

Personal Discount System (PersonalCards) for RK7 and SYNCARD installation

1. Introduction

1.1. Schemes

1.1.1. There are two main schemes: standalone restaurant and chain restaurants (corporation).

1.1.2. This document will also describe the installation and usage for PDS plug-in – SYNCARD - which is used in case of chain scheme (with HeadOffice part).

1.1.3. Card server has 3 working modes: single, head and local.

1.1.4. You can connect to any type cardserver with PCARDS application. But only in modes “Head” and “Single” users can edit cards. In mode “Local” users can view cards and reports.

1.1.5. In what mode server is working can be checked in PCARDS: Help->About->Access.

1.2. One restaurant case

1.2.1. In this case you usually install one Cardserv.exe and one Pcards.exe inside the restaurant.

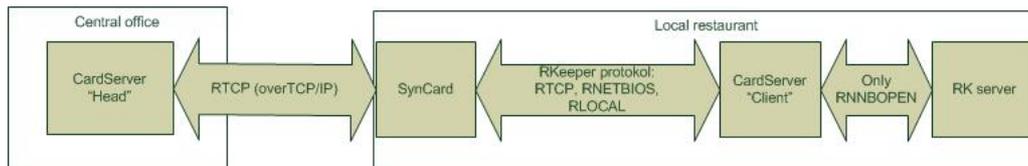
1.2.2. Cardserver mode = single.

1.3. Multirestaurant case

1.3.1. Syncard.exe software allows synchronize information between cardservers.

1.3.2. One of the servers is “Head”, other servers are “Local”. Both head and local servers have the same information. It is like a copy or backup of cardserver.

1.3.3. “Head” server is installed in central office, on PC, which has static external IP address, “Local” server is installed on restaurant level with Syncard near it (see the diagram 1 below).



Diagram

1

1.3.4. SynCard replaces the old solution with FarCards. It is better because it doesn't require full time online internet connection.

1.3.5. Pcards.exe (all of them if several) should be set to connect to Head server only (you cannot edit data in local DBs).

1.3.6. So, Local front office must have cardserver with syncard, Head back office - cardserver only.

1.3.7. In-restaurant server mode = local, head office cardserver mode = head.

2. Files and folders

2.1. card.ldb

2.1.1. Cardserver uses one DB file.

2.1.2. On what mode server is working (see 1.1.3.) depends on marks in database. These marks are made by SYNCARD application according to its ini file settings; user doesn't have to do anything additionally.

2.1.3. If cardserver is working without SYNCARD, then there is no any mark = server is of “single” type.

2.1.4. Server type (DB type) marks 'head' and 'local' are kept in database forever and user cannot change them.

2.1.4.1. “Single” server can be marked as “Head”.

2.1.4.2. “Single” server can be marked as “Local” only if it's database is empty (DB from distributive).

2.1.4.3. “Local” server can be marked as “Head” (only for restore lost data).

2.1.4.4. “Head” server cannot be marked as “Local”.

2.2. dll

2.2.1. Make sure you put all necessary dll files to working folders.

2.2.2. At least you must have those modules you enabled in ini files (see 3.).

3. Installation

3.1. Cardserver

3.1.1. From RK7 distributive \BIN\FOR_CARDSEV\ copy all the files to the folder with cardserv.exe, including .INI files.

3.1.2. Open file CARDSERV.INI and edit that.

3.1.2.1. Single type

3.1.2.1.1. Format

```
[DB]
File = card.udb
DayBound = 4:00
Backup =
IgnoreStopDate=No
BackupCount=2
WeekStart=7
Log = 5

[LinkDLL]
1 = pds_netk
2 = RTcp

[RTcp]
Port = 23456

[pds_netk]
NetServerName=DM_CARDSERV
ininame=netk.ini
```

3.1.2.1.2. You set 2 network protocols: one for PCards connection (RTcp), another for RK7 cashserver connection (pds_netk).

3.1.2.2. 'Head' type

3.1.2.2.1. Format is the same as for single type cardserver.

3.1.2.2.2. 'RTcp' protocol will be used both for PCards and Syncard connections to head type cardserver.

3.1.2.3. 'Local' type

3.1.2.3.1. Format is the same as for single type cardserver.

3.1.2.3.2. 'RTcp' protocol will be used both for PCards (if you need to - but usually not) and Syncard connections to local type cardserver.

3.1.2.3.3. It is allowed to use one and the same port for RTcp of all cardservers (of course, they all installed to different OS).

3.1.2.4. In section [pds_netk] for parameter NetServerName set cardserver own network name, this name will be the only search identifier of card server for RK7 system.

3.1.2.4.1. It is not necessary to set different names for cardservers in one chain (better make all 'local' cardservers with the same name).

3.1.3. Configure pds_netk protocol in netk.ini

3.1.3.1. Format

```
[netkern]
TESTMESSAGES=1
protocols=tcpsoc.dll
[TCPSOC]
port=22344
```

3.1.3.2. Port - any free TCP port. May be the same for all cardservers if run in different OS.

3.2. PersCard

3.2.1. From folder ..\BIN\FOR CARDSERV\ copy all files to the folder with PCARDS Including INI files.

3.2.2. Open rkeeper.ini (from PersCard folder, not RK7\WIN\ folder), in section [PCGET] for parameter Server set the name of your Reference server.

3.2.3. Open Pcards.exe and make sure it can connect to RK7 reference server.

3.2.4. Default administrator username "ucs" password "ucs" (empty DB). Create at least 1 user to edit accounts.

3.3. SynCard

3.3.1. In this paragraph we assume that technician knows how to install stand alone cards server (read above) and we will describe only installation of SYNCARD.

3.3.2. SYNCARD should be installed on restaurant level (local). It is copied to the same OS as local type cardserver.

3.3.3. Copy syncard files (syncard.exe and syncard.INI) to some (separate) folder.

3.3.4. Copy to this folder communication protocols (RTCP.DLL, RNETBIOS.DLL, RLOCAL.DLL). The same as for card server (versions must be the same). Usually it is only one file = Rtcp.dll.

3.3.5. Open SYNCARD.INI and set the following parameters:

3.3.5.1. Format

```
[Options]

Period=10
[Local]

DLL=RTcp
Gate=1

[Head]
```

```

DLL=RTcp
Gate=2
Modem=0
TryLink=1
[Modem]
PEntry=PhoneBookEntry

[Rtcp]
client1=PDS_LOC
server1=2.1.1.222
port1=23456

client2=PDS_HEA
server2=2.1.1.200
port2=23456

```

3.3.5.2. Description

3.3.5.2.1. 'Period' – how often connect to “Head” server after successful previous connection (In minutes). If connections wasn't successful – SYNCARD will try reconnect in 1-2 minutes.

3.3.5.2.2. [Local] - section with local type cardserver connection properties.

DLL = protocol which will be used to connect to “local” server. Also can be used Rlocal and RNETBIOS.

Gate = number of parameters section for this DLL in this ini.

3.3.5.2.3. [Head] - section with head type cardserver connection properties.

DLL=RTcp protocol which will be used to connect to “head” server.

Gate - number of parameters section for this DLL in this ini. Different from previous one.

Modem=0 using modem:

0 do not use

1 always use

2 use if direct link didn't work

TryLink=1 Only when Modem=2, after how many unsuccessful connection start use modem

3.3.5.2.5. [Modem] section PEntry= Name of connection for modem

3.3.5.2.6. IN [Rtcp] section you have to set parameters for both links

client# - syncard own name for connection to server by the link #

server# - address or cardserver by the link #

port# - port of cardserver by the link # (set on it, RTcp protocol)

3.3.6. SYNCARD can be run in 2 modes:

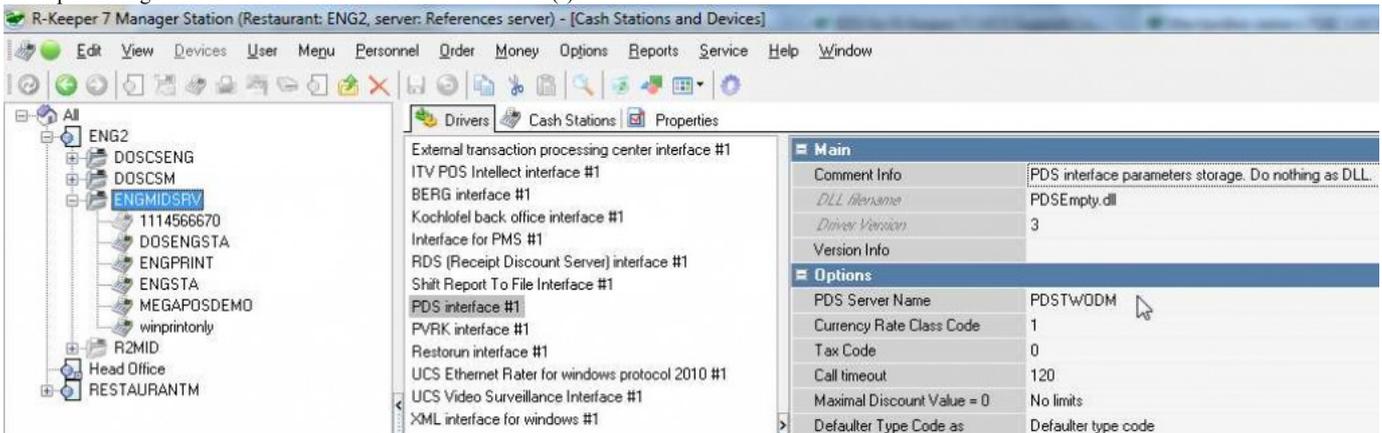
3.3.6.1. Application – run with parameter /desktop.

3.3.6.2. Service – run with parameter /install. To uninstall service run with parameter /uninstall.

3.3.7. You use syncard only in multirestaurant case. Syncard not to be installed with 'single' cardserver type.

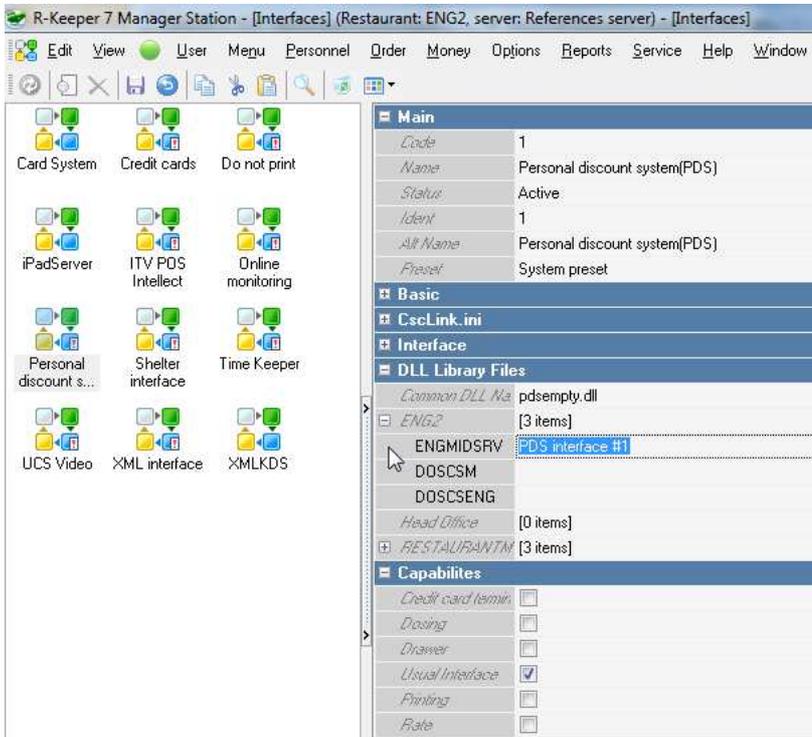
4. RK7 settings

4.1. Open manager station and add PDS interface to cash server(s).

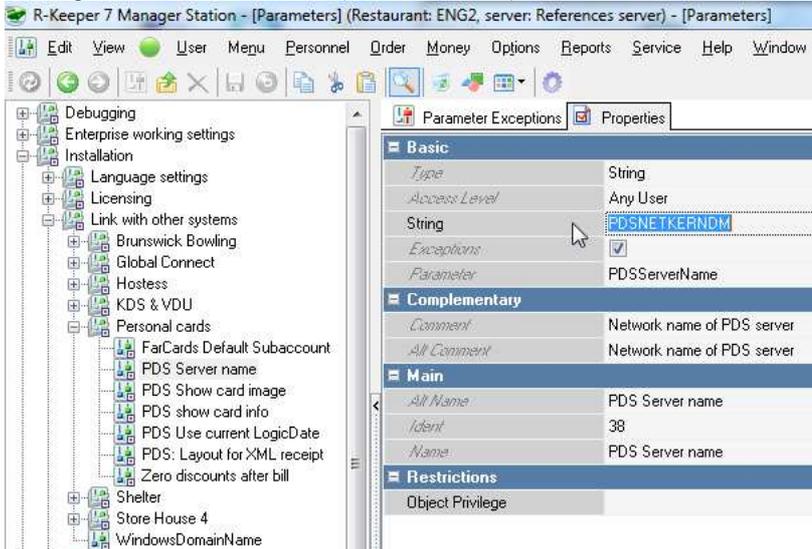


'PDS server name' must be set of local or single type cardserver.

4.2. Check logical interface to be set.

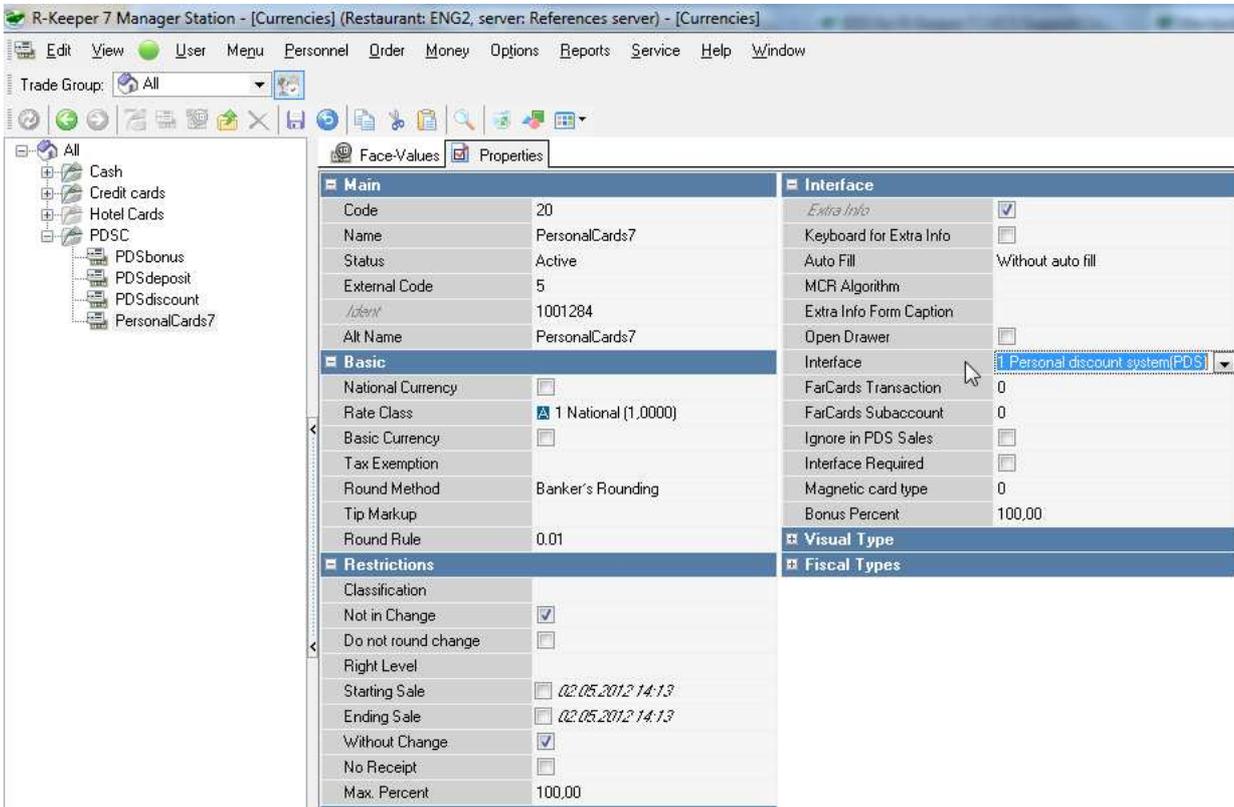


4.3. Set parameter "PDS server name" (if one in references).



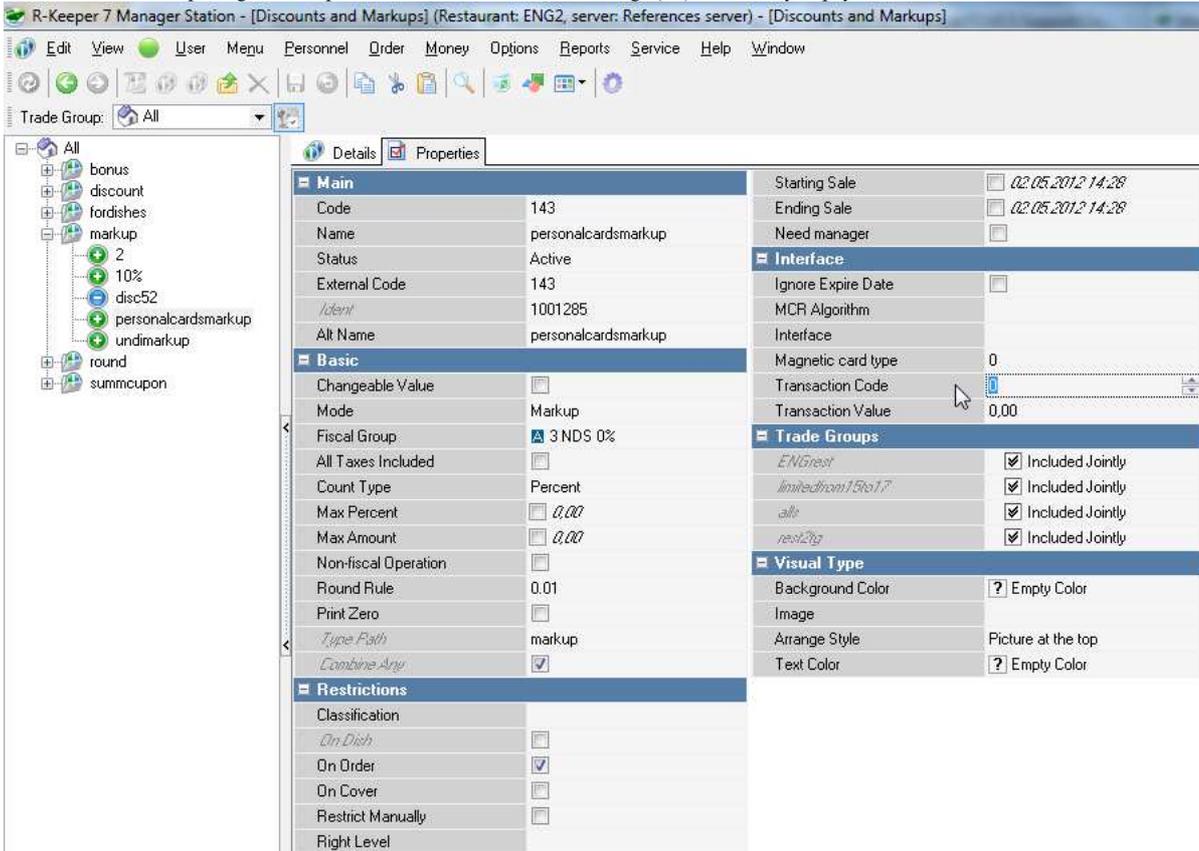
In parameters Installation -> Link with other systems -> Personal cards -> 'PDS Server name' set the name of single or local type cardserver (see 3.1).

4.4. Set currency to use logical PDS interface.



4.5. Make sure that no transaction code (=0) or account (=0) set (FarCards settings).

4.6. Check the markup assigned to deposit reason to have the same settings (=0) as currency to pay with.



5. Remarks

5.1. Databases

5.1.1. DB from one restaurant **CANNOT** be copied to another. If for some reason in one restaurant database is lost, just install empty database and SYNCARD will synchronize all the data from "Head" server.

If not empty database is copied to restaurant, then SYNCARD will give an error:
Can not mark [Local] as Local DB because it is not empty.

If empty "Head" database is copied to restaurant, then SYNCARD will give an error:
Can not mark [Local] as Local DB because it is Head DB.

If to "Head" server is copied not empty "Local" database, then SYNCARD will give an error:

Can not mark [Head] as Head DB because [Local] DB is not empty.

5.2. Versions

SYNCARD works with card servers starting from version 7.01
SYNCARD v. 1.06 works with card server version 7.06

5.3. Adds

5.3.1. Upgrade should be done beginning from "Local" servers, and only then "Head" server is to be upgraded. If to do in opposite way, synchronization won't work till "Local" server has the same version as "Head".

6. Pcards maintance

6.1. Import from text file

6.1.1. You are able to import cards and/or operations from fixed format text file (ANSI=Windows encoding).

6.1.2. For card import format is the following

CardNumber, ExpireDate, DiscountCode, BonusCode, BirthDay, HolderName, CardType, PayLimit, TelNum1, TelNum2, E-mail, DepartmentName, DiscountLimitSum, DiscountLevelName, CreditLimit

6.1.2.1. Each row is one card info, comma separated.

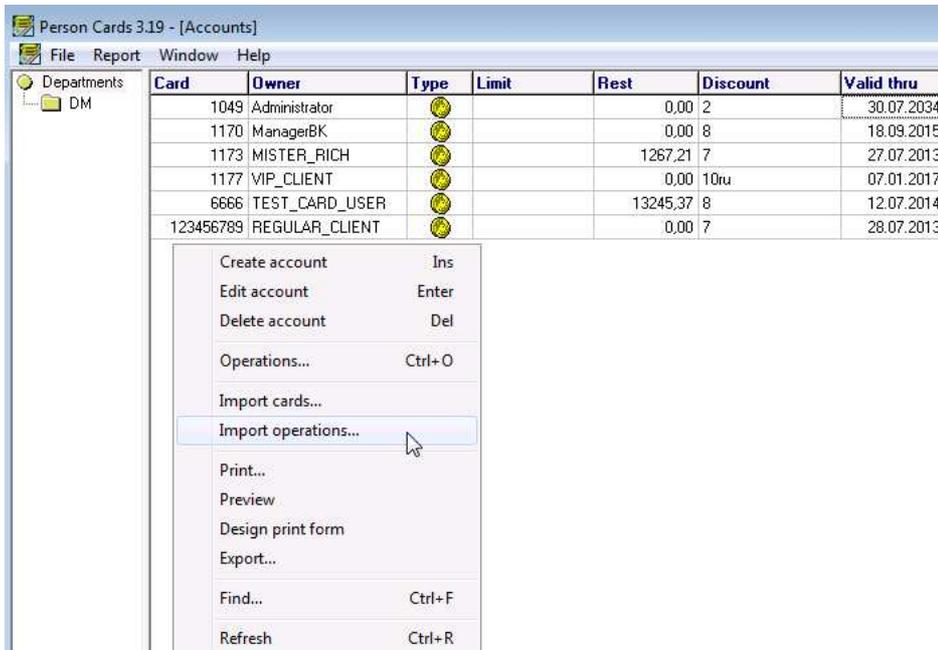
6.1.3. For operations import format is the following

CardNumber, OperationAmount, OperationDescription

6.1.3.1. Each row is one operation info, comma separated.

6.1.4. To do import from text file you may use Pcards.exe (GUI app) or cardimp.exe (command line app).

6.1.4.1. PersonalCards manager -> File -> Accounts : right click in main form and select necessary operation as shown below.



6.1.4.2. Choose proper text file in opened dialog and press 'Open', the operation result will appear. Example text file content:

1049, 789.01, test
1177, -123.45, penalty

7. Use (start)

7.1. Servers

7.1.1. First you start server, after that clients.

7.1.2. Servers must be installed as services and start automatically.

7.1.3. Start cardserver as desktop. Make sure all protocols are loaded in GUI.

7.1.4. Install servers as windows services after checked all working in desktop mode properly.

8. Upgrade

8.1. Upgrade of PersonalCards goes in 2 seps.

8.1.1. Upgrade DB (CARD.udb).

8.1.1.1. Use Cardup.exe, put it to the same folder as Cardserv.exe.

8.1.1.2. Stop Cardserv.exe (service) and copy with overwriting files from new version distributive.

8.1.1.3. Start Cardup.exe and wait for DB update finished.

8.1.1.4. Start new version of Cardserv.

8.1.2. Upgrade client application and syncard.

8.1.2.1. Do copy with overwriting files from new version distributive.
