

PayFacto Gift

Powered by DataCandy

User Guide



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Introduction

Gift PayFacto Powered by DataCandy

This guide describes the features of the Gift PayFacto powered by DataCandy application on your Android-powered payment terminal and explains how to use them when processing gift card transactions for your business.



IMPORTANT: The transactions explained in this document apply only to gift cards issued by DataCandy. Using a card issued by another gift card company will result in a refused transaction.

About Gift Cards

Gift cards are prepaid debit cards that contain a specific amount of money for use by customers to pay for products or services. When activated, gift cards are loaded with funds for future use. When using a gift card for a purchase, the card balance reduces by the amount of the transaction.

Some gift cards allow you to add funds (open loop), while others have a finite amount that cannot be reloaded (closed loop). Depending on your business, you can offer gift cards for use in specific locations or at all affiliated brands.

Gift cards can pay for products or services, in whole or in part, depending on the transaction and the funds balance remaining on the card. Gift cards cannot be used without prior activation.

Transactions

Transactions

Gift card transactions are very similar to regular credit or debit card transactions with the exception that gift cards have a preset amount available to spend. Depending on your Point of Sale (POS) environment, you may need to indicate that a sale is a debit card transaction on the POS workstation before using the payment terminal.

If you are using your payment terminal in standalone mode (no communication with a POS), or your POS system does not need to identify gift card transactions, then the transaction workflow begins on the payment terminal. Gift card transactions are similar to regular sales transactions, but [some of the terms may differ](#); for more information about processing gift card transactions, refer to the following links:

- [Redemption](#) (process a sale)
- [Empty Card](#) (empties the balance of a card)
- [Balance](#) (card balance inquiry)
- [Increment](#) (add funds to the gift card balance)
- [Complete Cancel](#) (reimburse the entirety of a previous gift card sale)
- [Partial Cancel](#) (reimburse a portion of a previous gift card sale)
- [Activation](#) (new cards must be activated before use)

Gift Card Transactions

There are 7 transactions available when you accept gift cards. Each transaction type applies to a specific situation as explained below:

- **Redemption:** Uses a portion of the remaining balance on the card as payment for a product or service.
- **Empty Card:** A redemption used to clear the remaining balance on the card. Only applicable to card balances below \$5 (\$4.99 or less).
- **Balance:** Informational only; queries the DataCandy server for the remaining card balance.
- **Increment:** Adds funds to an active card.
- **Complete Cancel:** Reverses the full amount from a previous transaction and adds the funds back to the card's balance. Requires the authorization number from DataCandy printed on the original receipt.
- **Partial Cancel:** Reverses a partial amount from a previous transaction and adds the funds back to the card's balance. Requires the authorization number from DataCandy printed on the original receipt.
- **Activation:** Activates and adds funds to a new card.

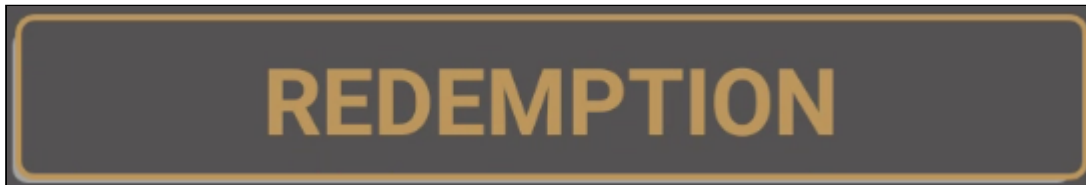
Redemption

Processing sales using gift cards are referred to as redemptions. A redemption is like any other sale, except instead of using a credit or debit card, the customer presents a gift card. The sale amount is deducted from the card's balance and the new balance is printed on the customer receipt. Redeeming funds from a gift card to pay for a purchase is a two-step process:

- The sale transaction is processed on the Point of Sale (POS) system.
- The funds redeemed from the card's current balance.

To perform a redemption:

1. Process the sale transaction on your POS, indicating that the payment method is a gift card.
2. Touch the number pad to enter the redemption amount.
3. Touch **Redemption**.



4. Swipe the customer's gift card.
You can also touch **GIFT CARD MANUAL ENTRY**, enter the Admin password, and then enter the card number and touch **OK**.



NOTE: If you have enabled password protection for manual card entry, you will need to enter the Merchant password to proceed; if required, enter the Merchant password and touch **OK**.

5. The authorization server deducts the amount from the card balance, and the terminal prints a transaction receipt. Tear off the receipt and hand it to the customer with their card. Touch **OK** to print a second receipt, or touch **CANCEL**.

Empty Card

If a customer has a balance of \$4.99 or less on their gift card, they can empty the card balance for a sale. The purchase cannot be more than the available card balance. After the balance is reduced to \$0.00, the gift card becomes inactive. Emptying the balance of a card is a two-step process:

- The sale transaction is processed on the Point of Sale (POS) system.
- The funds redeemed from the card's remaining balance.



NOTE: The Empty Card transaction does not require that you enter the purchase amount. If the client does not know the remaining balance on the card, you should perform a [balance inquiry](#) to ensure that the balance qualifies for the Empty Card transaction.

To empty a card balance:

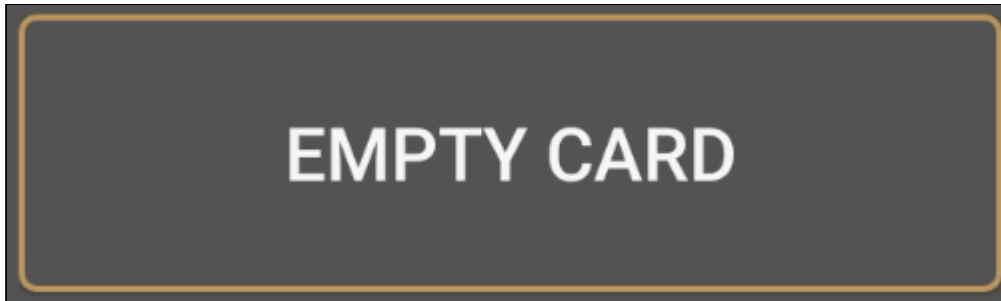
1. Process the sale transaction on your POS, indicating that the payment method is a gift card.
2. Touch the **Action** button on the main screen.



3. Touch **Transactions**.



4. Touch **Empty Card**.



5. Touch **Empty Card**.



6. Swipe the customer's gift card.
You can also touch **GIFT CARD MANUAL ENTRY**, enter the Admin password, and then enter the card number and touch **OK**.



NOTE: If you have enabled password protection for manual card entry, you will need to enter the Merchant password to proceed; if required, enter the Merchant password and touch **OK**.

- The authorization server empties the card balance, and the terminal prints a transaction receipt. Tear off the receipt and hand it to the customer with their card. Touch **OK** to print a second receipt, or touch **CANCEL**.

Balance

Because gift cards are loaded with a set amount of money, customers may not know their balance prior to paying for a product or service. Checking the available funds on a gift card does not affect the balance.

To check the balance on a card:

- Touch the **Action** button on the main screen.



- Touch **Transactions**.



- Touch **Balance**.



- Swipe the customer's gift card.
You can also touch **GIFT CARD MANUAL ENTRY**, enter the Admin password, and then enter the card number and touch **OK**.



NOTE: If you have enabled password protection for manual card entry, you will need to enter the Merchant password to proceed; if required, enter the Merchant password and touch **OK**.

- The authorization server verifies the card balance, and the terminal prints a transaction receipt. Tear off the receipt and hand it to the customer with their card. Touch **OK** to print a second receipt, or touch **CANCEL**.

Increment

If a customer has a re-loadable gift card, they can add funds to their balance (increment) whenever they want. Adding funds is a two-step process:

- Customer pays for the funds they want to add using cash, credit, or debit.
- The funds are added to the card's existing balance.



IMPORTANT! Each DataCandy merchant account has a maximum amount you can increment to a card. If you attempt to increment more than the amount authorized for the merchant account, the transaction will be declined. Retry the increment with a smaller amount.

To add funds to a card:

1. Using your POS, process the payment for the funds that will be added to the card.
2. Touch the **Action** button on the main screen.



3. Touch **Transactions**.



4. Touch **Increment**.



5. Touch the number pad to enter the funds amount to add to the card balance.

6. Touch **Increment**.



NOTE: If you have configured password protection for transactions, you may need to enter the Admin or Merchant password to proceed; if required, enter the requested password and touch **OK**.

7. Swipe the customer's gift card.

You can also touch **GIFT CARD MANUAL ENTRY**, enter the Admin password, and then enter the card number and touch **OK**.



NOTE: If you have enabled password protection for manual card entry, you will need to enter the Merchant password to proceed; if required, enter the Merchant password and touch **OK**.

8. The authorization server adds the increment amount to the card balance; the terminal prints a transaction receipt showing the new balance. Tear off the receipt and hand it to the customer with their card. Touch **OK** to print a second receipt, or touch **CANCEL**.

Complete Cancel

A complete cancel reverses the entire amount of a previous redemption. Gift cards do not allow for refunds in the same way as credit or debit cards. If a customer wants to return a product redeemed (purchased) with a gift card, the transaction must be reversed to allow the funds to be returned to the card balance. Reversing the complete amount is a two-step process:

- The transaction is reversed on the Point of Sale (POS) system.
- The full amount of the redemption is reversed to return the funds to the card's balance.



IMPORTANT: The customer must present the original transaction receipt, as it contains the transaction confirmation number required to cancel the previous redemption. Transaction confirmation numbers have a maximum length of 12 digits.

To reverse the complete amount of a previous redemption:

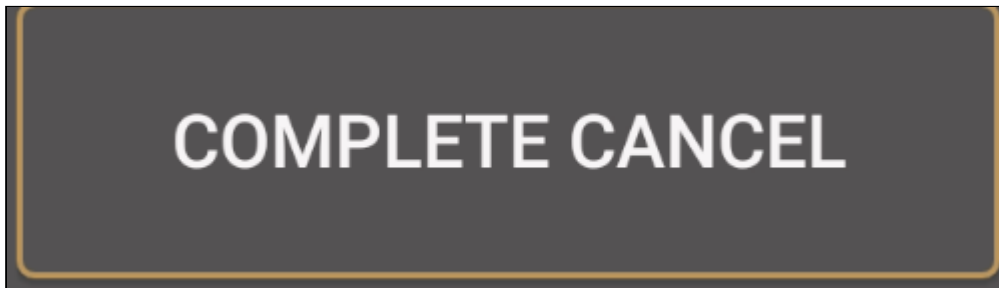
1. Touch the **Action** button on the main screen.



2. Touch **Transactions**.



3. Touch **Complete Cancel**.

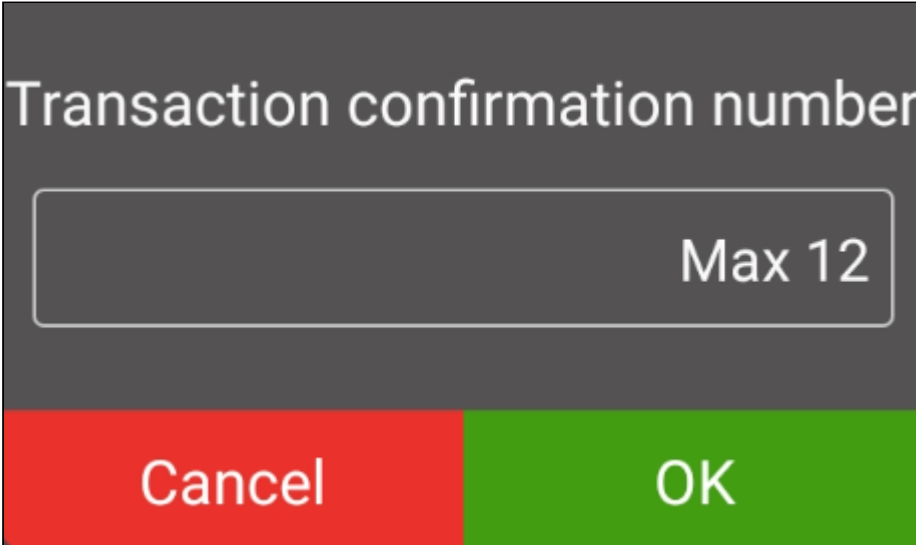


4. Touch **Complete Cancel**.



NOTE: If you have configured password protection for transactions, you may need to enter the Admin or Merchant password to proceed; if required, enter the requested password and touch **OK**.

5. Use the number pad to enter the transaction confirmation number that appears on the original receipt and touch **OK**.



A screen titled "Transaction confirmation number" with a text input field labeled "Max 12". At the bottom are two buttons: "Cancel" (red) and "OK" (green).

6. Swipe the customer's gift card.
You can also touch **GIFT CARD MANUAL ENTRY**, enter the Admin password, and then enter the card number and touch **OK**.



NOTE: If you have enabled password protection for manual card entry, you will need to enter the Merchant password to proceed; if required, enter the Merchant password and touch **OK**.

7. The authorization server cancels the previous redemption and increments the total to the card balance; the terminal prints a transaction receipt showing the updated balance. Tear off the receipt and hand it to the customer with their card. Touch **OK** to print a second receipt, or touch **CANCEL**.

Partial Cancel

While the [Complete Cancel](#) procedure reimburses an entire transaction, you can cancel a partial amount of a transaction. Use this transaction if your customer used a gift card to purchase more than one product or service in a single transaction. Cancelling a partial amount is a two-step process:

- The portion of the transaction is reversed on the Point of Sale (POS) system.
- The partial amount of the redemption is reversed to return the funds to the card's balance.



IMPORTANT: The customer must present the original transaction receipt, as it contains the transaction confirmation number required to cancel the previous redemption. Transaction confirmation numbers have a maximum length of 12 digits.

To reverse a partial amount of a previous redemption:

1. Touch the **Action** button on the main screen.



2. Touch **Transactions**.



3. Touch **Partial Cancel**.

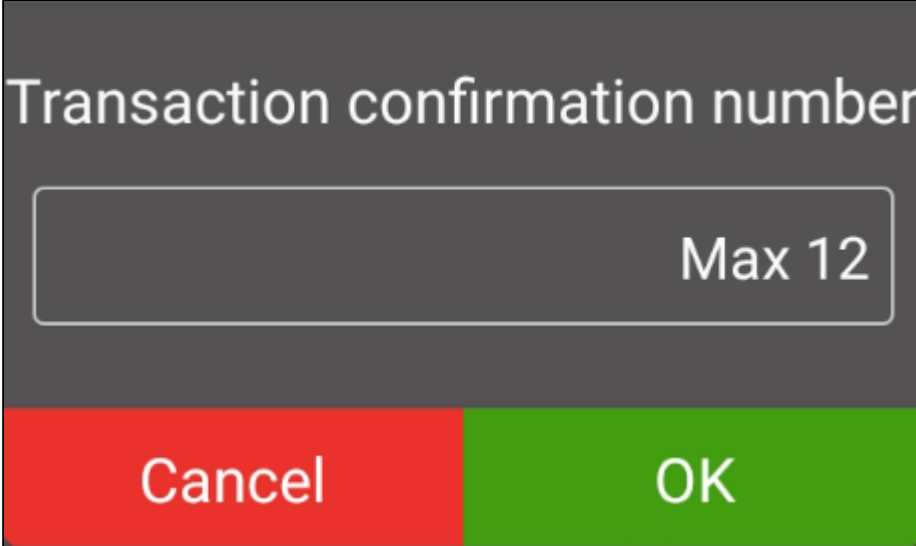


4. Touch the Number pad to enter the amount of the transaction to reverse.
5. Touch **Partial Cancel**.



NOTE: If you have configured password protection for transactions, you may need to enter the Admin or Merchant password to proceed; if required, enter the requested password and touch **OK**.

6. Use the number pad to enter the transaction confirmation number that appears on the original receipt and touch **OK**.



Transaction confirmation number

Max 12

Cancel OK

7. Swipe the customer's gift card.
You can also touch **GIFT CARD MANUAL ENTRY**, enter the Admin password, and then enter the card number and touch **OK**.



NOTE: If you have enabled password protection for manual card entry, you will need to enter the Merchant password to proceed; if required, enter the Merchant password and touch **OK**.

8. The authorization server cancels the specified amount of the previous redemption and increments the amount to the card balance; the terminal prints a transaction receipt showing the updated balance. Tear off the receipt and hand it to the customer with their card. Touch **OK** to print a second receipt, or touch **CANCEL**.

Activation

Gift cards have no value and cannot be redeemed prior to activation. When you activate a card, you are adding funds to the card balance while the card's unique identification number is registered as valid on the DataCandy server. Cards may have a preset value or allow the purchaser to add funds in the amount of their choosing; the procedure is the same for both. Activating a card is a two-step process:

- Customer pays for the card's preset value or the amount they wish to load onto the card using cash, credit, or debit.
- The card is registered as active on the DataCandy server and the funds are added to the card's balance.

To activate a new gift card:

Using your POS, process the sale for the card's value or the funds to add to the card.

1. Touch the **Action** button on the main screen.



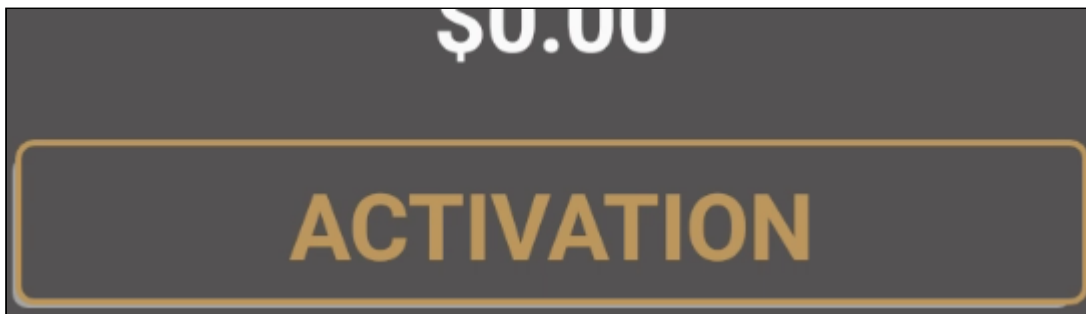
2. Touch **Transactions**.



3. Touch **Activation**.



4. Touch the number pad to enter the amount of funds to increment to the new card's balance.
5. Touch **Activation**.



NOTE: If you have configured password protection for transactions, you may need to enter the Admin or Merchant password to proceed; if required, enter the requested password and touch **OK**.

6. Swipe the customer's gift card.

You can also touch **GIFT CARD MANUAL ENTRY**, enter the Admin password, and then enter the card number and touch **OK**.



NOTE: If you have enabled password protection for manual card entry, you will need to enter the Merchant password to proceed; if required, enter the Merchant password and touch **OK**.

7. The authorization server activates the card and increments the balance; the terminal prints a transaction receipt showing the card balance. Tear off the receipt and hand it to the customer with their card. Touch **OK** to print a second receipt, or touch **CANCEL**.

Application Configuration

Application Configuration

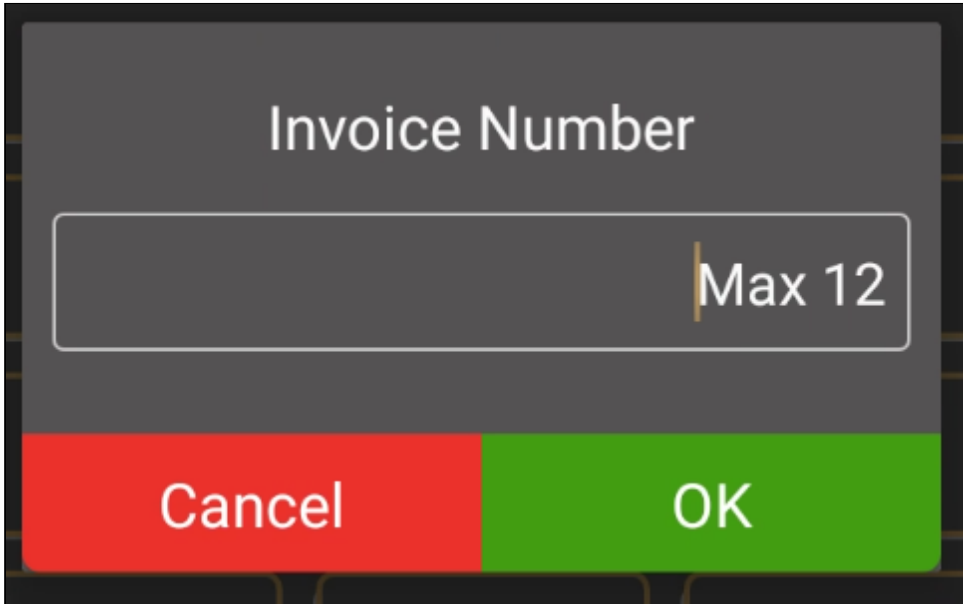
The PayFacto Gift application can run independently of the payment application running on your terminal or POS. If you are using PayFacto Gift as a standalone application, there are application and terminal settings you may want to configure to meet your business requirements.

These settings include:

- [Invoice Numbering](#)
- [DataCandy Settings](#)

Invoice Numbering

For bookkeeping purposes, transaction receipts (invoices) are numbered. The numbering can be done manually or automatically. By default, the terminal numbers the invoices automatically, in sequence. If you disable automatic invoice numbering, the terminal prompts the operator to manually input an invoice number (maximum of 12 numeric characters); you cannot process a redemption transaction without an invoice number.



To enable/disable automatic invoice numbering:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.

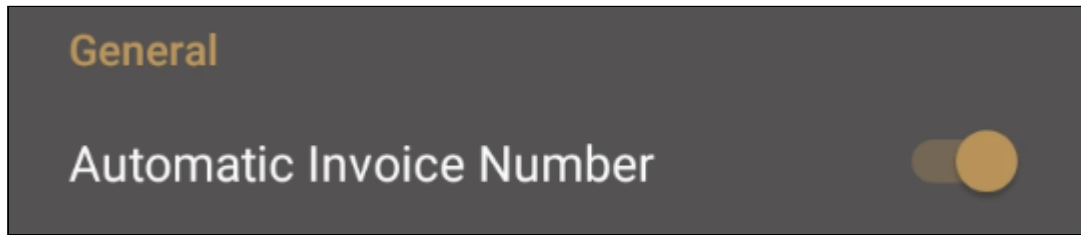


3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, toggle **Automatic Invoice Number** to **On** (to the right) to enable automatic invoice numbering or toggle to **Off** (to the left) to enter the invoice number manually for every redemption transaction.



5. Touch the **Back** icon to return to the main screen.



DataCandy Settings

The DataCandy Settings section of the Settings page are generally configured prior to delivery or as part of the application's setup process. They should not require modification. If your terminal is having problems communicating with the DataCandy server, you may need to adjust one or more of the fields contained in this section. Refer to the DataCandy email for the values.



NOTE: You should not change any of these fields unless instructed to do so by PayFacto or DataCandy support.

The available fields include:

- **Production URL:** Touch this toggle switch to **On** (to the right) to enable the terminal to communicate with the DataCandy server. When toggled to **Off** (to the left), the terminal cannot communicate with the DataCandy server.
- **URL:** The address of the DataCandy server.

- **WSN:** The WorkStation Number; a unique value for each terminal.
- **Merchant ID:** The information in this field should correspond to the Merchant ID sent to you by DataCandy. If the Merchant ID value does not match the one from in the DataCandy email, make the necessary corrections.
- **Merchant password:** The information in this field should correspond to the Merchant password sent to you by DataCandy. If the Merchant password value does not match the one from in the DataCandy email, make the necessary corrections.
- **Version:** This is a static value that should not be changed; it should always be 2010-01-06.
- **Access key:** The information in this field should correspond to the Access key sent to you by DataCandy. If the Access key value does not match the one from in the DataCandy email, make the necessary corrections.
- **App Version:** This field displays the current version of the Gift PayFacto powered by DataCandy app installed on the terminal; the field is read-only and cannot be modified.



IMPORTANT: Changing these fields to any value other than those provided by DataCandy or PayFacto will prevent your terminal from processing gift cards.

To change DataCandy settings:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



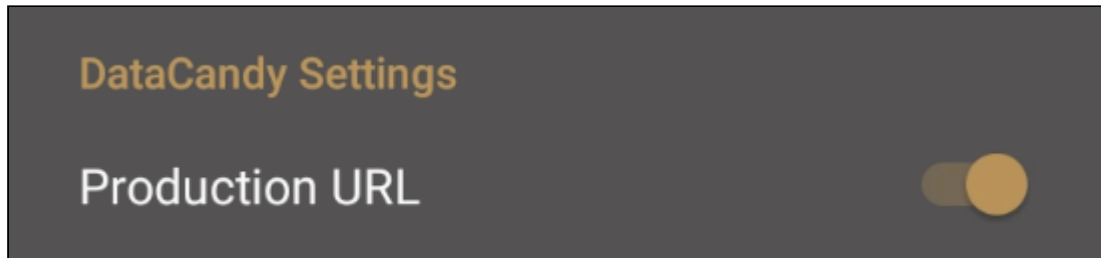
3. Enter the Merchant password and touch **OK**.



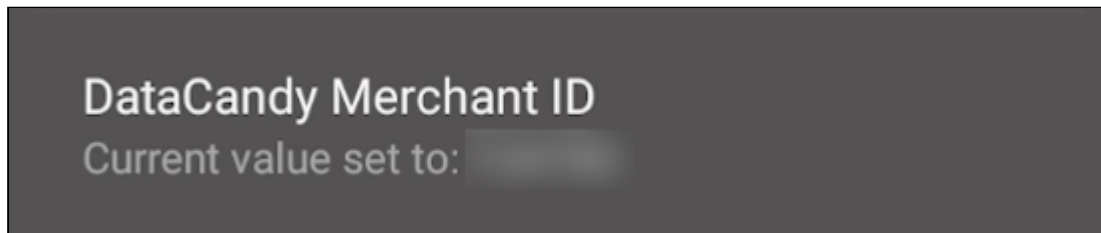
NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. Scroll to the **DataCandy Settings** section.

5. Confirm that the **Production URL** toggle switch is set to **On** (to the right).

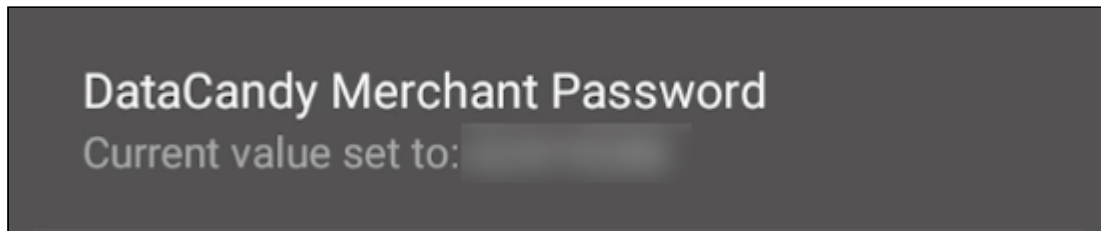


6. Confirm that the **DataCandy Merchant ID** field corresponds to the **Merchant ID** from the DataCandy communication you received.



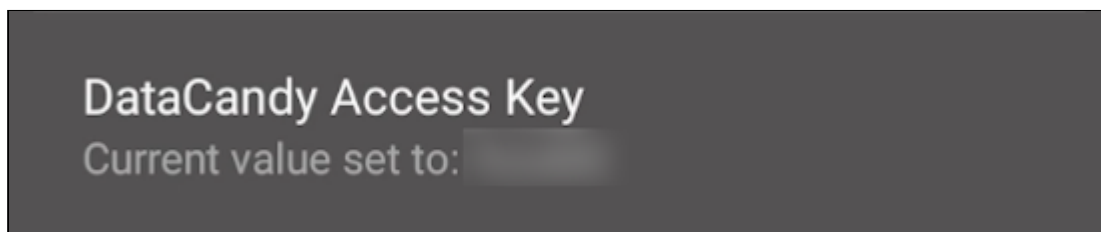
If the value is different, touch the field, enter the correct value, and touch **OK**.

7. Confirm that the **DataCandy Merchant password** field corresponds to the **Merchant password** from the DataCandy communication you received.



If the value is different, touch the field, enter the correct value, and touch **OK**.

8. Confirm that the **DataCandy Access key** field corresponds to the **Access key** from the DataCandy communication you received.



If the value is different, touch the field, enter the correct value, and touch **OK**.

9. Touch the **Back** icon to return to the main screen.



Operator Management

Operator Management

Gift cards are an easy method for restaurants to encourage guests to return. If your business employs wait staff that access the payment terminal, you can require each server to identify themselves and enter a password before completing a transaction; this ensures that no unauthorized individuals can use the terminal. The Gift PayFacto application refers to terminal operators as waiters. Operator management procedures include:

- [Enable Operators](#)
- [Add an Operator](#)
- [Change an Operator's Password](#)
- [Deleting Operators](#)
 - [Disable Operators](#)
 - [Delete Individual Operators](#)
 - [Delete All Operators](#)

Enable Operators

By default, any number of servers can operate the terminal, but you can require individual servers to identify themselves. When enabled, the terminal requires that individual servers enter their identification number and password prior to completing a transaction.



IMPORTANT: When you enable the use of waiters, you must add at least one waiter before you can process a transaction.

To enable waiters:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, toggle the **Enable waiters** button to **On** (to the right) to enable the identification of terminal operators for each gift card transaction.



5. Touch the **Back** icon to return to the main screen.



Add an Operator

When you enable the use of waiters, you need to add at least one waiter to the terminal. If you enable waiters on the terminal, but don't configure at least one waiter, the terminal will not allow you to process a transaction.



NOTE: If your business uses more than one payment terminal for gift cards, make sure to:

- * Activate the **Enable waiters** function on each terminal separately.

- * Configure the waiter identification credentials (numbers and passwords) on each terminal separately.

To add a waiter:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.

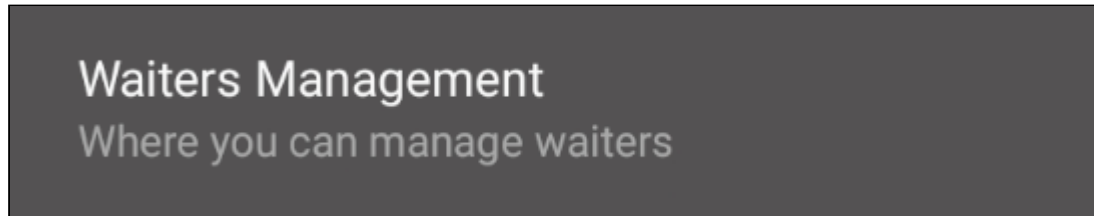


3. Enter the Merchant password and touch **OK**.

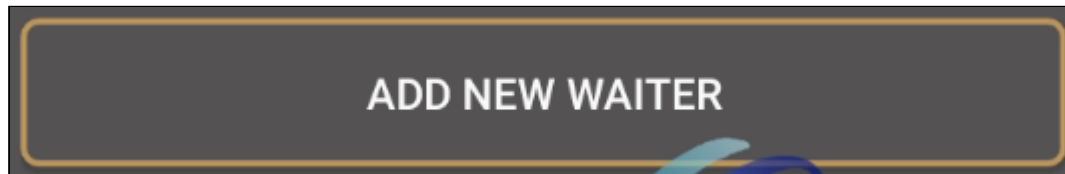


NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Waiters Management**.



5. Tap the **Add New Waiter** button.

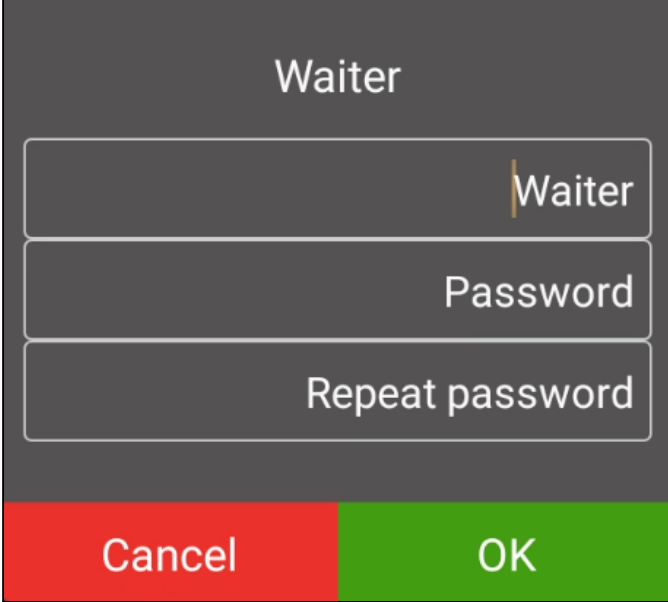


6. Enter the waiter's unique identification number in the **Waiter** field; numbers can range from 1 to 999.
7. Touch the **Password** field and enter the waiter's password.



NOTE: Passwords are numeric (numbers only) and 6 characters in length.

8. Touch the **Repeat password** field and re-enter the password to confirm.



A screenshot of a registration form titled "Waiter". It features three input fields: the first contains the text "Waiter", the second is labeled "Password", and the third is labeled "Repeat password". At the bottom, there are two buttons: a red "Cancel" button and a green "OK" button.

9. Touch **OK**. The new clerk ID appears in a list.



A screenshot of a list item for a clerk. It shows the ID "001" on the left, followed by a pencil icon for editing and a trash can icon for deletion.

10. Repeat steps 5 to 9 for each additional waiter you want to create.
11. Touch the **Back** icon to return to the main screen.



TIP: If a waiter forgets their password, you can use the Merchant or Administrator password as a workaround if you assigned Admin and Merchant passwords.

Change an Operator's Password

It is simple to change a waiter's password. You may need to change a password if an employee is assigned another employee's number, or you may want to change passwords on a recurring basis for terminal security.



NOTE: If your business uses more than one payment terminal for gift cards, make sure to change the waiter password on each terminal.

To change a waiter's password:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.

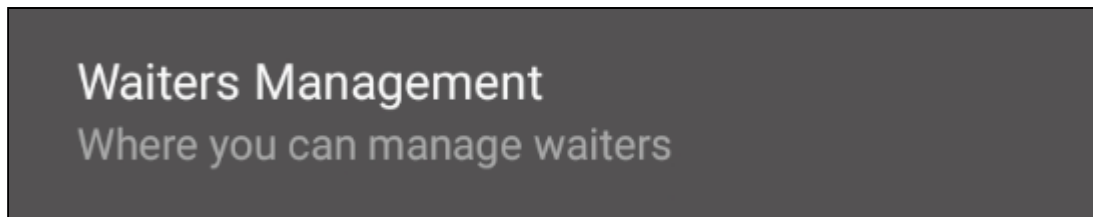


3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Waiters Management**.

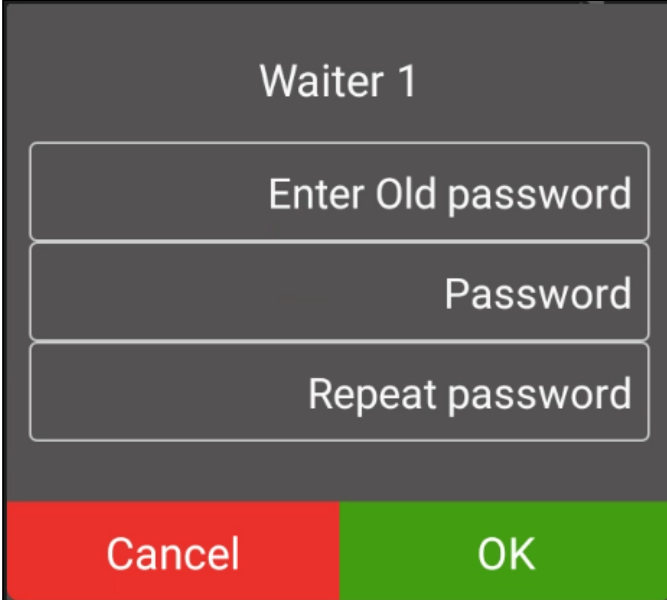


5. Locate the waiter whose password you want to change and touch the **Edit** (pencil) icon.



6. Enter the waiter's current password in the **Enter Old password** field.
7. Touch the **Password** field and enter a new password that is 4 to 6 characters in length.

8. Touch the **Repeat password** field and re-enter the new password to confirm.



9. Touch **OK**.
10. Touch the **Back** icon to return to the main screen.



Deleting Operators

You may want to remove the requirement for waiters to identify themselves. There are 3 ways to remove waiters from the terminal:

- [Disable waiter identification](#)
- [Delete individual waiters](#)
- [Delete all waiters](#)



IMPORTANT: If your business uses more than one terminal, you must disable or delete the waiter(s) from all terminals.

Disable Operators

If you choose to disable waiter identification, any waiters you have previously configured (including their passwords) will remain stored on the terminal but the terminal operators will not need to identify themselves before processing a gift card transaction.

To disable waiters:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Enable waiters** toggle button to disable (to the left) the identification of terminal operators.



5. Touch the **Back** icon to return to the main screen.



Delete Individual Operators

Deleting a single waiter only removes that clerk and the associated password from the terminal. All other waiters configured on the terminal remain operational.

To delete an individual waiter:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.

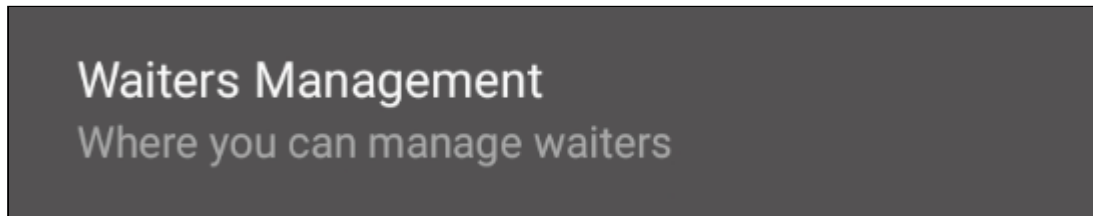


3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Waiters Management**.



5. Locate the waiter whose password you want to change and touch the **Delete** (trash can) icon.



6. Touch **OK** to confirm you want to delete the waiter.
7. Repeat steps 5 and 6 for each individual waiter you want to remove.
8. Touch the **Back** icon to return to the main screen.



Delete All Operators

If required, you can delete all existing waiters on the terminal at one time.



IMPORTANT: If you delete all waiters from the terminal, you must either disable waiter identification or add at least one new waiter before you can process any gift card transactions. Refer to the [Disable Waiter Identification](#) or [Add a Waiter](#) procedure for the appropriate information.

To delete all waiters on the terminal:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.

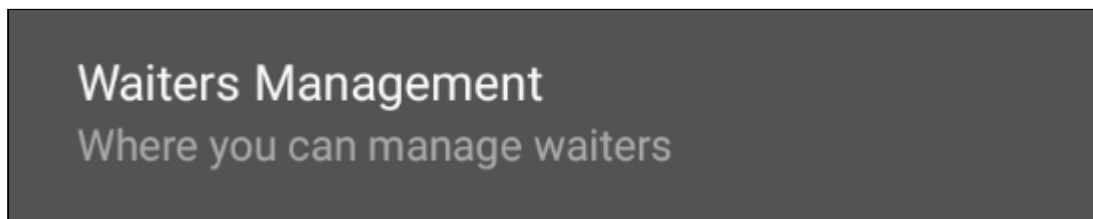


3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Waiters Management**.



5. Tap the **Delete All Waiter** button.



6. Touch **OK** to confirm you want to delete all the waiters from the terminal.

7. Touch the **Back** icon to return to the main screen.



Printing

Printing Options

If your terminal has a built-in printer, or connects to an external printer, there are several printing options you can enable in addition to the standard transaction receipts that support the different gift card transactions. The printing options you can configure include:

- [Configuring Transaction Printing Options](#)
- [Additional Printing Options](#)
- [Add Personalized Receipt Header](#)
- [Add Personalized Receipt Footer](#)
- [Edit Personalized Messages](#)
- [Deleting Personalized Messages](#)

Configuring Transaction Printing Options

By default, the terminal prints 2 receipts for all gift card transactions, with the Merchant copy printing first. You can adjust these settings to suit your business needs. The available transaction printing options are:

- Enabling or disabling the printing of receipts
- Enabling or disabling the printing of the merchant copy
- Color depth of the printout



IMPORTANT: It is strongly recommended that you do not disable the printing of transaction receipts, as customers need their receipt to know the balance of their gift card or to reverse a redemption.

To adjust the terminal's printing options:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Printer Options**.



Printer Options

5. In the **Copies** section, toggle **Receipt Copy Printouts** to **On** (to the right) to enable receipt printing or **Off** (to the left) to disable printing.

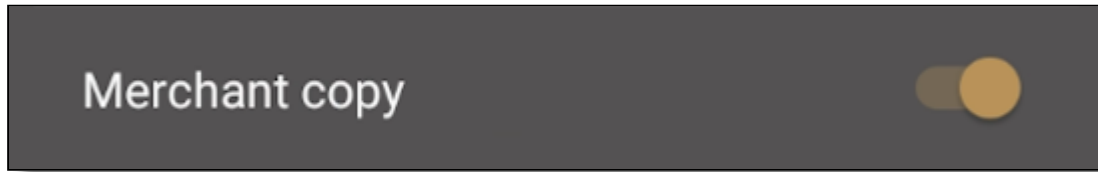
Copies

Receipt Copy Printouts



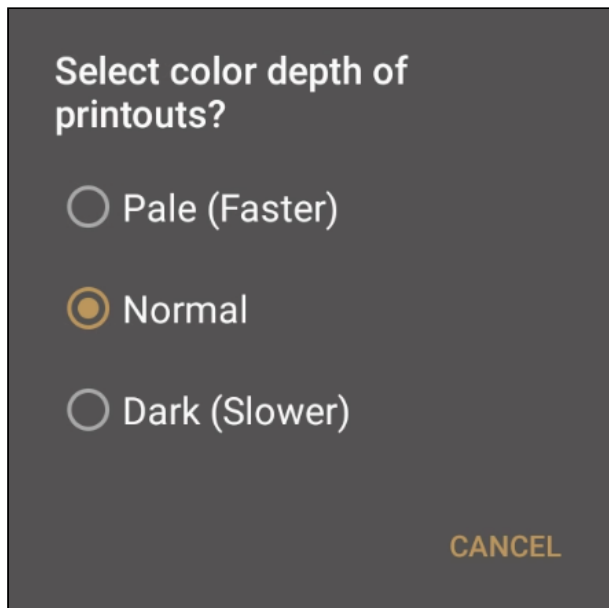
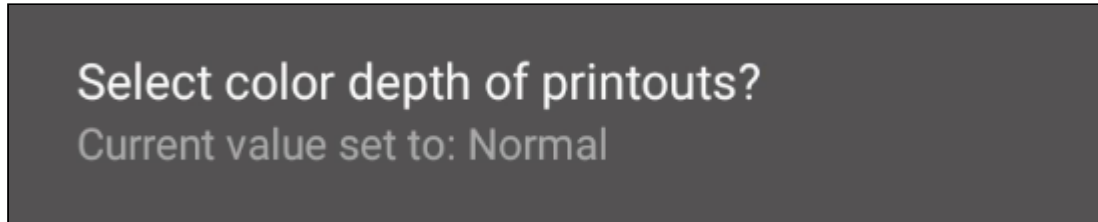
IMPORTANT! This toggle also controls the printing of the customer copy of the transaction receipt; if you disable this function, **no receipts are printed** (customer or merchant) and the customer has no record of their transaction, which prevents them from obtaining a refund (complete or partial cancel).

6. Toggle **Merchant copy** to **On** (to the right) to enable the printing of the merchant's copy of the transaction receipt. If you toggle **Merchant copy** to **Off** (to the left), the merchant copy of the transaction receipt will not print.



NOTE: If you disable the **Receipt Copy Printouts** toggle (step 5), the merchant copy will not print even if you toggle **Merchant copy** to **On**.

7. Touch **Select color depth of printouts** to set the color density of the receipts. The color depth and its associated printing speed affect a mobile terminal's battery life. The options are:
 - **Pale**: Lightest printout, prints faster and uses less battery.
 - **Normal**: Default printout setting, average printing speed and battery use.
 - **Dark**: Darkest printing, prints slower and uses more battery.



NOTE: If you disable the **Receipt Copy Printouts** toggle (step 5), the **Select color depth of printouts** is hidden and cannot be adjusted.

8. Touch the **Back** icon to return to the main screen.



Additional Printing Options

In addition to printing receipts for completed gift card transactions, you can configure the following terminal printer settings:

- **Print declined transactions:** Prints the transaction receipt when the transaction is declined
- **Print reverse on declined:** Prints the transaction result in white on a dark background for declined transactions
- **Print ECR mode transactions:** Uses the terminal's printer for payment transactions processed on a separate device (semi-integrated solutions).
- **Print second copy on ECR mode:** Uses the terminal's printer for the second copy of a transaction processed on a separate device (semi-integrated).

To enable/disable additional printing options:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



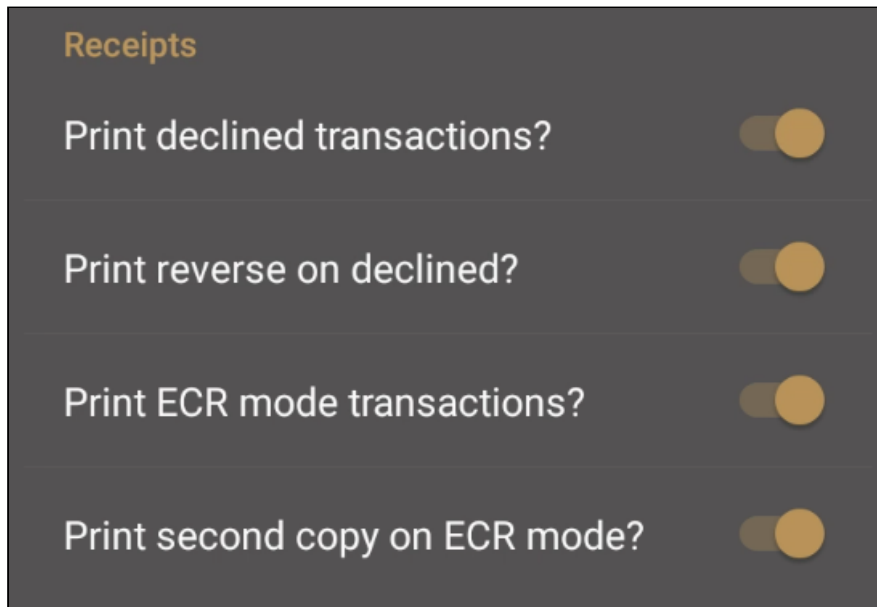
NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Printer Options**.



Printer Options

5. In the **Receipts** section, touch the toggle button to enable (to the right) or disable (to the left) printing for the declined and ECR mode printing options.



6. Touch the **Back** icon to return to the main screen.



Add Personalized Receipt Header

You can add your business information at the top of every printed receipt. Your business and contact information can contain up to 4 lines with 44 characters (including spaces) per line.



TIP: You should prepare your header information on a piece of paper in advance, to ensure that you have the correct number of characters per line.

To add a personalized message to your printed receipts:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Printer Options**.



Printer Options

5. Scroll down to the **Merchant header** section, toggle **Merchant header Printing** to **On** (to the right).

Merchant header

Merchant header Printing?



6. Touch **Merchant name** and enter the text for the merchant name in the text field that appears and touch **OK**.

Merchant name

Current value set to:

7. Touch **Merchant street address** and enter the text for the street address for your business in the text field that appears and touch **OK**.

Merchant street address
Current value set to:

8. Touch **Merchant city province** and enter the text for the city and province for your business in the text field that appears and touch **OK**.

Merchant city province
Current value set to:

9. Touch **Extra receipt** and enter any additional information (for example, the phone number) in the text field that appears and touch **OK**.

Extra receipt
Current value set to:

10. Touch the **Back** icon to return to the main screen.



NOTE: The header information appears on all printed receipts, the merchant copy as well as the customer copy.

Add Personalized Receipt Footer

You can add a personalized message at the bottom of every printed receipt. Your message can contain up to 4 lines with 44 characters (including spaces) per line.



TIP: You should prepare your header information on a piece of paper in advance, to ensure that you have the correct number of characters per line.

To add a personalized message to your printed receipts:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Printer Options**.



Printer Options

5. Scroll down to the **Footer** section, toggle **Footer Printing** to **On** (to the right).

Footer

Footer Printing?



 **DEBUG only**
Not for COMMERCIAL

6. Touch **Footer Line 1** and enter the text for the merchant name in the text field that appears and touch **OK**.

Footer Line 1

Current value set to:

7. If necessary, repeat step 6 for **Footer Line 2**, **Footer Line 3**, and **Footer Line 4** as required.
8. Touch the **Back** icon to return to the main screen.



NOTE: The header information appears on all printed receipts, the merchant copy as well as the customer copy.

Edit Personalized Messages

If you notice an error in your personalized header or footer, or you want to change some text in the message, you can easily edit your message. Repeat either the [Add Personalized Receipt Header](#) or the [Add Personalized Receipt Footer](#) procedure and adjust the text on the line(s) you want to modify.

Deleting Personalized Messages

You can easily remove your existing header or footer to enter a new one, or to leave the receipts blank.

To a delete the receipt header:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. In the **General** section, touch the **Printer Options**.



Printer Options

5. Scroll down to the **Merchant header** section.
6. Touch **Merchant header Value Reset**.

Merchant header Value Reset

The **Merchant name**, **Merchant street address**, **Merchant city province**, and **Extra receipt** fields are cleared.

7. Touch the **Back** icon to return to the main screen.



To a delete the receipt footer:

1. Touch the **Action** button on the main screen.

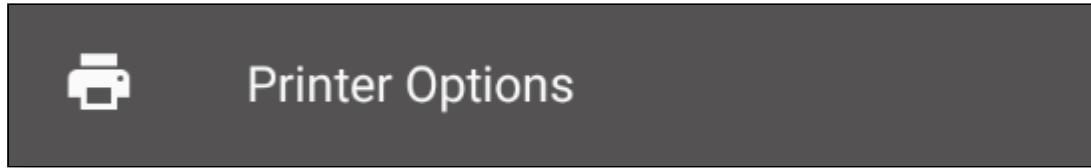


2. Touch **Settings**.

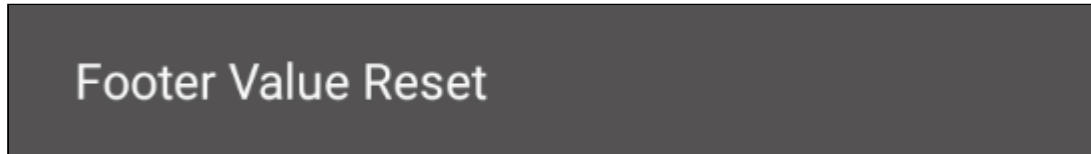


3. Enter the Admin password and touch **OK**.

4. In the **General** section, touch the **Printer Options**.



5. Scroll down to the **Footer** section.
6. Touch Footer **Value Reset**.



The **Footer Line 1**, **Footer Line 2**, **Footer Line 3**, and **Footer Line 4** are cleared.

7. Touch the **Back** icon to return to the main screen.



Passwords

Passwords

The Gift PayFacto application allows you to assign passwords to protect the terminal from unauthorized use. All terminal passwords are 6 digits (numbers only) in length to provide security without slowing down the overall time it takes to process a transaction.

The terminal has 3 types of passwords:

- **Administrator (Admin)**
- **Merchant**
- **Operator**

For more information on specific password procedures, click any of the following links:

- [Understanding Passwords](#)
- [Incorrect Password Entries](#)
- [Forgotten Passwords](#)
- [Setting Admin or Merchant Passwords](#)
- [Change an Operator's Password](#)
- [Change the Administrator Password](#)
- [Change the Merchant Password](#)
- [Password Protection for Transactions and Functions](#)
- [Require Password for Manual Gift Card Entry](#)

Understanding Passwords

The Gift PayFacto application uses Administrator and Merchant passwords to prevent unauthorized access to certain functions. As a fraud prevention method, you can also require the Administrator password when a transaction requires the manual entry of the gift card number rather than swiping the card.

Additionally, if you activate the **Enable waiters** function, each waiter will need to enter their unique password before they can perform a transaction. Refer to the [Operator Management](#) section for more information about the **Enable waiters** function.

Passwords in the Gift PayFacto application follow a hierarchy of user levels. A "higher" level password can activate a function (or replace a password) for a "lower" level user. For example, an operator can use the Merchant password to activate a password-protected sale, and the Administrator password can unlock functions that require a Merchant password. The password hierarchy is explained in the following table:

User Level	Description
Administrator	During the initial configuration, you had the opportunity to assign an Administrator password. The Administrator password can prevent unauthorized transactions and manual entry of card numbers. You can use the Administrator password for any function requiring a Merchant or Operator password.
Merchant	During initial configuration, you had the opportunity to assign a Merchant password. The merchant password can prevent unauthorized transactions and access the application's configuration parameters. You can use the Merchant password to carry out a transaction when the Operator password is required to process a sale.

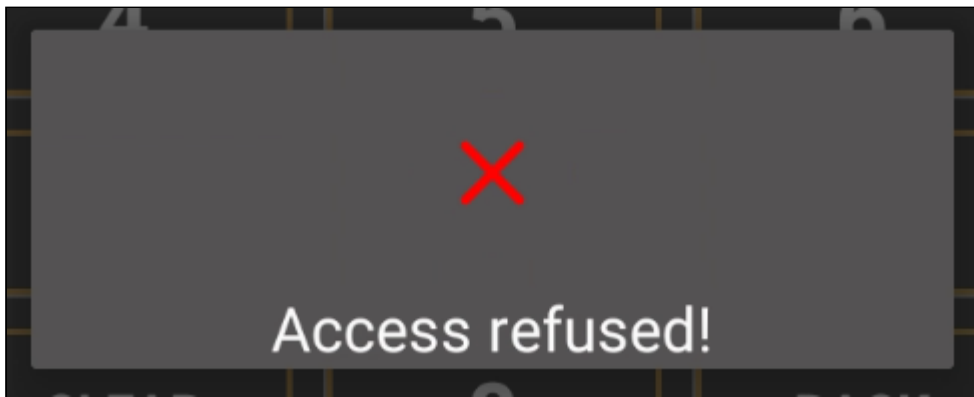
Operator	Assigned when you create one or more terminal operators. It can be activated to protect against unauthorized sales when associated with the operator ID.
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IMPORTANT! If you wish to set up a Merchant password, you must also assign an Administrator password. The merchant password cannot exist without a "higher" password as a recovery option, in this case the administrator password.

Incorrect Password Entries

If you enter a password incorrectly, the terminal displays an Access refused error message. The **Password** field reappears, prompting you for the required password with a number in parenthesis, which represents the number of tries remaining before the terminal locks out the user profile. An operator has 5 attempts to enter the password correctly; the counter resets after the password is entered correctly. If you incorrectly enter a password 5 times, the terminal locks and requires that you contact Technical Support to obtain a Superuser password.



Forgotten Passwords

If you have forgotten the Administrator password, the reset procedure requires that you contact Technical Support to obtain a Superuser password. To obtain support 24/7, contact PayFacto at 1-888-800-6622

Setting Admin or Merchant Passwords

Before using the terminal, you had the opportunity to assign an Administrator password during the initial configuration (if you are a new merchant using version 1.06.09, you also had the opportunity to assign a Merchant password). If you did not assign an Administrator or Merchant password during initial configuration, or if your merchant account was configured without a password, you can add a level of application security by assigning an Admin and/or Merchant password.



IMPORTANT! If you wish to assign a merchant password, you must also assign an administrator password. The merchant password cannot exist without the administrator password. Please refer to [Understanding Passwords](#) for more information.

Set an Administrator Password

To set an Administrator password:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. Scroll to the **Passwords** section, touch **Passwords**.

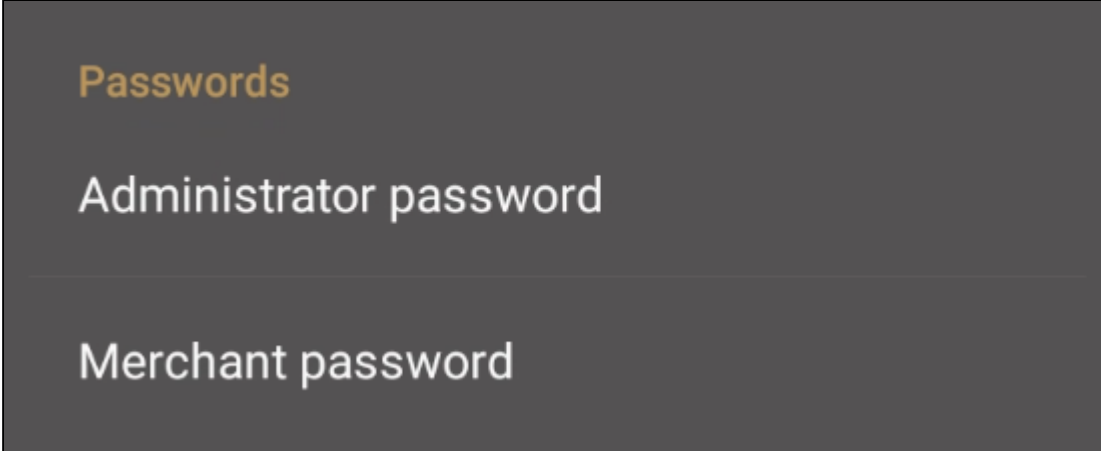


5. Enter the Admin password and touch **OK**.



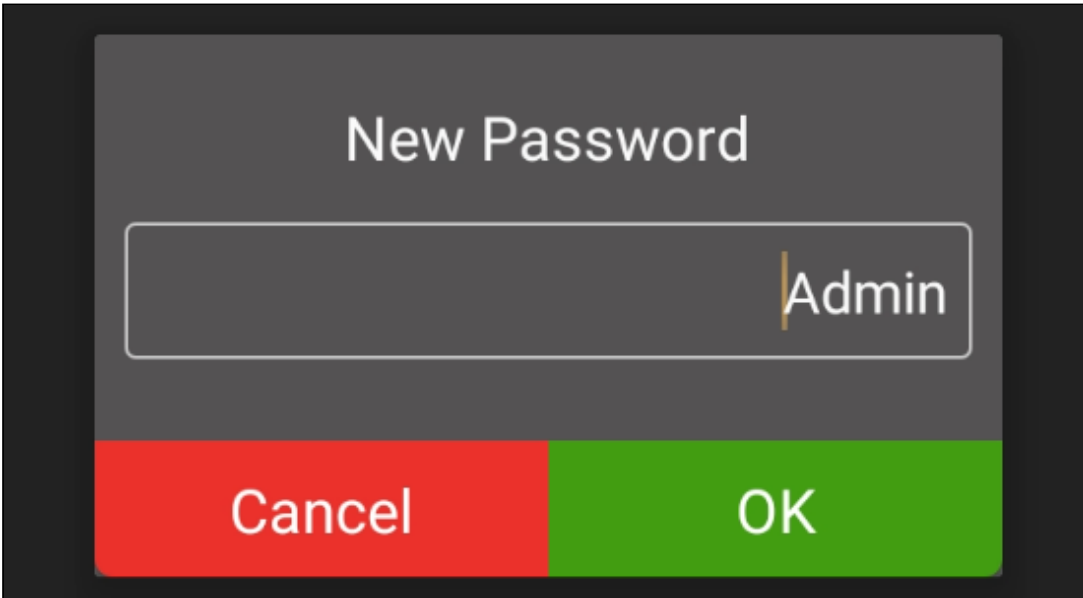
NOTE: If you have not previously set an Admin password, you are not prompted to enter the Admin password; the *Passwords* page appears.

6. Touch **Administrator password**.



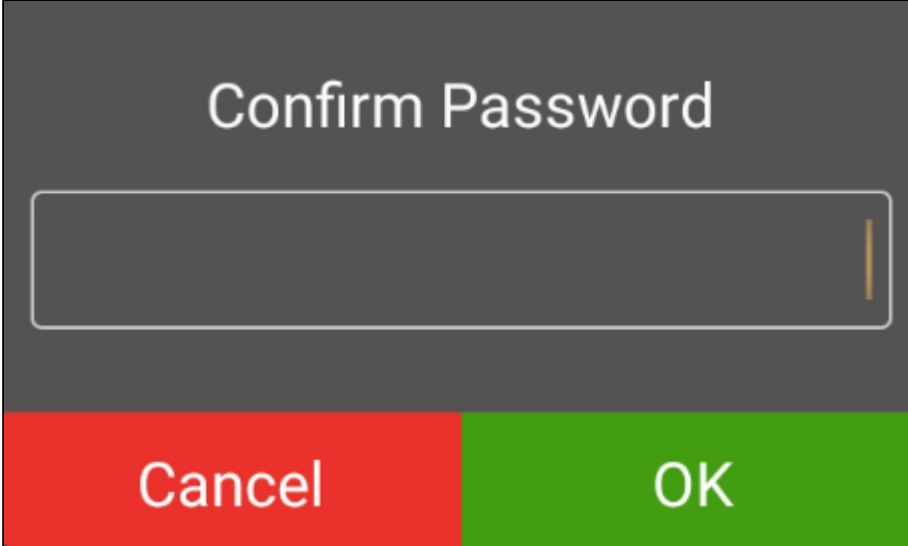
A screenshot of a mobile application screen titled "Passwords" in orange text. Below the title, there are two options: "Administrator password" and "Merchant password", both in white text. The "Administrator password" option is highlighted with a white border.

7. In the *New Password* screen, enter the new Admin password in the **Admin** field and touch OK.

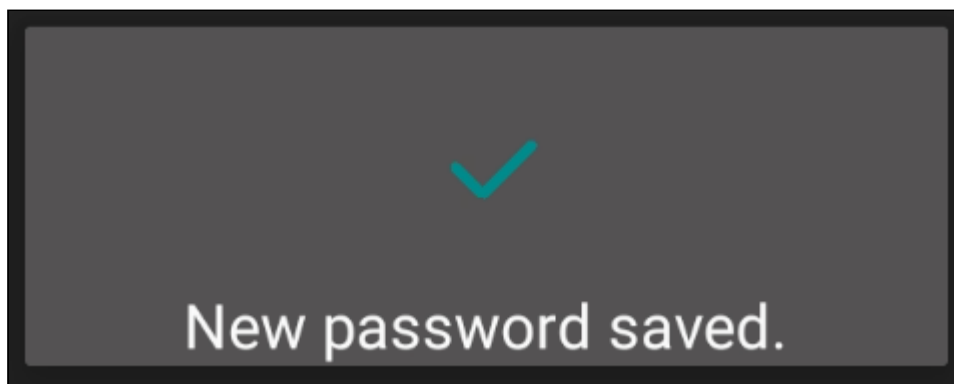


A screenshot of a mobile application screen titled "New Password" in white text. Below the title, there is a text input field with a white border. The word "Admin" is entered in the field, and a vertical orange cursor is positioned at the end of the text. At the bottom of the screen, there are two buttons: a red "Cancel" button and a green "OK" button, both in white text.

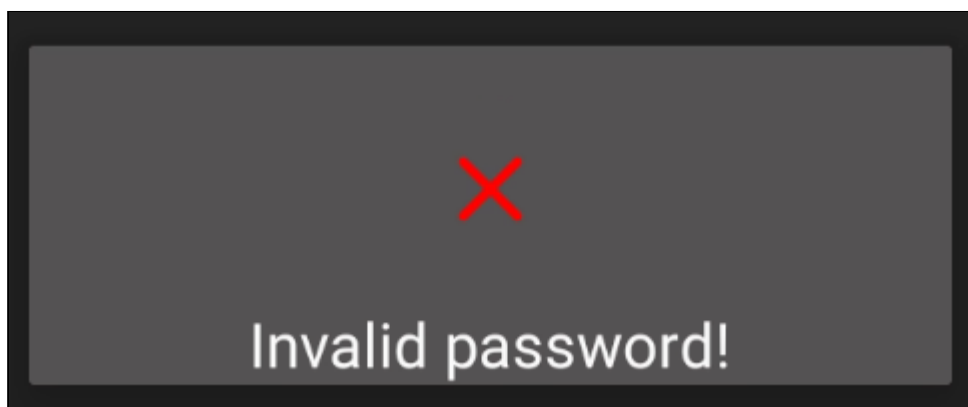
8. Re-enter the Admin password in the *Confirm Password* screen and touch **OK**.

A screenshot of the 'Confirm Password' screen. It has a dark gray background. At the top, the text 'Confirm Password' is displayed in white. Below the text is a white rectangular password input field with a thin gray border. At the bottom of the screen, there are two buttons: a red button on the left labeled 'Cancel' in white text, and a green button on the right labeled 'OK' in white text.

9. If the passwords match, the terminal displays **New password saved** and returns to the *Settings* page.



If the passwords do not match, the terminal displays **Invalid password** and returns to the *Settings* page without changing the Administrator password.



10. Touch the **Back** icon to return to the main screen.



Set a Merchant Password

To set a Merchant password:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



NOTE: If you have previously set an Administrator password, you are prompted to enter it before proceeding to the application settings. If you have not set an Administrator or merchant password, you are not prompted.

3. Scroll to the **Passwords** section, touch **Passwords**.

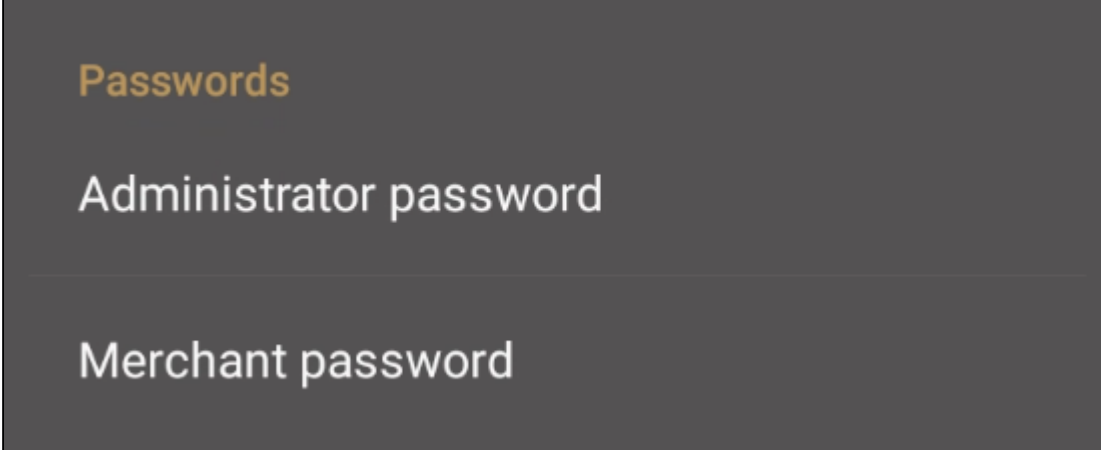


4. Enter the Admin password and touch **OK**.



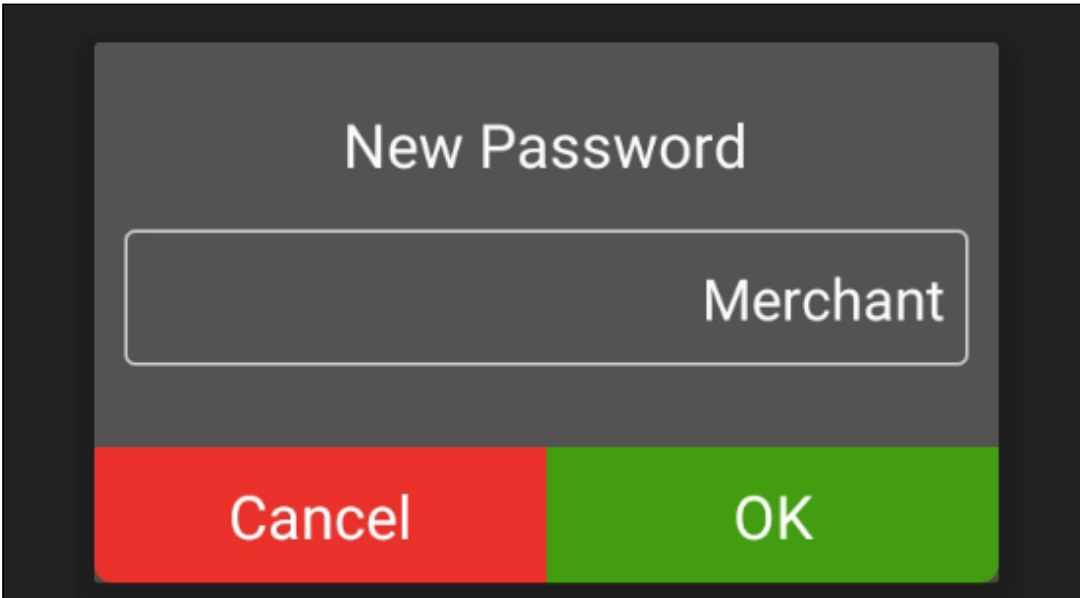
NOTE: If you have not previously set an Admin password, you are not prompted to enter the Admin password; the *Passwords* page appears.

5. Touch **Merchant password**.



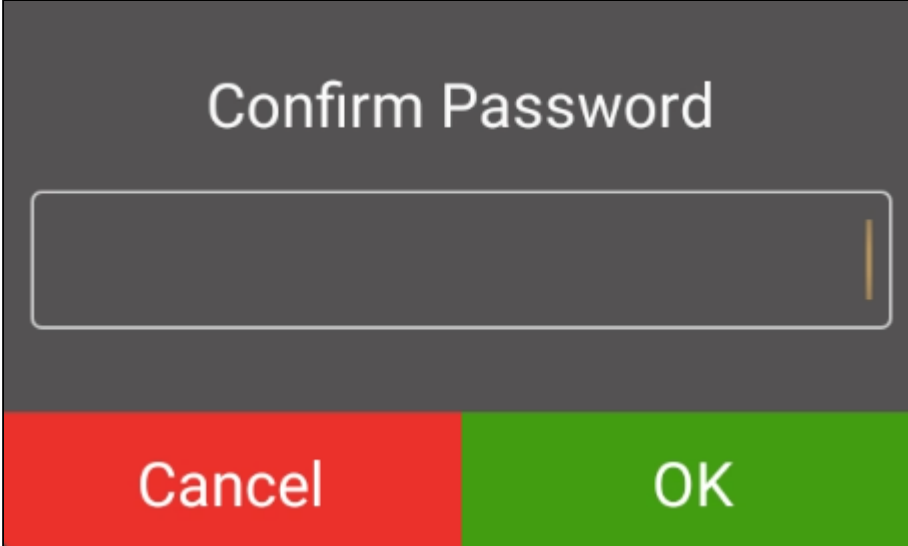
A screenshot of a mobile application screen titled "Passwords" in orange text. The screen has a dark gray background and contains two white text labels: "Administrator password" and "Merchant password". A horizontal line separates the two labels.

6. In the *New Password* screen, enter the new Merchant password in the **Merchant** field and touch OK.

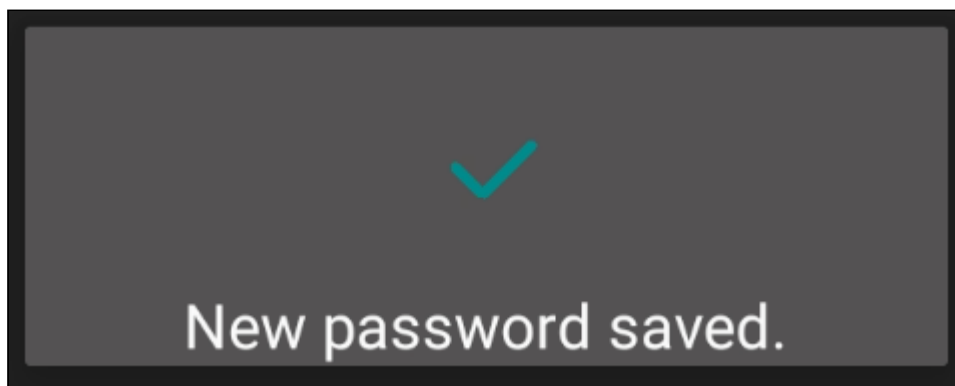


A screenshot of a mobile application screen titled "New Password" in white text. The screen has a dark gray background. Below the title is a white rectangular input field with the word "Merchant" in white text. At the bottom of the screen are two buttons: a red "Cancel" button and a green "OK" button.

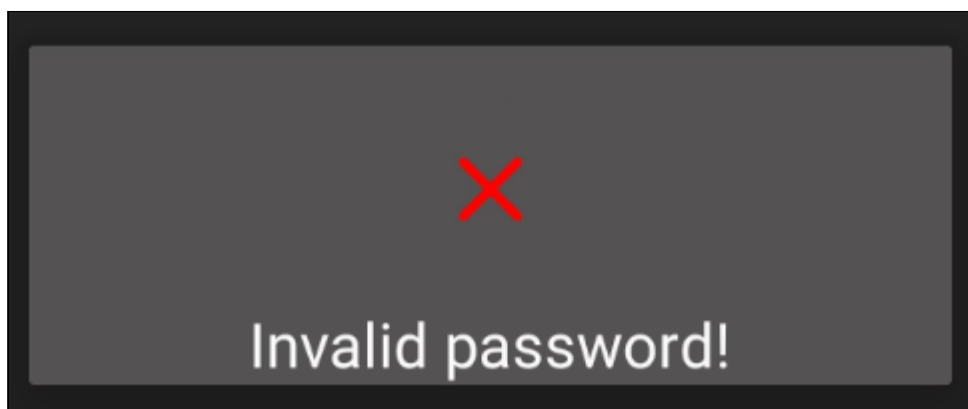
7. Re-enter the Merchant password in the *Confirm Password* screen and touch **OK**.

A screenshot of the 'Confirm Password' screen. It has a dark gray background. At the top, the text 'Confirm Password' is displayed in white. Below the text is a white rectangular password input field with a small orange cursor on the right side. At the bottom, there are two buttons: a red button on the left labeled 'Cancel' in white text, and a green button on the right labeled 'OK' in white text.

8. If the passwords match, the terminal displays **New password saved** and returns to the *Settings* page.



If the passwords do not match, the terminal displays **Invalid password** and returns to the *Settings* page without changing the Administrator password.



9. Touch the **Back** icon to return to the main screen.



Change an Operator's Password

It is simple to change a waiter's password. You may need to change a password if an employee is assigned another employee's number, or you may want to change passwords on a recurring basis for terminal security.



NOTE: If your business uses more than one payment terminal for gift cards, make sure to change the waiter password on each terminal.

To change a waiter's password:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

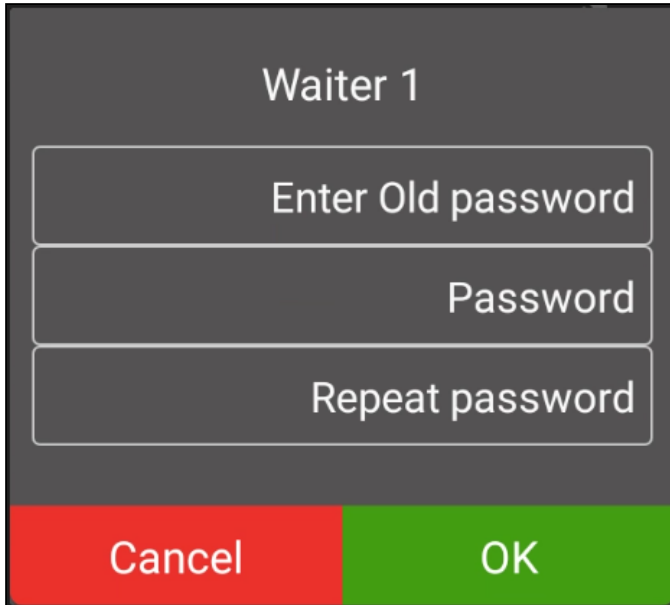
4. In the **General** section, touch the **Waiters Management**.

Waiters Management
Where you can manage waiters

5. Locate the waiter whose password you want to change and touch the **Edit** (pencil) icon.



6. Enter the waiter's current password in the **Enter Old password** field.
7. Touch the **Password** field and enter a new password that is 4 to 6 characters in length.
8. Touch the **Repeat password** field and re-enter the new password to confirm.



9. Touch **OK**.
10. Touch the **Back** icon to return to the main screen.



Change the Administrator Password

Before using the terminal, you had the opportunity to assign an Administrator password during the initial configuration. The Administrator password provides access to advanced terminal functions and can also enable password-protected operations. You can change the Administrator password whenever you feel it necessary.



NOTE: If you did not assign an Administrator password during initial configuration, or if your merchant account was configured without a password, you need to assign a password before you can change it. Please refer to

the [Setting Admin or Merchant Passwords](#) procedure for information on how to assign an Administrator or Merchant password.

To change the Administrator password:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. Scroll to the **Passwords** section, touch **Passwords**.

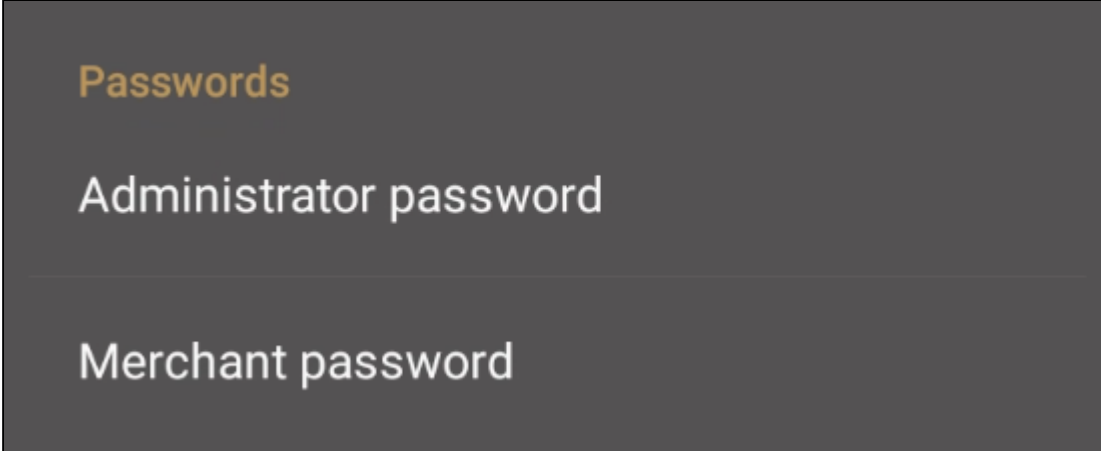


5. Enter the Admin password and touch **OK**.



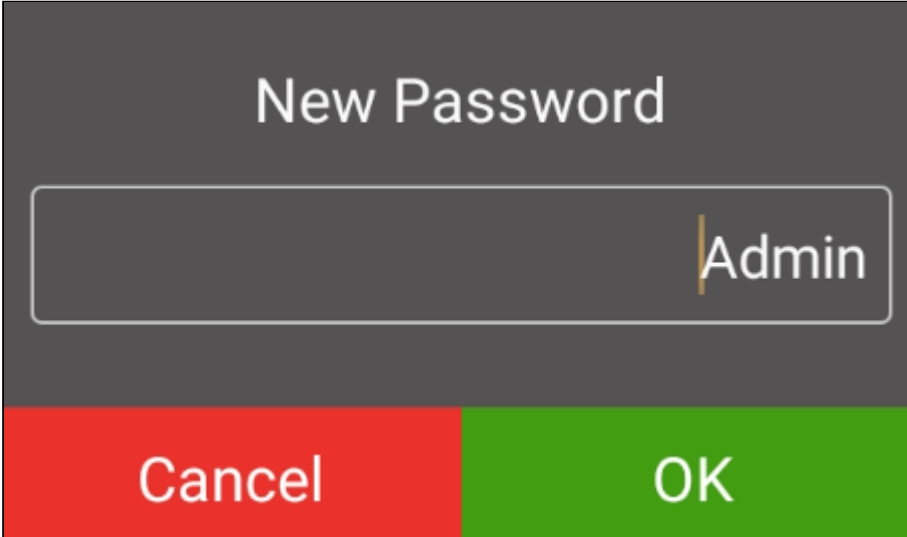
NOTE: If you have not previously set an Admin password, you are not prompted to enter the Admin password; the *Passwords* page appears.

6. Touch **Administrator password**.



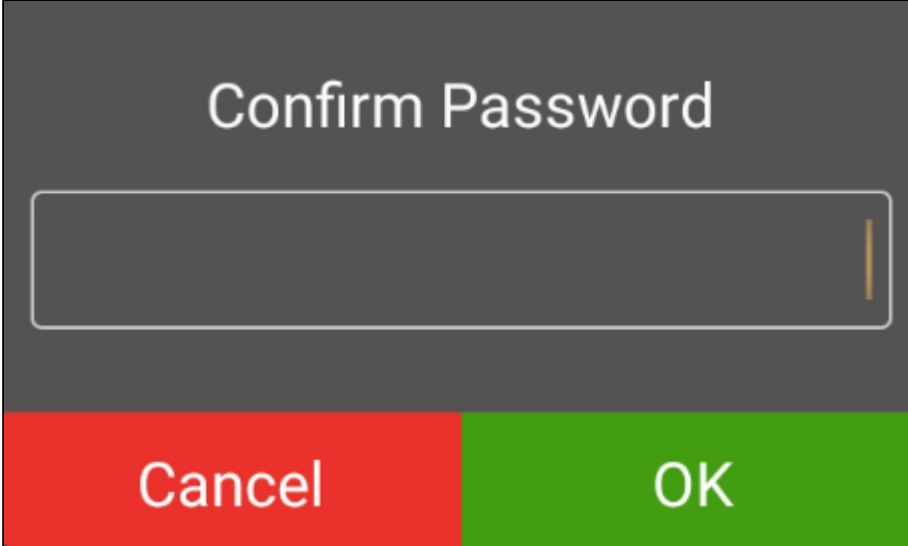
A screenshot of a dark gray screen titled "Passwords" in orange text. Below the title, there are two white text labels: "Administrator password" and "Merchant password", separated by a horizontal line.

7. Enter the current **Merchant** password and touch **OK**.
8. Enter the new, 6-character password in the **New Password** field and touch **OK**.

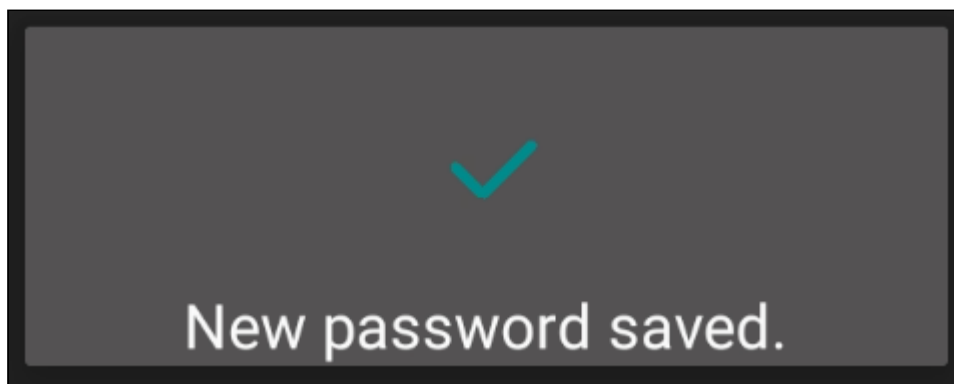


A screenshot of a dark gray screen titled "New Password" in white text. Below the title is a white rectangular input field containing the text "Admin" with a vertical cursor. At the bottom of the screen are two buttons: a red "Cancel" button and a green "OK" button.

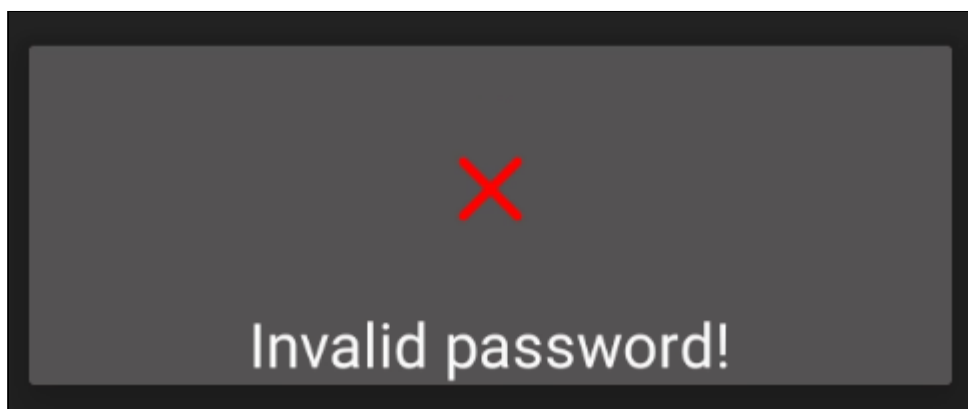
9. Re-enter the new password in the **Confirm Password** field and touch **OK**.

A screenshot of a mobile application screen titled "Confirm Password". It features a large, empty rectangular input field for password entry. Below the input field, there are two buttons: a red "Cancel" button on the left and a green "OK" button on the right.

10. If the passwords match, the terminal displays **New password saved** and returns to the *Settings* page.



If the passwords do not match, the terminal displays **Invalid password** and returns to the *Settings* page without changing the Administrator password.



11. Touch the **Back** icon to return to the main screen.



IMPORTANT: Do not forget the new Administrator password; the only way to reset it is to contact the technical support team.

Change the Merchant Password

As of version 1.06.09, the Gift PayFacto application includes a Merchant password to provide additional transaction security and offer flexibility in who can process gift card transactions. If you are a new merchant, using Gift PayFacto for the first time, you had the opportunity to assign an Administrator password during the initial configuration.

If you were using the Gift PayFacto application prior to version 1.06.09, the Merchant password is a new feature you can use to control who can process gift card transactions.

The Merchant password provides access to application configuration and can also enable password-protected operations. You can change the Merchant password whenever you feel it necessary.



NOTE: If you are a new Gift PayFacto user and you did not assign a Merchant password during initial configuration, or if you are an existing Gift PayFacto user and want to assign a new Merchant password, refer to the [Setting Admin or Merchant Passwords](#) procedure for how to assign a Merchant password before you can change it.

To change the Merchant password:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. Scroll to the **Passwords** section, touch **Passwords**.

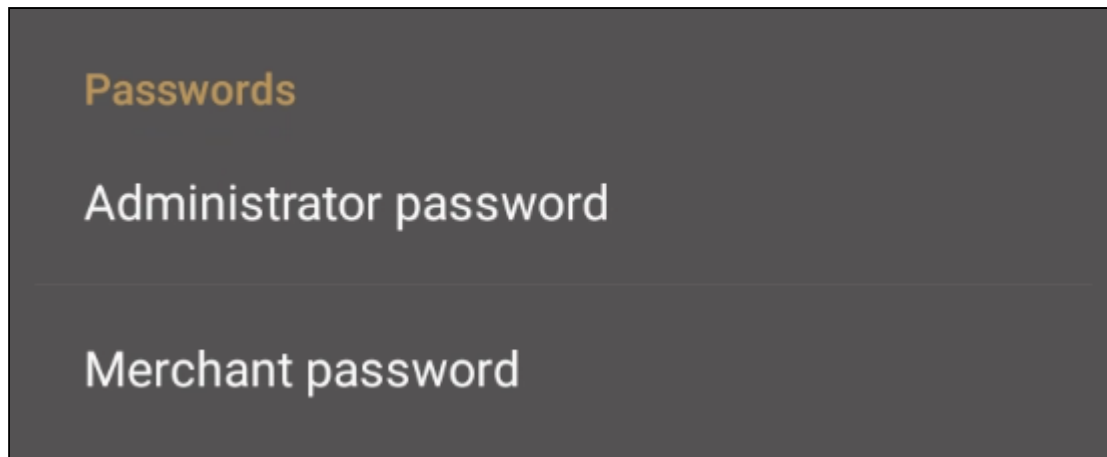


5. Enter the Admin password and touch **OK**.



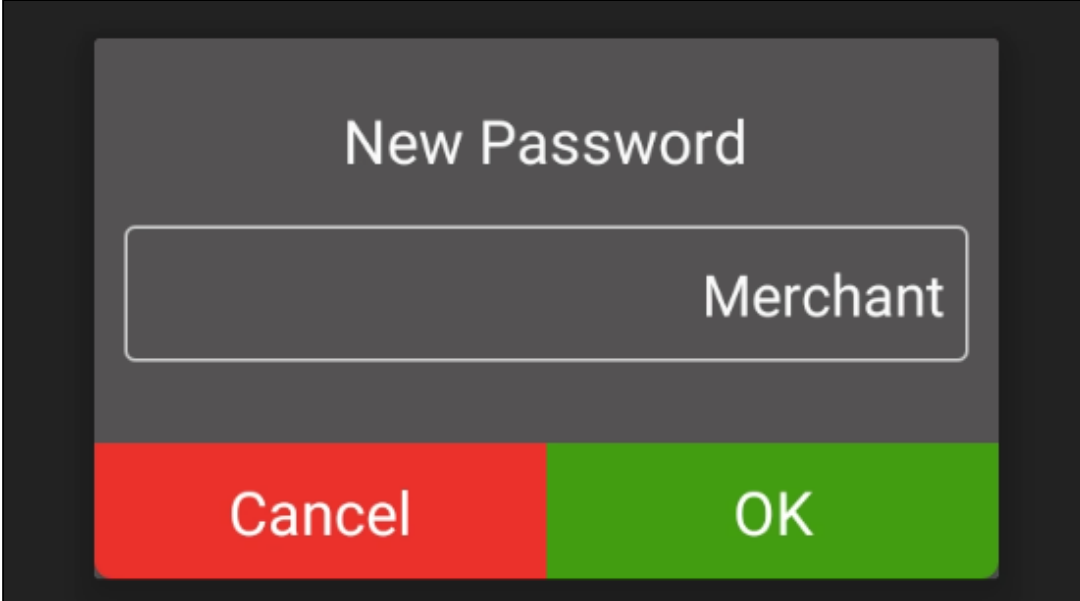
NOTE: If you have not previously set an Admin password, you are not prompted to enter the Admin password; the *Passwords* page appears.

6. Touch **Merchant password**.

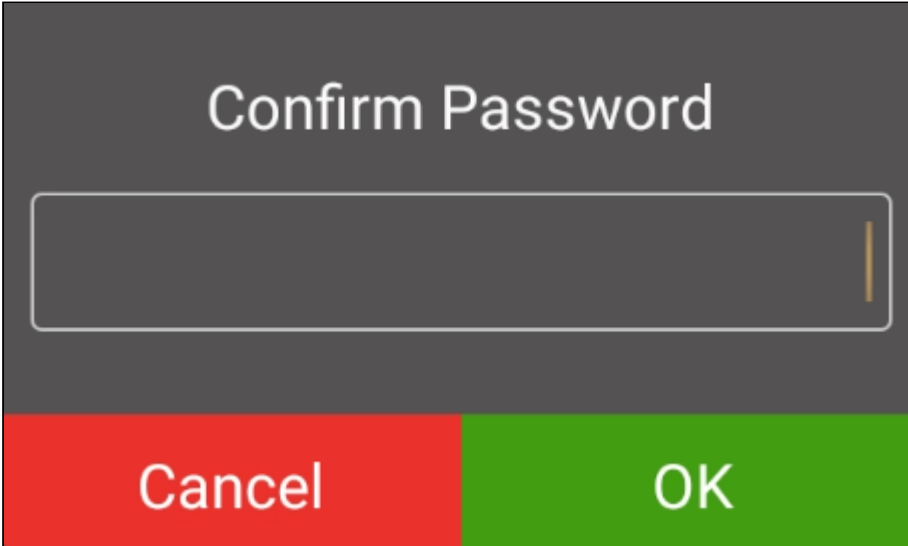


7. Enter the current **Admin** password and touch **OK**.

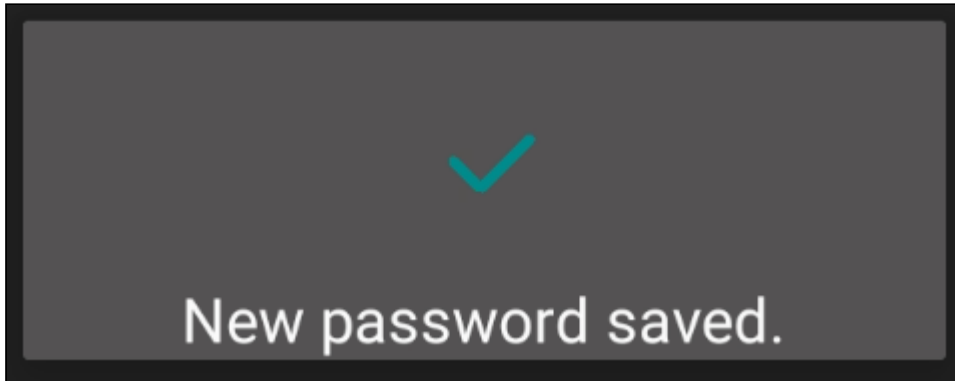
8. Enter the new, 6-character password in the **New Password** field and touch **OK**.

A screenshot of a mobile application screen titled "New Password". It features a large, empty rectangular input field with a light gray border. The word "Merchant" is displayed in the bottom right corner of this field. Below the input field, there are two buttons: a red button labeled "Cancel" on the left and a green button labeled "OK" on the right.

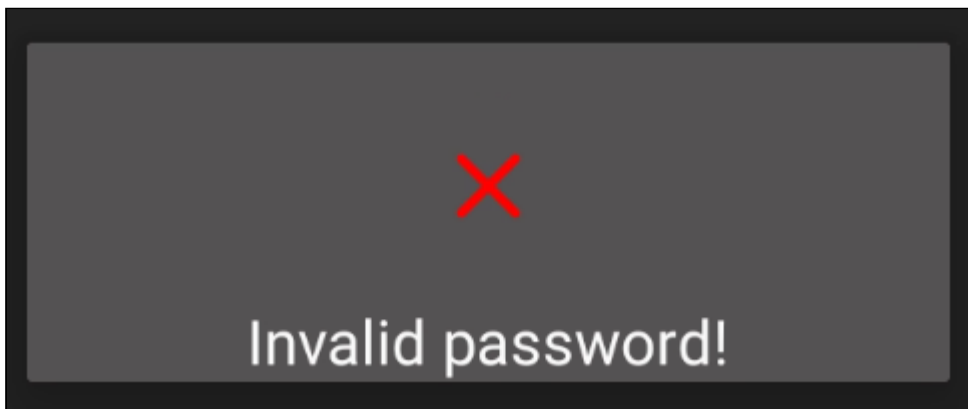
9. Re-enter the new password in the **Confirm Password** field and touch **OK**.

A screenshot of a mobile application screen titled "Confirm Password". It features a large, empty rectangular input field with a light gray border. Below the input field, there are two buttons: a red button labeled "Cancel" on the left and a green button labeled "OK" on the right.

10. If the passwords match, the terminal displays **New password saved** and returns to the *Settings* page.



If the passwords do not match, the terminal displays **Invalid password** and returns to the *Settings* page without changing the Administrator password.



11. Touch the **Back** icon to return to the main screen.



IMPORTANT: Do not forget the new Merchant password; the only way to reset it is to use the Admin password.

Password Protection for Transactions and Functions

As a security measure, you can password protect gift card transactions and exiting the application with either the Admin or Merchant password (or choose to not use a password). The transactions you can password protect are:

- [Activation](#)
- [Increment](#)
- [Partial Cancel](#)
- [Complete Cancel](#)

The [Balance](#) and [Empty Card](#) transactions do not require any password protection because the risk exposure of unauthorized users is limited to less than \$5.00 (empty card), whereas the other transactions can carry a greater risk of fraud in performed by unauthorized users.

To protect transactions or application exit with a password (or remove password protection):

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. Scroll to the **Passwords** section, touch **Passwords**.

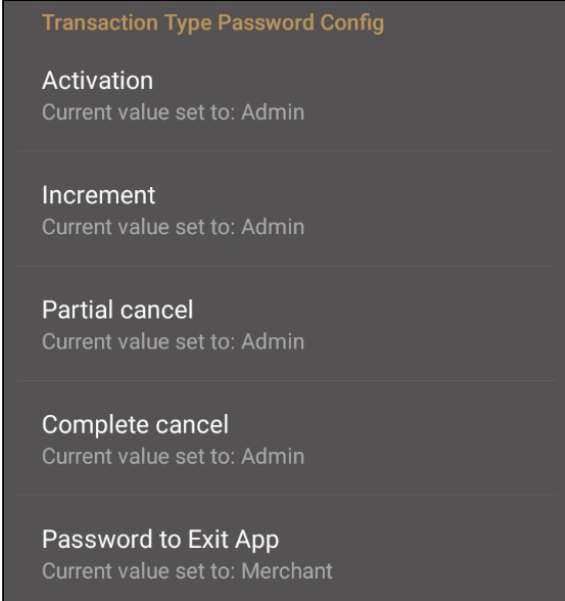


5. Enter the Admin password and touch **OK**.



NOTE: If you have not previously set an Admin password, you are not prompted to enter the Admin password; the *Passwords* page appears.

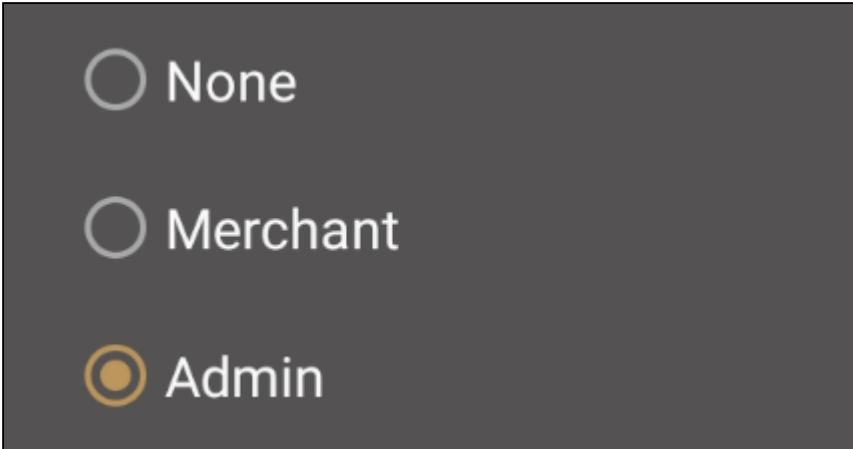
6. Scroll to the **Transaction Type Password Config** section.



The screen displays the 'Transaction Type Password Config' section with five rows, each containing a label and its current value:

Label	Current value set to:
Activation	Admin
Increment	Admin
Partial cancel	Admin
Complete cancel	Admin
Password to Exit App	Merchant

7. For each transaction type or application exit, touch the desired line and select the password to use:
- **None**
 - **Merchant**
 - **Admin**



The screen shows three radio button options for password selection:

- ☐ None
- ☐ Merchant
- ☒ Admin

8. Touch the **Back** icon to return to the main screen.



Require Password for Manual Gift Card Entry

The magnetic stripe on gift cards can be damaged and become unreadable by the terminal. In such situations, the card number can be entered manually using the terminal's number pad. Be aware that manual entry of card numbers is

susceptible to fraud, so it is strongly recommended to enable the feature requiring the Administrator password prior to manually entering a card number.



NOTE: This security feature is enabled by default.

To enable/disable password protection for manual card entry:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.

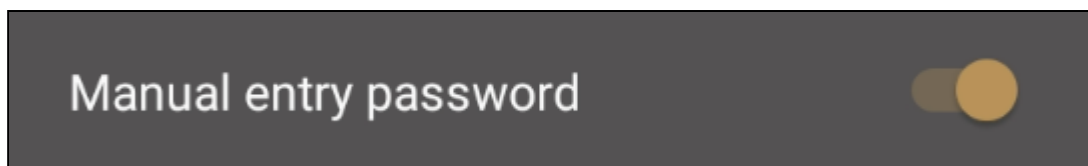


3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears.

4. In the **General** section, touch the **Manual entry password** toggle button to enable (to the right) or disable (to the left) password protection for manual card number entry.



5. Touch the **Back** icon to return to the main screen.



Reporting

Reports

The Gift PayFacto application includes reporting functionality. For more information on gift card reporting, refer to the following topics:

- [About Reporting](#)
- [View a Report](#)

About Reporting

The terminal can print reports, allowing you to view detailed or summary information on the day's gift card transactions. You can print reports to view information on gift card transactions by employee or for the overall merchant account. Report data comes from the DataCandy server.



IMPORTANT: Gift card reports are based on the current day's transactions. If you do not print a report for a specific day, you will not be able to print the previous day's report the next day.

The available reports include:

- **Daily detail report by employee:** Prints a detailed report of all the day's gift card transactions, separated by employee.
- **Daily summary report by employee:** Prints a summary report of the day's different types of gift card transactions, separated by employee.
- **Daily summary report by merchant:** Prints a summary report of the day's various types of gift card transactions for the merchant account.

View a Report

Regardless of the report you want to view, the procedure is the same. Viewing the detailed report for the current batch of transactions allows you to see each individual transaction's details and allows you to reprint or void the transaction if desired.

To view a detailed list of transactions for the current batch:

1. Touch the **Action** button on the main screen.



2. Touch **Settings**.



3. Enter the Merchant password and touch **OK**.



NOTE: If you have not previously set a Merchant password, you are not prompted to enter the Merchant password; the application settings page appears. If you have set an Administrator password, you need to enter it before you can access the application settings.

4. The selected report appears on the terminal screen. In the **Details and summary reports** section, touch the report you want to view:
 - **Daily detail report by employee**
 - **Daily summary report by employee**
 - **Daily summary report by merchant**



The selected report appears on the terminal screen.

5. Touch the **Back** icon to return to the main screen.

