EVO Lane 3000/5000/7000 PIN Pad Installation Instructions

Hardware: **Ingenico Lane Series PIN Pads (Lane 3000, Lane 5000, Lane 7000)**
Keystroke Software: **Keystroke – v8.00.98 or later**
Operating System: **Windows 10 or late**
.NET Version: **.NET Framework v4.8 is required. Installed with v8.00.98 or later. See (page 4)**

Install Keystroke v8.00 Build 98 or later

The Ingenico Lane Series Pin Pads require Keystroke Direct Payment Processing Software (KSDirect) included in the v8.00.98 installation. Use the **Keystroke Update Installer** (from the Windows Start Menu) to install the Full Version on the Keystroke server. On **each workstation**, run the **SetupWS.exe** program to register the KSDirect files on the workstation(s).

Unpack and assemble the PIN Pad, connect to your network, and power on

- Unpackage the PIN Pad, Ethernet Cable, Power adapter from the shipping box
- Assemble the Ethernet Cable to the PIN Pad using 2 screws and plug it into your network router/switch
  For detailed Lane 3000 information, see: https://datacapsystems.com/dc-direct-lane-3000-ethernet
  For detailed Lane 5000 information, see: https://datacapsystems.com/dc-direct-lane-5000-ethernet
  For detailed Lane 7000 information, see: https://datacapsystems.com/dc-direct-lane-7000-ethernet
- Plug the power plug into a power outlet
- The unit will power up. This takes a few minutes

How to verify the IP Address of the device (see Page 3 if IP Address changes are needed)

- In most cases, the PIN Pad will be assigned an IP Address from your internet modem/router
- **IMPORTANT: It is recommended by EVO Payments to set the devices to STATIC IP. (See page 3 below).**
- On the PIN Pad, press # (.'#*) to display the ADMIN MENU (Manager Password)
- Enter password "**EVO72963687**". To enter "E", hit the number 3-key 6 times to get to the letter "E"
  Note: If it asks a 2nd time for a Manager Password, re-enter the above password and Green O to continue.
- Press 7 to go to TERMINAL INFO
- Press 2 to go to DISPLAY PARAMETERS
- Press 1 to go to COMMUNICATION PARAMS
- Using the down arrow (below the display), look for "Terminal IP"
- Take note of the IP address assigned to the device (you will enter this in Keystroke)
- Press the Red X a few times to return back to the Main/Idle Screen

Setup the Keystroke Direct Authorization Method(s)

- In Configuration Manager, select Tables Menu – Authorization Methods
- Select Add New Method
- Enter a name (we suggest **EVO** for Credit/Debit cards)
- Under Type, select Keystroke Direct and then select Ok. The authorization settings will be displayed
- Enter the Card Not Present MID and Token Key found on an email received from EVO/DataCap
  This may be noted as "for Credit E-Commerce transactions" on the EVO/DataCap documentation
- Make sure the Card Type is set to EMV Credit/Debit
- Optional - Enter a Name on Select Pay List (i.e., Credit/Debit)
  Note: If left blank, the 1st Credit Card payment name on the Sales Payment list will be displayed
- Most other settings below are optional (Cash Back, Gratuity, Skip Approved, etc.)
- **Important:** Payment Mappings must be setup. This tells Keystroke which payment types will be hidden for credit/debit cards and how to store the processed payment. Select a valid payment type for each type listed
- Hit enter on PIN Pads. If you have only 1 PIN Pad, hit enter on Default, otherwise, leave Default set to None, and hit enter on Add New. If using Add New, the Machine Number and Register Number must be assigned (/M /R)
- Enter the IP Address noted above under "How to verify the IP Address of the device"
- You can test the PIN Pad if desired at this time
- Use F10 to save the PIN Pad settings
- Click Ok or use F10 to save the Authorization Method

Setup the Credit / Debit Payment Type in Keystroke

- In Configuration Manager - Tables Menu - Sales Payment Types.
- Edit the first existing payment type for Credit/Debit Cards (usually Visa/MC/Discover)
- Payment Type should be Payment Card. Make sure Available on Sales, Card Swipe is Supported, and Parse Reference are all ON
- Choose **EVO** as the Authorization Method (setup in previous section)
- Add the **EVO** Authorization Method to all Credit/Debit payment types previously mapped

Note: Very Important - The FIRST PROCESSED Payment on the Sales Payment Type list in Configuration Manager must be a Credit or Debit payment type (not EBT nor Gift Card). The list in Sales Manager will show that first payment name and hide the other "mapped" credit and debit payment types based on the Payment Mappings on the Authorization Method.

Gift Cards

- The Gift Card payment type(s) will show in the payments list in Sales Manager separately from Credit / Debit.
- Setup another Authorization Method similar to EVO noted above (we suggest **EVOGIFT**).
- Under Type, select Keystroke Direct and then select Ok. The authorization settings will be displayed
- Enter the Card Not Present MID and Token Key found on an email received from EVO/DataCap
  This may be noted as "for Credit E-Commerce transactions" on the EVO/DataCap documentation
- Make sure the Card Type is set to Gift Card
- Optional - Enter a Name on Select Pay List (i.e., Gift Card)
  Note: If left blank, the Gift Card payment name on the Sales Payment list will be displayed
- Most other settings below are optional (Show Check Balance, Prompt for Manual Entry, etc.)

EBT (Food Stamps and/or Cash Benefits)

- The EBT payment type(s) will show on the payments list in Sales Manager separately from Credit / Debit
- Use **EVOEBTF** for the Authorization Method on an EBT Food sales payment type
- Use **EVOEBTC** for the Authorization Method on an EBT Cash Benefits sales payment type
- Under Type, select Keystroke Direct and then select Ok. The authorization settings will be displayed
- Enter the Card Not Present MID and Token Key found on an email received from EVO/DataCap
  This may be noted as "for Credit E-Commerce transactions" on the EVO/DataCap documentation
- Make sure the Card Type is set to EBT-Cash Benefits or EBT-Food Stamps
- Optional - Enter a Name on Select Pay List (i.e., EBT Cash or EBT SNAP, etc.)
  Note: If left blank, the EBT payment name on the Sales Payment list will be displayed
- Most other settings below are optional (Allow Cash Back, Gratuity, etc.)

Setting up the PIN Pad in Keystroke & Testing the PIN Pad

- In Keystroke, go to Configuration Manager - Hardware Menu - PIN Pad
- Under PIN Pad Type, select "EVO - Keystroke Direct" and then select Settings List
- You will use Default if only 1 PIN Pad will be used in the business. Enter the IP Address for the 1 PIN Pad
  Select <Add New> to setup multiple PIN Pads. Enter the Mach#, Reg#, and IP Address for each PIN Pad which will require the use of /R# and /M# target line startup switches
- Use the Test PIN Pad option to test the device. You will be prompted to enter a 10-digit phone number to test the PIN Pad numpad, and then prompted to Tap/Insert/Swipe a card for a $0 validation test
- Once the test passes with no errors, click OK

Admin Functions (Set Date/Time, Download Parameters), etc.:

To "Set Date/Time" using the Admin Functions of the PIN Pad:

- For Details with Photos by PIN Pad model, go to: https://datacapsystems.com/dc-direct-setup-guide
- Press **F** on the PIN Pad (lower left button next to the 0)
- Press the Green Circle (Enter) while on **Admin Mode**
- Enter password "**EVO72963687**". To enter "E", hit the number 3-key 6 times to get to the letter "E"
  Note: If you have already entered Admin Mode/Password, the unit will not display this again, go to the next step
- Press the down arrow 6 times to highlight **Control Panel** and press the Green Circle (Enter)
- Press the down arrow 3 times to highlight **Terminal Settings** and press the Green Circle (Enter)
- Highlight **General Settings** and press the Green Circle (Enter)
- Press the down arrow 1 time to highlight **Date and Time** and press the Green Circle (Enter)
- Press the down arrow 6 times to highlight **Control Panel** and press the Green Circle (Enter)
- Highlight **Set Date** or **Set Time**
- You also change the Time format from 24 hour to 12 under **Time Format**

To "Download Parameters" (when EVO changes settings on their end):

- For Details with Photos by PIN Pad model, go to: https://datacapsystems.com/dc-direct-setup-guide
- Press F on the PIN Pad (lower left button to the left of the 0)
- Press the Green Circle (Enter) while on Admin Mode
- Enter password "**EVO72963687**". To enter "E", hit the number 3-key 6 times to get to the letter "E"
  Note: If you have already entered Admin Mode/Password, the unit will not display this again, go to the next step
- Press the down arrow 3 times to highlight **Tetra Admin** and press the Green Circle (Enter)
- Press 1 or press the Green Circle (Enter) on the **Download Application**
- Press 2 for **Start Download** or arrow down to Start Download and press the Green Circle (Enter)
- Press the Green Circle (Enter) on the Download Package/Enter Package Name screen
- The PIN Pad will download the new parameters and eventually restart back to the main screen

How to Change the PIN Pad to Static IP (advanced, and if needed)

- The device will default to DHCP and the IP will be assigned by your network/router. If you experience issues, or you want to assign specific IP Addresses to multiple devices, follow these steps.
- Press "**F**" on keypad of the PIN Pad (lower left button next to the 0)
- Select "**Admin Mode**" using the Green Circle
- Enter password "**EVO72963687**". To enter "E", hit the number 3-key 6 times to get to the letter "E"
  Note: If you have already entered Admin Mode/Password, the unit will not display this again, go to the next step
- Arrow down and select "**Control Panel**" and press the Green Circle (Enter)
- Arrow down and select "**Terminal Settings**" and press the Green Circle (Enter)
- Arrow down and select "**Communication means**" and press the Green Circle (Enter)
- Select "**Ethernet**" which will be highlighted and press the Green Circle (Enter)
- Select "**DHCP activation**" and press the Green Circle (Enter), select 2-Off.
- Select 2-Off
- Arrow down and select "**IP address**". Use the Yellow < to delete the IP Address. Now enter the IP Address you want to use using the keypad numbers and # key as a period (.,#*) (i.e., 192.168.001.150)
- Arrow down and select **Subnet Mask** (if set to 255.255.255.0 press the Green Circle (Enter))
- Arrow down and **Default Gateway** of your LAN Network (i.e., 192.168.001.001).
  Note: Use "IPCONFIG /ALL" at a Command Prompt (cmd.exe) for help finding this information
- Arrow down and select "**DNS 1 address**" (usually assigned by your router)
  Note: Use "IPCONFIG /ALL" at a Command Prompt (cmd.exe) for help finding this information
- Arrow down and select "**DNS 2 address**" (usually assigned by your router, or use 8.8.8.8 if one is not set)
  Note: Use "IPCONFIG /ALL" at a Command Prompt (cmd.exe) for help finding this information
- When done, press the "**Red X**" and Save parameters will be displayed. Press the Green Circle=OK/Save
- Press the "**Red X**" again until you return to the main screen.
- Last step: When on the Main Screen, hold down the **Yellow and # buttons together** to reboot the device.

For detailed Lane 3000 instructions, see: https://datacapsystems.com/dc-direct-lane-3000-ethernet
For detailed Lane 5000 instructions, see: https://datacapsystems.com/dc-direct-lane-5000-ethernet
For detailed Lane 7000 instructions, see: https://datacapsystems.com/dc-direct-lane-7000-ethernet

Surcharging:

Surcharging processed payments can be done with EVO Payments and Keystroke Point of Sale

Adding surcharges to processed payments is highly regulated and, if not done correctly, can expose the merchant to large fines and penalties. Below are some websites from the different card brands and their regulations. Please review each of these websites to determine if you company could, and should, setup surcharging on EVO processed payments.

Mastercard Surcharge Rules:
https://www.mastercard.us/en-us/business/overview/support/merchant-surcharge-rules.html

Visa Merchant Surcharging Considerations and Requirements:
https://usa.visa.com/content/dam/VCOM/global/support-legal/documents/merchant-surcharging-considerations-and-requirements.pdf

Visa Surcharging Q&A:
https://usa.visa.com/dam/VCOM/download/merchants/surcharging-faq-by- merchants.pdf

The Discount/Surcharge feature is setup on Payment Types in Configuration Manager. The Sales Payment Type "Discount/Surcharge" button is used to enter the parameters for adding a Discount or Surcharge to a Sales Transaction when a payment type is used.

On the Payment Discount/Surcharge parameters screen, the first button is used to toggle between "Discount" and "Surcharge" ("Surcharge" adds an amount to the transaction total). The Amount is either a Dollar ("$") amount or Percentage ("%") amount depending on what the second button is set to. The "Record As" button allows the amount to be accounted for on the transaction as either a "Line Item" or a "Payment" (Payment is recommended). The "Payment" button is used to select which payment type to add to the transaction to record the surcharge amount.

The Surcharge amount should be entered as a percentage (see the above links for recommended maximums). Note that charging a Surcharge is not permitted in all states and may have a different maximum in other states. If a surcharge is used, then the program will display the amount that will be requested. This amount will be added to the charge total if permitted based on the Card Type. If the card type does not allow surcharging (i.e., Debit), then no additional amount will be added (surcharge will be set to $0.00 for that transaction). All merchants should first consult with the appropriate professional and/or their payment processor to make sure how the rules apply to their particular situation.

Note: These settings are not used when entering ROA payments. And Surcharge is disabled for most other processed payments (those that use a MICR Reader with KeyPay, Global Payment's Genius, and NETePay with FIS/Worldpay).

Steps to Setting Up Surcharging:

- First, in Configuration Manager, under Tables, and Sales Payment Types, use the <INS> key to add a new Payment Type for the Surcharge. Some suggested names are "Surcharge", "Service Fee", "Credit Card Fee", etc. And set the Terms Field to something similar to the name (this is used on printed receipts)
- Set the Payment Type to Other
- Turn on Available on Sales
- Turn on Don't display on Sales Payments list
- Turn on Print in Tax Loop on Forms (this will be used on a form like STARTAX.NVC)
- Click OK, or use F10 to save the payment type. And F10 again to save the list of payment types
- Second, you will edit the first Credit Card payment on the list of payments (the one closest to the top)
- Select the Discount/Surcharge button and select Surcharge
- Enter a % amount (remember the rules and regulations – links above)
- Select the Record As button and set this to Payment
- Select the Payment button and select the Payment Type you just save in the above 1st step
- Click Ok to save the Surcharge Setting, and then Ok again to save the credit card payment type
- You are now ready to test the process in Sales Manager

Note: Card brands do not allow surcharging of Debit Cards. This includes ATM Cards run as Credit (without a PIN). Acquiring Banks use BIN Lookup to determine what cards are eligible for surcharges. So do not be surprised that many processed cards will not process a surcharge.

Troubleshooting:

.NET Framework v4.8 is required for EVO and KSDirect. Both Setup.exe and SetupWS.exe will attempt to install .NET Web installer v4.8 if it is not found. If you are not connected to the internet, you may need to manually download the Offline Installer on another machine and transfer it to the computer that needs it. Here are the links:
Offline Installer: https://dotnet.microsoft.com/en-us/download/dotnet-framework/thank-you/net48-offline-installer
Web Installer: https://dotnet.microsoft.com/en-us/download/dotnet-framework/net48

Error Number: -2147024894: Could not load file or assembly 'System.Net.Http. Version=4.2.0.0, Culture=nutral, PublicKeyToken=....
Happens testing EVO Auth Method in CNF or doing a test transaction in Sales Manager. The problem is due to .NET v4.8 needing to be installed. **SOLUTION: Need to Install .NET v4.8 (required for EVO and KSDirect). See above links.**

Manually install Microsoft Edge WebView2 software (if needed)

Note: The program will automatically install the required Microsoft Edge WebView2 Software when you either do a test on the Authorization Method, or attempt a Manually Entered Sale. If this process fails, follow the steps below to install the program.

- Right-Click on the Keystroke shortcut on your desktop and select **Open File Location**
- Go to the top of the list of files and find the **Support** sub-folder and open it
- In that folder, open the folder named **Webview2**
- In the Support\Webview2\ folder, find the file **MicrosoftEdgeWebview2Setup.exe**
- Right-Click that file and select **Run as Administrator**
- The installation should begin without additional prompts and when it is finished, the program will close without displaying a finished screen and just close
- You are done, and can then test this by editing the EVO Authorization Method EVO and selecting Test