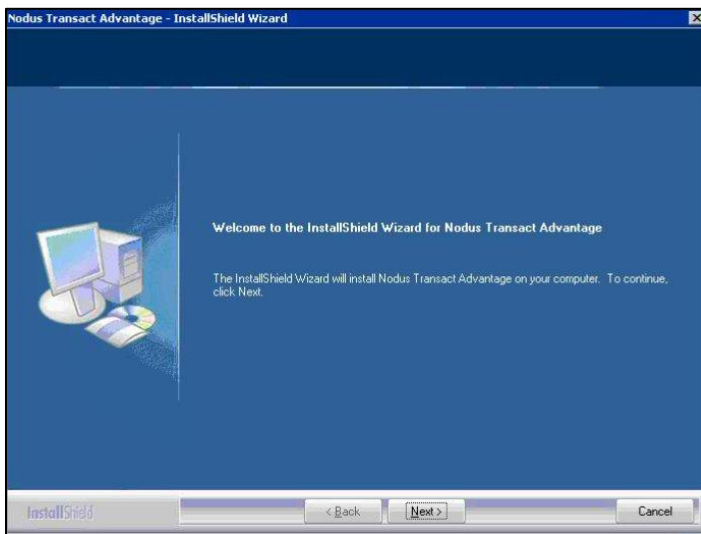
6. After reviewing the license agreement, click the **Yes** button to accept and continue
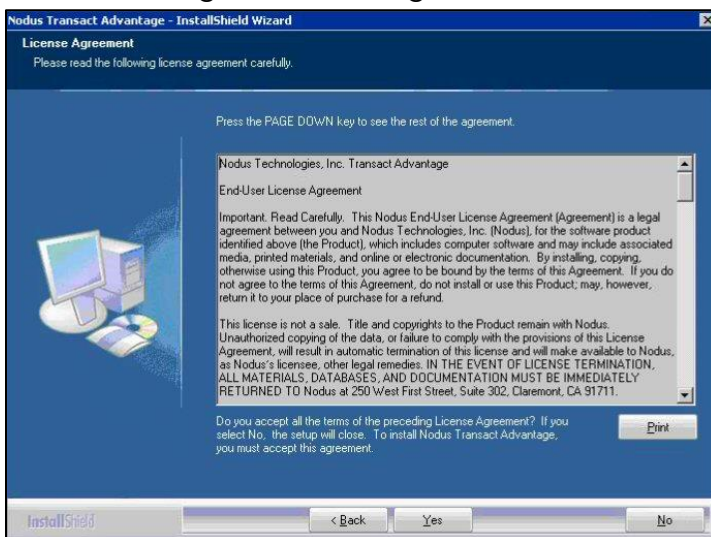
7. At the '**Choose Destination Location**' page, leave the '**Destination Folder**' as the default location, or use the '**Browse**' button to select a different location for the application files.
8. Click the '**Next >**' button to continue.

9. On the '**Start Copying Files**' page, Click the '**Next >'** button to start the installation process
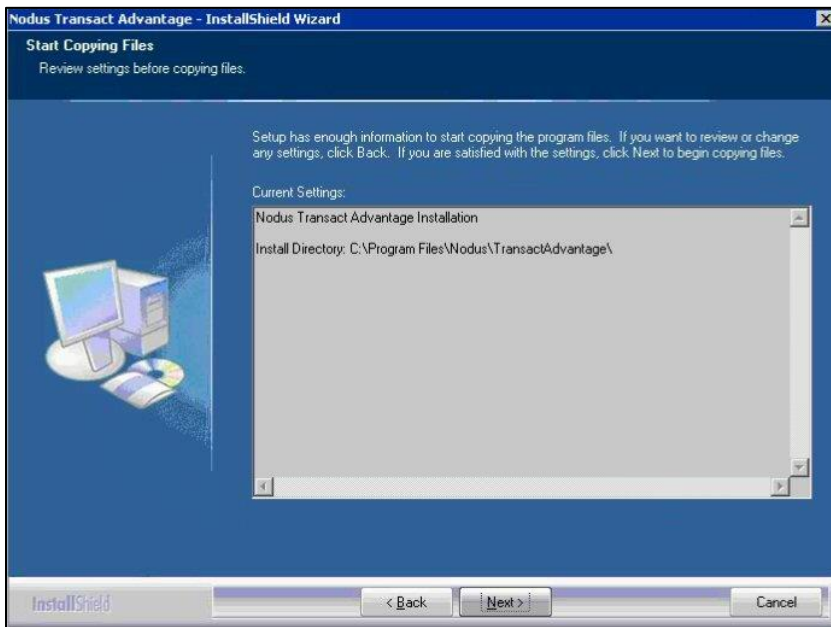
10. Once the installation completes, click the '**Finish'** button to close the installer
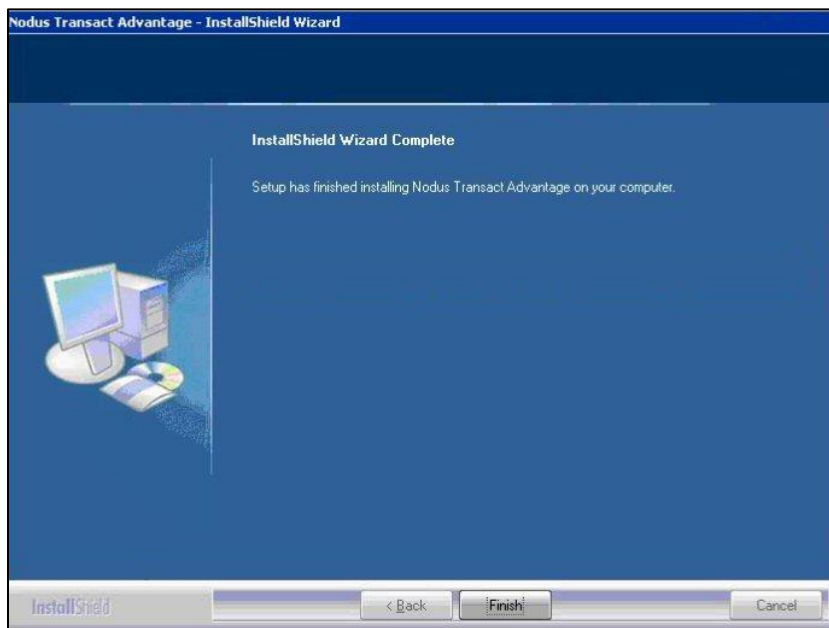
11. **Return to the main instructions and proceed to the next step** |

eStore Advantage Installation

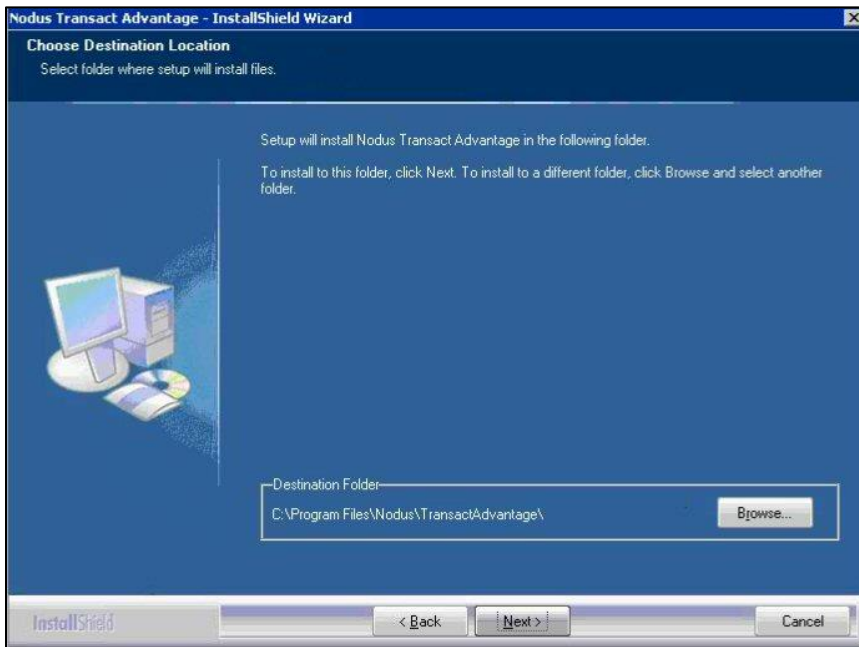1. **If eStore Advantage is already installed on this system**, please return to the main installation procedure and proceed to the next step. | <u>For New Installation</u> | <u>For Upgrade</u> |
2. The user logged in for the installation must be in the Administrators group for the computer where eStore Advantage is being installed
3. Navigate to the folder where the eStore Advantage installation file is located
4. Right click the eStore Advantage installation file and choose to run the installation file as an administrator user
5. When the Welcome page opens, click the **'Next >'** button
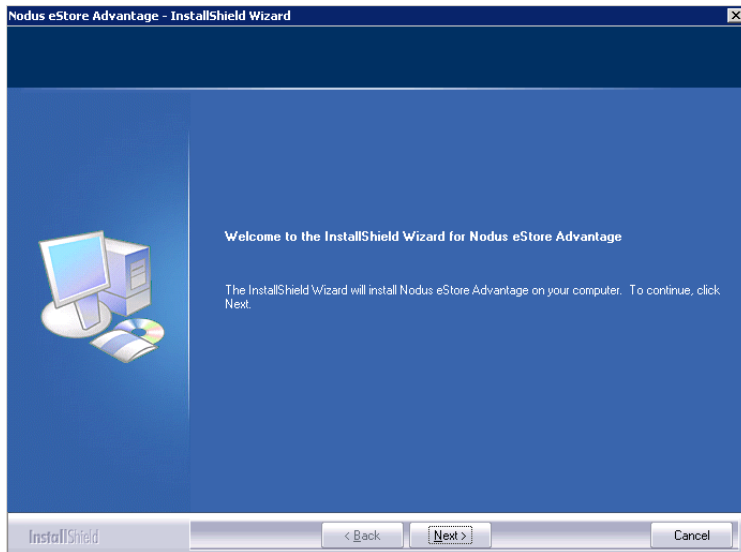
6. After reviewing the license agreement, mark the '**I accept the terms of the license agreement**' option and the click the **'Next >'** button to accept the terms and continue
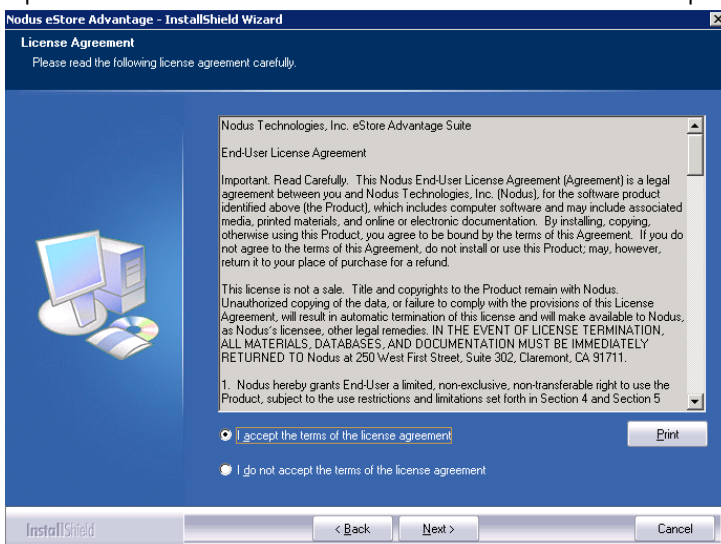
7. At the '**Choose Destination Location'** page, either leave the default location or use the '**Browse**' button to select a different location for the application files. Click '**Next >**' to continue
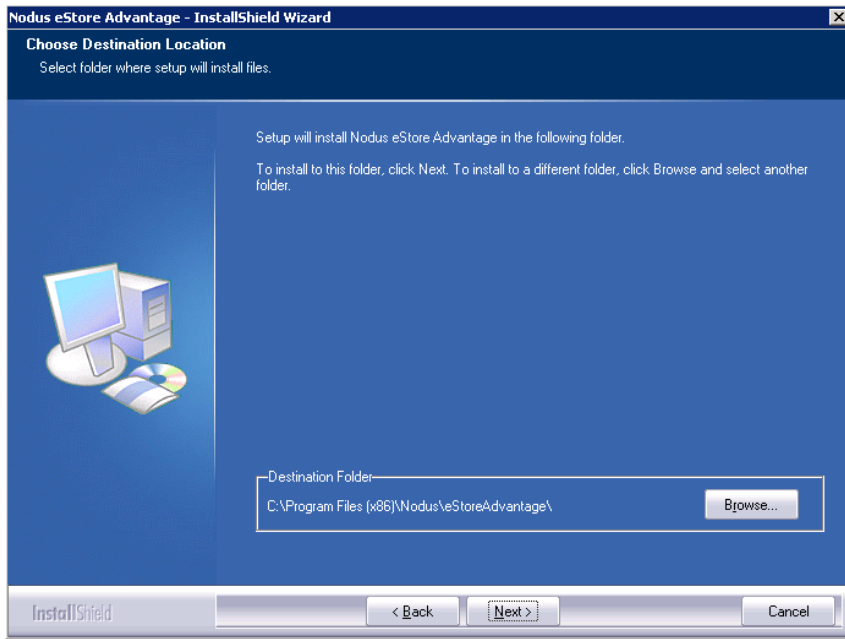
8. At the '**Setup Type**' page, the '**Back Office Installation**' option should already be selected. Click the '**Next >**' button to proceed.
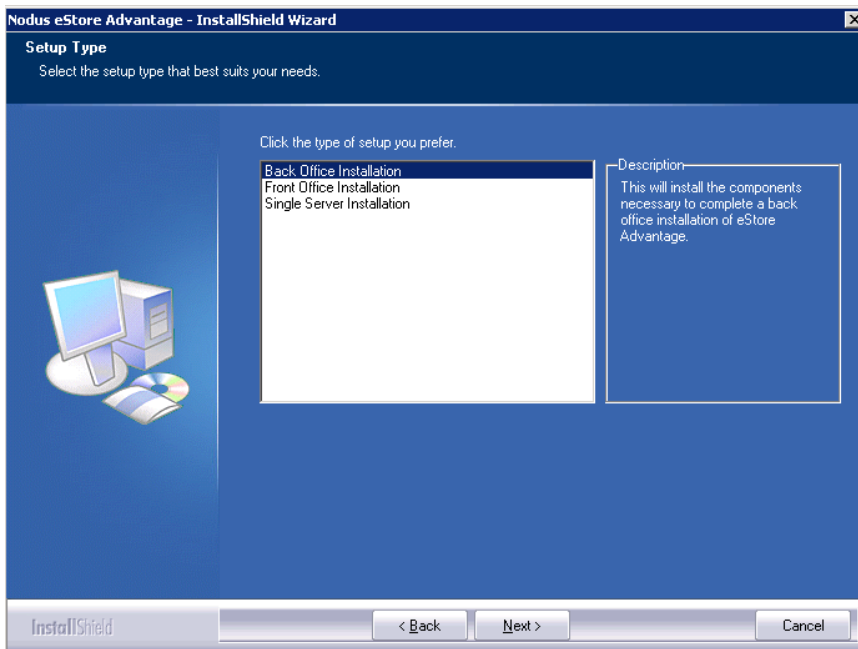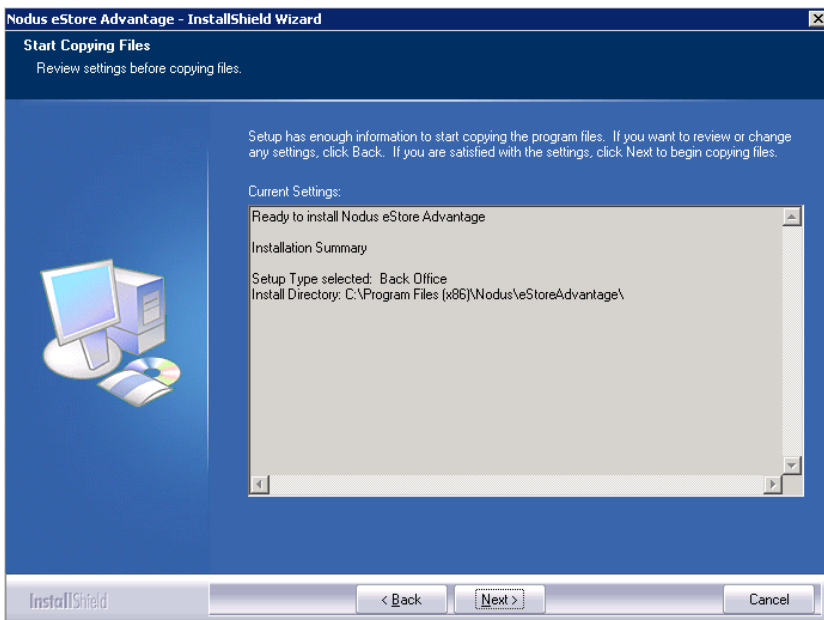
9. On the '**Start Copying Files'** page, click the '**Next >'** button to start the installation process
10. Close the two text documents that will open after this process is completed
11. Once the installation completes, click the '**Finish'** button to close the installer
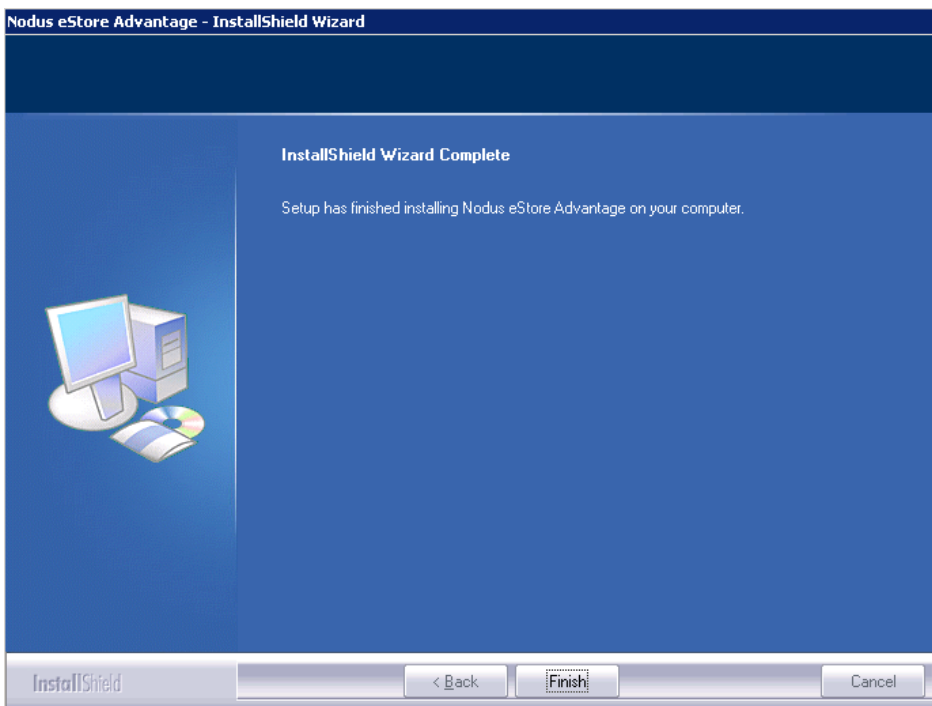
12. **Return to the main instructions and proceed to the next step** | <u>For New Installation</u> | <u>For Upgrade</u> |

Configure the Transact Service Connection

1. To configure the connection to the Dynamics GP database, open the **Nodus Connection Manager** from '**Start → Programs → Nodus Technologies → Nodus Connection Manager**'
2. If this is an ePay upgrade for this system, check the '**Setup ID**' dropdown for a Setup ID called '**Transact Service Connection'**. If this already exists, choose this connection and proceed to validate the information in the following steps
3. If this is a new installation on this system, enter the text '**Transact Service Connection'** (without quotes) in the '**Setup ID'** dropdown list on the top.
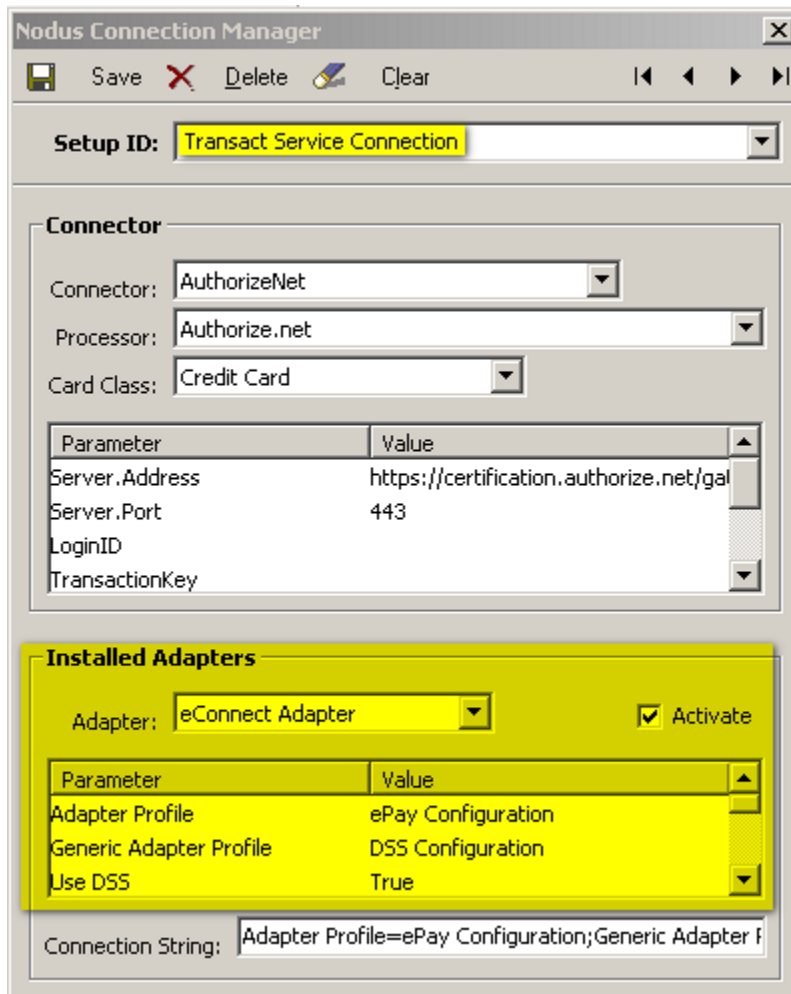
4. Skip down to the '**Adapter'** dropdown list, choose '**eConnect Adapter'** option
5. Mark the '**Activate'** checkbox
6. Provide the information in the '**Value**' column for the different Parameters using the following table. If a Parameter is not included in the below table, do not change the default value.

PARAMETER	VALUE
Adapter Profile	Enter 'ePay Configuration' (without quotes)
Generic Adapter Profile	Enter 'DSS Configuration' (without quotes)
Use DSS	Enter 'True' (without quotes)
Provider	If the SQL Server version of the system containing the Dynamics GP SQL Database is SQL 2008R2, enter 'SQLNCLI10' (without quotes) If the SQL Server version of the system containing the Dynamics GP SQL Database is SQL 2012 or 2014, enter 'SQLNCLI11' (without quotes)
User ID	Enter the login name for the GP SQL User account which will be used as a service account to access the GP databases The SQL user must have the DYNGRP role permission for the DYNAMICS database and the DYNGRP and db_owner roles to the GP company database.
Password	Enter the password for GP SQL User account
Data Source	Enter the name of the SQL server instance for the GP databases
Initial Catalog	Enter the name of the GP company database
eConnectVersion	Enter the following value based on the version of eConnect that is being used to connect to the GP database '100' for eConnect 10 '110' for eConnect 2010 '120' for eConnect 2013 '140' for eConnect 2015

7. Click the '**Save**' button to store the setup information
8. Close the Nodus Connection Manager
9. **Return to the main instructions and proceed to the next step** | For New Installation | For Upgrade |

Configure the Payment Gateway Connection

1. **<u>If using the PayFabric option</u>**:
    a. Log into the desired PayFabric account
    b. Click the 'Gateway Account Profiles' menu option in the 'Configuration' Section
    c. If the desired payment gateway connections are already setup, proceed to the end of this section.
    d. Otherwise, click the 'Create' button to create a new Payment Gateway connection.
2. **<u>If using the Encryption or Tokenization Options</u>**, Open the Nodus Connection Manager from 'Start → Programs → Nodus Technologies → Nodus Connection Manager'
3. Create a name for your connection in the first available field. This value will be used as a reference to this gateway connection.
4. Fill in the remaining fields based on the payment gateway that is being used
    a. If a Gateway Account has already been setup, choose which of the supported gateways that will be used for processing transactions.

    | PayPal PayFlow Pro | USAePay | Authorize.Net | CyberSource |

    | Paymentech | Moneris | Payeezy (First Data GGe4) | WorldPay |

    b. If a gateway account is needed, please contact Nodus Technologies Support for information on setting up a Gateway Account.
5. Click the 'Save' button to save the changes
6. If there are multiple gateway accounts that need to be setup, such as if both Credit Cards and eChecks will be processed from this website, then repeat the steps in this section for each gateway account
7. **<u>Return to the main instructions and proceed to the next step</u>** | For New Installation | For Upgrade |

ePay Advantage Installation

1. The user logged in for the installation must be in the Administrators group for the computer where ePay Advantage is being installed
2. Navigate to the folder where the ePay Advantage installation file is located.
3. Right click the ePay Advantage installation file and choose to run the installation file as an administrator user
4. When the Welcome screen opens, click the **'Next >'** button to proceed
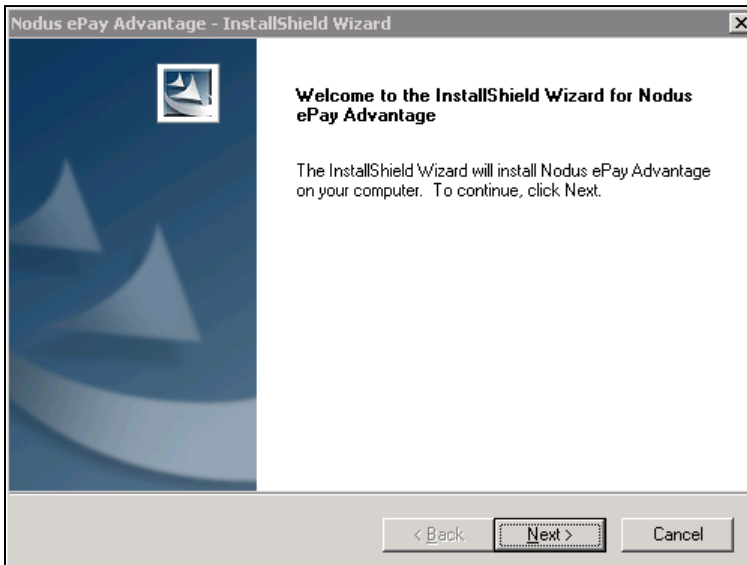
5. On the '**License Agreement**' page, read and accept the **End-User License Agreement**, then click the '**Next >**' button to proceed
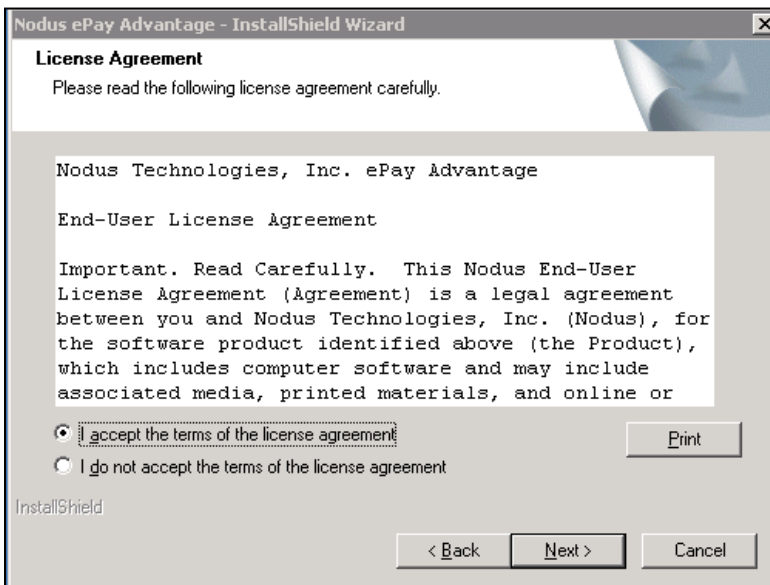
6. On the '**IIS Destination Selection**' page, choose to install ePay as a new website or under an existing website.
    a. If you want your website as its own standalone website with its own port and URL, the likely choice is '**Install as a new website**'
    b. If you want ePay to be under an existing website on this system then the likely choice is to '**Install as a new virtual directory under**'. For example, If there is already a website, such as 'http://www.YourCompany.com', ePay will be installed under it so the web address will become 'http://www.YourCompany.com/ePay/'. Please be aware if you use this option there is a chance ePay will inherit behaviors from the parent website it is under which may result in the site not displaying correctly.
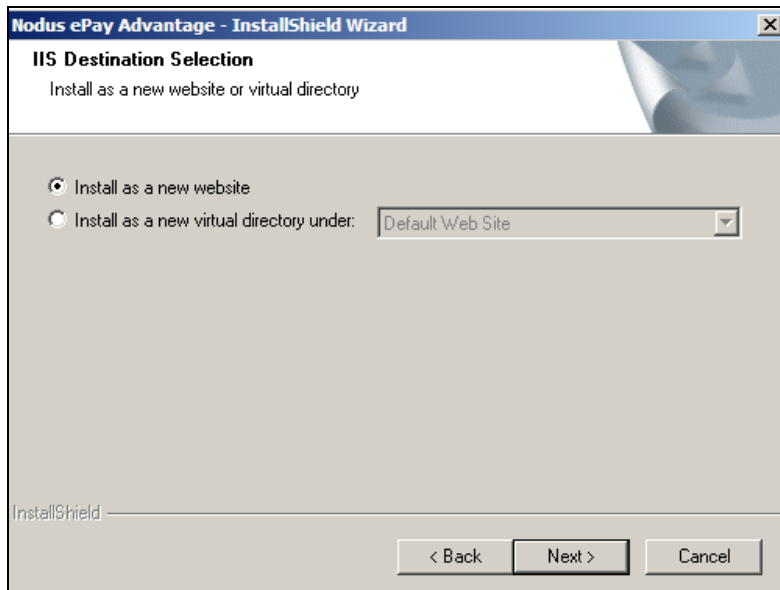
7. After you select your decision, use the '**Next >**' button to proceed to the '**Site Information Collection**' page
8. If you chose the '**Install as a new website**' option on the '**IIS Destination Selection**' page:
    a. Then provide the name you would like to use for the website in the '**Site Name**' field.
    b. Choose the desired port you would like your website to run on in the '**Port**' field, please make sure this port is not being used by other applications in your environment.
9. If you chose the '**Install as a new virtual directory under**' option on the '**IIS Destination Selection**' page:
    a. Provide the name you would like to use for your website in the '**Virtual directory alias**' field. This will be the name that will appear in the web address after the slash character.
10. In the '**Registration Key**' field enter the Registration key for ePay Advantage. If this key is not available, please contact Nodus Technologies support to obtain this key.

11. Use the '**Next >**' button to proceed to the '**Choose Destination Location**' page
12. The default location for the ePay website files will be displayed on this page. If there is a need to change this location, use the '**Change…**' button to change the website file installation folder.

13. Use the '**Next >**' button to proceed to the '**Database Server**' page
14. In the '**Database server that you are installing to**' field, enter the SQL Server Instance name or IP where the ePay database will reside.
15. Choose the '**SQL Server Authentication**…' option
16. In the '**Login ID**' and '**Password**' fields, supply the '**ePay SQL User' login** ID and password credentials to access the SQL instance. The '**ePay SQL User' user** must have the **dbcreator** server role on the SQL server to create the new database, and the user will become a service account to be used by the ePay site to access the database.
17. In the '**Name of database catalog'** field, enter a name for the new database to be used by the ePay website.

41

a. <u>If an ePay upgrade is being performed</u>, then please direct ePay to a new database even if a database already exists or an error will occur during the installation.
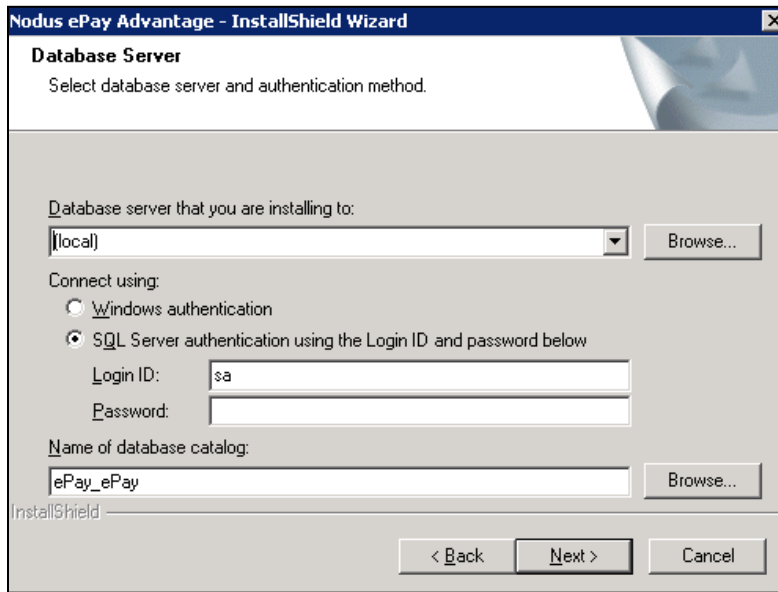
18. Press the '**Next >**' button to proceed to the '**Ready to Install the Program**' page. The connection to the SQL server will be tested at this time.
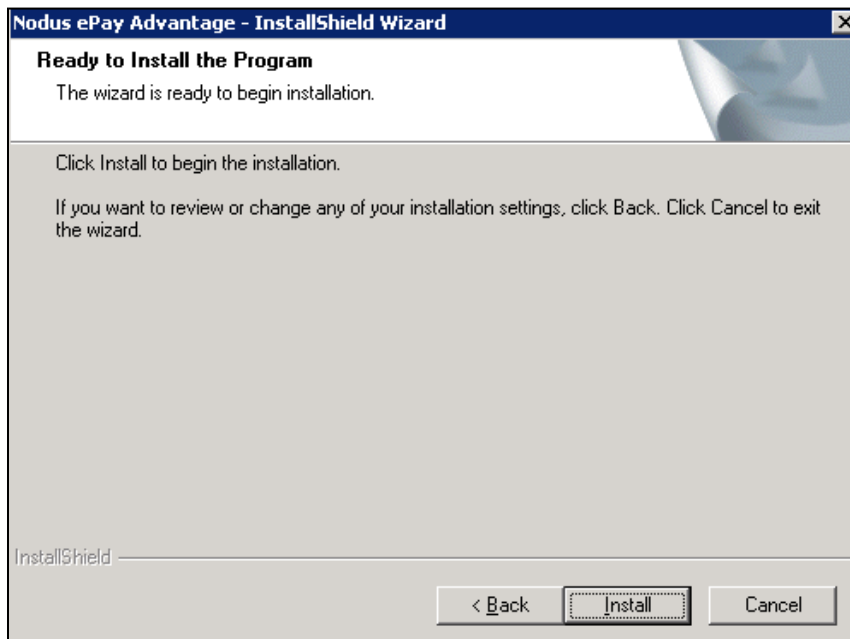
11. On the '**Ready to Install the Program**' page opens, click the '**Install**' button to proceed with the deployment
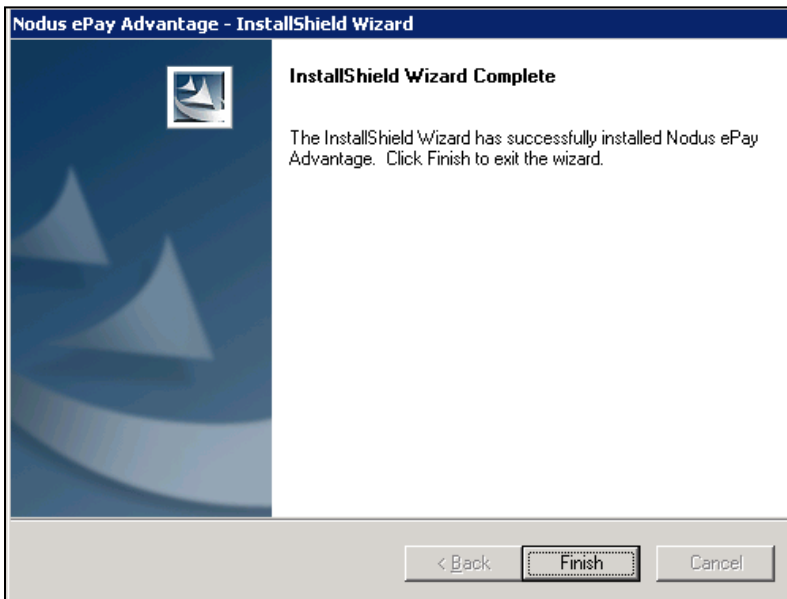
12. The installation will proceed and the '**InstallShield Wizard Complete**' page will be displayed. Click the '**Finish'** button to close the installer
13. To browse the newly installed website, open the IIS Manager by opening the '**Run**' window from the Start Menu and typing "**Inetmgr**". Then click the '**OK**' button to open the IIS Manager.
14. Expand the server information and the '**Sites'** folder using the '+' icons to locate the installed website
15. Right click the website, navigate to the '**Manage Web Site'** option and choose the '**Browse**' Option
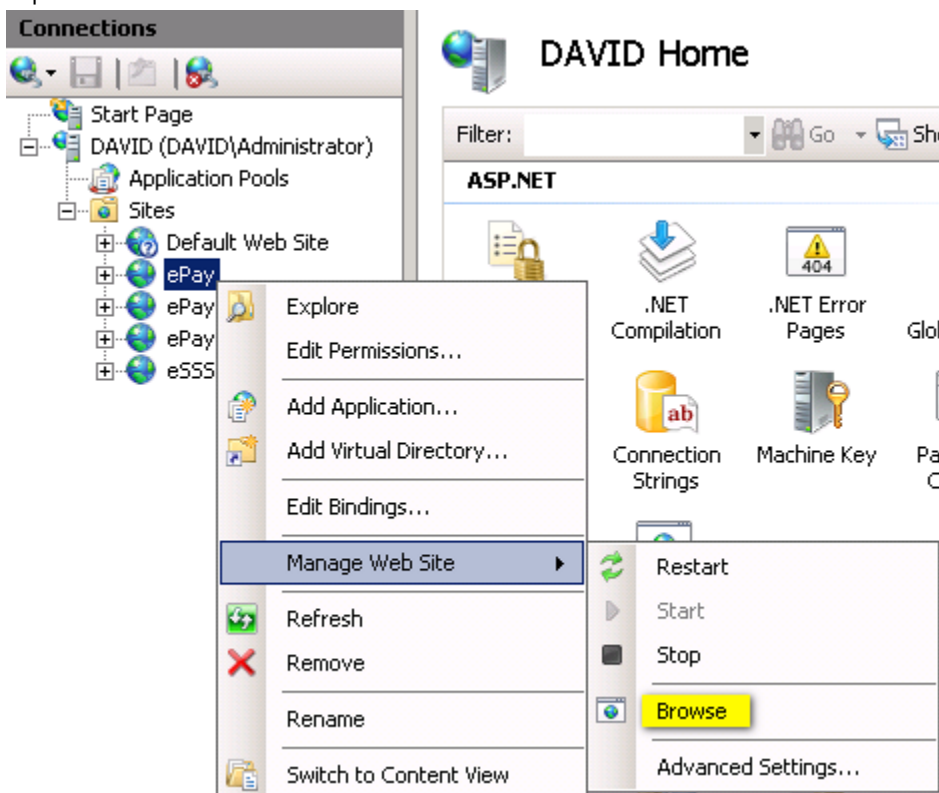
16. The website login screen should then open in the web browser

17. Log into the website as an administrative user using the following credentials
     User Name: **admin**
     Password: **password**
18. Once logged in, the system will require the password be reset.
19. Enter '**password**' in the '**Current Password**' field.

20. In the '**New Password**' and '**Confirm New Password**' fields, enter the new password for the 'admin' user.
21. Please document this password for future use on the website.
22. Once completed, click the '**Save**' button
23. **Return to the main instructions and proceed to the next step** | For New Installation | For Upgrade |

Upgrade ePay Advantage

1. Locate the backup copy of the ePay Advantage Sitefiles
   a. If this backup copy does not exist, please create a backup copy of the ePay Advantage Sitefiles before proceeding
2. The user logged in for the installation must be in the Administrators group for the computer where ePay Advantage is being installed
3. Navigate to the folder where the ePay Advantage installation file is located.
4. Right click the ePay Advantage installation file and choose to run the installation file as an administrator user
5. If this server contains an existing installation of the ePay website the '**Existing Installed Instances Detected**' page should be displayed.
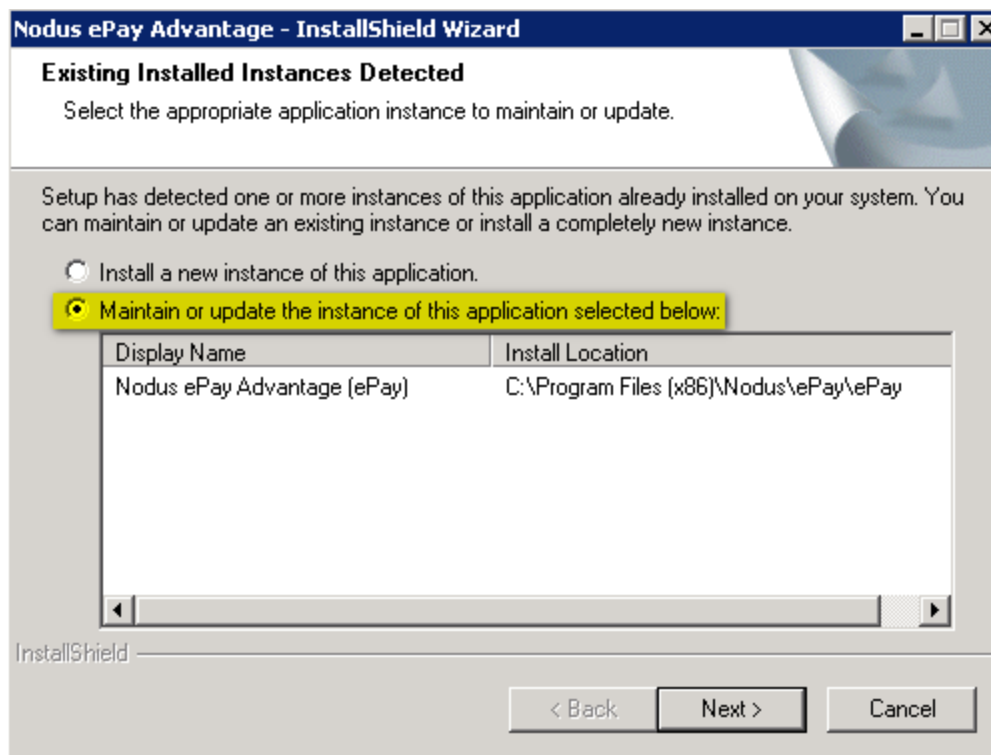
   a. If the ePay Web Server does **NOT** contain an existing installation of the ePay website, the Welcome screen should be displayed instead. In this case, proceed with installing a new instance of ePay Advantage using the following link. Install ePay Advantage
6. Choose the option '**Maintain or update the instance of this application selected below:**' option and then select the desired ePay instance to upgrade
7. Once the correct ePay instance has been selected, click the '**Next >**' button to proceed to the 'Preparing Setup' page.
8. The 'Preparing Setup' page will take a few seconds to prepare the installation and display the '**Welcome**' page

9. The '**Repair**' option should already be selected. With this option selected, click the '**Next >**' button to proceed with deploying the upgraded 'Sitefiles' to the website.
    a. This process will overwrite many of the existing website files, ensure the backup copy of the website files is secured before clicking the 'Next >' button.
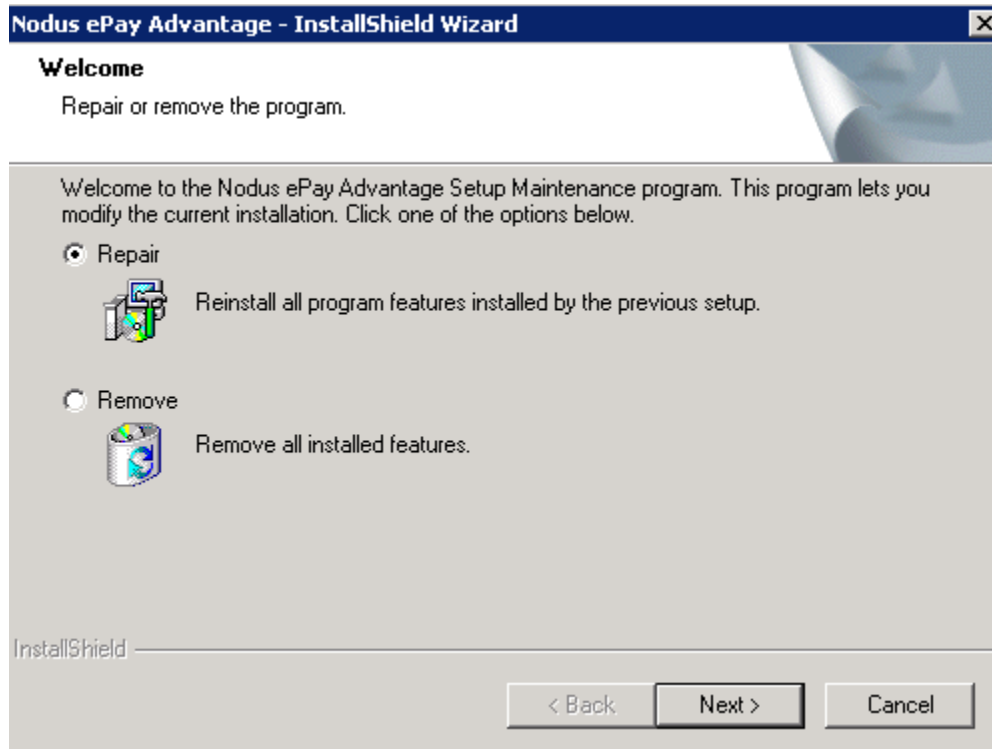
10. Once the deployment is completed, click the '**Finish**' button to close the installer file.
11. **Return to the main instructions and proceed to the next step** | For Upgrade |

Migrate the ePay Advantage Sitefiles

1. Locate both the backup copy of the website 'Sitefiles' folder and the upgraded 'Sitefiles' folder.
2. <u>If the system the ePay website is installed on is the same system as prior to the upgrade</u>, proceed with the following steps a and b.
   a. Copy the file 'db.config' from the backup folder to the updated folder. Overwrite the existing file.
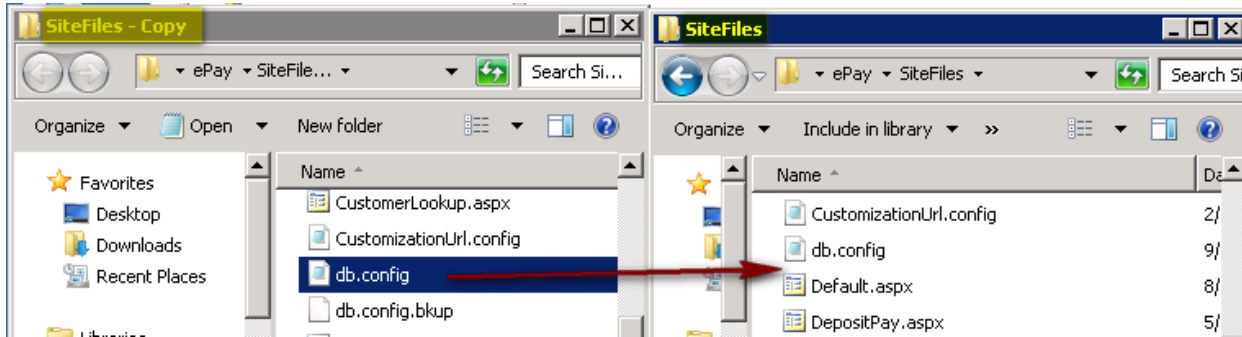
   b. Copy the file Nodus.lic from the backup folder to the updated folder.
3. <u>If the system the ePay website is installed on is a new system,</u> proceed with steps a through e in the next section
   a. In the 'Sitefiles' folder, open the 'db.config' file in Notepad
   b. Replace all the text in this file with the text in the below box

   ```
   <connectionStrings>
   <clear />
   <add name='DatabaseConnection' connectionString='Data
   Source=SQLSERVER;Initial Catalog=DATABASENAME;User
   ID=USERNAME;Password=PASSWORD;'
   providerName='System.Data.SqlClient' />
   ```

   c. Modify the following text to match location for the ePay database

Text to Replace	Value
SQLSERVER	The name or IP of the SQL instance where the ePay SQL Database is located, make sure to include the SQL server instance name is necessary.
DATABASENAME	The name of the original ePay SQL database
USERNAME	The name of the **ePay SQL user** who has the db_owner permission to the ePay database
PASSWORD	The password for the **ePay SQL user**

d. Save the changes to the db.config file
e. Recycle the application pool for the ePay website

4. Any changes to individual files will need to be migrated from the backup folder to the new sitefiles. For most of these changes, it would be best to review each modified file individually and apply the modification directly in the file rather than overwriting any of the new existing files in the updated 'Sitefiles' folder.

a. These changes could include:
   i. Modifications to the '<appSettings>' section of the web.config file
   ii. Theme modifications in the 'App_Themes' folder
   iii. Image files in the 'App_Themes\[WebsiteTheme]\Images' folder
   iv. Other changes added to any of the other website files

5. **If the ePay website was installed on a new system and either the Tokenization or Encryption Option is in use**, proceed to Configure the Payment Gateway Configuration

6. **If the ePay website was upgraded on the same system as prior to the upgrade or the PayFabric option is in use**, return to the main instructions and proceed to the next step | For Upgrade |

Nodus Synchronizer Installation and Configuration

1. The user logged in for the installation must be in the Administrators group for the computer where Nodus Synchronizer is being installed.
2. Run the Nodus Synchronizer installation file

3. When the '**Welcome…**' page opens, click the '**Next >**' to proceed to the '**License Agreement**' page
4. After reviewing the license agreement, mark the 'I accept the terms in the license agreement' option to accept the terms.
5. Click the '**Next** >' button to proceed to the '**Destination Folder**' page.
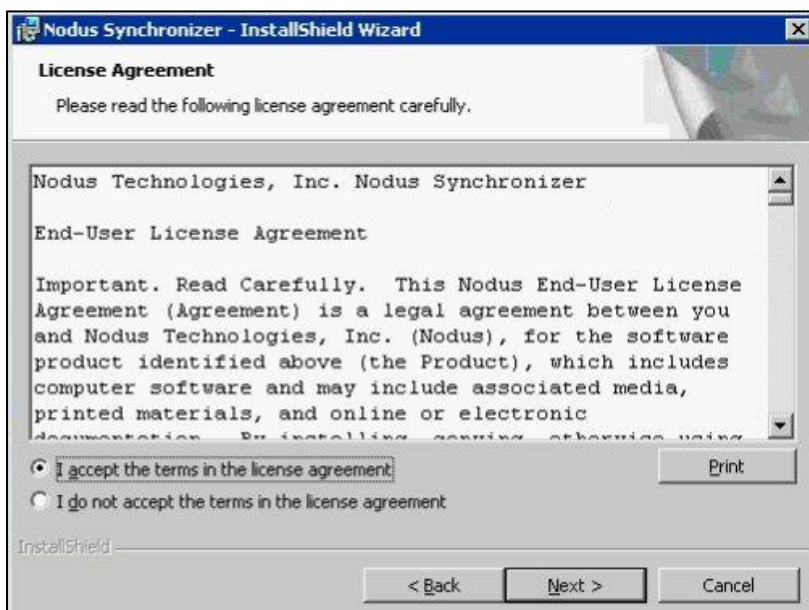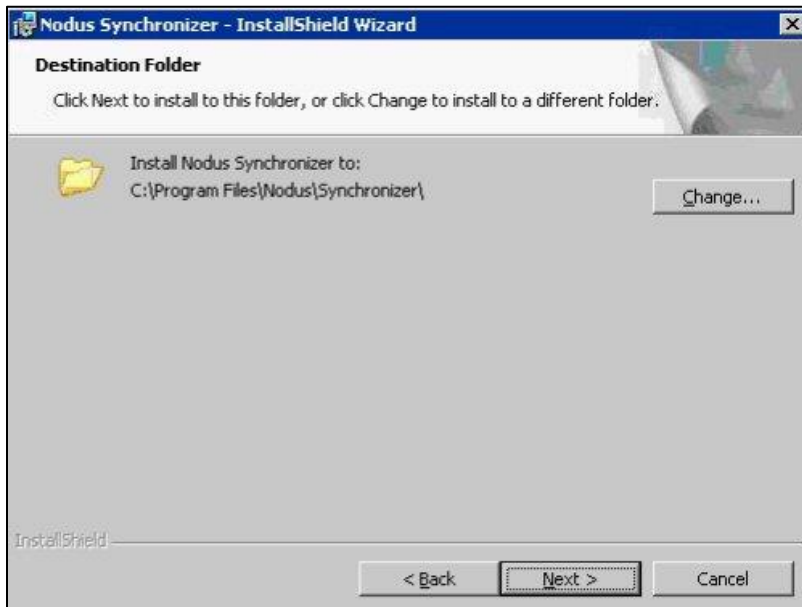
6. The default installation folder for these files should be displayed on the screen. If you would like to change the installation folder for the installation files, click the '**Change**' button and browse to the desired location.

7. After ensuring the installation path is correct, click the '**Next >**' button to be taken to the '**Ready to Install the Program**' page

8. When the '**Ready to Install the Program**' screen opens, click the '**Install**' button to start the installation process
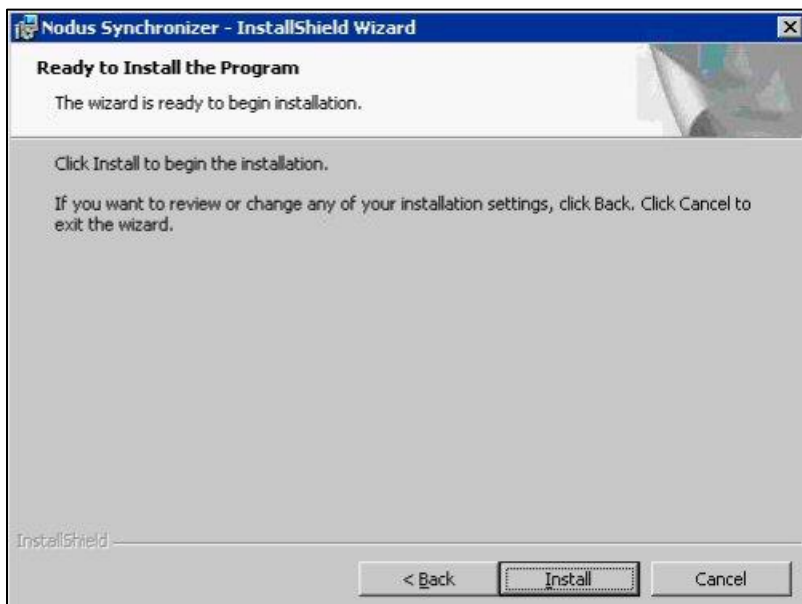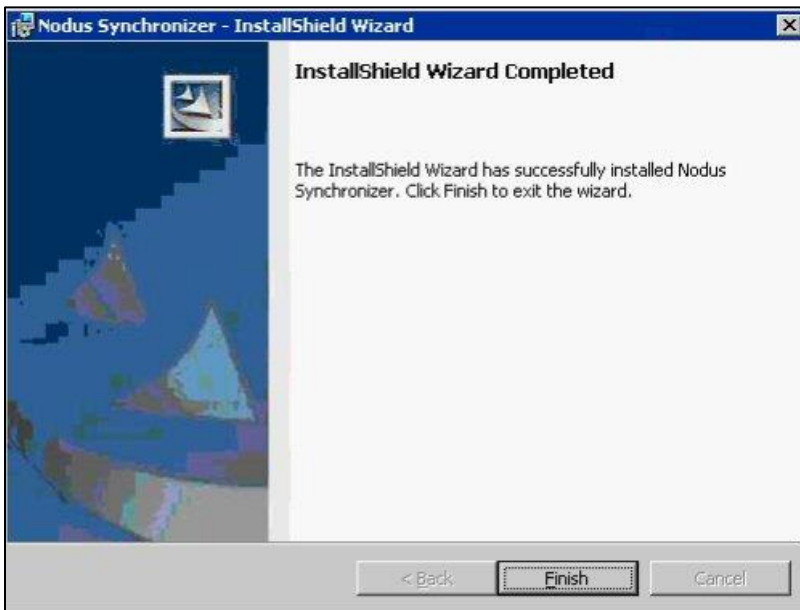
9. Once the installation is completed, click the '**Finish**' button to close the installer.

Nodus Synchronizer Configuration

1. Open the Nodus Synchronizer Configuration window by navigating to '**Start → Programs → Nodus Technologies → Nodus Synchronizer → Nodus Synchronizer Configuration**'
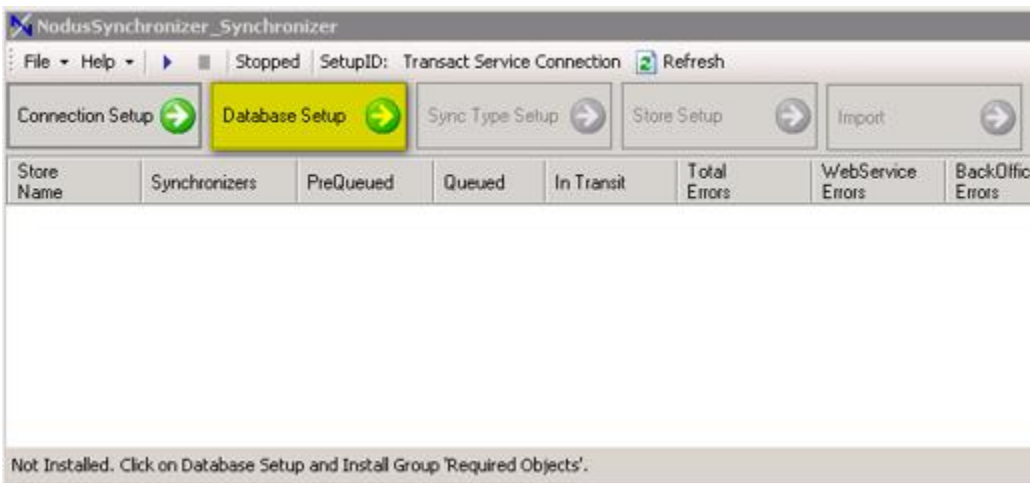
2. Click the '**Database Setup'** button to open the '**Database Setup'** window.
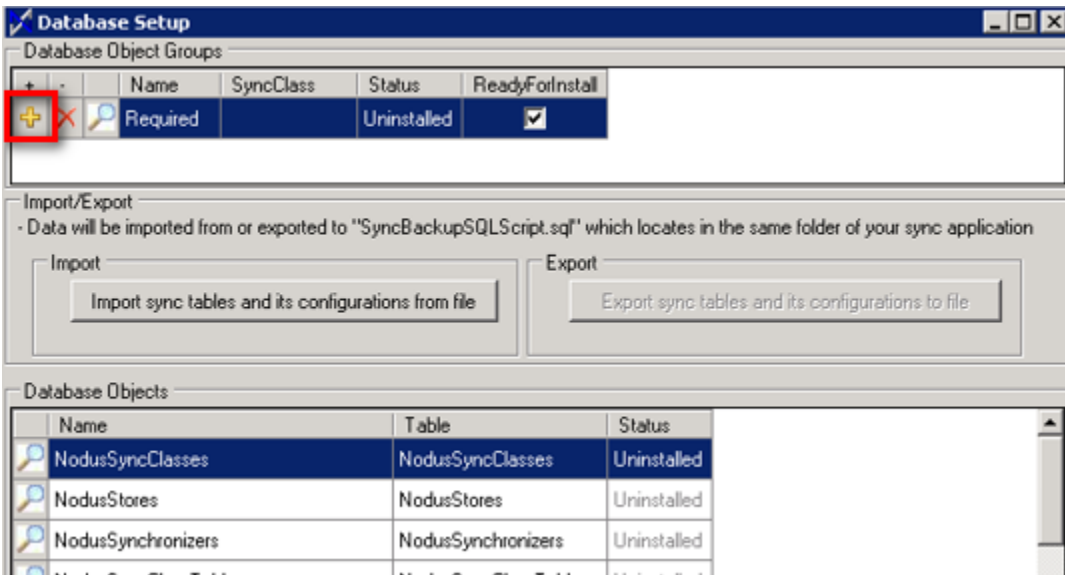
3. Under '**Database Object Groups'** section, click the yellow plus sign in the upper left corner to load the database objects for the Nodus Synchronizer into the GP database.
4. This will take a small amount of time to complete. Once it is completed, the values in the '**Status'** column in the '**Database Objects**' section will change from **Uninstalled** to **Installed**.
5. Close the '**Database Setup'** window using the 'X' button in the upper right corner of the window
6. Back in the Synchronizer window, click the '**Store Setup**' button to open the '**Store Setup**' window
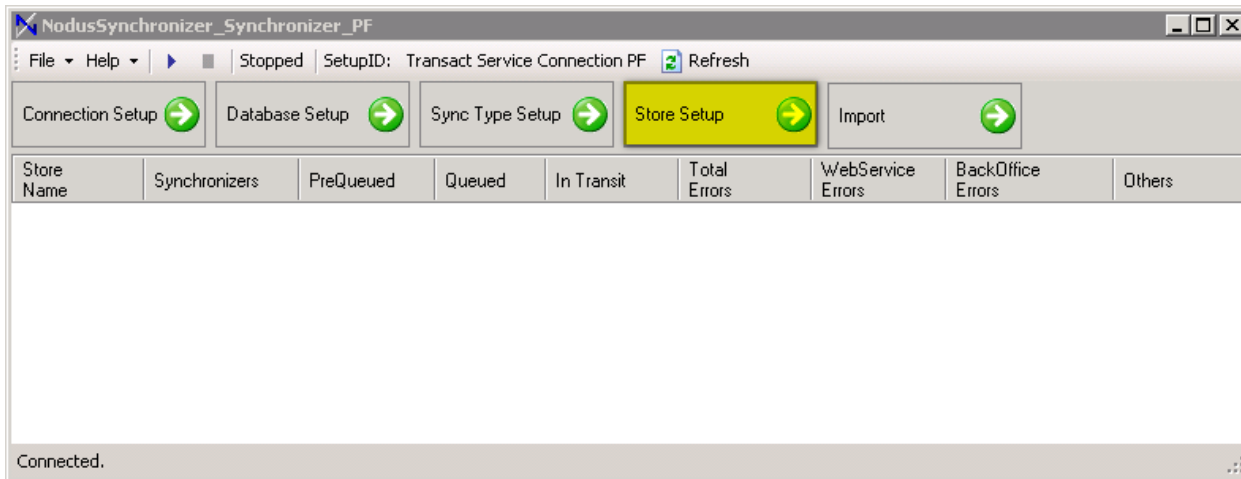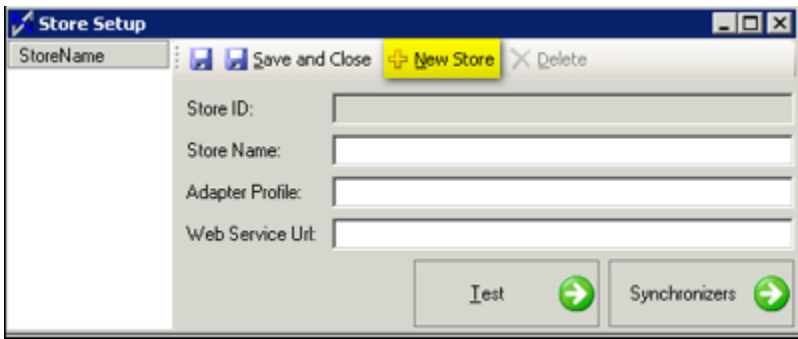
7. In the '**Store Setup**' click the '**New Store**' button to begin setting up the connection to the ePay website.
8. After clicking the '**New Store**' button the fields in this window will be populated
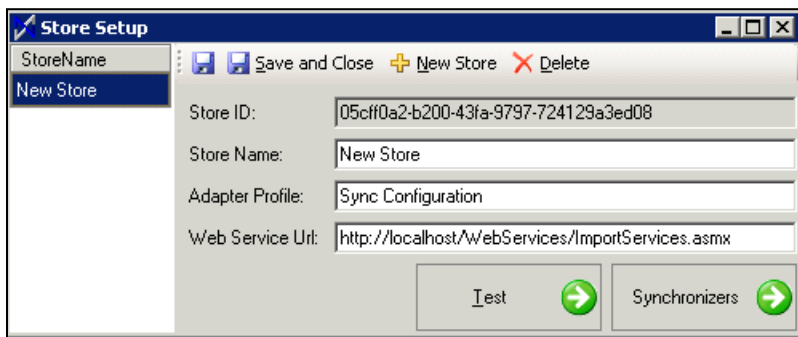
9. Fill in the fields in this window using the information from the following table

FIELD	ENTRY
Store ID	This should be automatically populated.
Store Name	Enter the store name that is relevant for the website
Adapter Profile	Leave this field as 'Sync Configuration'
Web Service URL	Replace the 'http://localhost' with the **ePay Website Address**. Leave the section '/WebServices/ImportServices.asmx' the same. (Example: https://myServer:Port/Webservices/ImportServices.asmx) **If the **ePay Website Address** is ever changed, then this field should be updated accordingly.

10. Click the '**Test'** button to verify the '**ePay Website Url**' is correct and accessible from the system running the Integration Services.
11. If the test is successful, a message will be displayed that will say the Web Service URL is correct.
12. Click the '**Synchronizers'** button to open the '**Synchronizers**' window
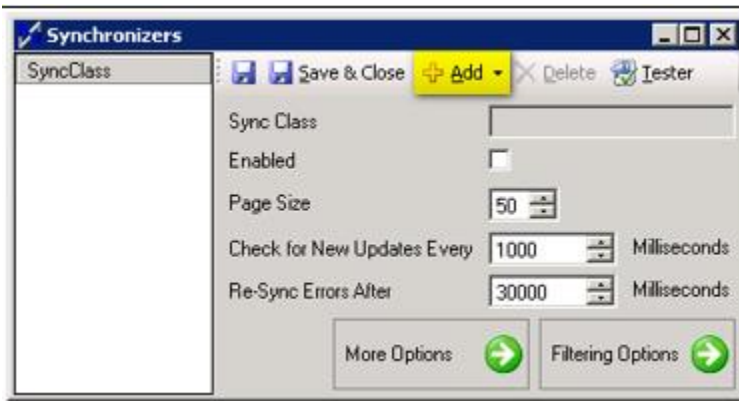
13. Using the '**Add**' button, select the following Sync Classes using the table below based on the ePay modules purchased.
    a. If you do not know which modules were purchased for ePay Advantage, log into the ePay website as an administrator user and browse to 'Reports → System Information Report' page from the top menu to see the modules purchased.

Module	*Sync Classes*
Online Bill Pay, Recurring Payments, and/or Installment Payments	• CashReceiptWork • InvoiceHistory • InvoiceWork • InvoicesReturns • PaymentHist • PaymentWork
Recurring Invoicing	• InventoryItem • TaxDetail
eSOP Advantage	• InventoryItem • OrderHist • OrderWork • TaxDetail
All Modules (Use the following sync classes for all modules)	• Customer • Salesperson
*If using the **Encryption Option***	• CustomerWallet_DSS
*If using the **Tokenization Option***	• CustomerWallet_Token

14. Click the '**Save and Close'** button on the '**Synchronizers'** window to save changes and return to the '**Store Setup**' window
15. Click the '**Save and Close'** button on the '**Store Setup**' window to save changes and return to the main Synchronizer window

16. Click the '**Refresh**' button to see the synchronizer classes load into the main Synchronizer page.
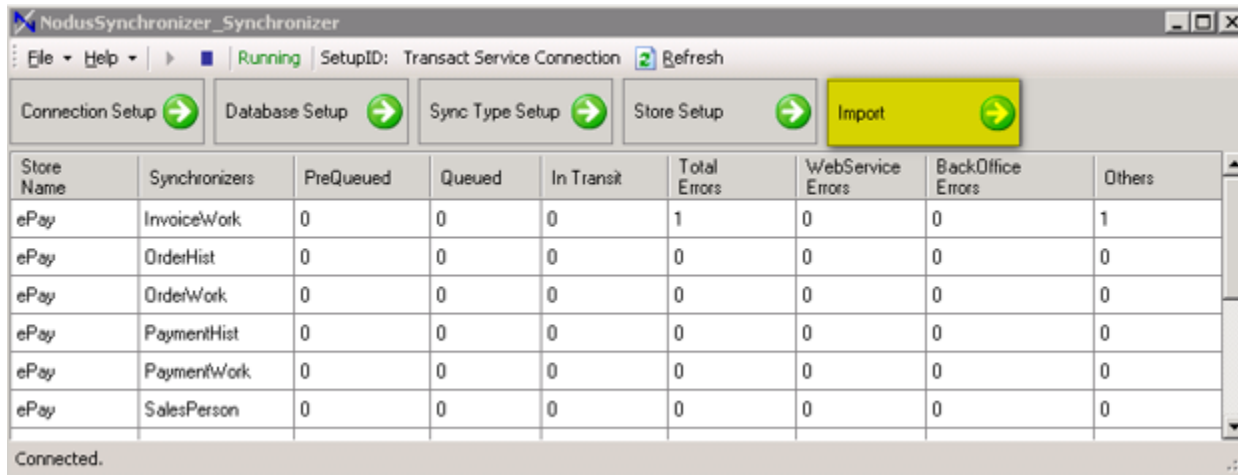
17. If there is any reason to filter data going to the ePay site such as limiting ePay to only have data from certain customer classes or to filter data from a specific date range, please take the time to setup a Nodus Synchronizer filter. If you would like information on setting up a filter in the Nodus Synchronizer, please contact the Nodus Technologies Support.
18. After the filter is setup or if there is no need to set a filter, then click the '**Import**' button to open the '**Import**' window
19. In this window, push the '**Import All**' button to begin the import process for all the necessary GP data for ePay.
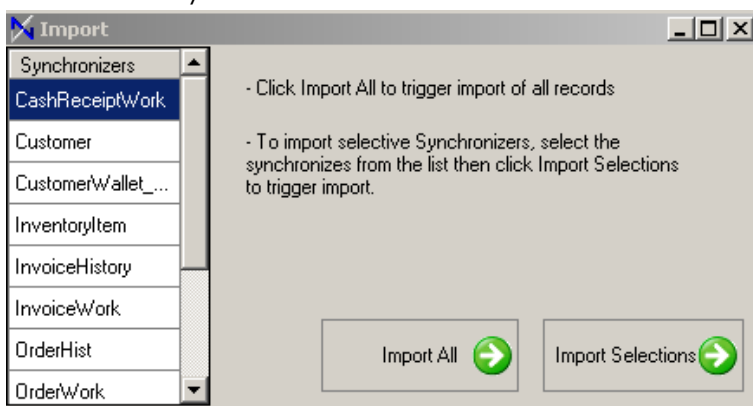
20. Click the 'OK' option at the prompt to begin the trigger for the mass import process.
21. It may take some time, but once the trigger is completed, a prompt will let you know that the process was successful. Click the 'OK' button in the prompt to be returned to the main Synchronizer page.
22. Click the Play button (►) to start the Synchronizer
    a. If you receive an error at this time, please Close the Synchronizer and right click the 'Nodus Synchronizer Configuration' shortcut (Start → Programs → Nodus Technologies → Nodus Synchronizer) and choose 'Run as Administrator' to be allow the access to start the Synchronizer service.
23. If you push the 'Refresh' button, you should see the data migrating to the site.

55

    a. Please be aware that the Synchronizer Classes related to Invoices, Payments or Orders, will show many errors during this initial import process. These errors will clean themselves up over time.

24. The Synchronizer setup is now complete, the data will migrate for the next few hours or days based on the database volume.

25. **Return to the main instructions and proceed to the next step** | For New Installation | For Upgrade |

Configure ePay Advantage

After installing ePay Advantage, the following configuration steps are required in order for the site to function properly.

1. Open an internet browser and navigate to the ePay website. From the menu bar at the top of the page, browse to '**Settings → Back Office Settings**' to open the '**Back Office Settings**' page

2. In the '**Back Office Connection**' field, enter the web address for the Transact Service website. This was automatically created during the eStore Advantage Back Office installation. This needs to be an address that can be browsed from the system hosting the ePay Website.
   a. Replace the 'BackOffice' text in this field with the URL for the eStore Advantage Back Office web service
      i. Typically, replacing the 'BackOffice' text in this field to name or IP of the system hosting the **Integration Services** should be sufficient as long as the port is open.
   b. Change the '2' in the web address to a '3'.
      i. An example of what it would be when completed is: 'http://ApplicationServerName/TransactService_3.0/TransactService.asmx'
   c. To verify this is a valid connection, copy the web address in this field and browse to this website from the system hosting the ePay Website. If it is functional, a page with 'TransactService' at the top of the page will be shown. If this is not working, check with the network administrator to verify the necessary ports are open for this connection to be made.
3. Click the '**Save**' button in the lower right corner to save the changes.
4. After the changes are saved, click the '**Import Functional Currency'** link and the Functional Currency from Dynamics GP should load into the '**Functional Currency**' field
5. From the menu bar at the top of the page, browse to '**Reports -> System Information**' to open the '**System Information**' page
6. Check the values in the 'Nodus Services' section to verify the system is properly running
   a. The '**Encryption Service**' should display 'DSS Encryption – Working' or 'Legacy Encryption – Working' based on the Credit Card Storage Options
   b. The '**Transact Service**' should display 'Working'

NODUS SERVICES

Encryption Service: DSS Encryption - Working
Transact Service: Working.
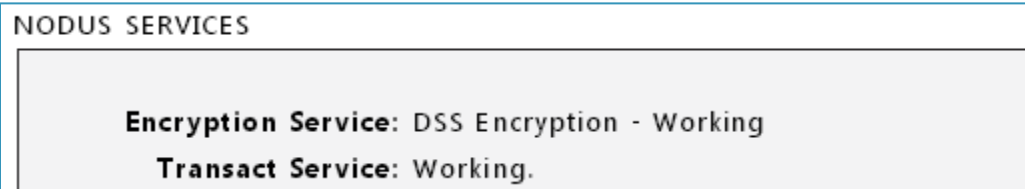
7. After confirming all the services are running, go to the top menu and browse to '**Settings -> Site Settings**' to open the site settings page
8. Navigate to the '**Transaction Processing Options**' tab.
9. **If the Payfabric Option is in use**, please proceed to Configure the PayFabric Connection. Otherwise, please continue with the following steps.
10. If the website is to accept Credit Cards as a payment option, choose Setup ID in the '**Credit Card Setup ID:**' dropdown for the Setup ID that will be used for processing credit cards for this website.
11. If a '**Credit Card Setup ID**' was chosen, mark the '**Accept Credit Cards**' checkbox

Site Settings

Global configuration settings for ePay website

| Company Information | Transaction Processing Options | Content Management | Email Setup | Payment Scheduler Options | Landing Page Options |

Options to enable/disable credit card/eCheck payment processing

Credit Card Setup ID: PayFlowPro
Accept Credit Cards: ☑
AVS Enabled: ☐
CVV2 Required: ☐
eCheck Setup ID: USAePay eC
Accept eCheck: ☑

12. If the website is to accept eChecks as a payment option, choose the Setup ID in the '**eCheck Setup ID**' dropdown for the Setup ID that will be used for processing eCheck for this website.
13. If an '**eCheck Setup ID**' was chosen, mark the '**Accept eCheck**' checkbox.
14. Click the '**Save**' button in the lower right corner to save the changes.
15. At this point in the installation, only the necessary settings for the website to be functional have been configured. Please use the '**Configuration Checklist**' in the main menu to complete the remaining configuration.
    a. If assistance is needed for this configuration, please refer to the '**ePay Advantage User's Guide**' for assistance. The guide can be accessed from the top menu under '**Documentation → ePay User's Guide**'

If needed, use the following links to return to the main instructions
   | For New Installation | For Upgrade |

Configure the PayFabric Connection

1. Log into the desired PayFabric account that is to be connected to the ePay website
2. In the 'DEV Central' section of the left menu, select the '**Themes**' option
3. Click the '**Create New +**' button and enter a name that would be relevant to the ePay website
4. Click the below link to obtain the CSS code for the ePay device
   http://www.nodus.com/Downloads/PayFabric/Themes/ePay/ePayPF_CSS_2.0.txt
5. Copy all the text from the page
6. Browse back to the PayFabric page and paste the copied text into the '**Custom.css**' field
7. Click the '**Save**' button to save the changes to the theme.
8. In the 'DEV Central' section of the left menu, select the '**Devices**' option
9. Click the '**Generate**' option to present the fields for creating a Device
10. Populate the '**Device Name**' field with a value that would be relevant to the ePay website
11. Populate the '**Password**' and the '**Confirm Password**' fields with a secure password. Please take note of this password as it will be used again shortly.
12. Click the '**Confirm**' button to generate the device.
13. Take note of the '**Device ID**' as it will be used shortly.
14. In the Device List, click the Shirt icon in the '**Default Theme**' column for the newly created device
15. Select the Theme name for the theme that was created in the above steps
16. Click the '**Confirm**' button to save changes.
17. Log into the ePay website as an administrator user and browse to the '**Transaction Processing Options**' tab of the '**Site Settings**' page

Site Settings
Global configuration settings for ePay website

| Company Information | Transaction Processing Options | Content Management | Email Setup | Payment Scheduler Options | Landing Page Options |

Options to enable/disable credit card/eCheck payment processing

PayFabric Hosted Page URL:	https://sandbox.payfabric.com/v2/web
PayFabric API URL:	https://sandbox.payfabric.com/v2/rest/ running
PayFabric Device ID:	00000000-0000-0000-0000-000000000000
PayFabric Device Password:	••••••••
Credit Card Setup ID:	PayFlowPro Test
Credit Card Transaction Type:	Sale
Accept Credit Cards:	☑
eCheck Setup ID:	USAePay eCheck
Accept eCheck:	☑

SAVE

18. Use the information from the below table to populate the fields on this page.

60

Field	Value
PayFabric Web Address	For Test Transactions: https://sandbox.payfabric.com/v2/web For Live Transactions: https://www.payfabric.com/v2/web
PayFabric Service Address	For Test Transactions: https://sandbox.payfabric.com/v2/rest/ For Live Transactions: https://www.payfabric.com/v2/rest/
PayFabric Device ID	Enter the Device ID generated from PayFabric for the ePay website
PayFabric Device Password	Enter the Password that was provided when generating the Device on PayFabric for the ePay website.
Credit Card Setup ID	This should automatically populate with the configured Gateway Account Profile from PayFabric. Select the desired Gateway Account Profile for processing Credit Cards with the ePay website. If this field is not populating, please ensure that the PayFabric API URL, the Device ID and password are correct.
Accept Credit Cards	If Credit Card transactions are to be accepted on this website, mark this box
eCheck Setup ID	This should automatically populate with the configured Gateway Account Profile from PayFabric. Select the desired Gateway Account Profile for processing eChecks with the ePay website. If this field is not populating, please ensure that the PayFabric API URL, the Device ID and password are correct.
Accept eCheck	If eCheck transactions are to be accepted on this website, mark this box

19. Click the '**Save**' button in the lower right corner to save the changes.
20. At this point in the installation, only the necessary settings for the website to be functional have been configured. Please use the '**Configuration Checklist'** in the main menu to complete the remaining configuration.
     a. If assistance is needed for this configuration, please refer to the '**ePay Advantage User's Guide**' for assistance.

If needed, use the following links return to the main instructions

|For New Installation | For Upgrade |

PayPal PayFlowPro Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	PayFlowPro
Processor	Choose the Credit Card Processor that the PayPal PayFlowPro account is connected to
Card Class	Choose 'Credit' for Credit Card Transactions Choose 'Check' for eCheck Transactions
Server.Address	For Test Transactions: https://pilot-payflowpro.paypal.com For Live Transactions: https://payflowpro.paypal.com
Partner	This is the partner that setup the PayFlowPro account. This is the same as the 'Partner' field used to log into https://manager.paypal.com
Vendor	This is the '**Merchant Login'** used to identify the PayFlowPro account. This is the same as the 'Merchant Login' used to log into https://manager.paypal.com
UserID	The PayFlowPro account may utilize a User when logging into https://manager.paypal.com. If no 'User' is used when logging into the PayPal Manager, fill in this field with the same value as the '**Vendor**' field.
Password	This is the password associated with the 'User' or 'Merchant Login' to log into https://manager.paypal.com.
UseToken	If using the **Tokenization Option**, set this field to 'True'. Otherwise, leave it as false.

After the configuration is completed, return to Configure the Payment Gateway Connection.

USAePay Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	USAePay
Processor	USAePay
Card Class	Choose 'Credit' for Credit Card Transactions Choose 'Check' for eCheck Transactions
Server.Address	Put Test or Live in this field if this Setup id being used for a test or live account respectively
Server.Port	443
SourceKey	This is the Source Key that is obtained from the settings of the USAePay gateway
TestMode	For a Test Source Key, set this value to '**True**' For a Live Source Key, set this value to '**False**'

After the configuration is completed, return to <u>Configure the Payment Gateway Connection</u>.

Authorize.Net Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Authorize.Net
Processor	Authorize.Net
Card Class	Choose 'Credit' for Credit Card Transactions Choose 'eCheck' for eCheck Transactions
Server.Address	For Test Transactions: https://secure.authorize.net/gateway/transact.dll For Live Transactions: https://test.authorize.net/gateway/transact.dll
Port	443
LoginID	This is the login id used for the Authorize.net account
TransactionKey	This key can be obtained from the Authorize.Net Gateway. Contact the Authorize.net gateway provider for more details.
TestMode	For a test transactions, set this value to '**True**' For a live transactions, set this value to '**False**'
UseToken	If using the **Tokenization Option**, set this field to 'True'. Otherwise, leave it as false.

After the configuration is completed, return to Configure the Payment Gateway Connection.

CyberSource Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Cybersource
Processor	Choose the Credit Card Processor that the Cybersource account is connected to
Card Class	Credit
Server.Address	For Test Transactions: ics2test.ic3.com For Live Transactions: lcs2.ic3.com
MerchantID	This is the merchant ID for the Cybersource account

To use the Cybersource Gateway, it is necessary to obtain the secure CyberSource Keys from the Cybersource eCert Application. Contact the CyberSource partner for more information on obtaining these keys. Once the keys are obtained, they should be placed in the following folder:

C:\Program Files (x86)\Common Files\Nodus\CyberSource\keys

After the configuration is completed, return to Configure the Payment Gateway Connection.

Paymentech Orbital Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Paymentech
Processor	Paymentech
Card Class	Choose 'Credit' for Credit Card Transactions Choose 'Check' for eCheck Transactions
Server.Address	For Test Transactions: Orbitalvar1.paymentech.net For Live Transactions: Orbital1.paymentech.net
Port	443
MerchantID	This is the Merchant identifier used for the Paymentech Account
BIN	This is the typically 6 digit bin number associated with the Paymentech Account
TerminalID	This is the identifier for the Terminal ID used with the Paymentech Account
UseToken	If using the **Tokenization Option**, set this field to 'True'. Otherwise, leave it as false.

When using the Paymentech Gateway it is important to make sure that the Web Server's external IP has been registered with Paymentech for the specified account before processing transactions.

After the configuration is completed, return to Configure the Payment Gateway Connection.

Moneris Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Moneris
Processor	Moneris
Card Class	Credit
Server.Address	For Test Transactions: https://esqa.moneris.com:43924/gateway2/servlet/MpgRequest For Live Transactions: https://www3.moneris.com:43924/gateway2/servlet/MpgRequest
Server.Port	43924
StoreID	This is the Store identifier obtained from Moneris
APIToken	This is the API Token value obtained from Moneris

After the configuration is completed, return to Configure the Payment Gateway Connection.

Payeezy (First Data GGe4) Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

To obtain most of this information, log into the gateway account, browse to 'Terminals' and select the desired Terminal associated to the desired merchant account.

Field	Value
Connector	FirstDataGGe4
Processor	First Data GGe4
Card Class	Credit
Server.Url	https://api.demo.globalgatewaye4.firstdata.com/transaction/v12
APIKeyID	'Key ID' associated to the Terminal for the Payeezy account. This value is located under the 'API Access' tab after selecting the terminal.
HMACKey	'Hmac key' identifier associated to the Terminal for the Payeezy account. This value is generated under the 'API Access' tab after selecting the terminal.
GatewayID	'Gateway ID' associated to the Terminal for the Payeezy account. This value is located under the 'Details' tab after selecting the terminal.
GatewayPassword	'Password' associated to the Terminal for the Payeezy account. This value is generated under the 'Details' tab after selecting the terminal.

After the configuration is completed, return to Configure the Payment Gateway Connection.

WorldPay Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	WorldPay
Processor	Choose the Credit Card Processor that the account is connected to
Card Class	Credit
Server.Url	https://trans.worldpay.us/Web/services/TransactionService
AcctID	This is the Account identifier for the account
SubID	This is the Sub Identifier for the account
MerchantPin	This is the Merchant Pin associated to the account

After the configuration is completed, return to Configure the Payment Gateway Connection.

Revision History

Author	Date	Changes
Jay Sun	9/21/11	Initial version based on 4.0
Jay Sun	9/26/11	Updated back office installation Updated single server installation
Nikki Nguyen	11/8/11	Updated with QA feedback
Nikki Nguyen	4/20/12	Update with 4SP1 Changes
Nikki Nguyen	7/27/12	Update with software requirement specs
Nikki Nguyen	4/15/13	Update with 4SP2 Changes
David Geli	5/1/14	Major structure update and ePay 5.0 changes
David Geli	10/1/14	Update for 5.0 SP1
David Geli	8/21/15	Update for 5.0 R2
David Geli	5/20/16	Update for ePay 6

Copyright

Copyright © 2008-2016 Nodus Technologies, Inc. All rights reserved. All rights reserved. Your right to copy this documentation is limited by copyright law and the terms of the software license agreement. As the software licensee, you may make a reasonable number of copies or printouts for your own use. Making unauthorized copies, adaptations, compilations, or derivative works for commercial distribution is prohibited and constitutes a punishable violation of the law.

Trademarks Nodus PayLink, PayFabric, CRM Charge, eStore Solution Stack, Scheduled Payments, ePay Advantage, Credit Card Advantage, eStore Advantage, and Retail Advantage are either registered trademarks or trademarks of Nodus Technologies, Inc. in the United States.

The names of actual companies and products mentioned herein may be trademarks or registered marks - in the United States and/or other countries - of their respective owners.

The names of companies, products, people, and/or data used in window illustrations and sample output are fictitious and are in no way intended to represent any real individual, company, product, or event, unless otherwise noted.

Warranty Disclaimer Nodus technologies, Inc. disclaim any warranty regarding the sample code contained in this documentation, including the warranties of merchantability and fitness for a particular purpose.

Limitation of Liability The content of this manual is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Nodus Technologies, Inc. Nodus Technologies, Inc. assumes no responsibility or liability for any errors or inaccuracies that may appear in this manual. Neither Nodus Technologies, Inc. nor anyone else who has been involved in the creation, production or delivery of this documentation shall be liable for any indirect, incidental, special, exemplary or consequential damages, including but not limited to any loss of anticipated profit or benefits, resulting from the use of this documentation or sample code.

License agreement Use of this product is covered by a license agreement provided with the software product. If you have any questions, please call Nodus Technologies Support at 909-482-4701

Return to Top

EPay Advantage - End User License Agreement (EULA)

Important – Read Carefully. This Nodus End-User License Agreement ("Agreement") is a legal agreement between you ("End-User") (on the one hand) and Nodus Technologies, Inc. ("Nodus") and its OEM partner(s) ("OEM") (on the other hand), for the software product identified above, which includes computer software and may include associated media, printed materials, and online or electronic documentation (the "Product"). By installing, copying, other otherwise using this Product, you agree to be bound by the terms of this Agreement. If you, the End-User, do not agree to the terms of this Agreement, do not install or use this Product; you may, however, return it to your place of purchase for a refund or credit.

This license is not a sale. Title and copyrights to the Product remain with Nodus and its OEM partner(s). Unauthorized copying of the data, or failure to comply with the provisions of this License Agreement, will result in automatic termination of this license and Nodus and its OEM partner(s) may use any other legal remedies available to it. IN THE EVENT OF LICENSE TERMINATION, ALL MATERIALS, DATABASES, AND DOCUMENTATION MUST BE IMMEDIATELY RETURNED TO NODUS TECHNOLOGIES, INC. AT THE ADDRESS LISTED AT THE END OF THIS AGREEMENT.

1. End-User represents and warrants that it is authorized and empowered to enter into this Agreement. Nodus represents and warrants that it is authorized and empowered to grant the rights hereinafter set forth.

2. Nodus and its OEM Partner(s) hereby grant End-User a non-exclusive, non-transferable right to use the Product, subject to the use restrictions and limitations set forth below.

3. Nodus shall provide End-User with one (1) machine-readable copy of the Product. This license authorizes use of the Product at a single location, which shall mean a single location which uses or accesses the Product either from a computer or terminal on site or through a computer or terminal at a supporting location.

4. End-User acknowledges that the Product is confidential, proprietary material owned and copyrighted by Nodus. End-User agrees that Nodus and its OEM partner(s) shall retain exclusive ownership of the Product, including all literary property rights, patents, copyrights, trademarks, trade secrets, trade names, or service marks, including goodwill and that Nodus may enforce such rights directly against End-User in the event the terms of this Agreement are violated.

5. The Product is intended for use solely by End-User for their own internal purposes as an alternative electronic information source of data. The Product may only be used at the location(s) licensed and paid for by End-User to the Nodus. End-User agrees not to copy, modify, sub-license, assign, transfer or resell the Product, in whole or in part. End-User agrees not to translate, reverse engineer, decompile, disassemble, or make any attempt to discover the source code of the Product (except and only to the extent applicable law prohibits such restrictions). End-User further agrees not to download/upload the Product, in whole or in part, or to establish a network, place data on the Internet or otherwise publish, or offer a service bureau utilizing the Product. End-User agrees to restrict access to the Product to designated employees and to use its best efforts to prevent violation of these restrictions by agents, employees and others, taking such steps and reasonable security precautions as may be necessary. End-User shall permit Nodus and/or its representative access to its premises during normal business hours to verify compliance with the provisions of this Agreement.

6. Without prejudice to any other rights, Nodus may terminate this Agreement if End-User does not abide by the terms and conditions of this Agreement. Upon termination of this Agreement, all licenses and rights to use the Product shall immediately terminate and End-User shall immediately cease any and all use of

the Product. Within thirty (30) days after termination of the Agreement, End-User shall return to Nodus, postage prepaid, all copies of the Product.

In the event that the End-User fails to pay the periodic maintenance fee, unless such periodic maintenance fee is waived in writing by Nodus, then Nodus shall no longer be obligated to provide any services or support to End-User nor shall Nodus be obligated to provide any additional upgrades or updates for such Product or any other service or Product. Nodus reserves the right to discontinue any services provided to End-User or made available to End-User through the use of the Product.

7. All UPDATES provided by Nodus and its affiliates shall be considered part of the Product and subject to the terms and conditions of this Agreement. Additional license terms may accompany UPDATES. By installing, copying, or otherwise using any UPDATE, End-User agrees to be bound by this Agreement and any terms accompanying each such UPDATE. If End-User does not agree to the additional license terms accompanying such UPDATES, do not install, copy, or otherwise use such UPDATES.

8. End-User agrees that Nodus and its affiliates may collect and use information End-User provides as a part of support services, problem resolution or technical improvements or developments in connection with the Product.

9. End-User acknowledges that the Product is of U.S. origin and agrees to comply with all applicable international and national laws that apply to the Product, including the U.S. Export Administration Regulations, as well as end-user, end-use and destination restrictions issued by U.S. and other governments.

10. NODUS REPRESENTS THAT THE PRODUCT DOES NOT VIOLATE OR INFRINGE ANY PATENT, TRADEMARK, TRADE SECRET, COPYRIGHT, OR SIMILAR RIGHT. IN THE EVENT THE PRODUCT IS HELD TO INFRINGE THE RIGHTS OF ANY THIRD PARTY, NODUS SHALL HAVE THE OPTION EITHER TO PROCURE THE RIGHT FOR THE END-USER TO CONTINUE USING THE PRODUCT OR AT NODUS'S EXPENSE, TO REPLACE OR MODIFY THE PRODUCT SO THAT IT BECOMES NON-INFRINGING. NODUS AND ITS OEM PARTNER(S) MAKE NO OTHER WARRANTY, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE ACCURACY OF THE PRODUCT OR THE MERCHANTABILITY AND FITNESS OF THE PRODUCT FOR A PARTICULAR PURPOSE. FURTHER, NODUS DOES NOT WARRANT THE COMPATIBILITY OF THE PRODUCT WITH END-USER'S COMPUTER HARDWARE AND/OR SOFTWARE SYSTEM.

11. End-User's sole and exclusive remedy for any damage or loss in any way connected with the Product furnished herein, whether by breach of warranty, negligence, or any breach of any other duty, shall be, at Nodus' option, replacement of the Product or return or credit of an appropriate portion of any payment made by End-User with respect to such Product. Under no circumstances shall Nodus or its OEM Partner(s) be liable to End-User or any other person for any indirect, incidental, special or consequential damages of any kind, however, caused and regardless of theory of liability, including, without limitation, for lost profits, loss of data, loss of goodwill, business interruption, computer failure or malfunction or any and all other commercial damages or losses.   This limitation will apply even if Nodus has been advised of the possibility of such damage. Some jurisdictions do not allow the exclusion of a limitation of indirect, incidental, special or consequential damages, so the above exclusion may not apply to such End-Users. In such event, Nodus' total liability to End-User for all damages shall be limited to the amount of fifty dollars ($50.00).

12. Nodus may cancel this license at any time if End-User fails to comply with the terms and conditions of this Agreement; and Nodus may obtain injunctive relief and may enforce any other rights and remedies to which it may be entitled in order to protect and preserve its proprietary rights.

13. This Agreement is the complete and exclusive statement of the understanding between the parties, with respect to the subject matter, superseding all other agreements, representations, communications, advertisements, statements and proposals, oral or written.

14. No term or provision hereof shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute a consent to, waiver of, or excuse for any other different or subsequent breach.

General
The internal laws of the State of California shall govern this Agreement. If any provision of the Agreement is held invalid, the remainder of the Agreement shall continue in full force and effect. If you have any questions, please contact in writing: **Nodus Technologies, Inc., 2099 S. State College Blvd., Suite 250, Anaheim, CA 92806, Tel: (909) 482-4701**

[Return to Top](#)