



# Linkly In-Store Installation and Configuration Guide

# Contents

1. Introduction	3
1.1 Before you start	3
1.2 Components installed with Linkly	3
2. Installing the software for Linkly IP Communications Gateway	4
2.1 Single POS with Pinpad	5
2.1.1 Configuration Wizard	9
2.2 Dedicated Server Setup	14
2.2.1 Configuration Wizard	16
2.3 POS with Pinpad Connecting to the Server	19
2.3.1 Configuration Wizard	22
2.4 POS with Pinpad Connecting directly to bank	26
2.4.1 Configuration Wizard	29
3. Linkly Client User Guide	32
3.1 Client Statuses	34
4. Linkly Client Control Panel	35
4.1 EFTPOS	36
4.2 Settlement	37
4.3 Journal	33
4.4 Diags	39
5. Printing Configuration	40

# 1. Introduction

This document outlines how to install both the Linkly EFT Client and EFT Server software when using the Linkly IP Gateway as the primary link to the bank. It covers multiple examples of configuration, depending on the users preference.

- Linkly EFT Software must first be installed on the PC which will act as the server connecting to the Linkly IP Gateway. The server requires an internet connection and not connect via a proxy.
- If installing EFT software on more than one PC, please record the IP address of the server as this may be required for further setup.

## 1.1 Before You Start

Before you begin the installation of both the Linkly software and your EFTPOS terminal(s), you should ensure you have the following;

- If utilizing the Linkly IP Gateway, you must have a Linkly ID and Password
- An integrated EFTPOS terminal(s) provided by your bank.
- If utilizing the Linkly IP Gateway Internet connection (the server must not be connecting via a proxy)
- The latest release of Linkly In-Store Software, (the software can be downloaded directly from our website – [Software Downloads - Linkly](#)

## 1.2 Components installed with Linkly

The following section will describe some of the important components installed with Linkly and their functions.

### Linkly EFT Client

The Linkly EFT Client is the “Middleware” that facilitates the connectivity between the Point of Sale Software and Eftpos Terminal. For more information, see section 3. Linkly Client User Guide.

### EFT-Server

The EFT-Server facilitates a connection to the Linkly IP Gateway and in turn a bank or host, allowing processing of transactions over the internet for supported Eftpos Terminals. For more information on EFT-Server configuration options, see section 2. Installing the software for Linkly IP Communications Gateway.

### Optional components

#### EMS-Client

The EMS-Client can be used to:

- View the EFTPOS.rcp files containing receipts for previous transactions and settlements
- View the EFTPOS.ejl files containing information for previous transactions and settlements
- Configure automatic settlements and automatic printing of settlement receipts

More information on the EMS Client and it's operation can be found at the Manuals and Guides section of the Linkly website: [Manuals and Guides - Linkly](#)

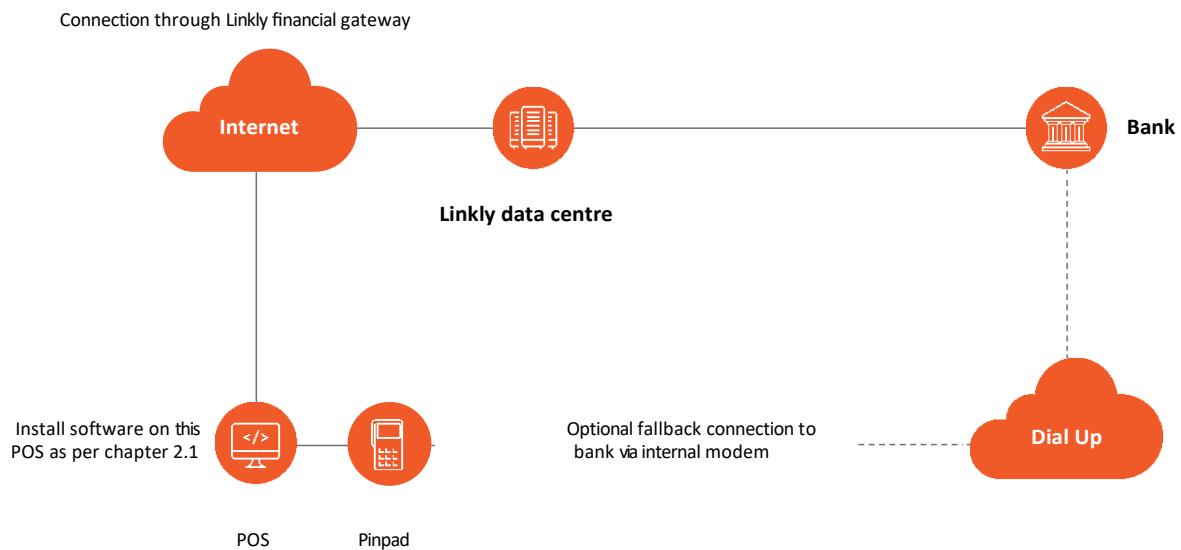
#### USB Driver

The latest USB driver certified by Linkly for Ingenico, Verifone and PAX hardware.

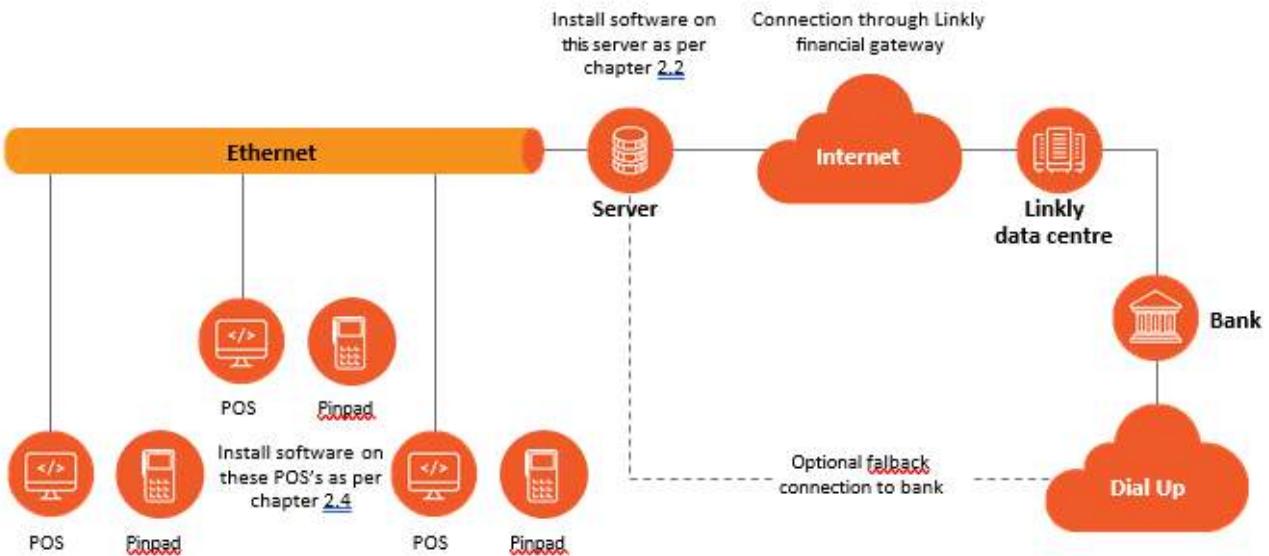
## 2. Installing the software for Linkly IP Communications Gateway

The Linkly Software can be configured in multiple ways. The following are some common scenarios and examples of different configuration options;

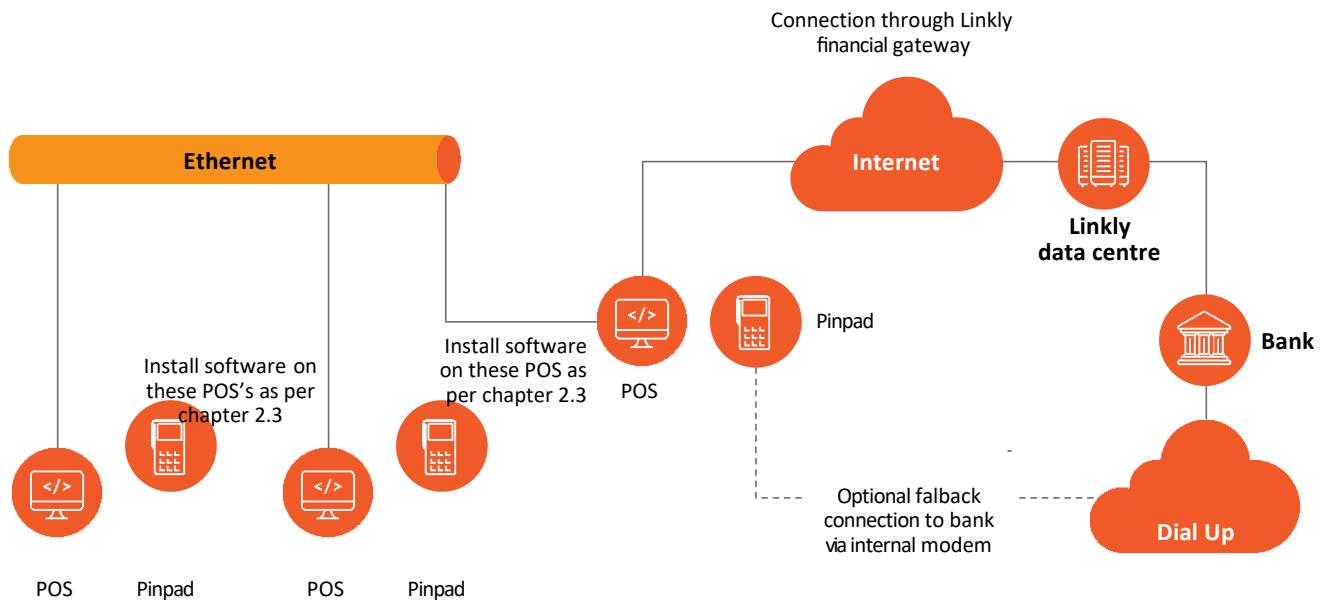
- 1) A single POS terminal with a pinpad connecting to the Gateway (refer to Chapter 2.1)



- 2) Multiple POS terminals with pinpads, and a dedicated server machine with no pinpad that connects to the Gateway (Refer to Chapter 2.2 for installing the server software and Chapter 2.3 for installing the software on additional terminals)

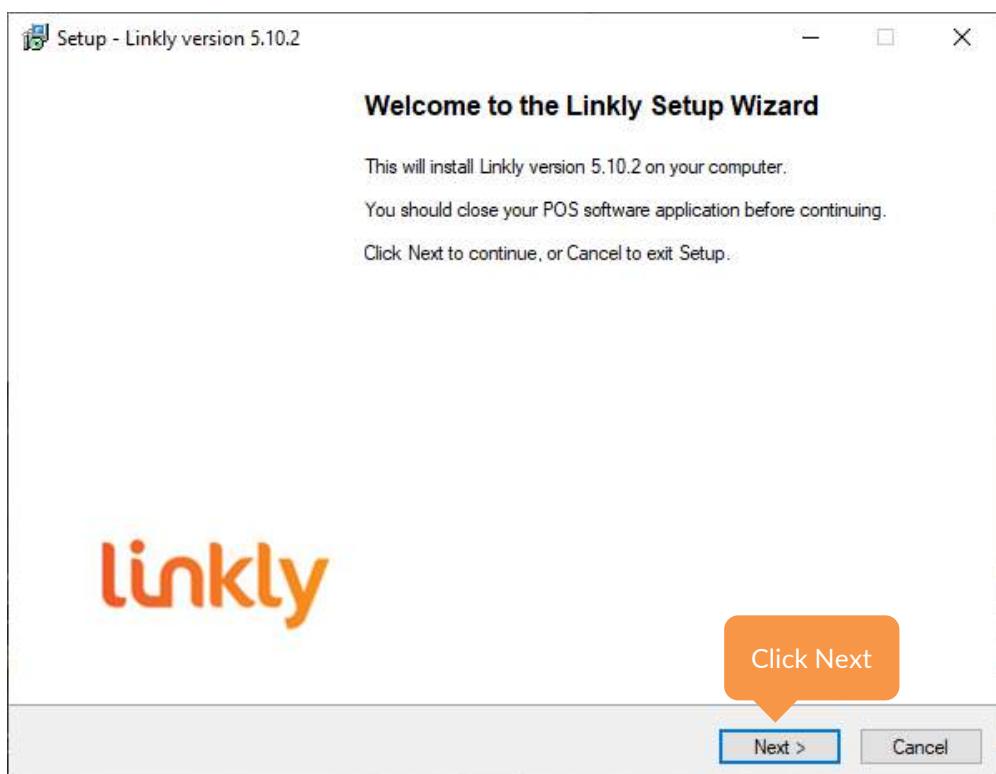


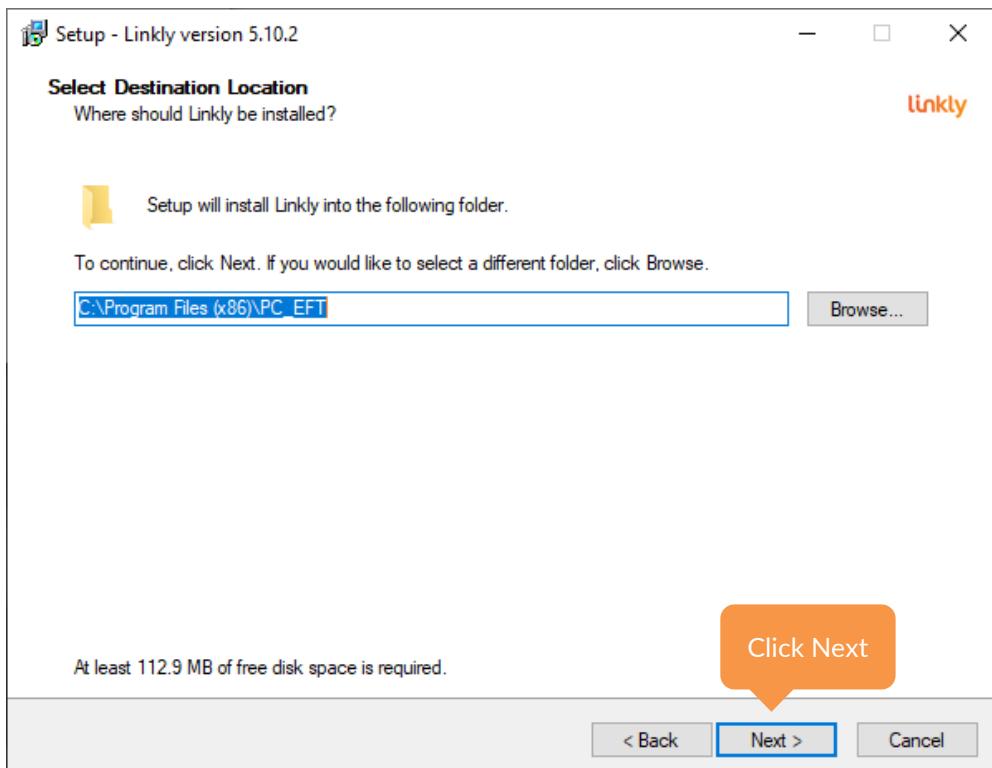
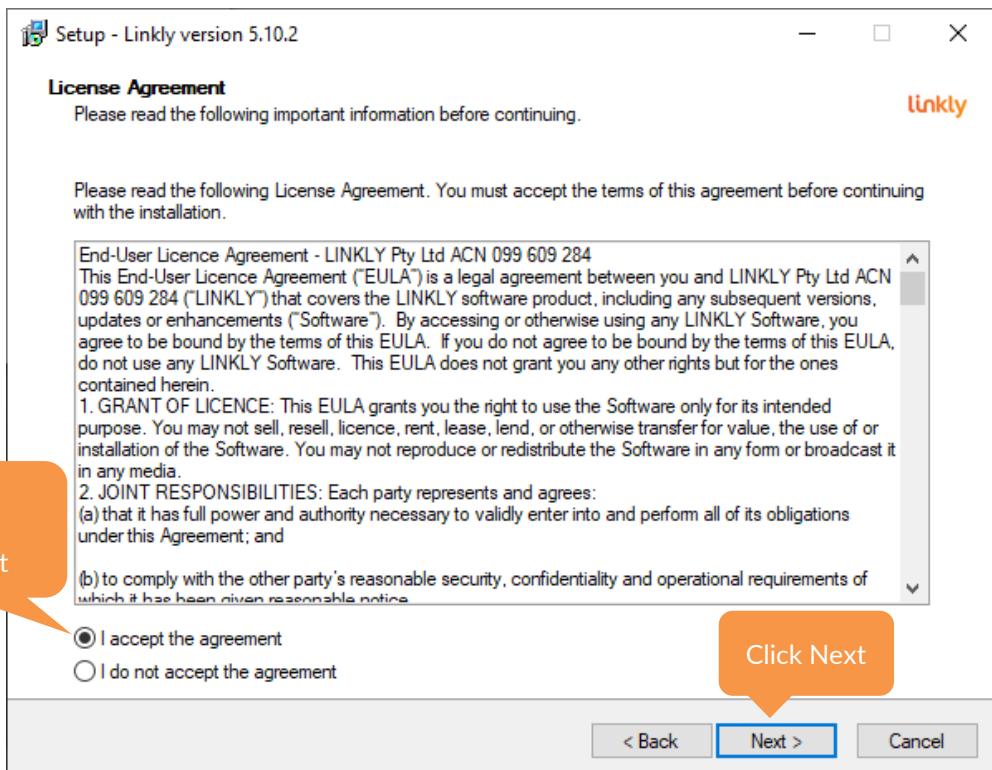
3) Multiple POS terminals with pinpads, with no dedicated server. In this case you will need to select one of the POS to act as the server which connects to the Gateway.

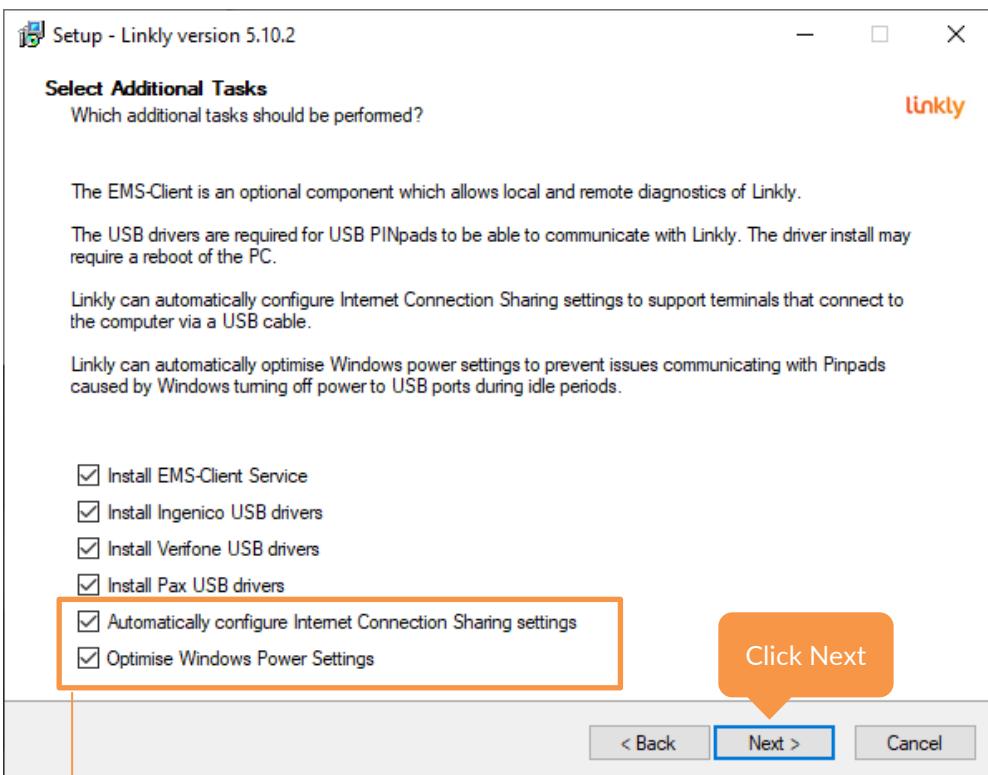
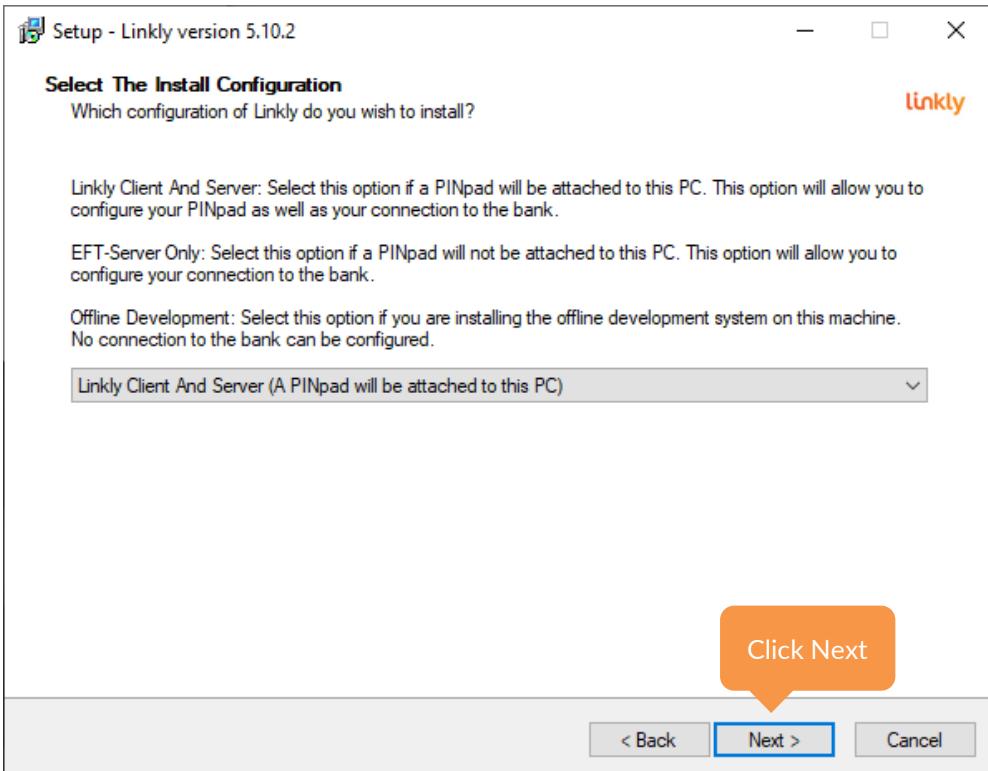


## 2.1 Single POS with Pinpad

Visit the Linkly website and download the Linkly setup.exe -[Software Downloads - Linkly](#)







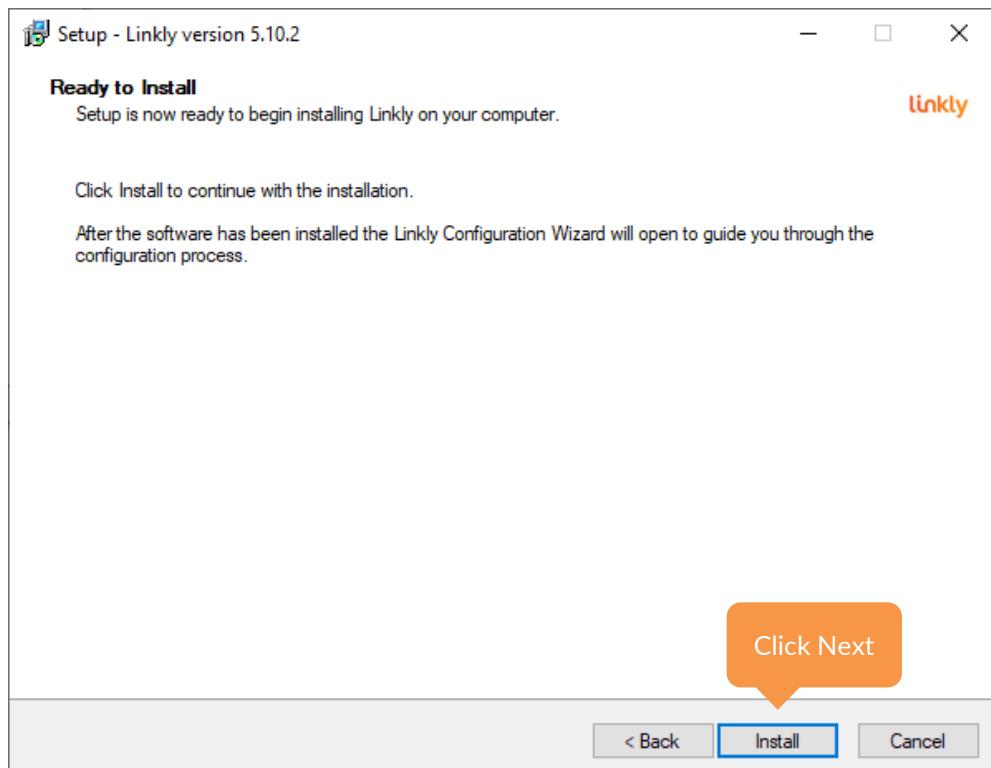
### Automatically configure Internet Connection Sharing Settings

Automatically configures Internet Connection Sharing Settings for Eftpos Terminals utilizing ICS

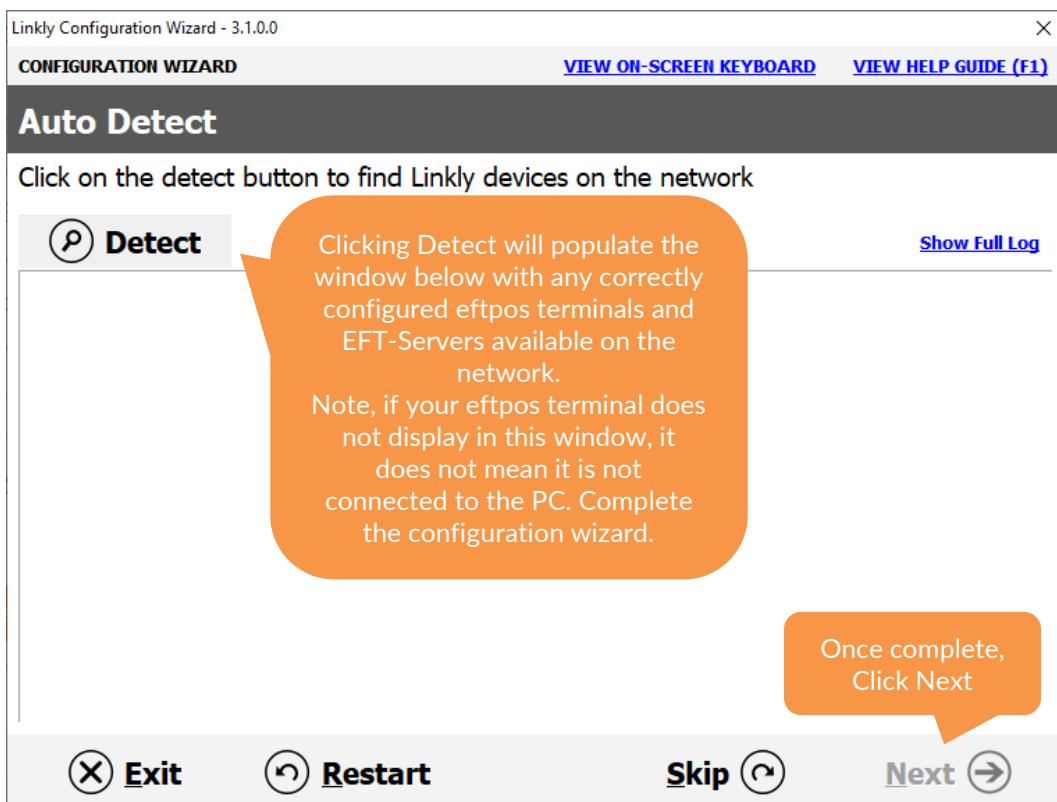
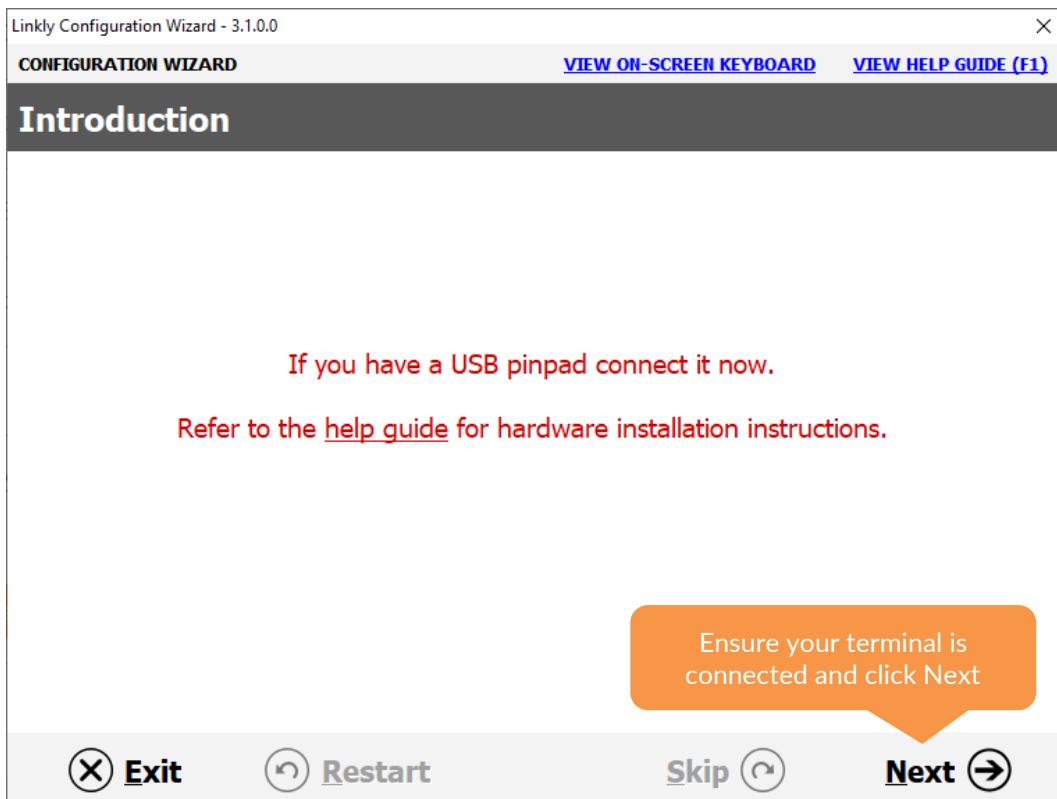
### Optimise Windows Power Settings

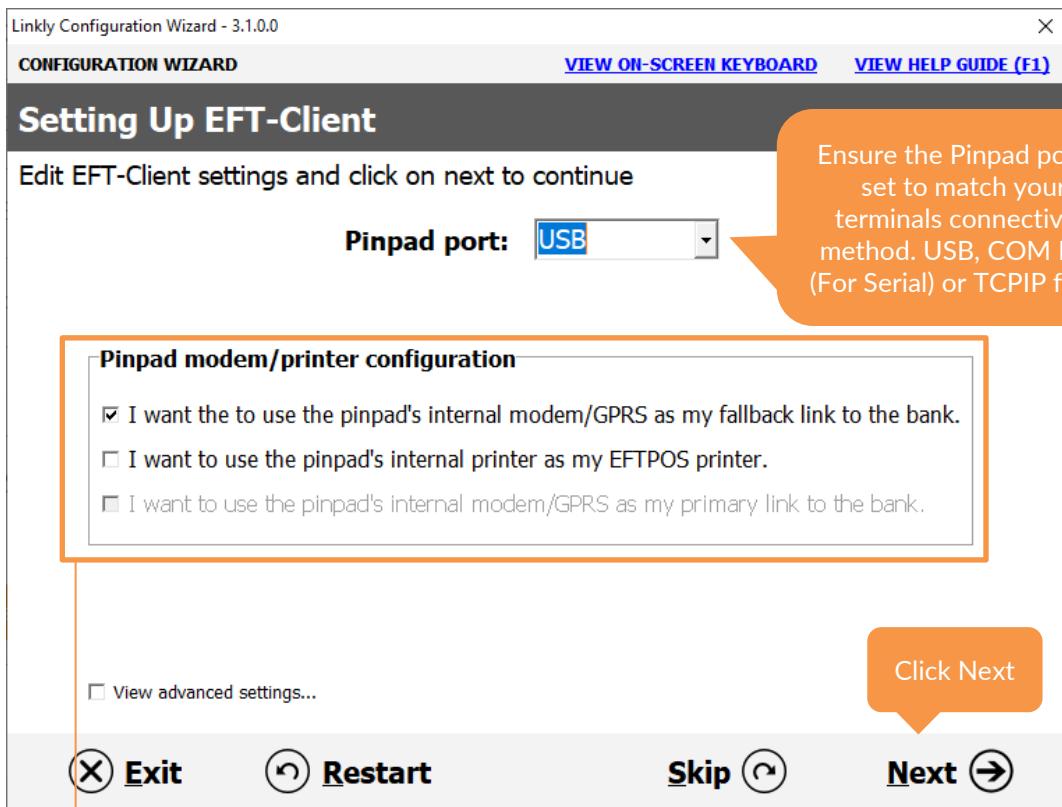
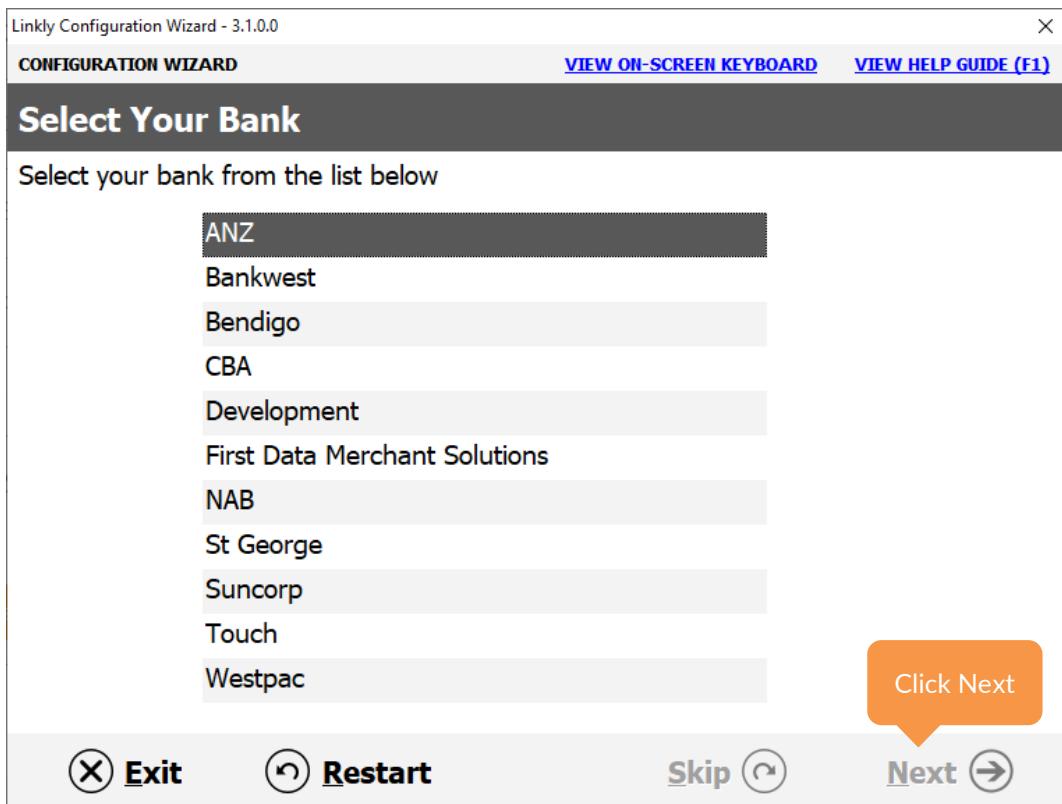
Optimises Windows Power settings that are known to interfere with a devices USB connection.

For more information on the Install EMS-Client Service, Install Ingenico USB driver, Install Verifone USB driver and Install Pax USB driver options, see section 1.2 Components installed with Linkly



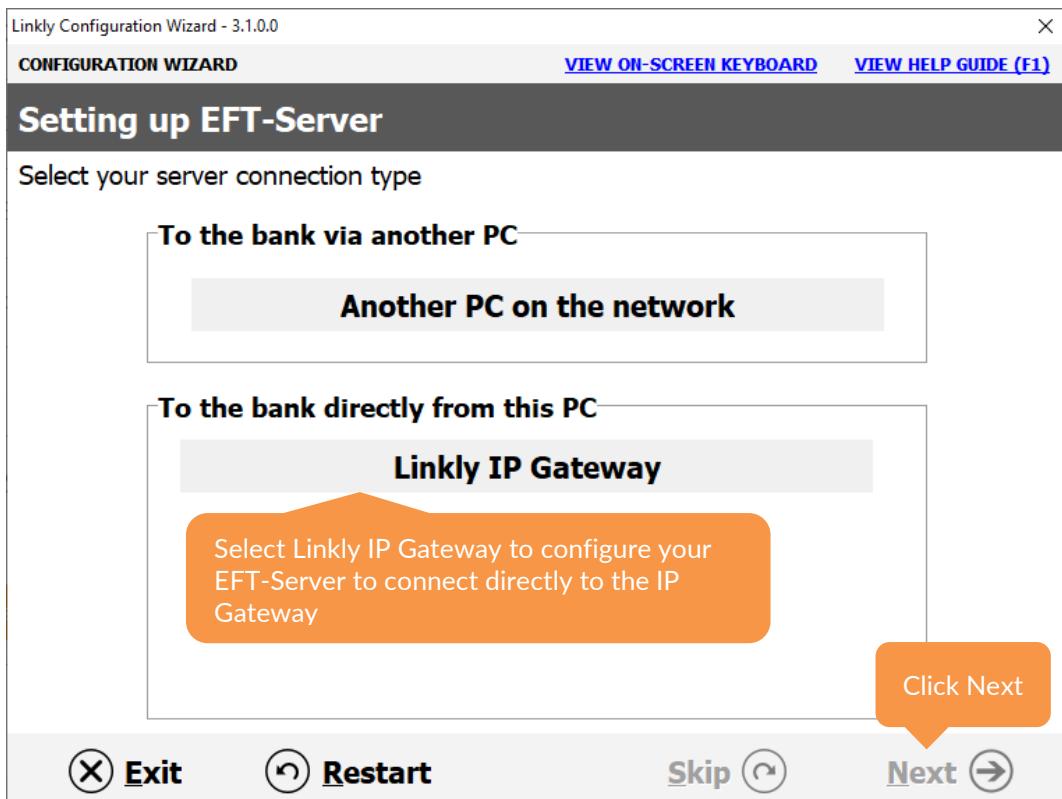
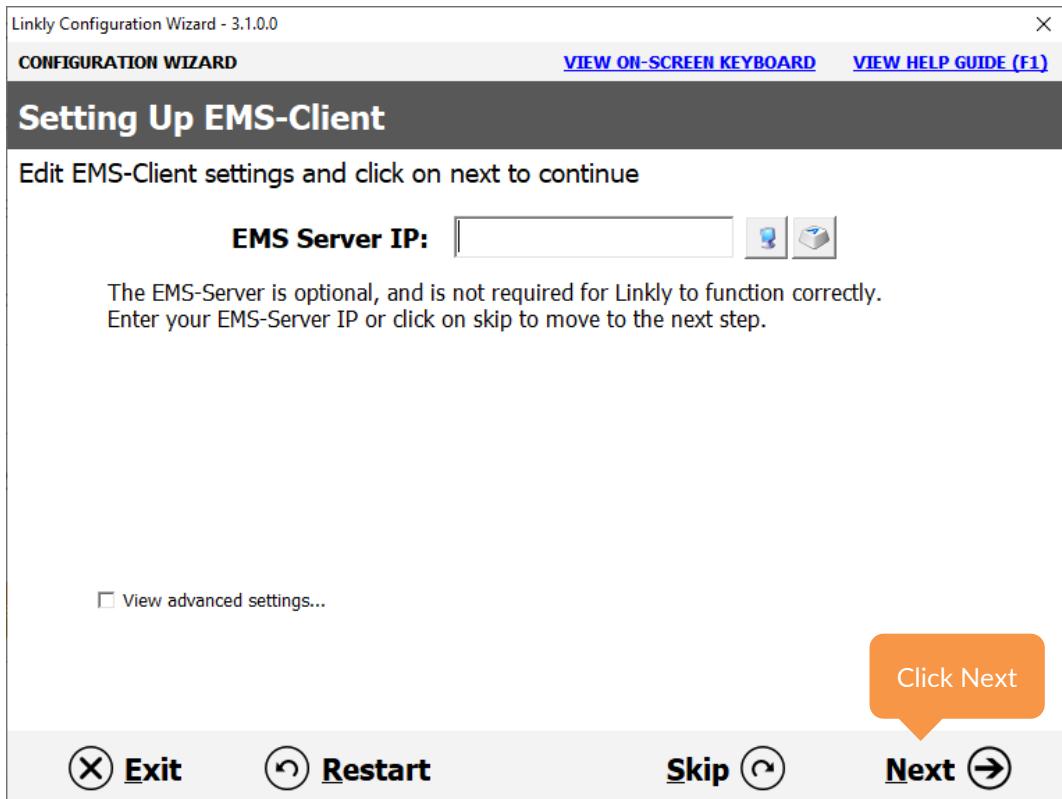
## 2.1.1 Configuration Wizard

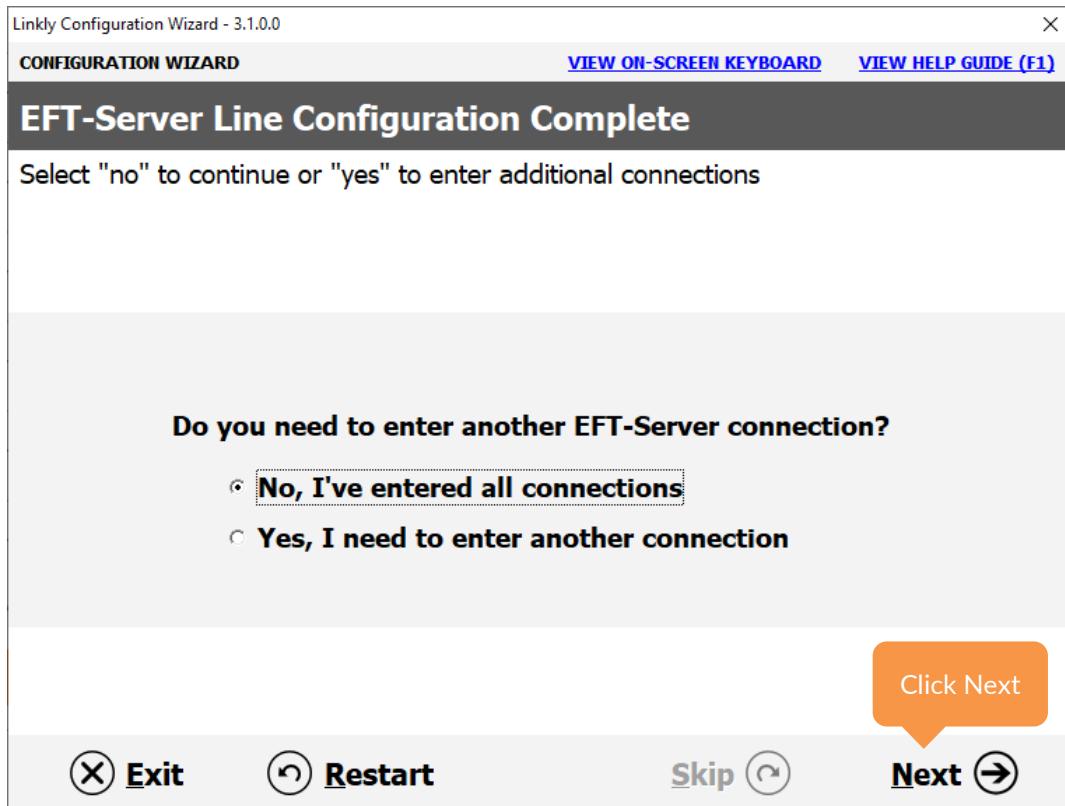
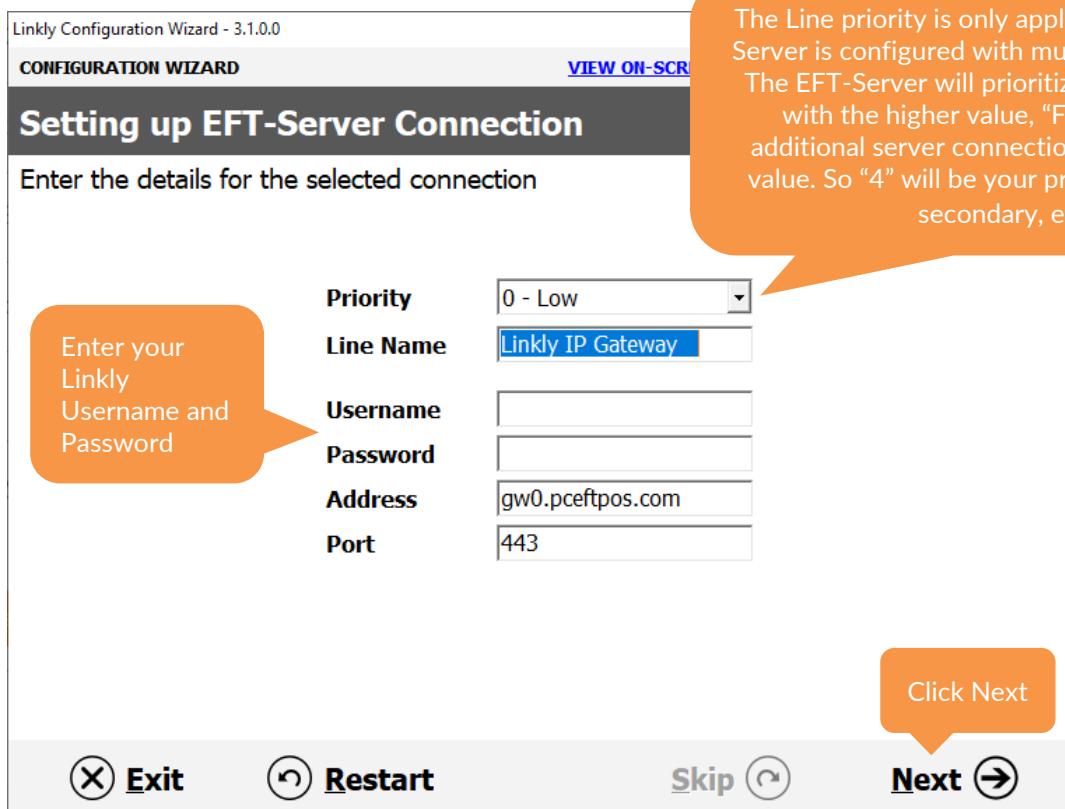


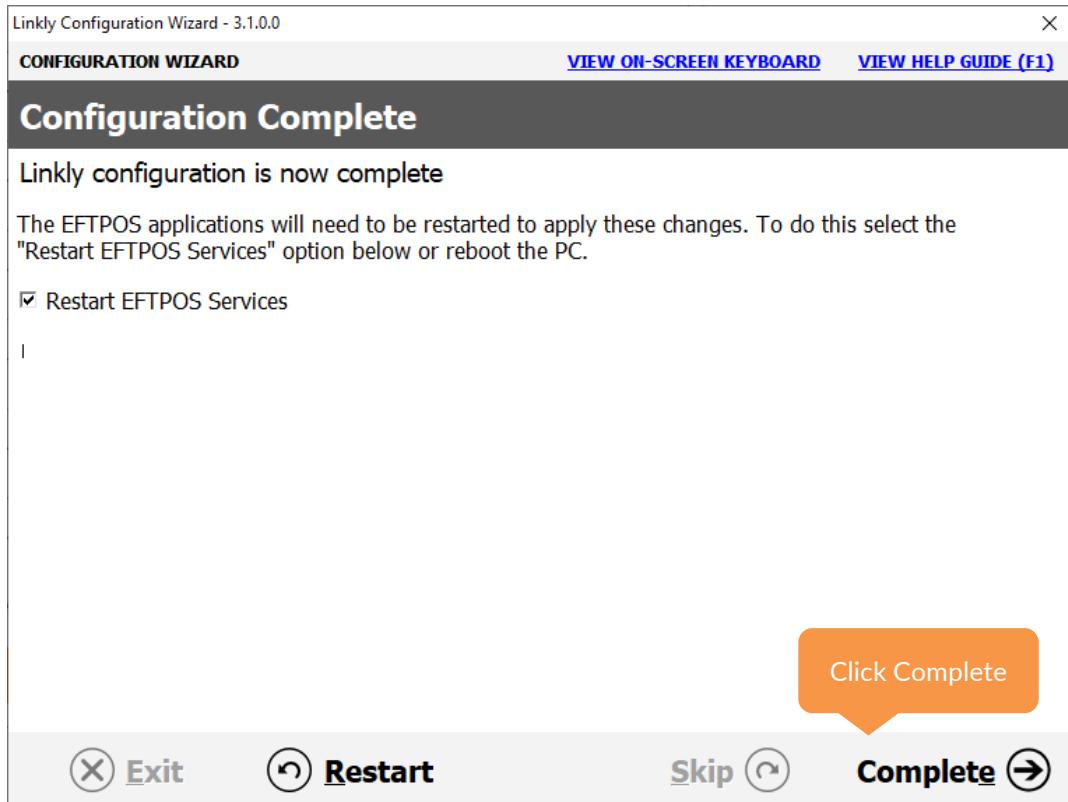


If you are not utilising the Linkly EFT-Server and are connecting directly to the bank from your device, choose "I want to use the pinpad's internal modem/GPRS as my primary link to the bank".

This will skip the EFT-Server configuration steps of the configuration wizard.

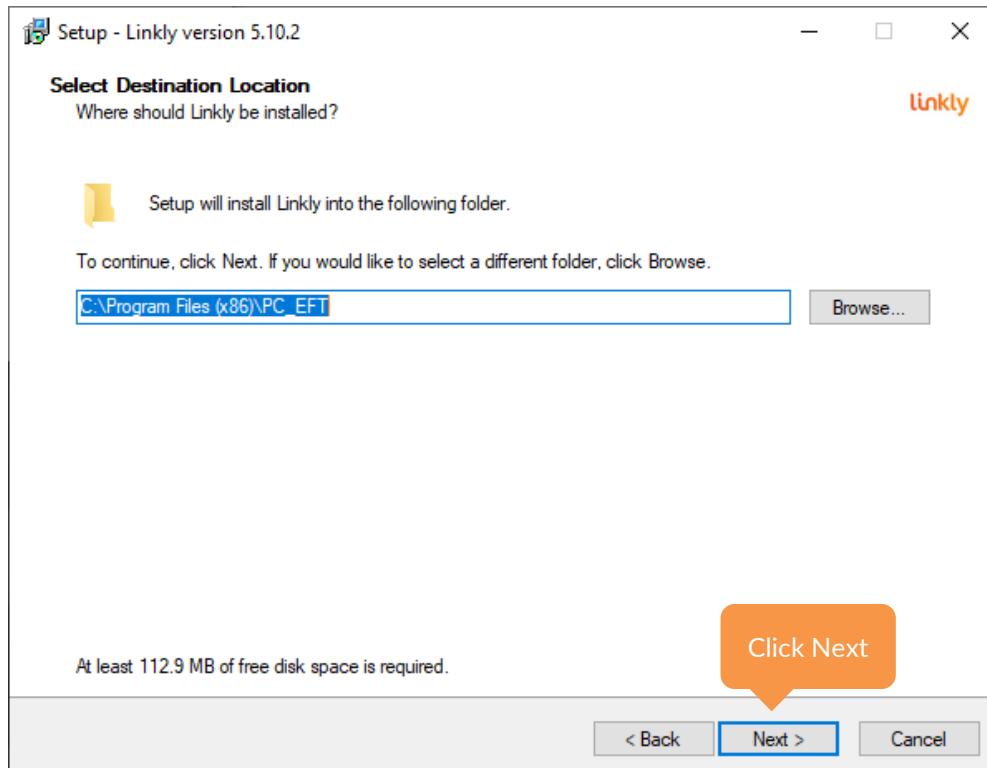
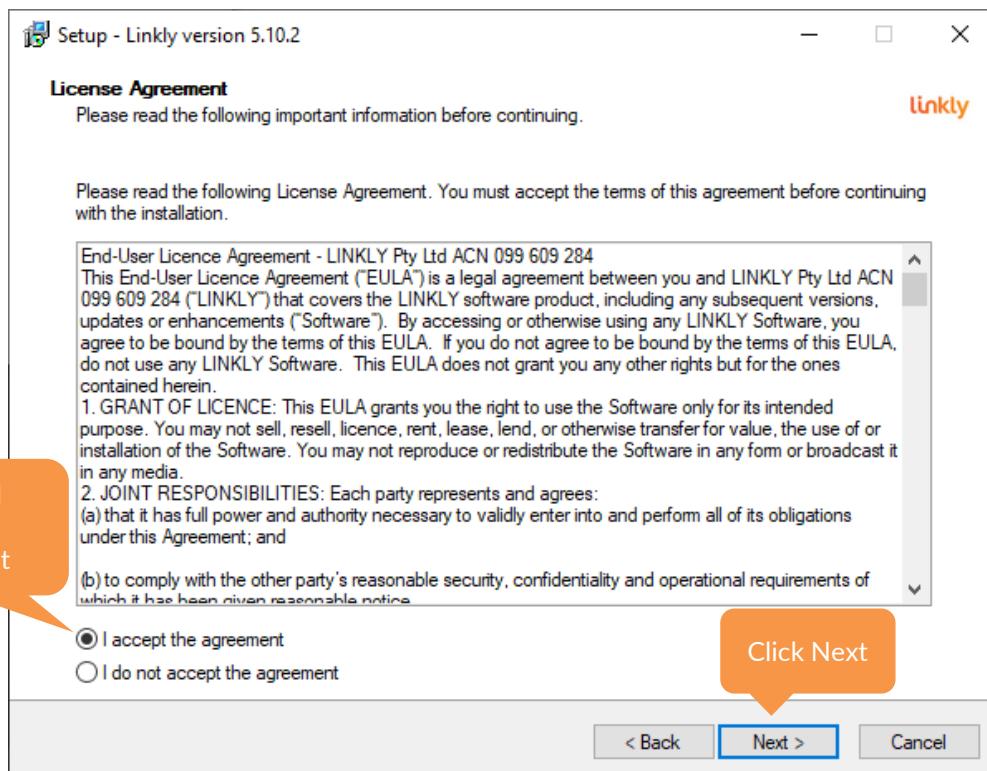


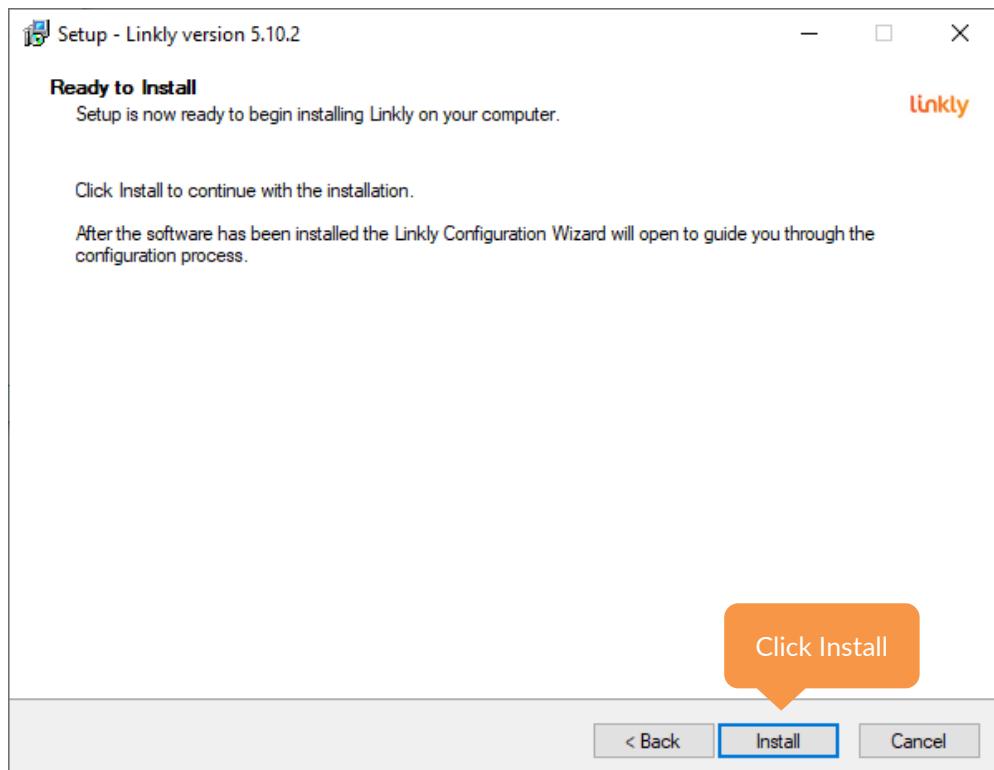
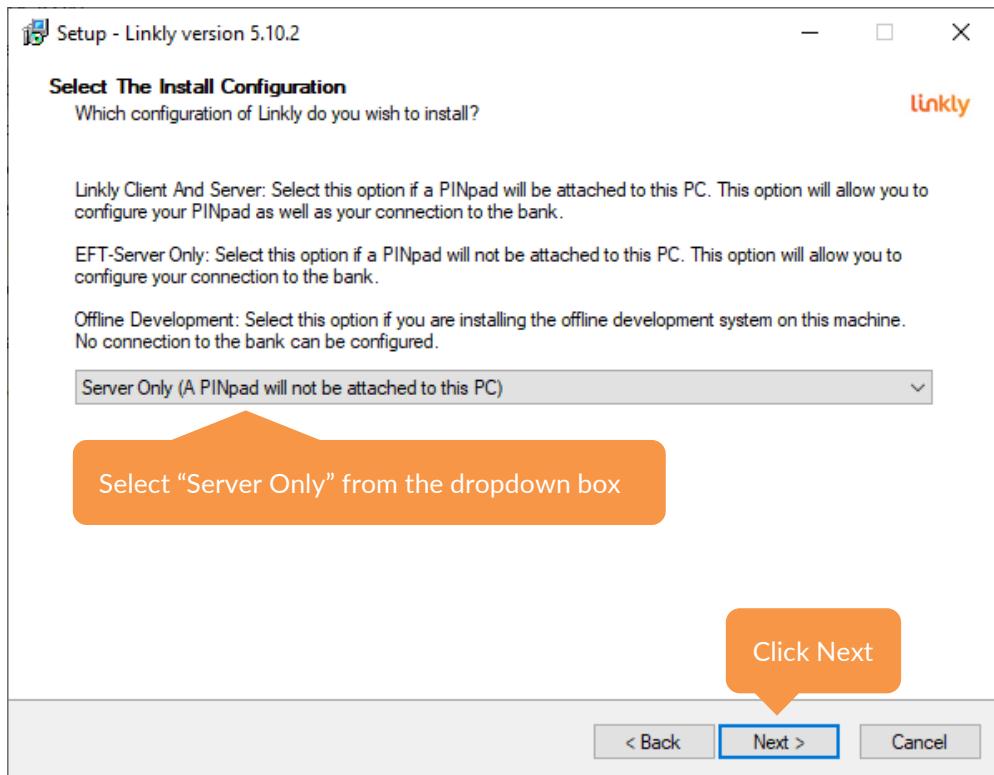




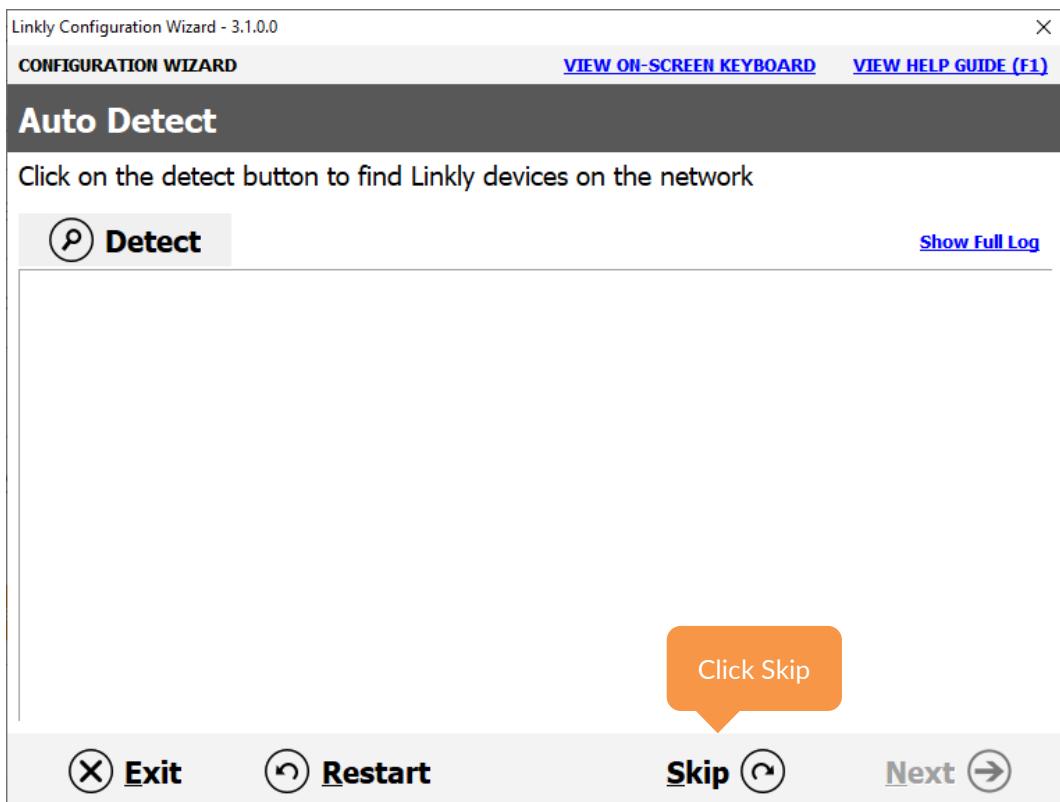
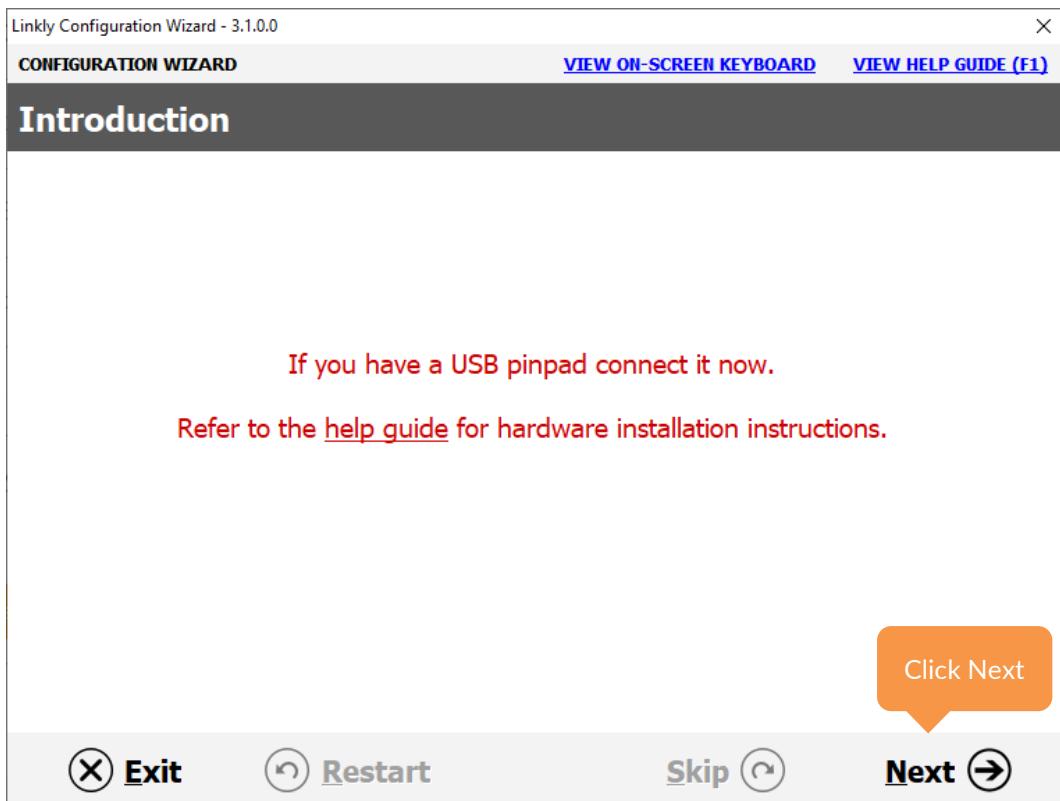
## 2.2 Dedicated Server Setup

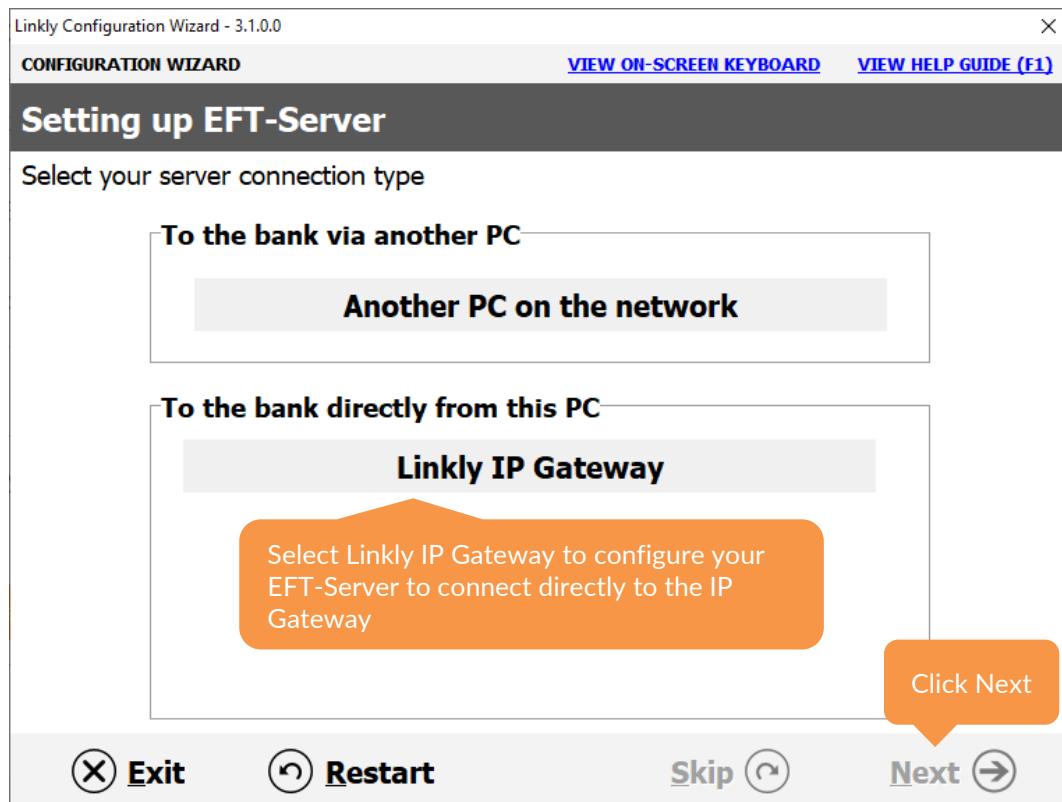
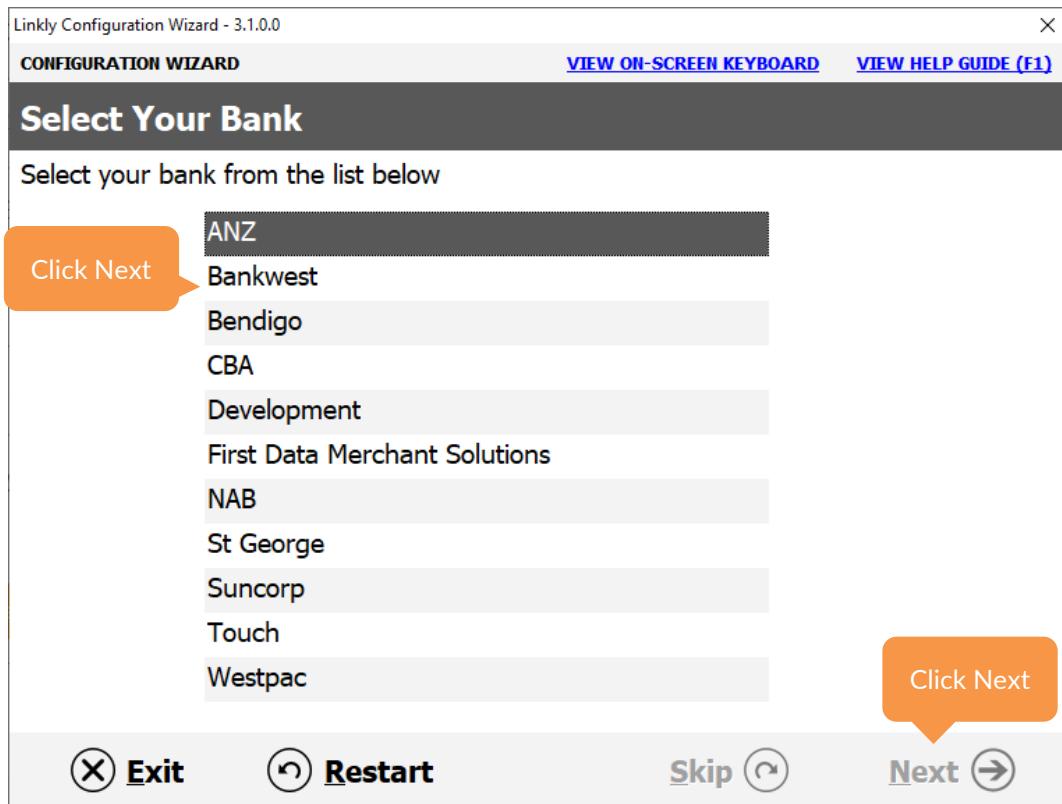
Visit the Linkly website and download the latest release of Linkly - [Software Downloads - Linkly](#)

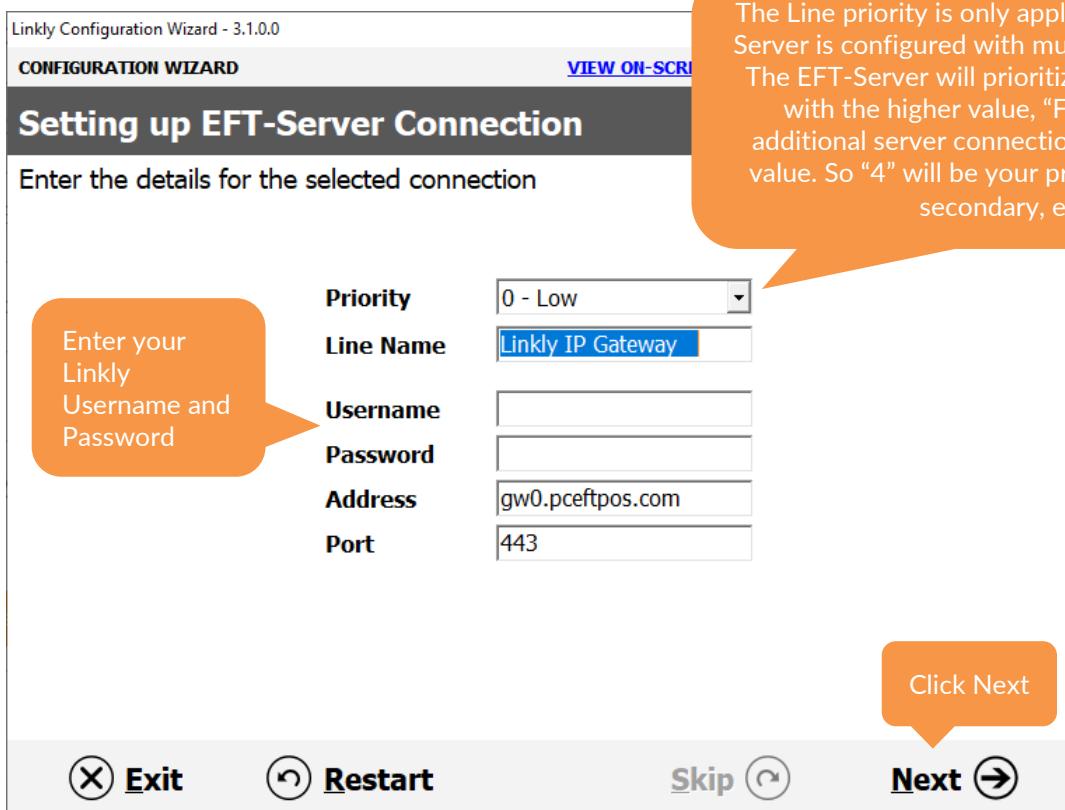




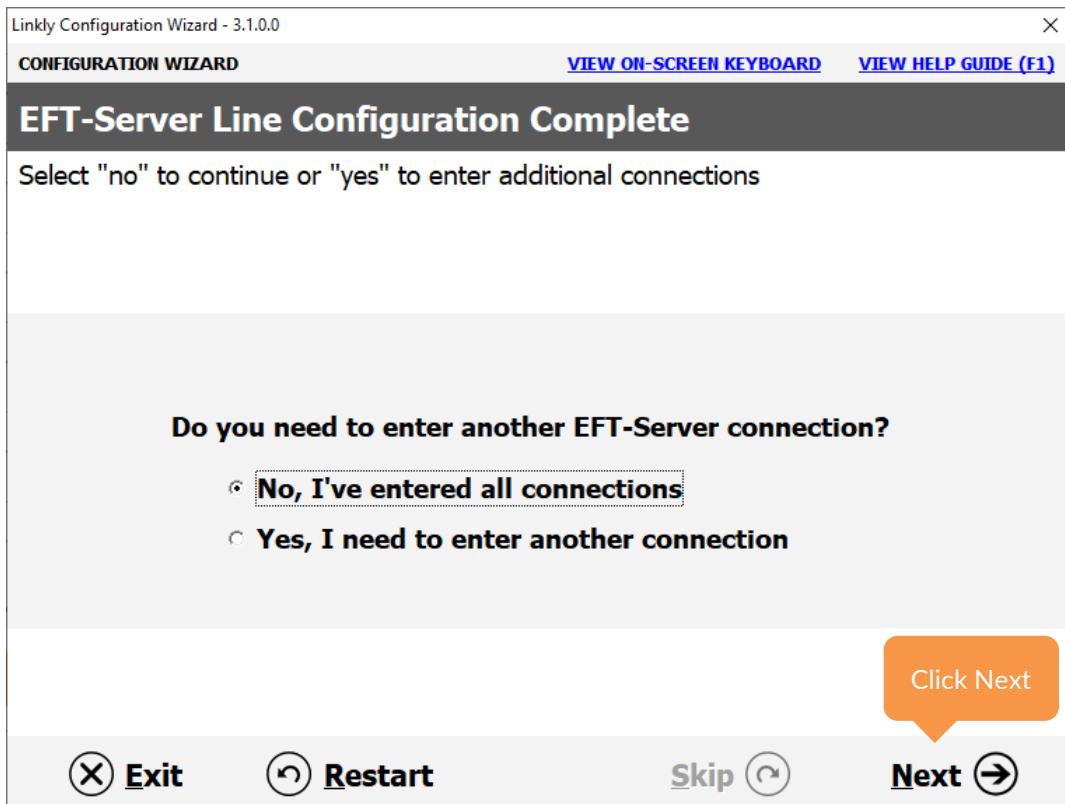
## 2.2.1 Configuration Wizard





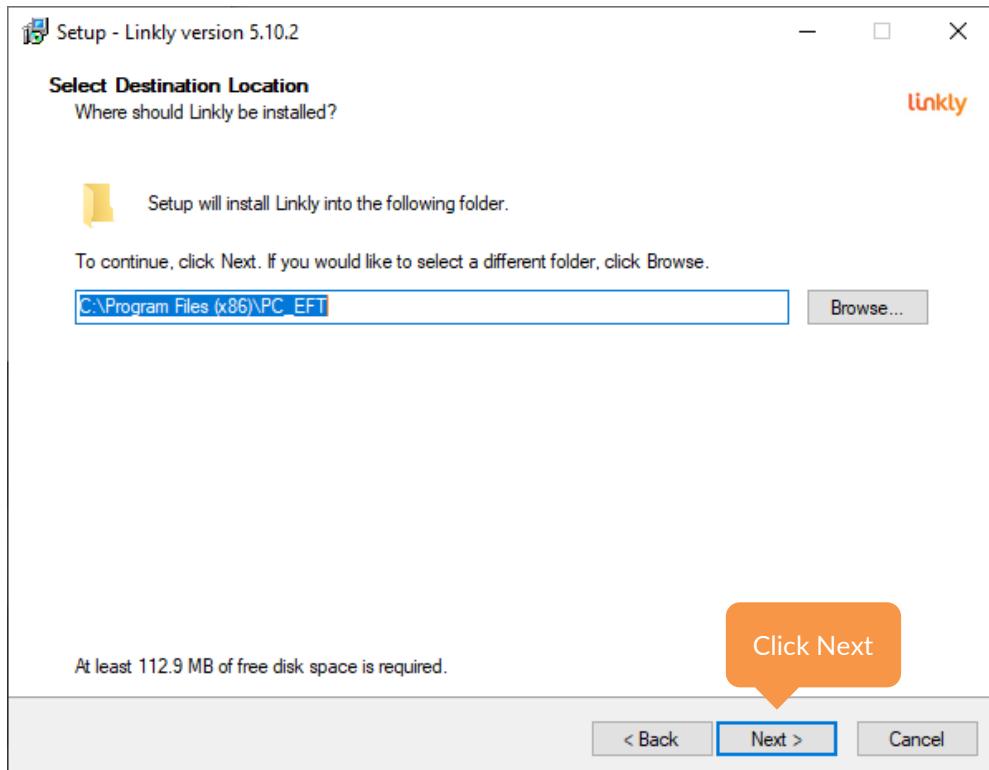
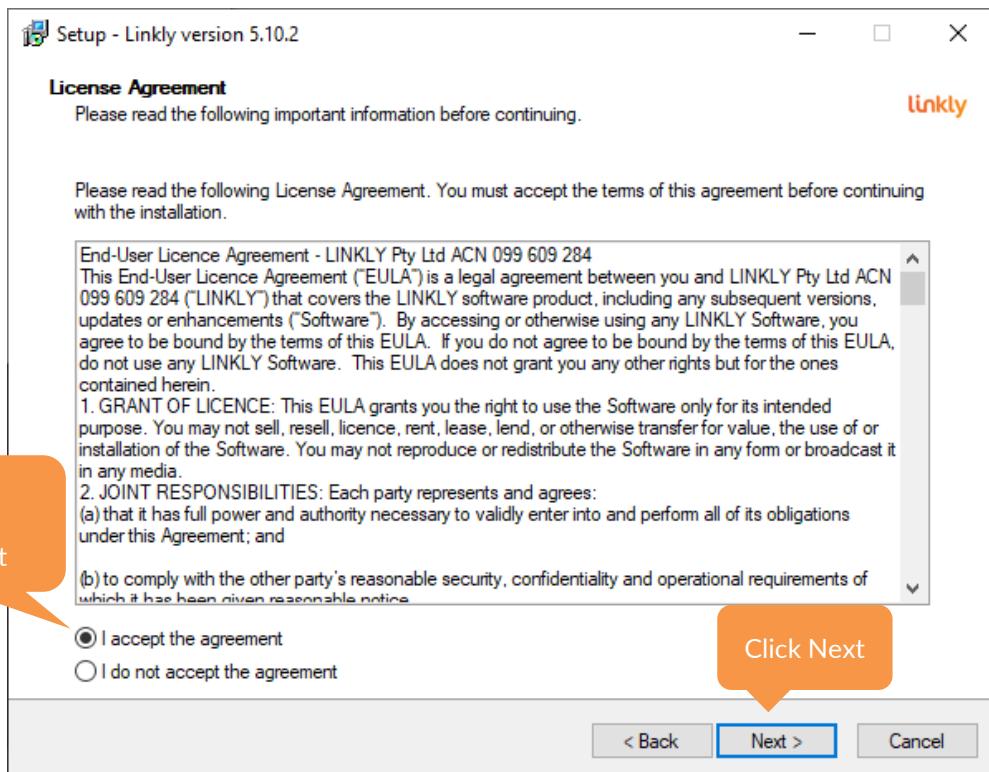


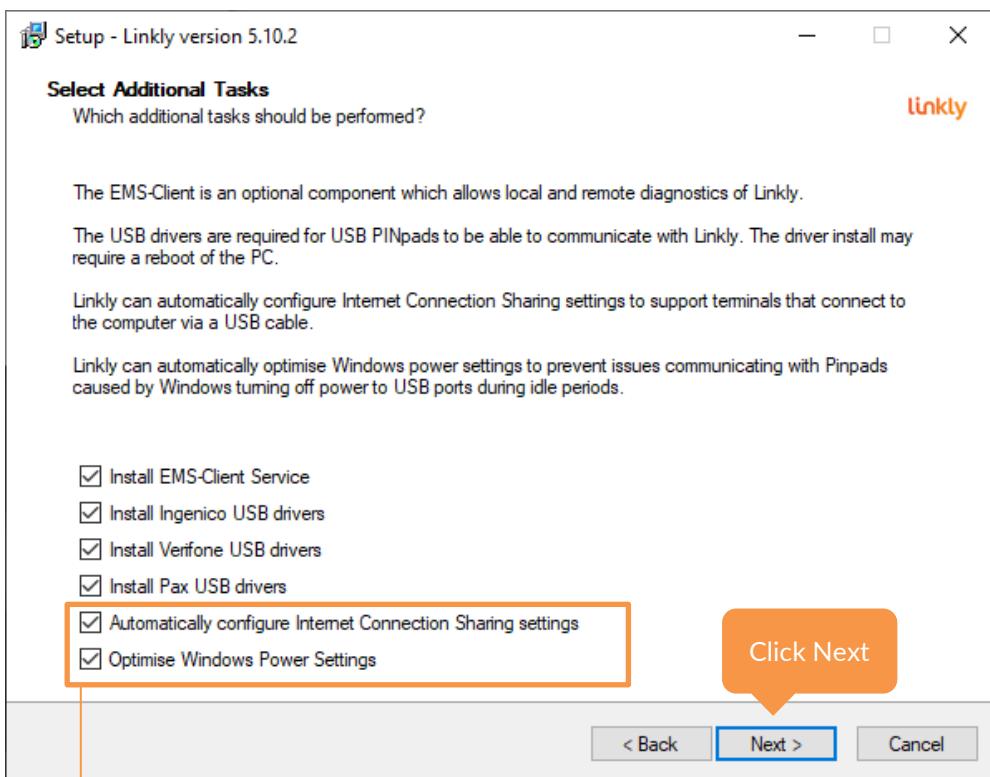
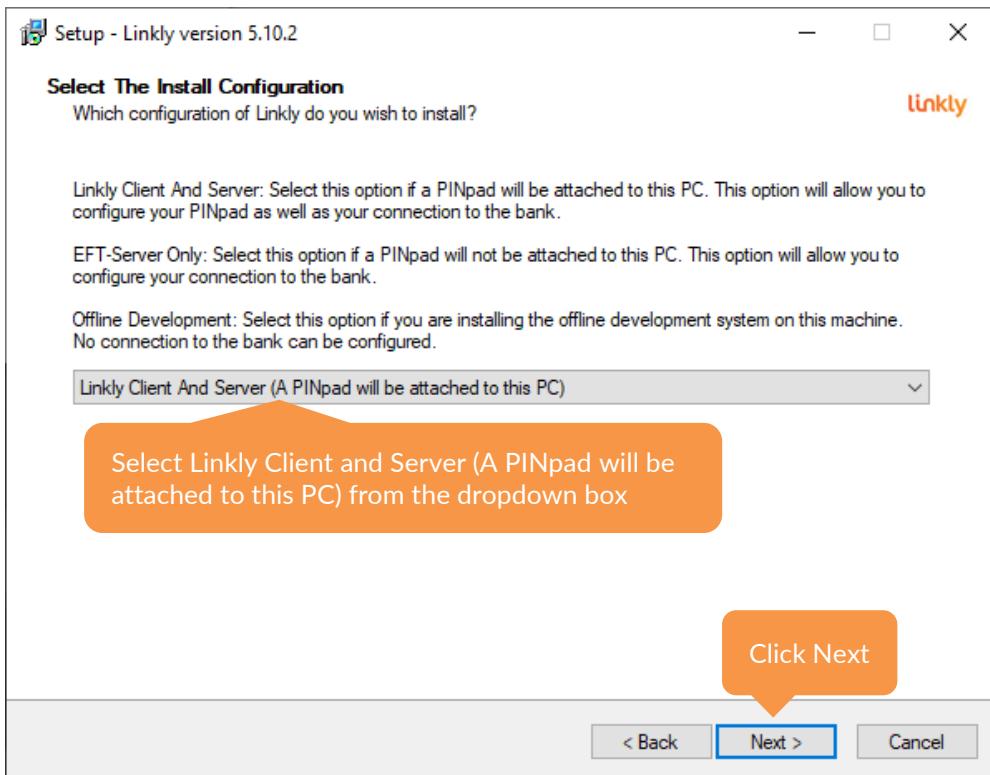
The Line priority is only applicable if your EFT-Server is configured with multiple connections. The EFT-Server will prioritize the connection with the higher value, "Falling back" to additional server connections in descending value. So "4" will be your primary, "3" will be secondary, etc.



## 2.3 POS with Pinpad Connecting to the Server

Visit the Linkly website and download the latest release of Linkly - [Software Downloads - Linkly](#)





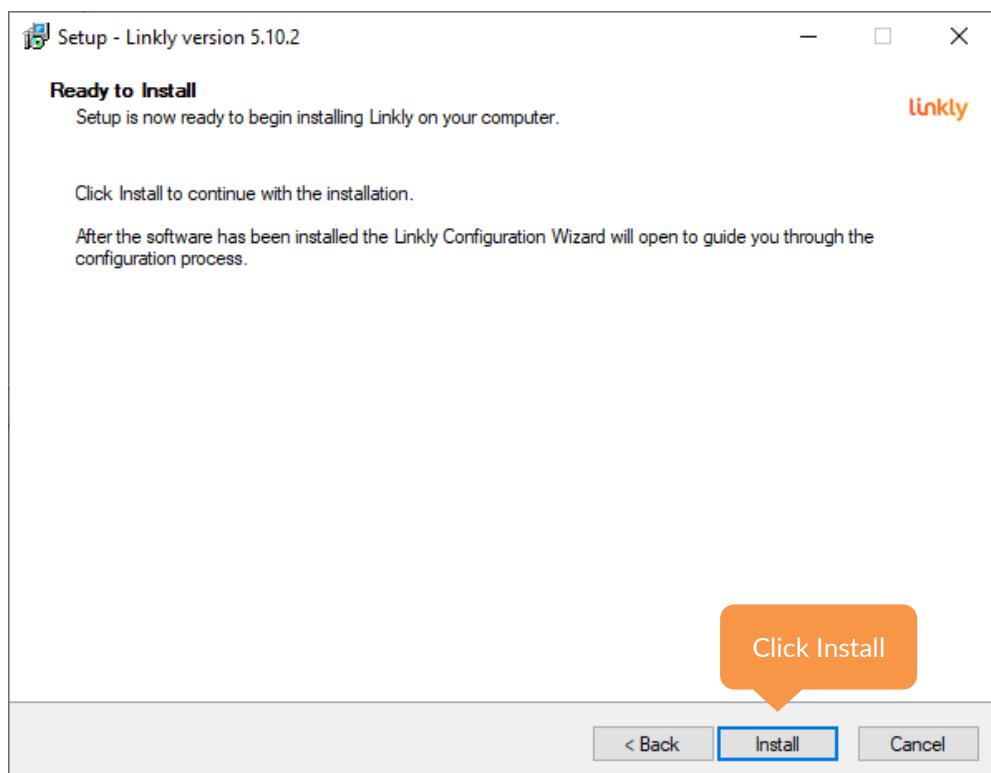
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Automatically configures Internet Connection Sharing Settings for Eftpos Terminals utilizing ICS

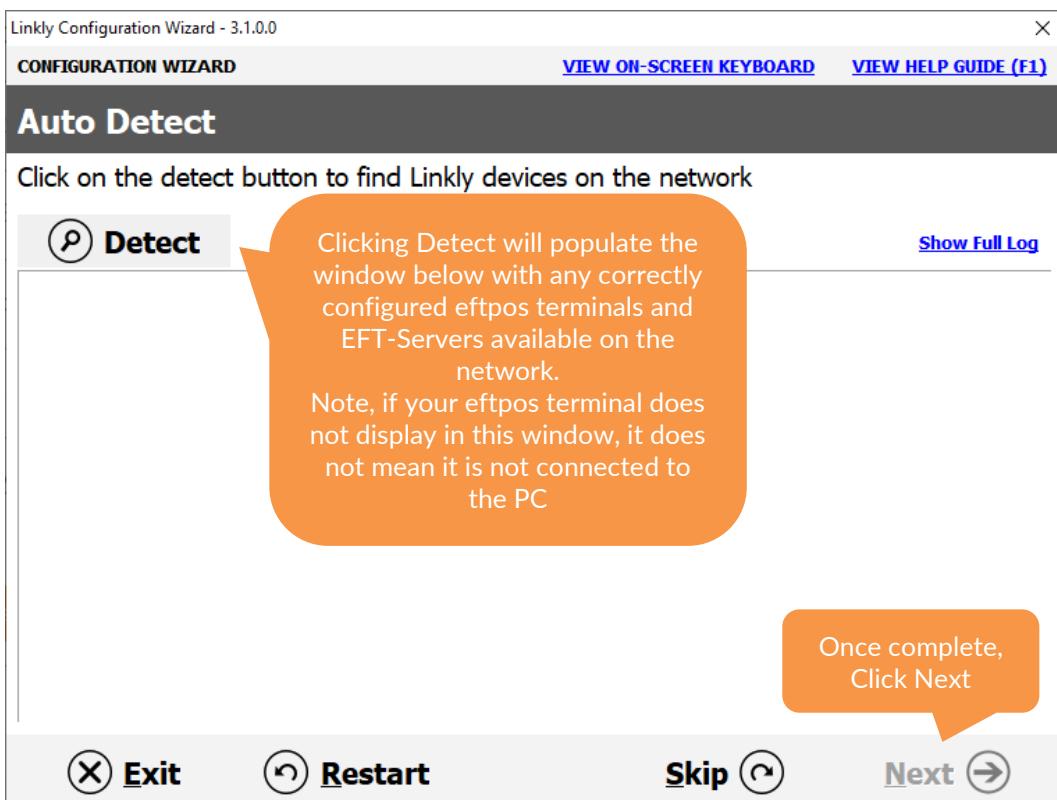
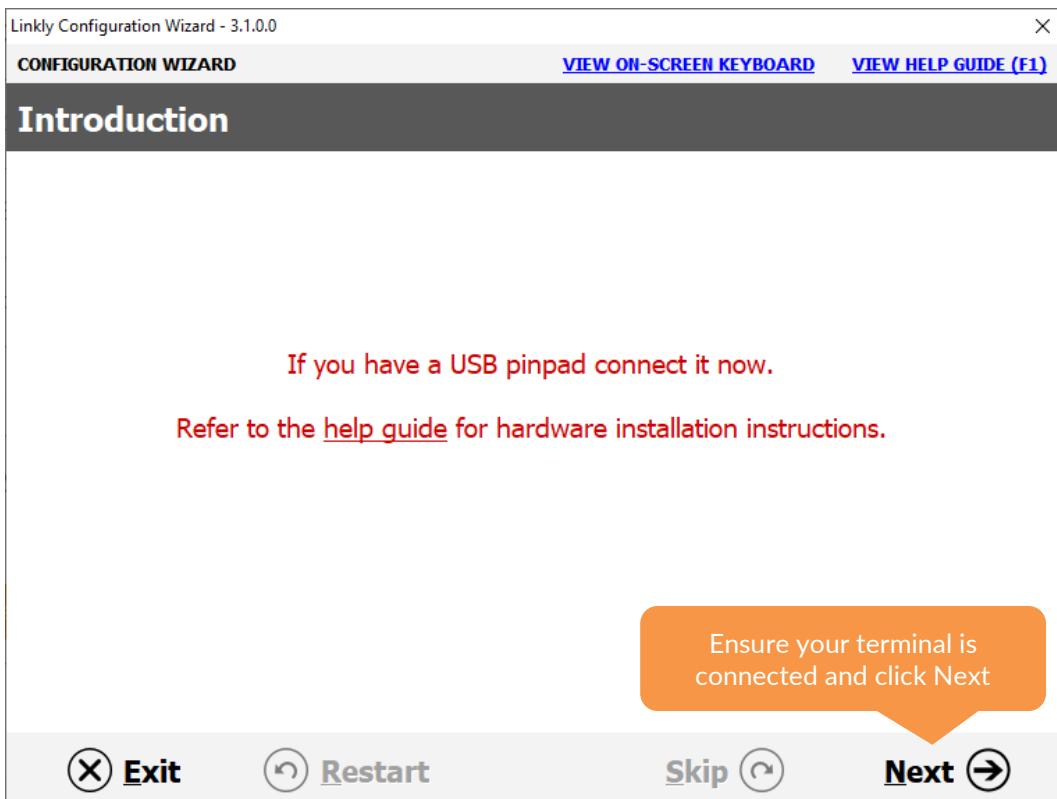
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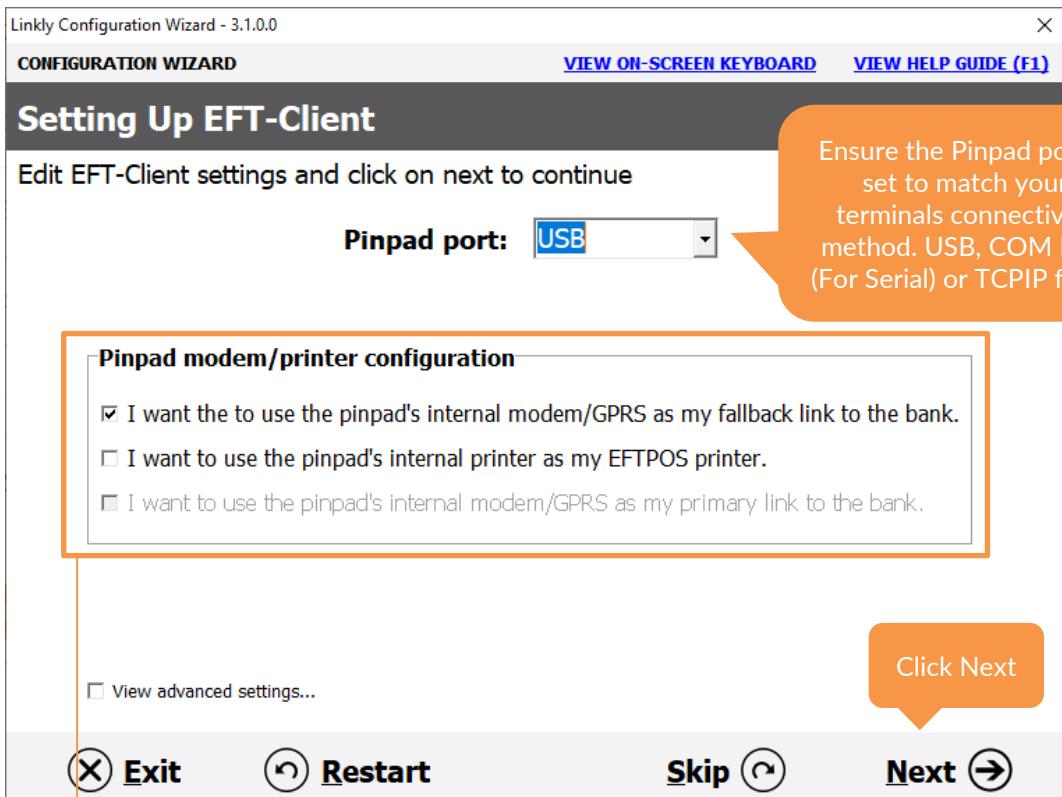
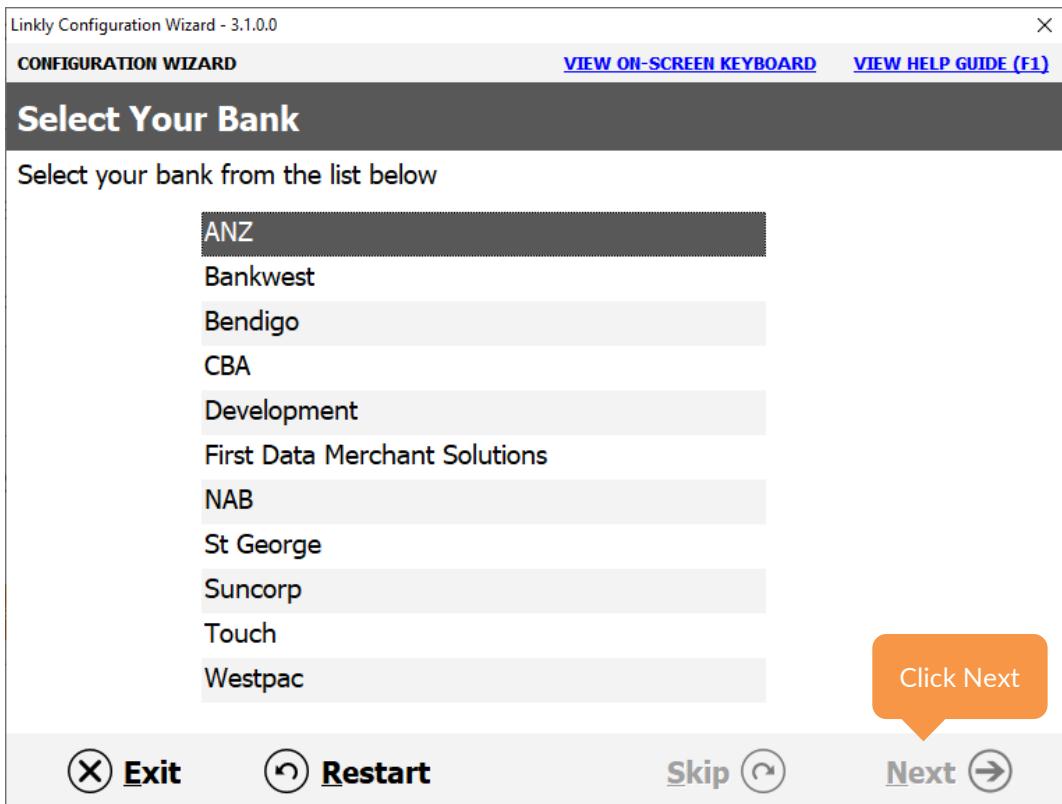
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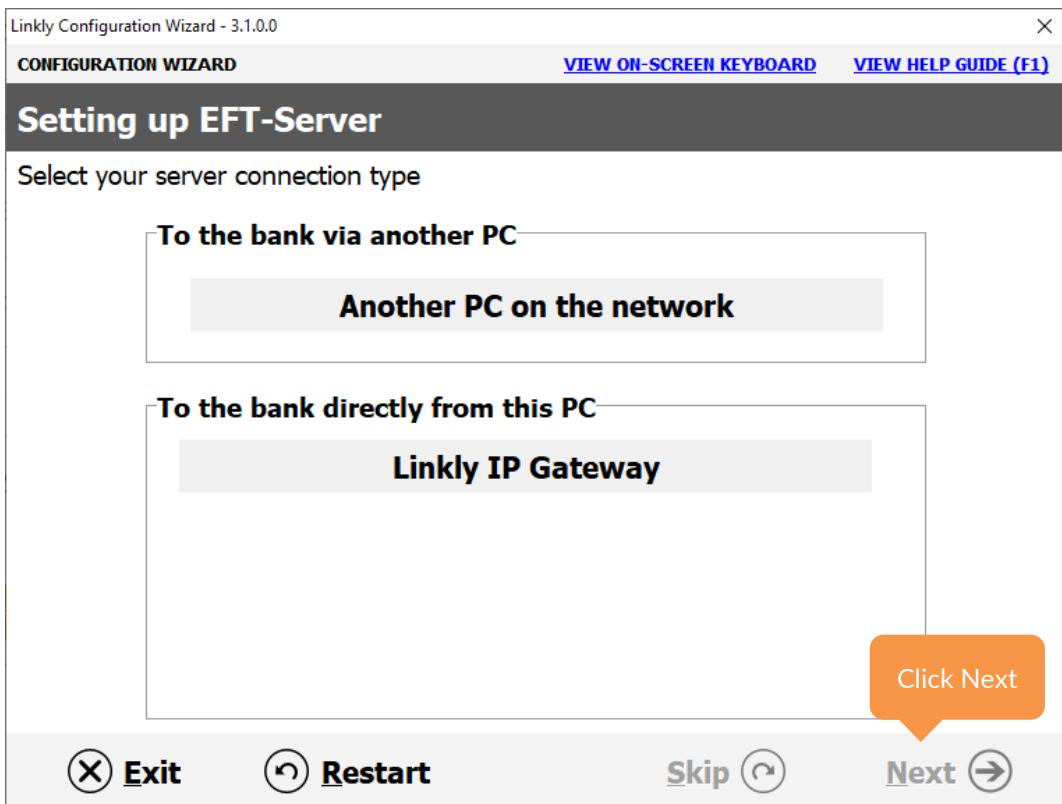
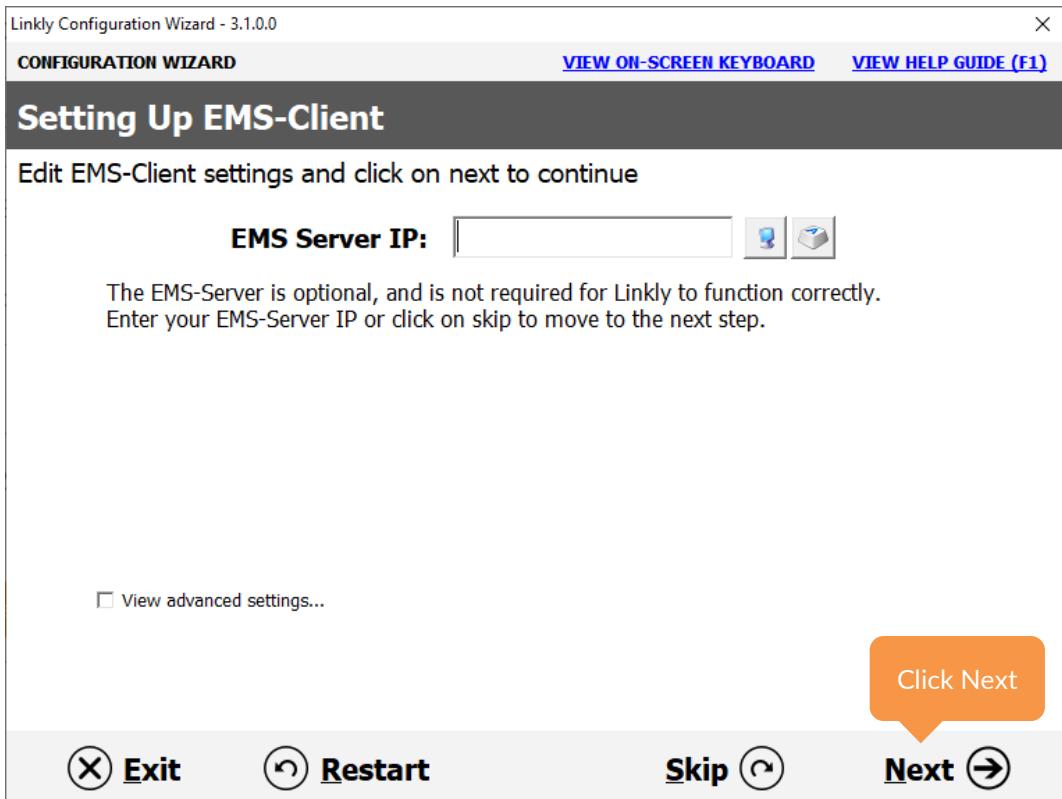
## 2.3.1 Configuration Wizard

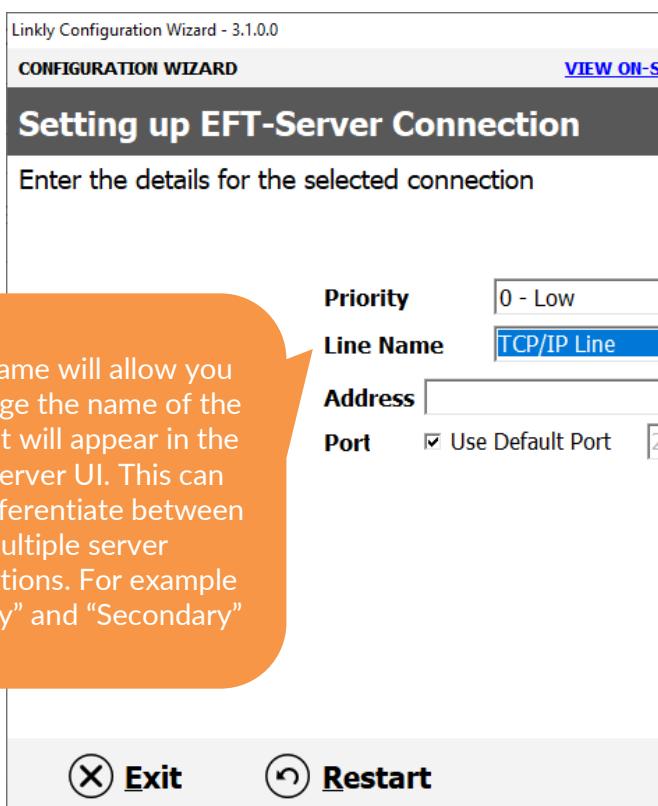




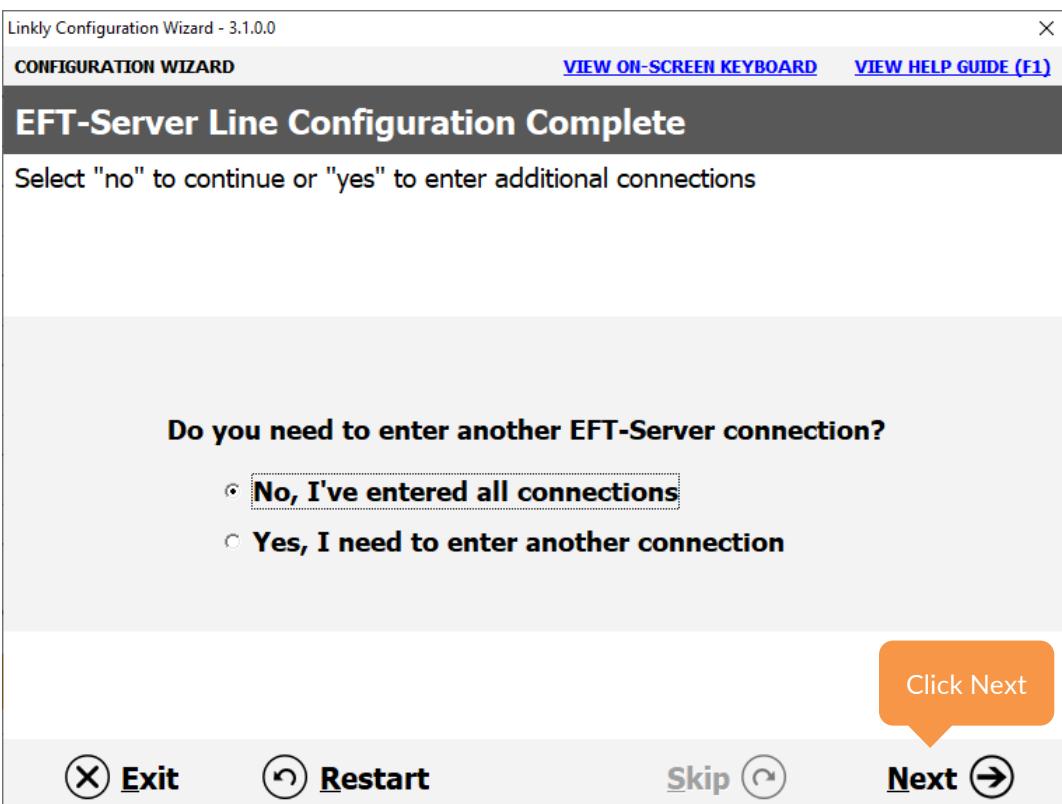
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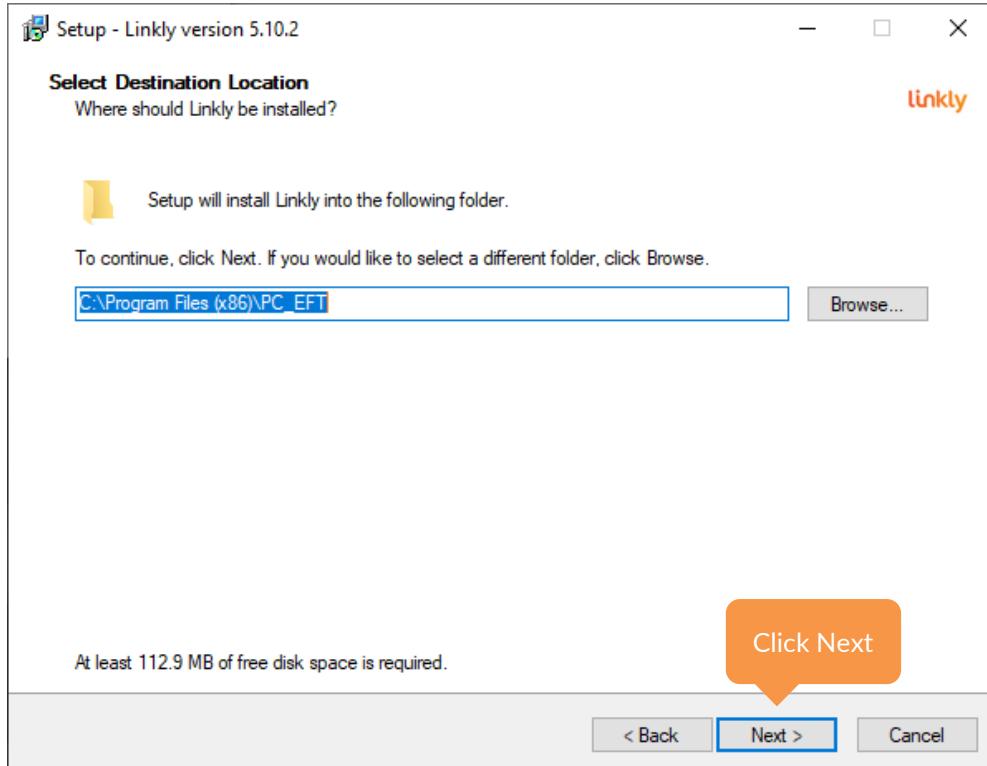
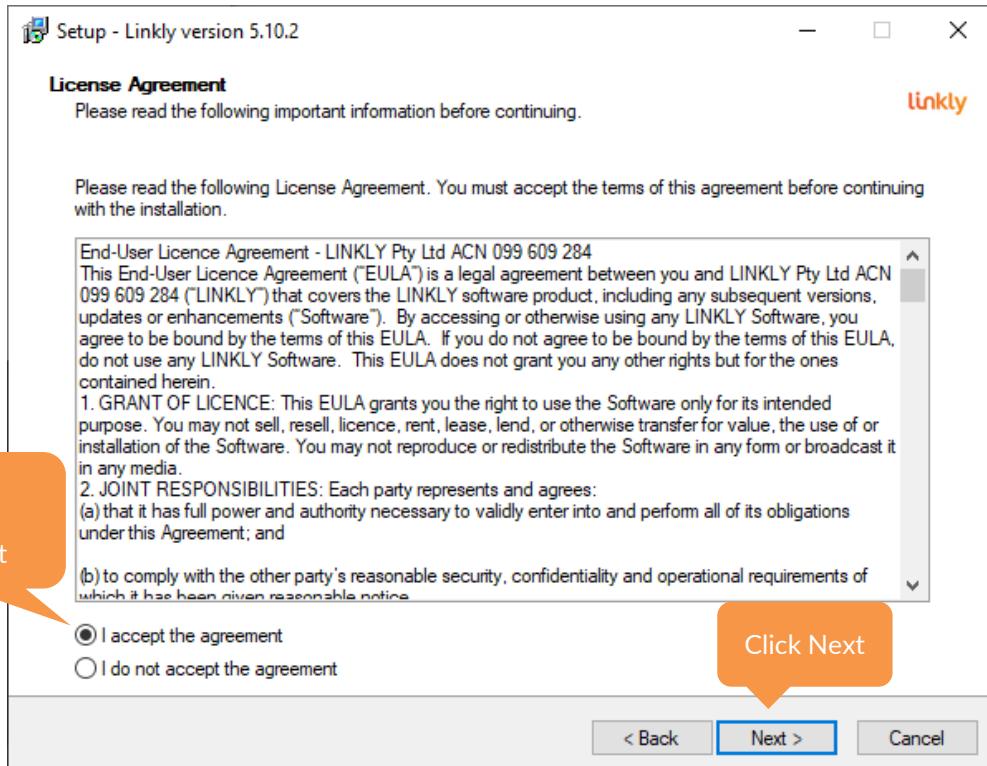
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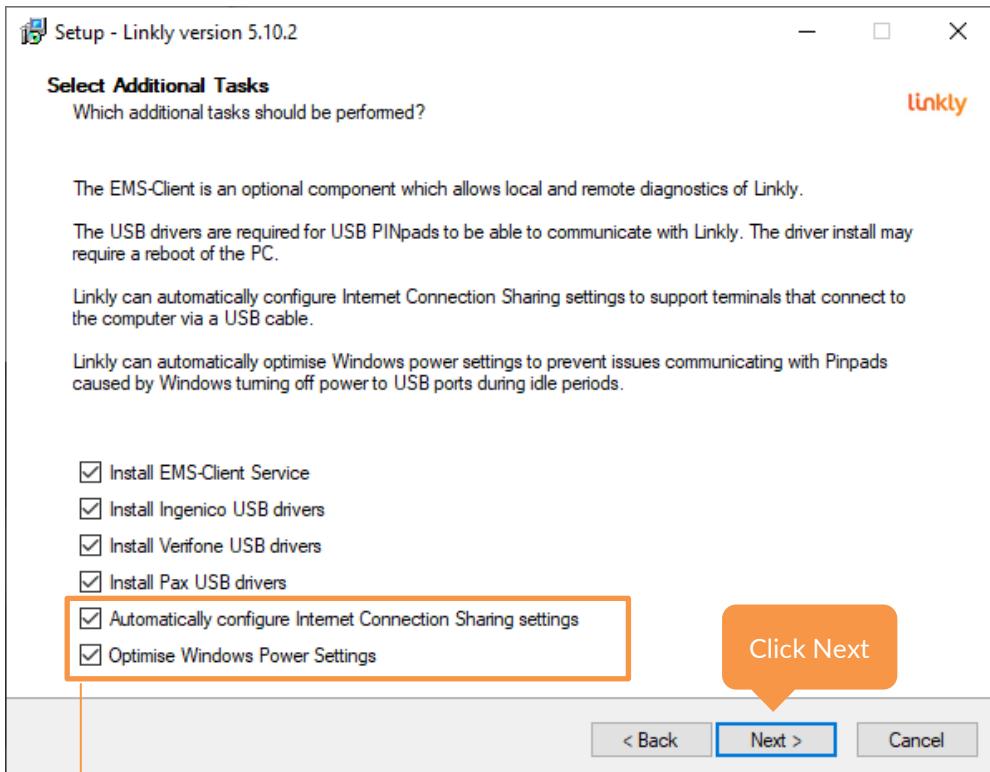
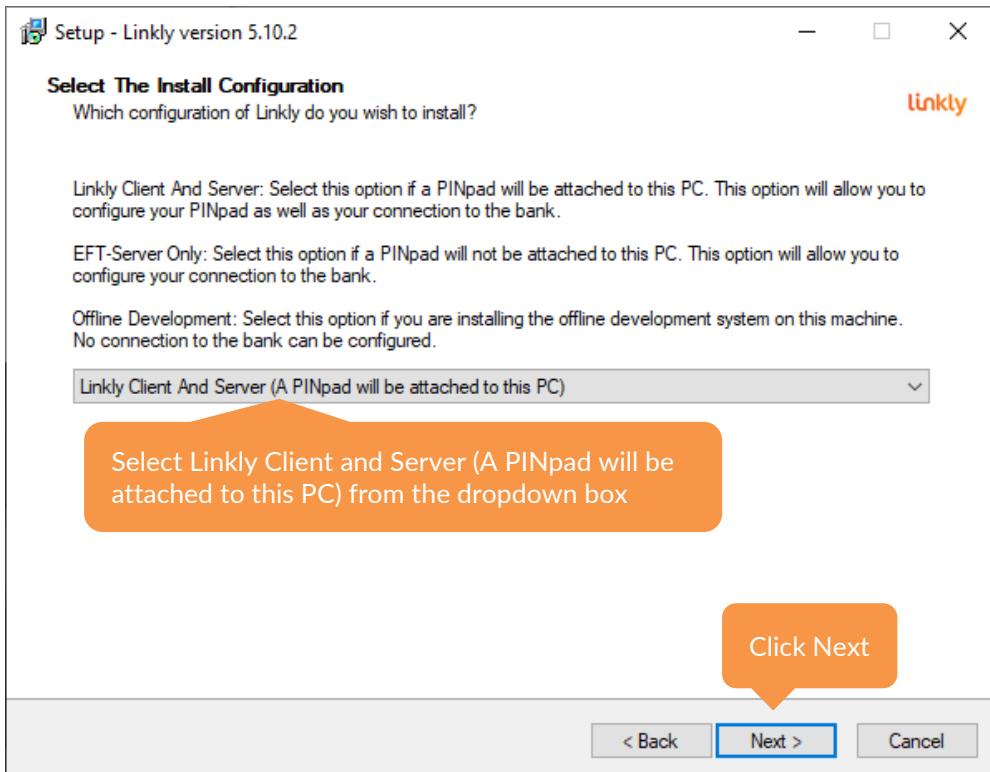


Click Next

## 2.4 POS with Pinpad Connecting directly to bank

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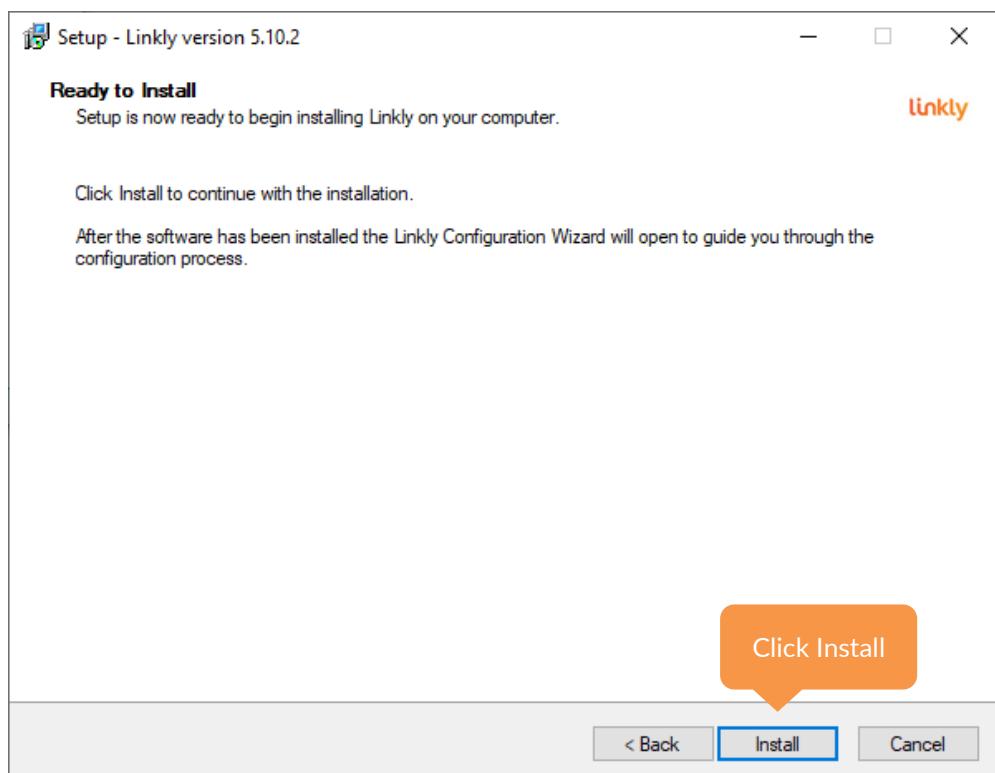
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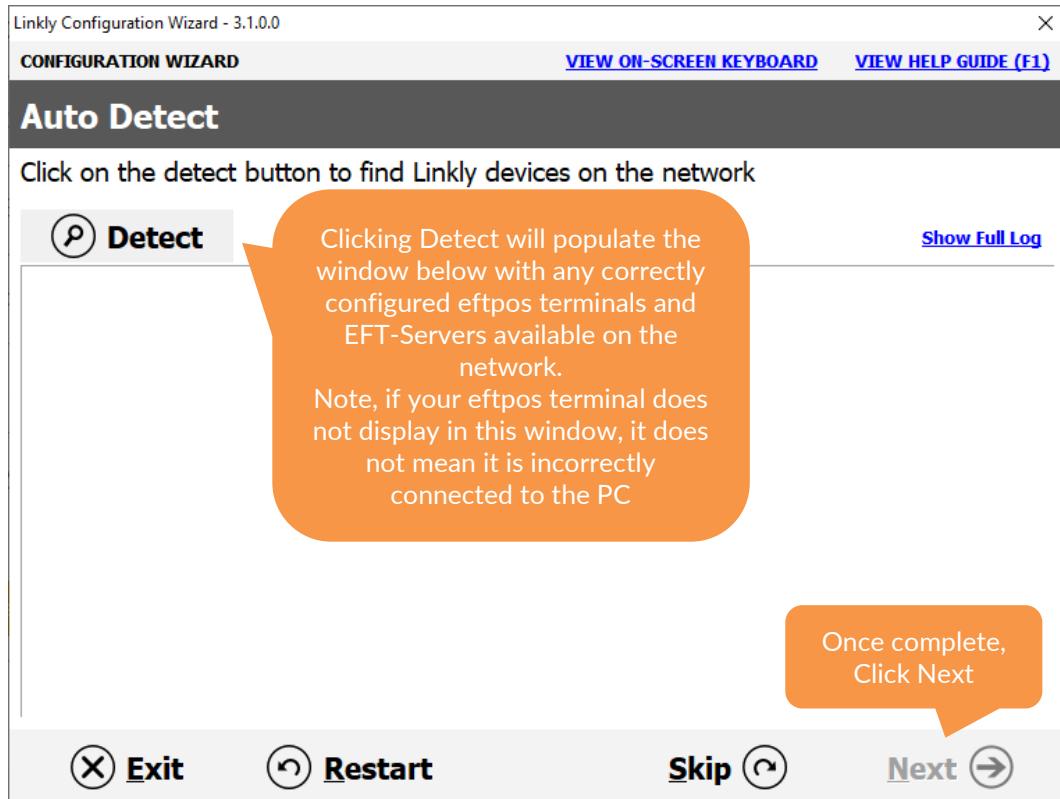
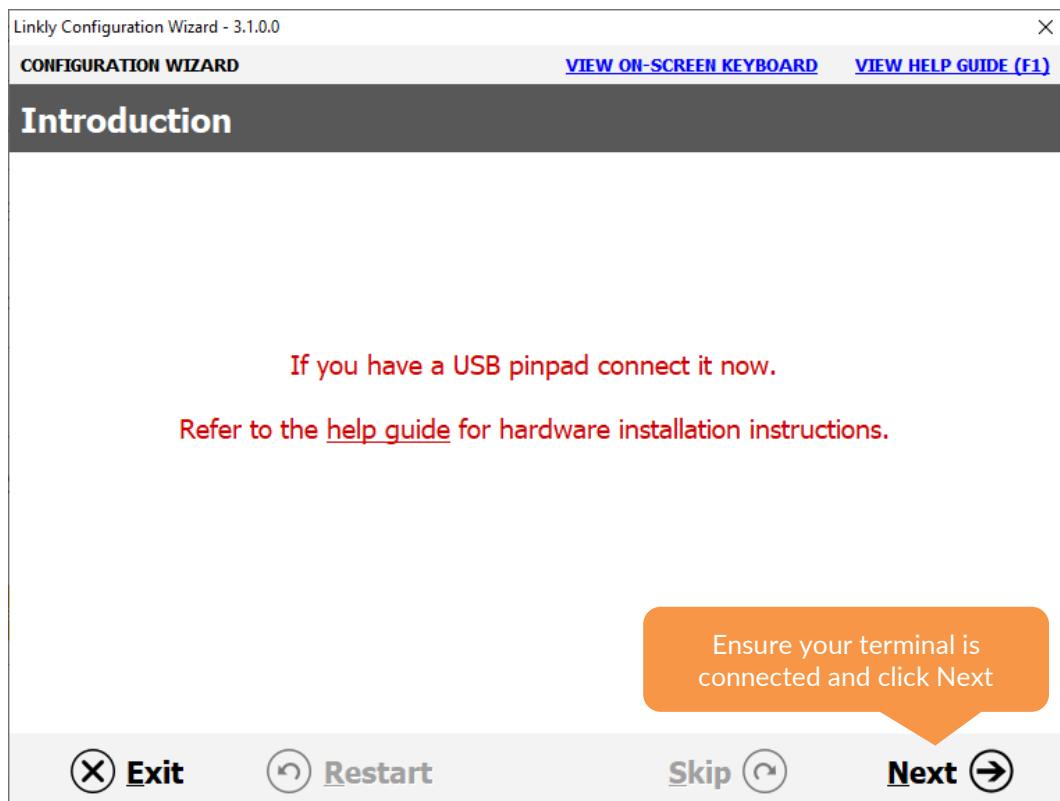
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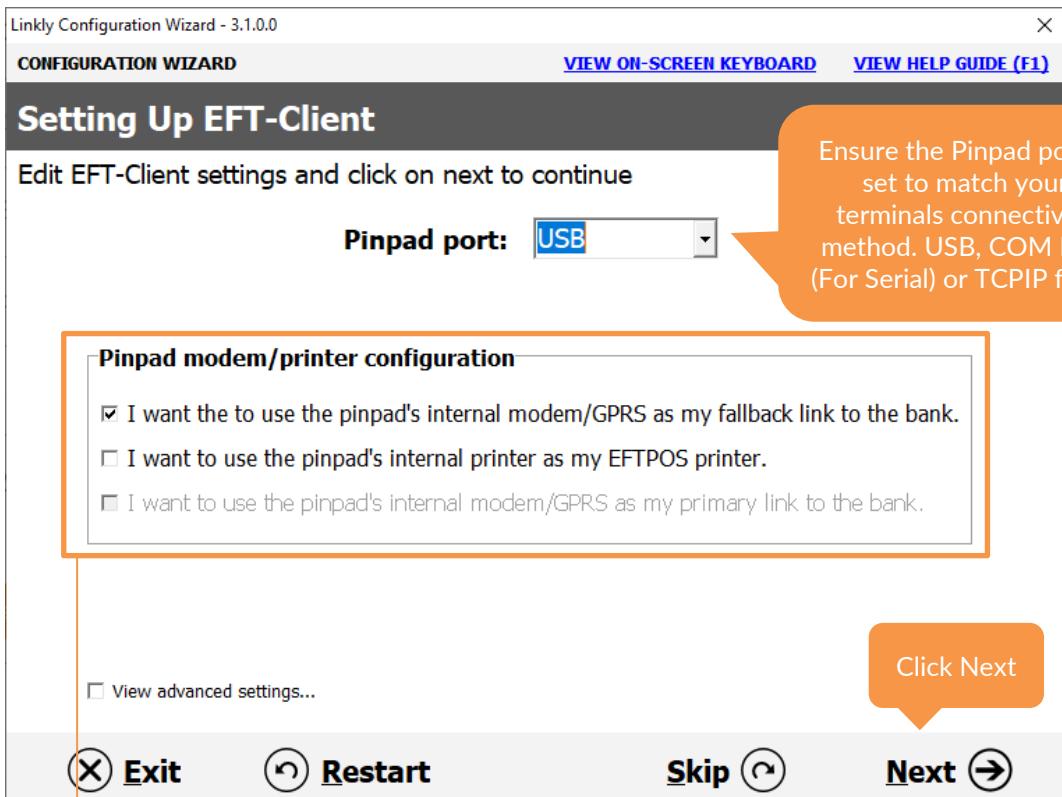
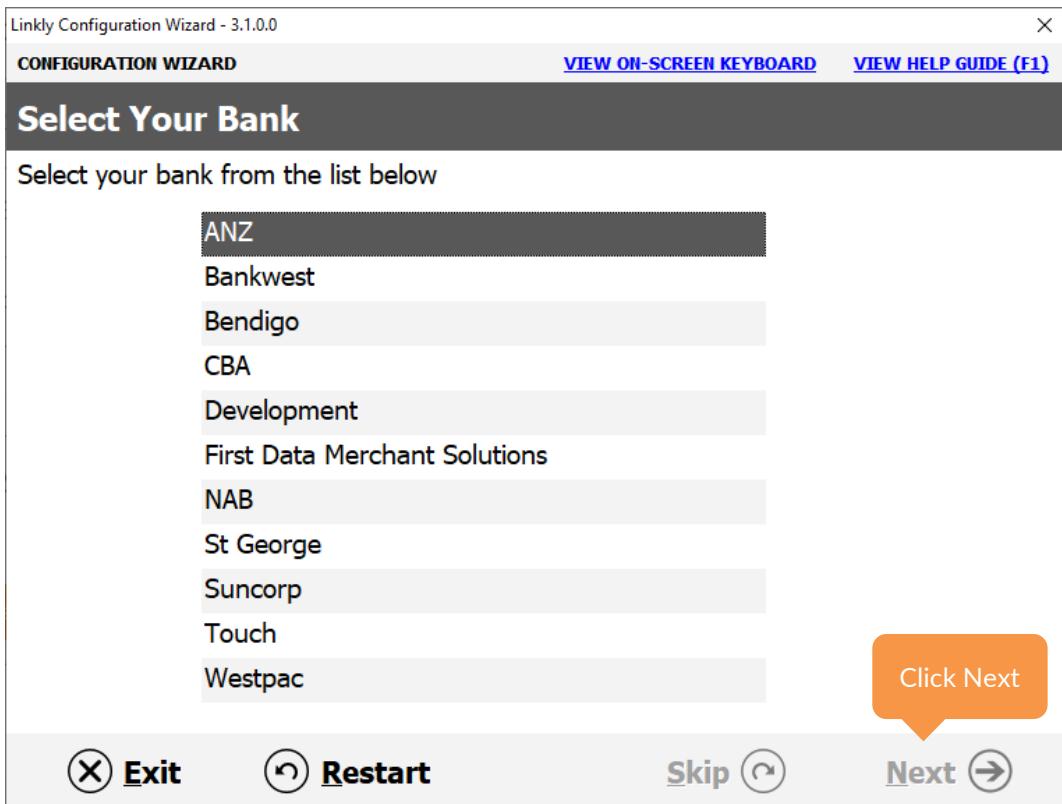
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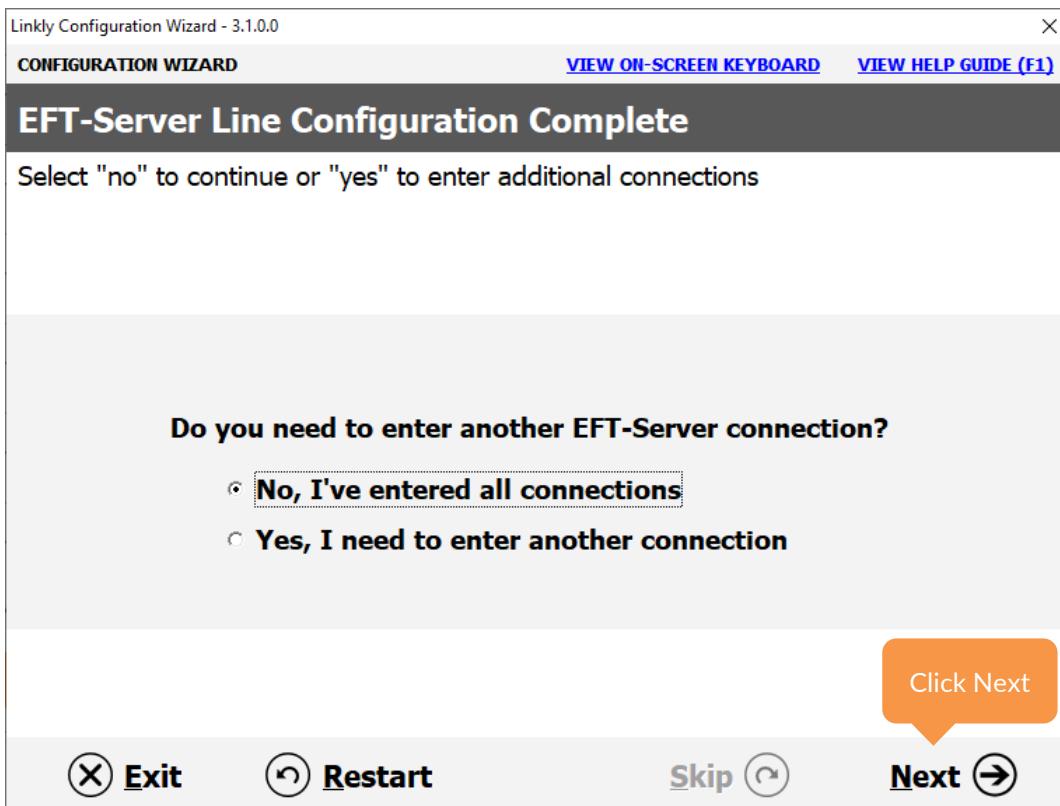
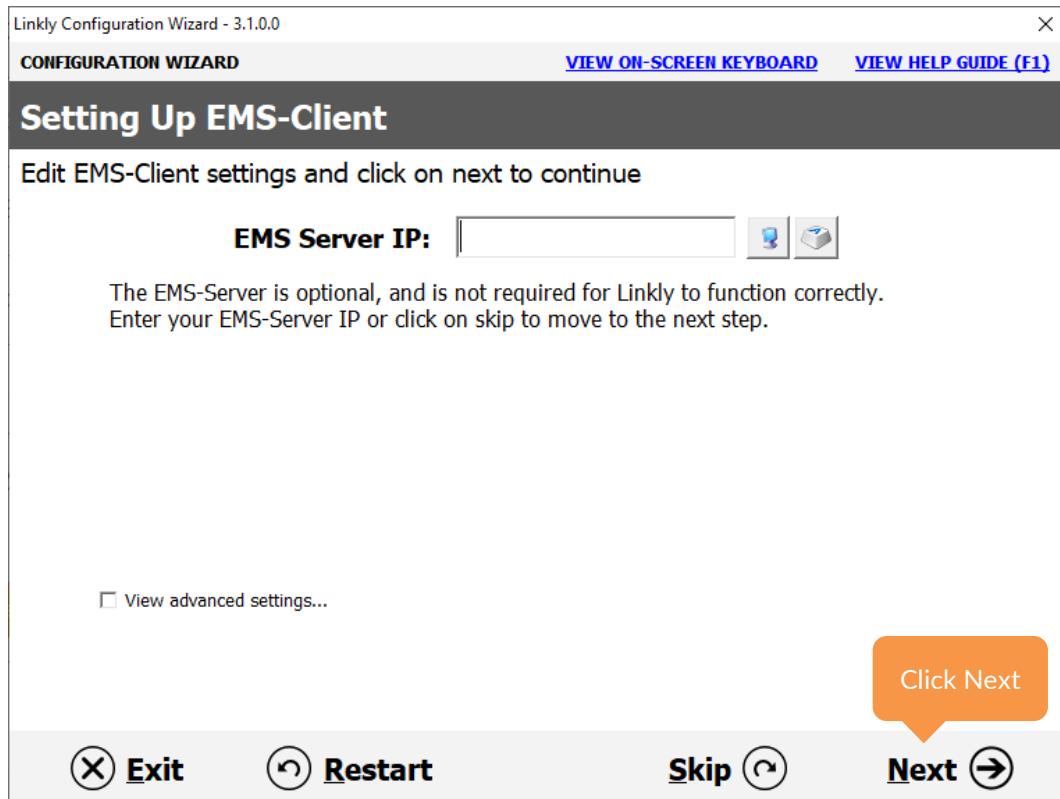
## 2.4.1 Configuration Wizard





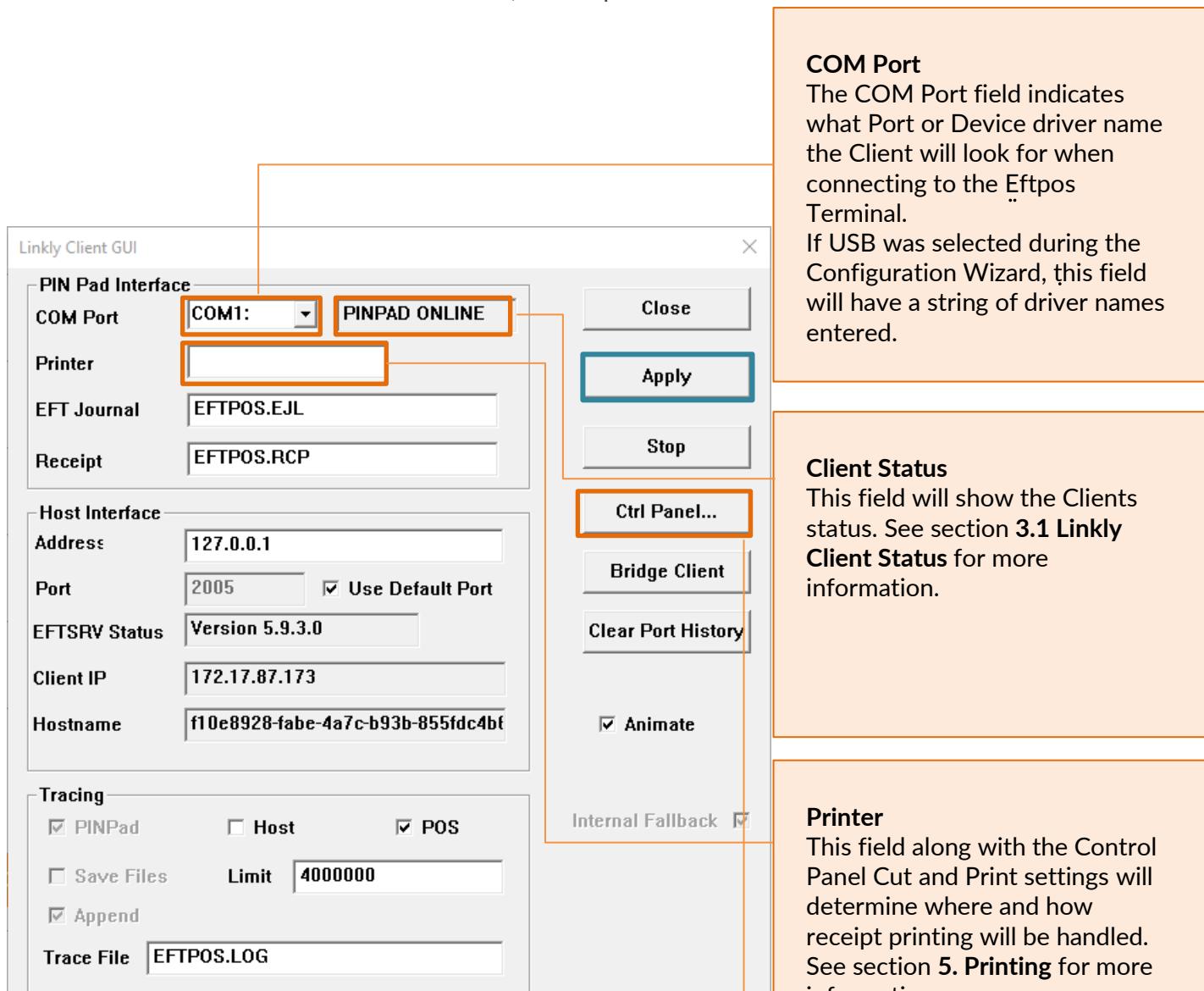
If you are not utilising the Linky EFT-Server and are connecting directly to the bank from your device, choose "I want to use the pinpad's internal modem/GPRS as my primary link to the bank".

This will skip the EFT-Server configuration steps of the configuration wizard.



### 3. Linkly Client User Guide

The Linkly Client is one of the three primary programs installed when installing the Linkly software. The Client interfaces with the POS Software, The Eftpos Terminal and the Eft-Server.



After performing any changes to the Client, you will need to hit the Apply Button to save.

#### COM Port

The COM Port field indicates what Port or Device driver name the Client will look for when connecting to the Eftpos Terminal.

If USB was selected during the Configuration Wizard, this field will have a string of driver names entered.

#### Client Status

This field will show the Clients status. See section **3.1 Linkly Client Status** for more information.

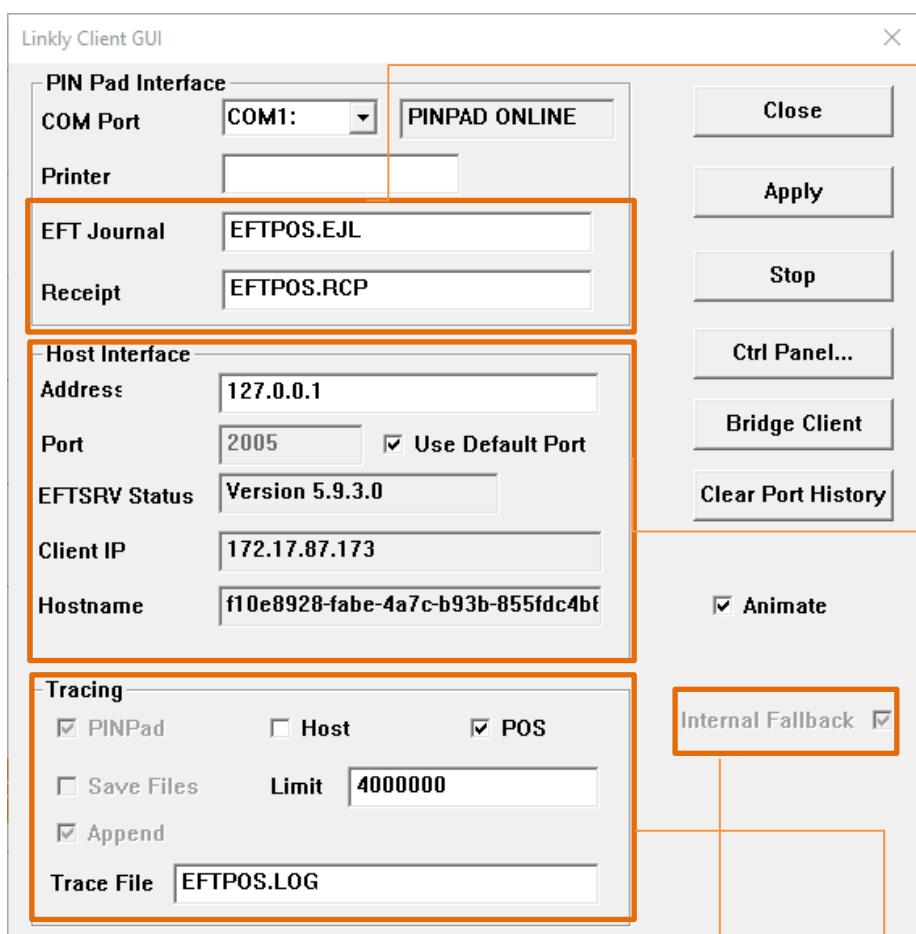
#### Printer

This field along with the Control Panel Cut and Print settings will determine where and how receipt printing will be handled. See section **5. Printing** for more information.

#### Ctrl Panel...

The Ctrl Panel... Button will open the Client Control Panel. Here You can perform a logon, perform any settlement options available and get diagnostic Information.

See section **4. Control Panel** for more information



## EFT Journal and Receipt Journal

These are the files the customers Receipts and Journal information will be saving to.

## Host Interface Address

This Is the address of the Client. This should always be 127.0.0.1

## Port

This Is the default port for communicating with the EFT-Server. This should always be left as port 2005.

## EFTSRV Status

This will display the Version of the EFT-Server.

## Client IP Address

The Local IP of the computer the Client Is running on.

## Hostname:

The hostname of the PC

### Internal Fallback

If enabled, the terminal will "fall back" to use its internal modem when the EFT-Server cannot establish a connection to the Linkly Gateway / Bank.

This can be enabled or disabled on the "setting up the EFT Client" page of the configuration wizard.

This setting will only affect terminals that have an Internal modem / GPRS capacity.

### Tracing

This section shows the file that the eftpos terminal will generate trace Information to. The default limit is 4000000. The log file will be named EFTPOS.LOG.

These settings shouldn't be changed.

## 3.1 Linkly Client Status

If the Eftpos Terminal is not communicating the Client software correctly, it will display in the Status box of the Client.

The Linkly Client can show "Invalid Port", "Error 123", "Port Open", "Port In Use" or "PINPAD ONLINE"

### **Invalid Port**

Invalid Port is a response which indicates the currently selected Com Port is not a valid com port name.

### **Error 123**

Error 123 indicates the driver name configured in the Linkly Client COM Port field is not present or is not a valid device driver name.

### **Port Open**

This indicates that a device using the driver name or COM port specified in the Linkly Client COM Port field is present but the Client is unable to communicate with the device.

### **Port in Use**

The Port the Client is trying to communicate with is in use by another program or device.

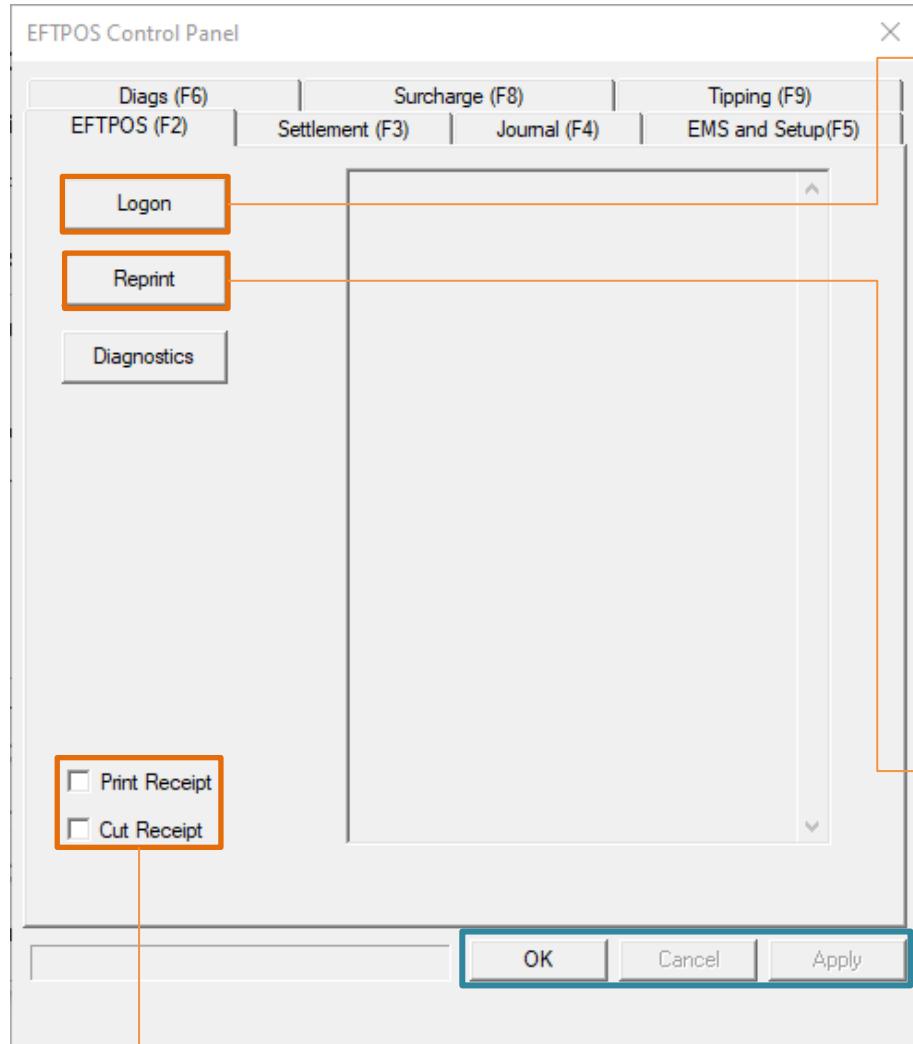
### **PINPAD ONLINE**

This Indicates that the Eftpos Terminal and Client are configured correctly.

## 4. Control Panel

The EFTPOS Control Panel can be used to perform a logon to the Bank, perform any available Settlement action, view the Journal information collected by the Client for the current date, configure Linkly Dynamic surcharging and Tipping and view diagnostic information about the terminal and Linkly software.

### EFTPOS (F2) Tab



#### Logon

Here you can perform a Logon to the bank / Host. The response returned will indicate either a successful or unsuccessful connection and will return a corresponding response code.

#### Reprint

Here the customer can Reprint any eftpos receipts processed during the most recent transaction.

#### Print Receipt and Cut Receipt

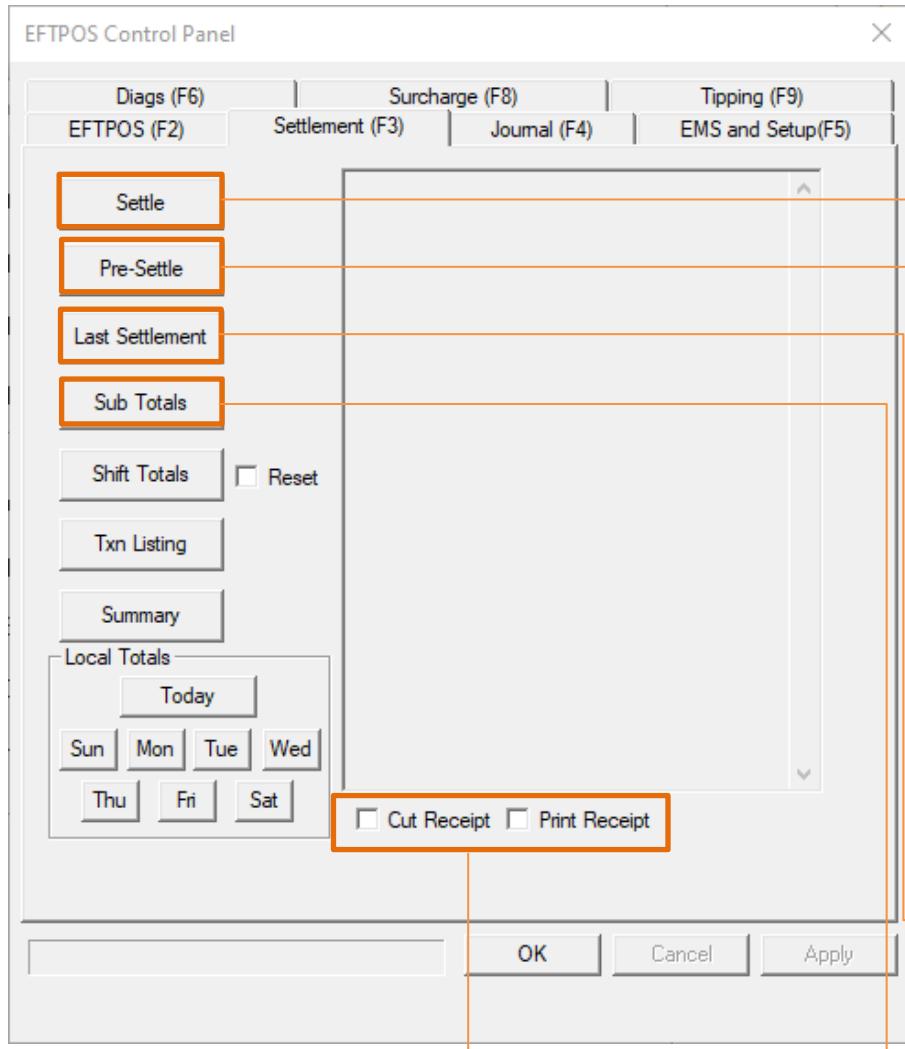
The Print and cut boxes need to be enabled if printing to a Local Windows Printer or printing to the terminal's Internal printer.

See section 5. Printing for more information.

To confirm any changes made to the Linkly Client Control Panel, hit the OK or Apply button

## 4.1 Settlement (F3)

The settlements tab is used to settle funds to the bank and display settlement information and total transaction amounts.



**Settle**  
Settles all transactions performed in the last settlement period. Generally, once every 24 hours.

**Pre-Settle**  
Provides all the information seen on a settlement without settling the device. There is no limit to how often this can be performed.

**Last Settlement**  
Will provide the most recent settlement the Terminal has performed.

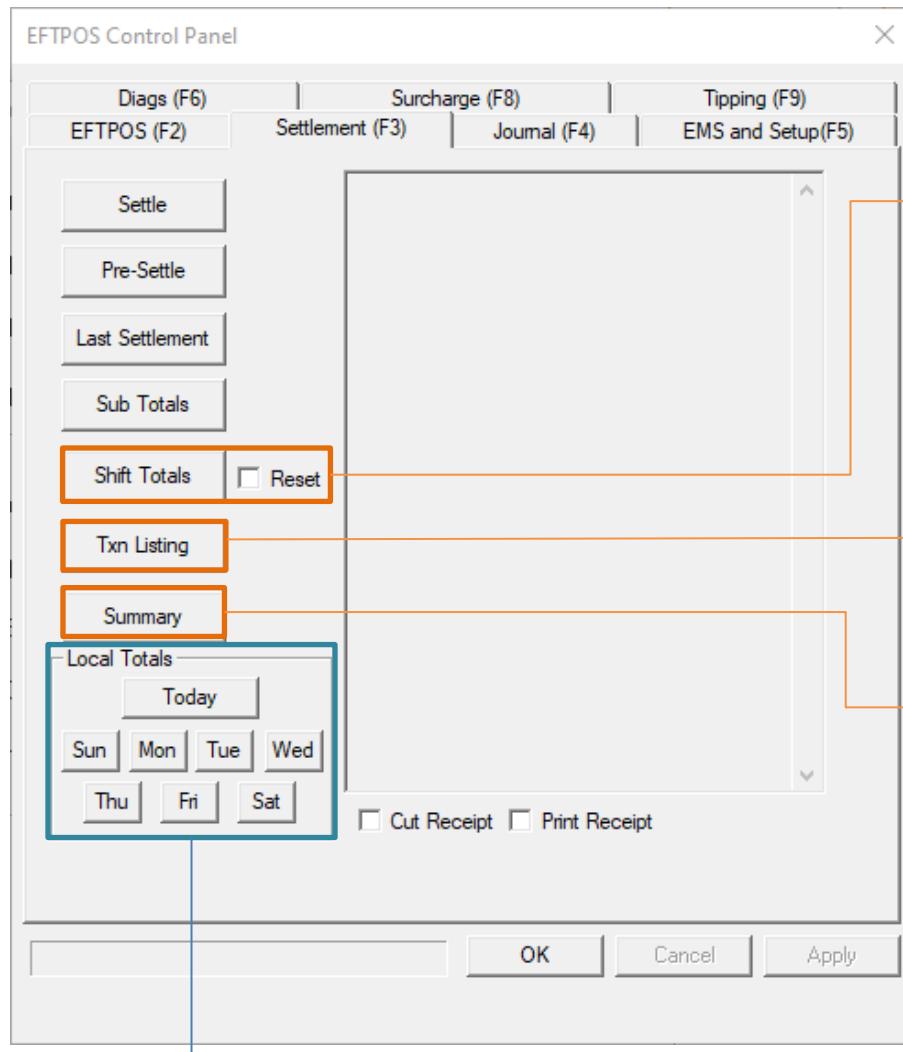
**Cut Receipt and Print Receipt**  
The Cut and Print Receipt boxes need to be Ticked for the customer to print any information from the settlement tab.

**Sub Totals**  
Displays all transactions that were performed since the last settlement or shift total was performed.

Performing any function with the Cut Receipt and Print Receipt boxes unticked will display the information in the panel to the right of the buttons.

# Settlement (F3)

All Information shown when performing any function (With the exception of Local Totals) Is pulled from the terminal itself. Any concerns regarding total amounts, mismatching figures or missing transactions should be directed to the bank.



## Local Totals

Shows Total amounts for transactions performed on the corresponding day. Local totals are generated from the registry. Upon completion of a sale, a corresponding entry will be made to the EFTPOS.ejl file for the current date. This contains a record of the sale. Any Issues with local totals should be directed to Linkly.

## Shift Totals

Transaction totals per shift. Ticking the "Reset" box will Reset the total amount to 0.

## Txn Listing

Provides approved transactions since most recent settlement.

## Summary

Details transactions performed since most recent settlement.

## Note

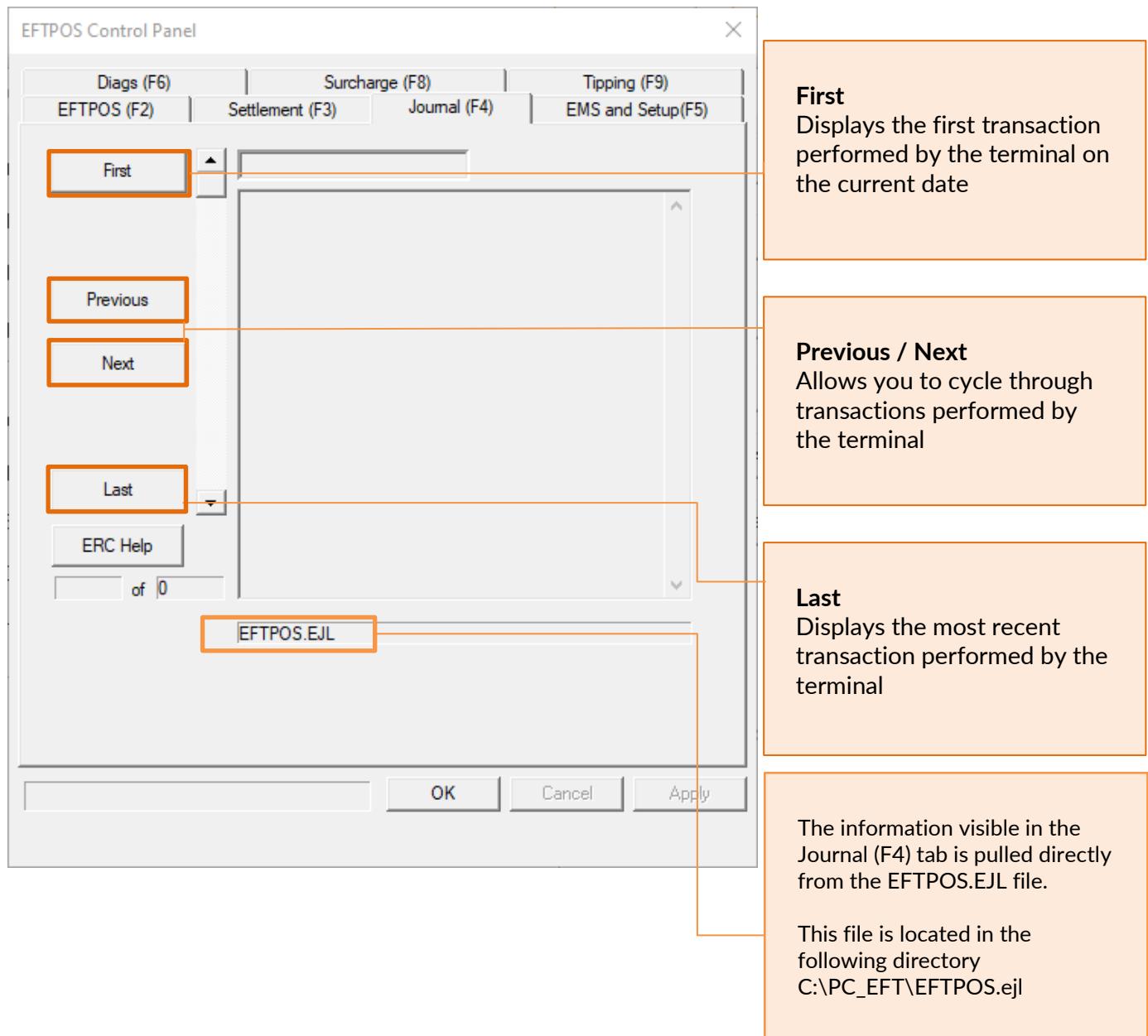
Not all settlement options will be available to the users. The options that are available will depend on the acquirer providing your terminal and your terminal model.

Any discrepancies between POS generated Totals and the totals obtained from the Settlement tab need to be referred to the POS Provider and bank respectively.

## 4.2 Journal (F4)

The journal tab will allow you to view all transactions performed on the current date. This includes transactions, logons, settlements, successful and failed transactions.

This information will “Reset” once the date changes.

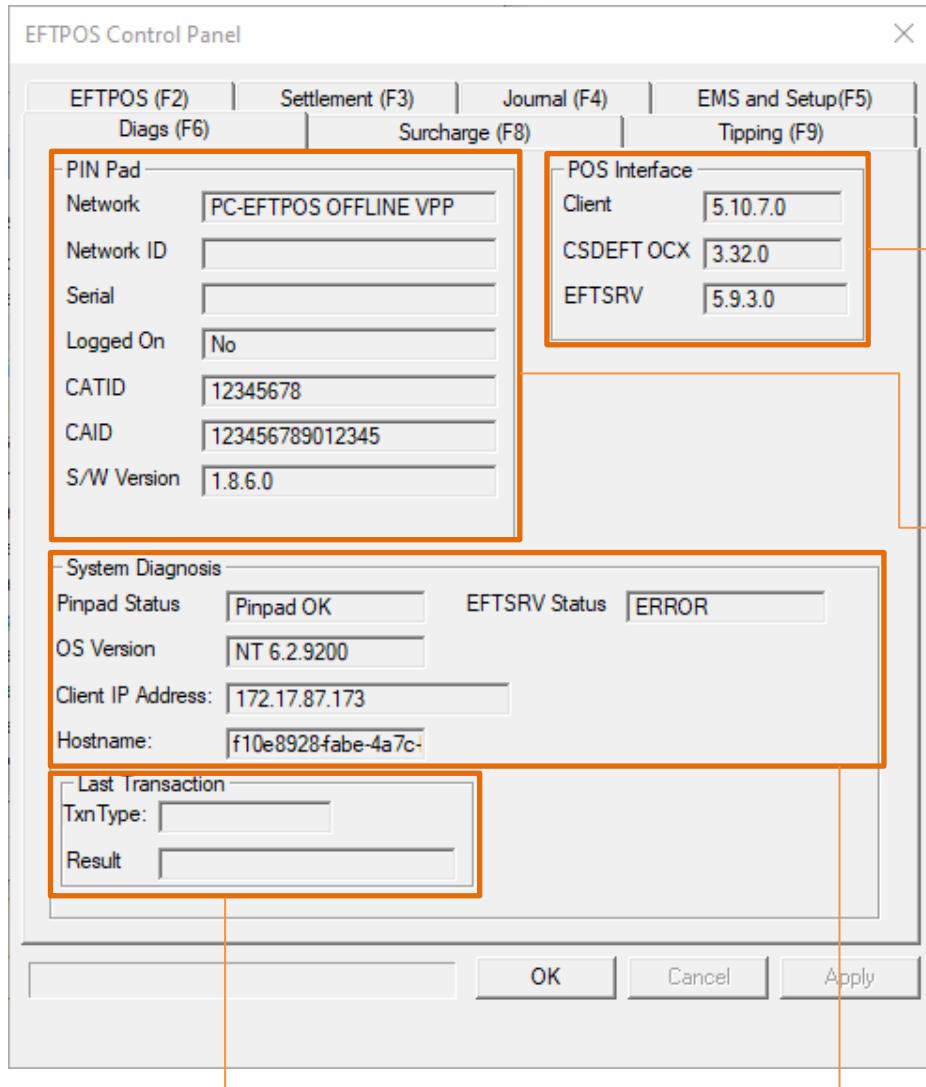


All journal information since the installation of Linkly can be viewed using the EMS Client. A guide to the EMS Client can be found at the Manuals & Guides section of the Linkly Website.

[Manuals and Guides - Linkly](#)

## 4.3 Diags Tab (F6)

The Diags tab shows diagnostic information about the Terminal, Client and system.



### POS Interface

**Client:** Shows the version of the Linkly client

**CSDEFTOCX:** CsdEft.ocx file version

**EFTSRV:** shows the EFT-Server version

### PIN Pad

#### Network:

shows the network the terminal is configured to connect to

#### Network ID:

Acquirer Network ID

#### Serial Number:

shows the serial number of the device

#### Logged on

shows if the terminal has been logged on

#### CATID and CAID:

shows the respective ID for the terminal

#### S/W Version:

shows the version of the software loaded on the terminal

### Last Transaction:

Shows the Type and result of the most recent transaction performed on the terminal while Integrated.

### System Diagnosis

#### Pinpad status:

Shows the status of the terminal

#### EFTSRV Status:

Shows the status of the EFT-Server

#### OS Version:

Shows the Operating System version for the POS

#### Client IP Address:

Shows the IP address the client is running on

#### Hostname:

Hostname of the PC

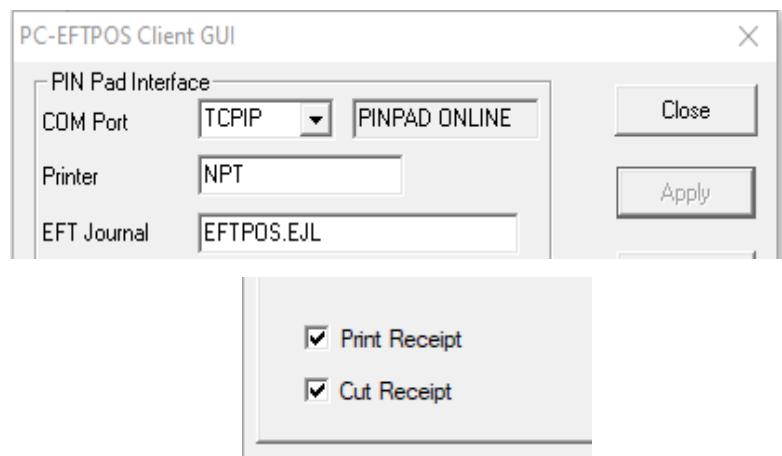
# 5 Printing

The Client can control where receipts print but does not influence what receipts are printing. There are three ways Printing can be handled by the Client

## Printing to the terminals Internal Printer

To Print to the terminals Internal Printer, NPT has to be entered Into the Printer field of the Client and the Print and cut boxes on the EFTPOS (F2) and Settlements (F3) Tabs need to be ticked.

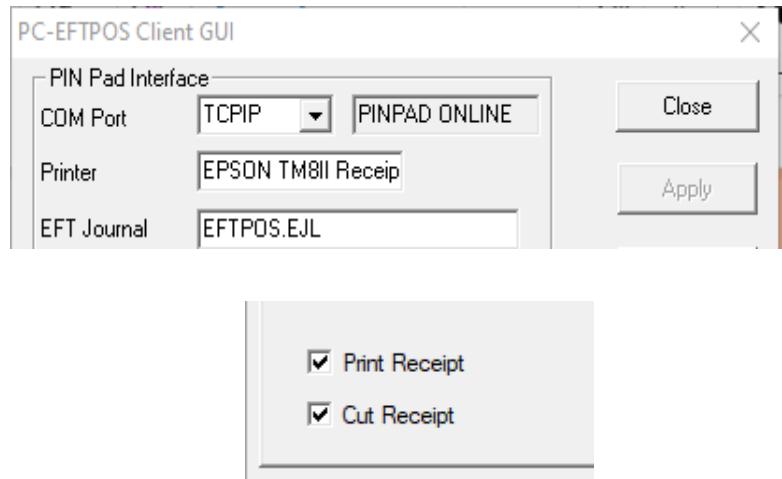
After making changes to the Printer field In the Client, you need to hit the Apply button to save the changes.



## Printing to a local windows printer

The Client can be set to Print to a local windows printer. The Printer name must be entered Into the Printer field In the Client and must be entered exactly and entirely. If misspelled, a receipt will not print. For the Client to handle printing, the Print and cut boxes on the EFTPOS (F2) and Settlements (F3) Tabs need to be ticked.

In the example, the printer name Is EPSON TM8II Receipt. The whole name needs to be entered into the printer field.



## POS Controlled Printing

If the Printer field In the Client is left Blank and the Print and Cut boxes In the EFTPOS (F2) and Settlements (F3) tab are Unticked, the Client will return all receipt data to the POS.

With this configuration, you will not be able to print directly from the Linkly Client Control Panel. This Includes settlements.

