

# POS Installation Form

**POS Software-Install form required only for merchants using the following POS Software**

Software	Version	Supported Programs
<b>POSitouch</b>	v5.27 to v5.29	Gift Only - Gift Processor supported and installed
<b>Aloha</b>	V5.2.73 to v.6.0; w/IBER (v 5.25.100-5.2.7.140 N/A) (All FOH terminals must be running Microsoft Windows 2000 or newer OS)	Gift / Loyalty - Gift Processor supported and installed
<b>Aloha</b>	V5.2.5.12 to v5.2.72 w/IBER <b>NO COMP</b> (BOH & all FOH terminals must be running Microsoft Windows 2000 or newer OS)	Gift Only - Gift Processor supported and installed
<b>CDX-32</b> (windows application)	Windows NT or Newer	Gift / Loyalty – Gift Processor supported and installed <i>Please submit CDX-32 setup sheet</i> <i>Install fee 25.00 per location.</i>

**PLEASE COMPLETE THE FOLLOWING & SUBMIT WITH EACH LOCATIONS GIFT CARD APPLICATION**  
**POS WORKSHEET IS NEEDED PER LOCATION**

• **Business information**

Merchant Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact Email: \_\_\_\_\_

Business Days and Hours of Operation: \_\_\_\_\_ Install Date: \_\_\_\_\_

Time Zone (check one)  Eastern  Central  Mountain  Pacific

• **POS Setup Parameters**

Local POS Dealer Support number: \_\_\_\_\_ Contact: \_\_\_\_\_

POS Type (Select One):  Aloha **Version=** \_\_\_\_\_ (Table Service- ATS only)  Positouch\* **Version=** \_\_\_\_\_

# of Terminals/Stations: \_\_\_\_\_ \*Credit Card Modem Software: \_\_\_\_\_

Software Connection type (Select One):  Dial-Up  TCP-IP/High Speed

If using a firewall what comport will be assigned for communication to the host? Port out: \_\_\_\_\_ Port in: \_\_\_\_\_

• **PC Anywhere/Dial Term login information**

PC Anywhere Connection Type (Select One):  Dial-up  TCP-IP/High Speed

If Dial-up, what is the connection phone number? \_\_\_\_\_

If TCP-IP/High Speed, what is the connection IP address? \_\_\_\_\_

Username: \_\_\_\_\_ Password: \_\_\_\_\_

**NOTE: There is a \$175.00 POS Install Fee billed per location**

If Install scheduled outside of normal business hours is an additional \$75.

**Integration hours of operation 8am-5pm (MST) Mon-Thurs Only.**

**No Installations performed on Fri, Sat, or Sun.**

*Install fee charged to ISO or sales office after Installation*

# POS Setup

The following buttons are configured to POS systems to process the gift cards. Some variations depending on the POS software may apply. All POS setups will send daily totals on all gift card activity in end of day reports. This will report separate from your cash, credit card totals.

**GC Issuance / GC Add value / GC Redeem / GC Inquiry / GC Void**

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All systems must include the following items configured & installed before we schedule final integration with merchants:

**Required Items:**

- Contact your POS dealer about Gift Card Module and Key (if needed)
- Phone line for dial up connection or IP/DSL line (connected to back office PC)
- External USB modem for all systems using dial connectivity to the host.
- If using IP or high speed DSL a router will need to be installed and configured.
- Back office PC that runs the software must have PC Anywhere or other dial term software so we can connect remotely and configure the system.
- We must have a manager or owner on site the day we go live.
- Need time scheduled after systems are configured to train managers/owners.

NOTE: Some dealers may charge fees to setup the hardware or configure the software to accommodate the programs.

## POS/GIFT CARD Support Information

For all Gift Card Technical Support related issues on your POS system you **MUST** call OPT directly.

**TECHNICAL SUPPORT on GIFT CARD issues only**

**GIFT CARD TECHNICAL SUPPORT LINE  
(866) 331-2929**

The Support desk is open 24-7 (365 days a year)  
***\$25.00 per location support fee will be billed each month to the merchant's checking account number on file***

## POS Installation Checklist

**PLEASE NOTE:  
THIS FORM MUST BE SIGNED AND FAXED BACK TO 866-307-1631.**

After the integration has been completed, the following Gift Card Transactions must be processed successfully on each front of house terminal:

<b>Issuance:</b> <input type="checkbox"/>	<b>Balance Inquiry:</b> <input type="checkbox"/>	<b>Redemption:</b> <input type="checkbox"/>
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Merchant Name: \_\_\_\_\_ Contact name: \_\_\_\_\_ Store Location: \_\_\_\_\_

By signing this form I agree that the installation has been preformed at the location listed above, all gift card transactions were successfully processed, and that the POS integration is now complete.

Signed by: \_\_\_\_\_ Date: \_\_\_\_\_