TrueCommerce™ | Do business in every direction

Integration Service Installation
Reference Guide

Copyright

Table of Contents

TrueCommerce Integration Service Installation Reference Guide

Chapter 1
Integration Service Installation

Overview

The TrueCommerce Integration Service is a locally installed service that enables the Transaction Manager web-based solution to interact locally with your computer for functions such as local ERP integrations, local label printing, and other system interactions.

In order for Transaction Manager to properly communicate to your system, the TrueCommerce Integration Service and Transaction Manager must be synced to recognize communication.

This document is intended to provide troubleshooting steps on ensuring that the Integration Service is properly installed and configured.

IMPORTANT	*The Transaction Manager Silverlight Edition was retired on December 31, 2021. All customers must move to the Transaction Manager Foundry version.*

Prerequisites

- The Transaction Manager Integration Service and associated Port Manager component **MUST BE RUN AS LOCAL ADMINISTRATOR** (not domain administrator) due to permissions with the scheduler user configuration.

  A common question is "Why can I not use my Domain Admin login?" A Domain Admin account is very configurable and can be set up to have as many or as little permissions as possible to do various functions. The Local Admin account will ALWAYS have the same set of permissions. The other reasoning is that if the Transaction Manager Integration Service is installed via a Domain Admin login on the Terminal Server, the Transaction Manager Integration Service stops running when the Domain Admin signs out, whereas the Local Admin account is ALWAYS running (hence, the Transaction Manager Integration Service is running), even if every user on the Terminal Server is signed out.

- Operating System
  - Microsoft Windows 10 Home, Pro, or Enterprise
  - Microsoft Windows 8.1, Windows 8.1 Pro, Windows 8.1 Enterprise
  - Microsoft Windows 8, Windows 8 Pro, Windows 8 Enterprise
  - Microsoft Windows 2012 Server and newer
- Access to the host files on the local machine
- There CANNOT be a Proxy server setup
- Access to internet settings (trusted sites and security zone)

NOTE	*TrueCommerce follows the lifecycle of the Operating System and Browser. IF the developer of either stops support of a version, TrueCommerce will no longer support that version.*
	All supporting Operating Systems must be in the English language.
	TrueCommerce does not support Linux/UNIX Operating Systems.

Downloading Transaction Manager Integration Service

Every Transaction Manager user who wants to perform integration work must install the Integration Service locally. To download and install the Integration Service, perform the following steps:

1. Log in to the terminal server as the **Local Administrator**.

2. In Transaction Manager, open the **Integration Settings** view from the navigation menu.

3. Select from the Advanced Integration Service Settings radio button options, then click **Download Integration Service**.

NOTE	*If you select any Advanced Integration Service Setting option other than Option 2, you can skip this NOTE in its entirety.*

If Option 2 is selected, **TMOIntegrationServicesV2** *will display in File Explorer.*

- If the user has one terminal server or if they do not want to install the integration service on several different clients, the integration service can be installed just once (for example, on a Sage 100 server but nowhere else), and a unique identifier will be associated to that server to make it a cloud integration.
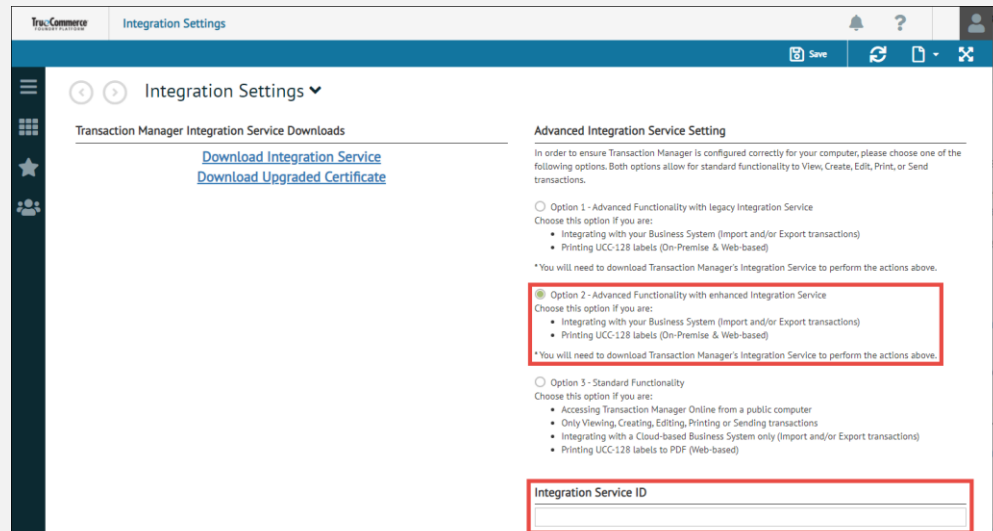
Integration Service V2

The Active Scheduler Machine *field should show both the Global Unique Identification Number (GUID) of the integration service and the machine on which it is installed on the* Transaction Manager | Administration | Scheduler *page (and the* Scheduled Event Edit *page, accessed by editing a specific event).*

- For the previous Integration Service, the Active Scheduler Machine field will only show the Windows computer name.

Logic is included for determining whether to add or remove customer's record from the ttcCloudCustProfile*, depending on the integration service version (for local and hybrid BSPs), or Cloud only customer (cloud only BSP).*

- The Active Scheduler Machine must be set to at least 1 Active Cloud Scheduled Event.

Integration Service V2 and beyond

For Integration Service V2 and beyond, the Active Scheduler Machine *must be set to at least 1 Active Cloud or local Scheduled Event and the* Advanced Integration Service Setting must be set to **Option 2** with the correct GUID.

Following are the ordered steps in which to configure Scheduler for Integration Service V2 (and later versions):

1. Install IntegrationServiceV2.

2. Once it is running, right-click on the TrueCommerce icon within the system tray, then select **about**.

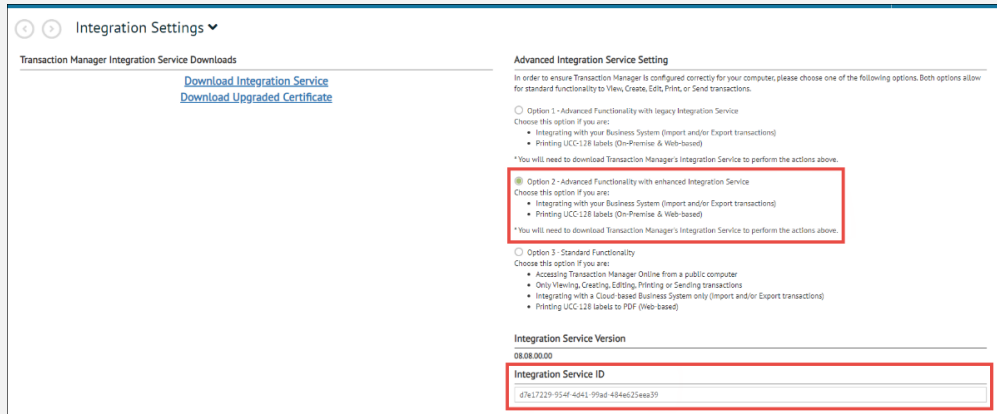3. Copy the **Integration Service ID** by clicking the paper icon to the right of the Integration Service ID.
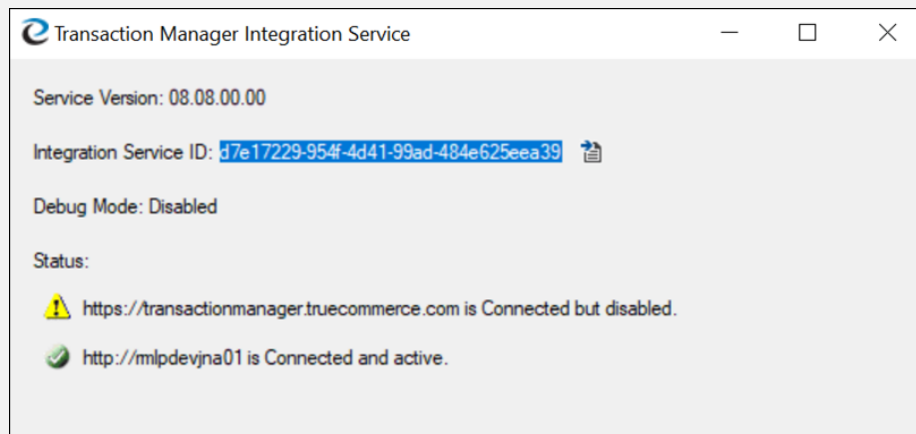
4. Log Into Transaction Manager and navigate to the Integration Settings" page.

5. Select **Option 2**, then paste the Integration Service ID into the **Integration Service ID** field.

6. Click **Save**.

7. Navigate to Transaction Manager | Scheduler and click Activate.

8. Once configured, it will look like the screen capture, immediately below:
    Integration Service ID installed on *Windows Computer Name*.
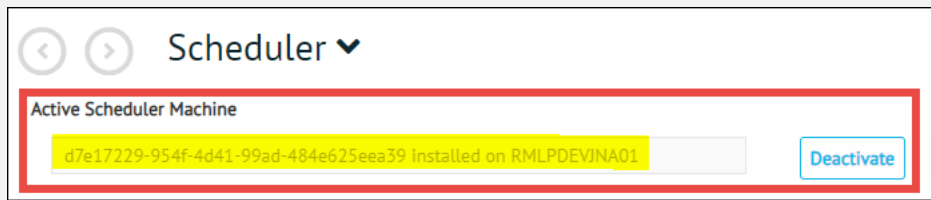
The only other instance where the integration service will need to be installed is if a customer is utilizing an on-premise labeling utility, where the Integration Service will need to be installed on that machine.

9. **Save** the file locally to the machine and right-click to run as administrator.

10. Click **Next** on the Transaction Manager Integration Service – InstallShield Wizard pop-up to begin the installation.
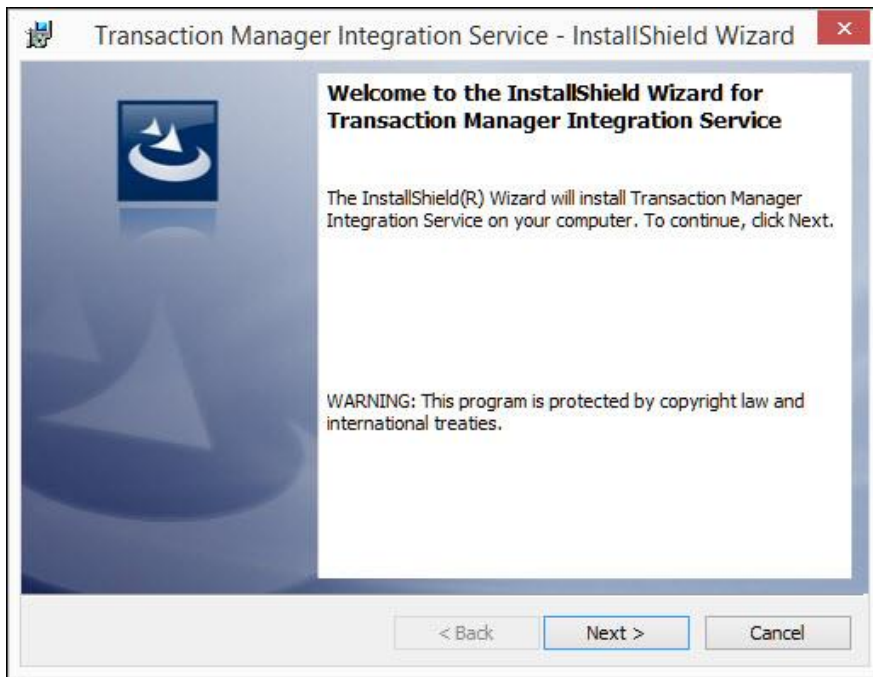
11. Enter a **User Name** and **Organization**, then click **Next**.
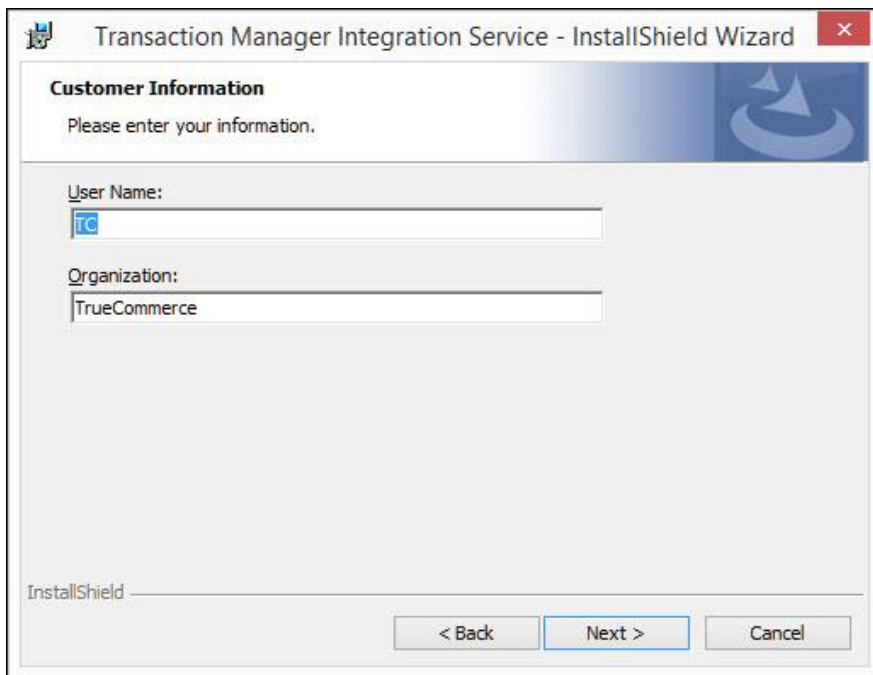
12. Click the **Complete** Setup Type radio button, then click **Next**.
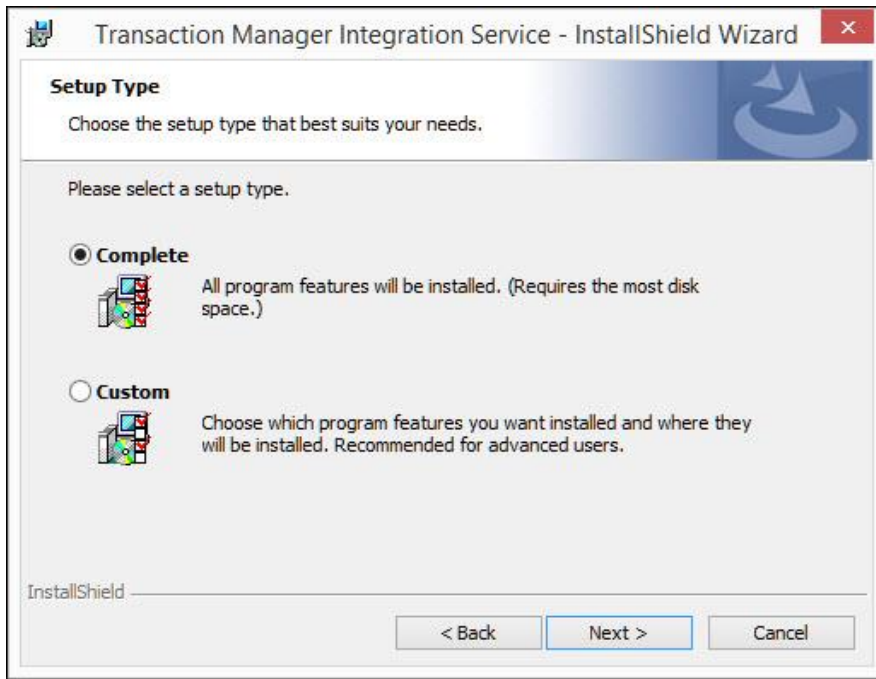
13. Click the **Install** button once the Integration Services is ready to install.
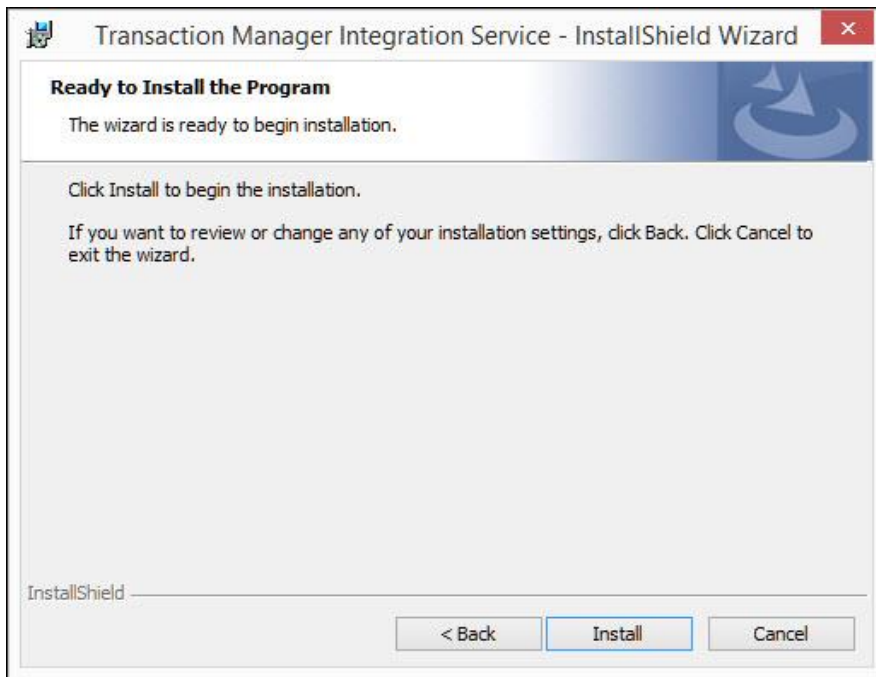
If necessary, click **Yes** to allow the program to install.
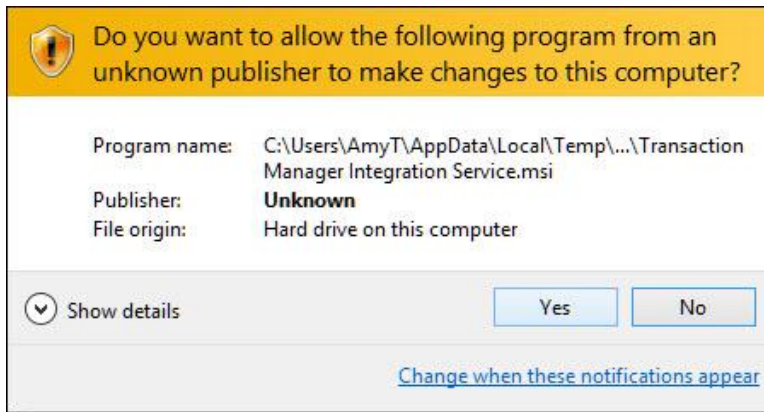
14. A progress bar displays to notify the status of the Integration Service installation.

15. Click **Finish** to complete the install of Transaction Manager Integration Service.
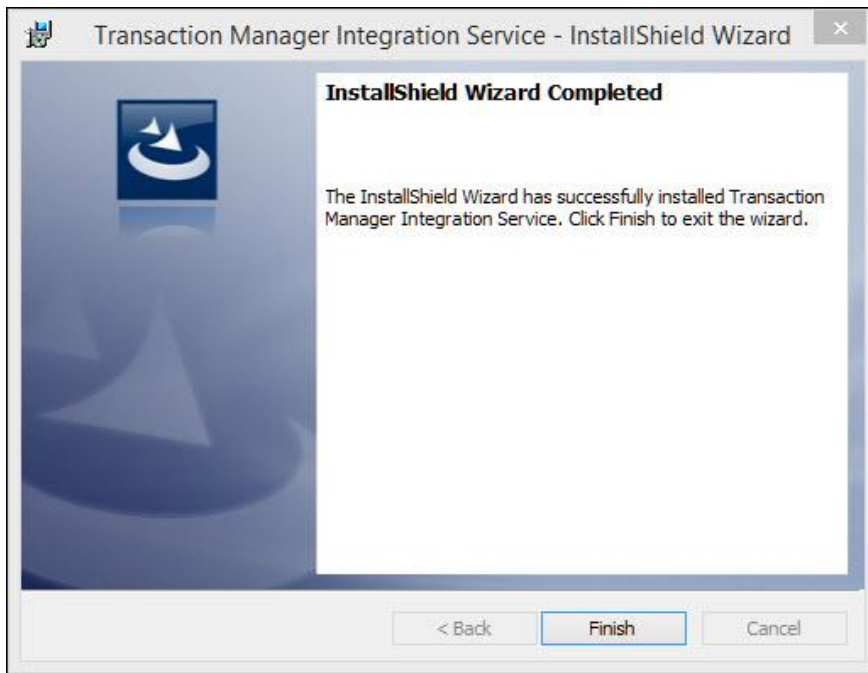
16. When prompted by the pop-up, click **Yes** to allow the Transaction Manager Integration Service to add the URLs to the "Trusted" security zone on your computer.

NOTE

Group Policies that are setup on the server may need to have these sites added manually. In addition, each user that logs into the terminal server (if configured to RunOnLogin) will see this dialog box as well.
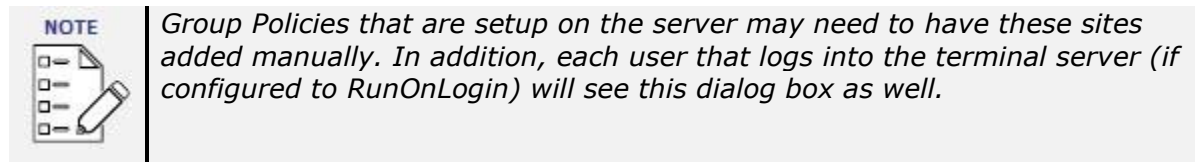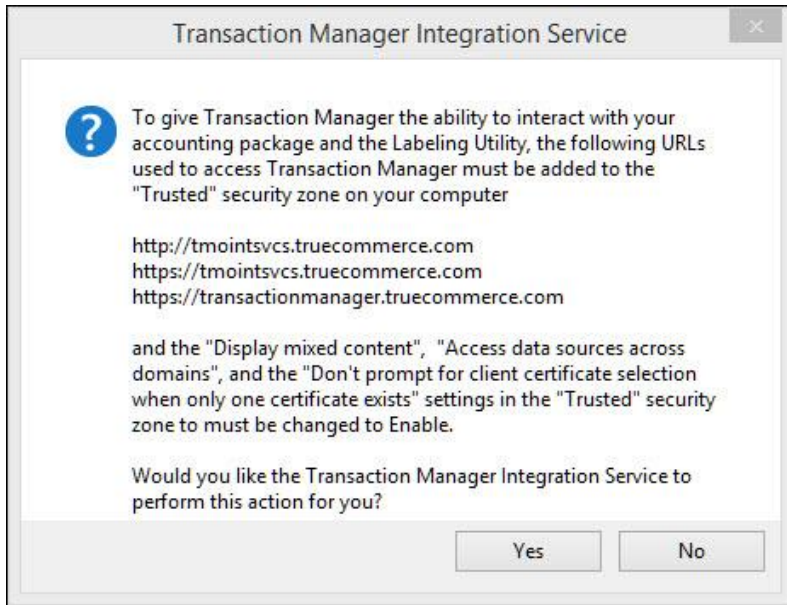
17. Select **OK** to acknowledge that the settings have been changed.
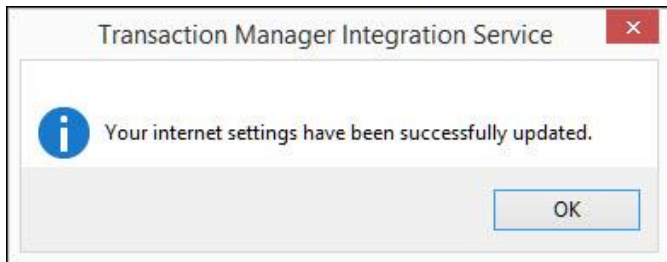
Open Permissions on the TrueCommerce Directories

Once the Integration Service has been installed, permissions on the TrueCommerce directories will need to be opened. To accomplish this, perform the following steps:

1. Navigate to your C: drive and access 'Program Files (x86)' | 'True Commerce'.

2. Right-click on the TrueCommerce folder, then select **Properties**.
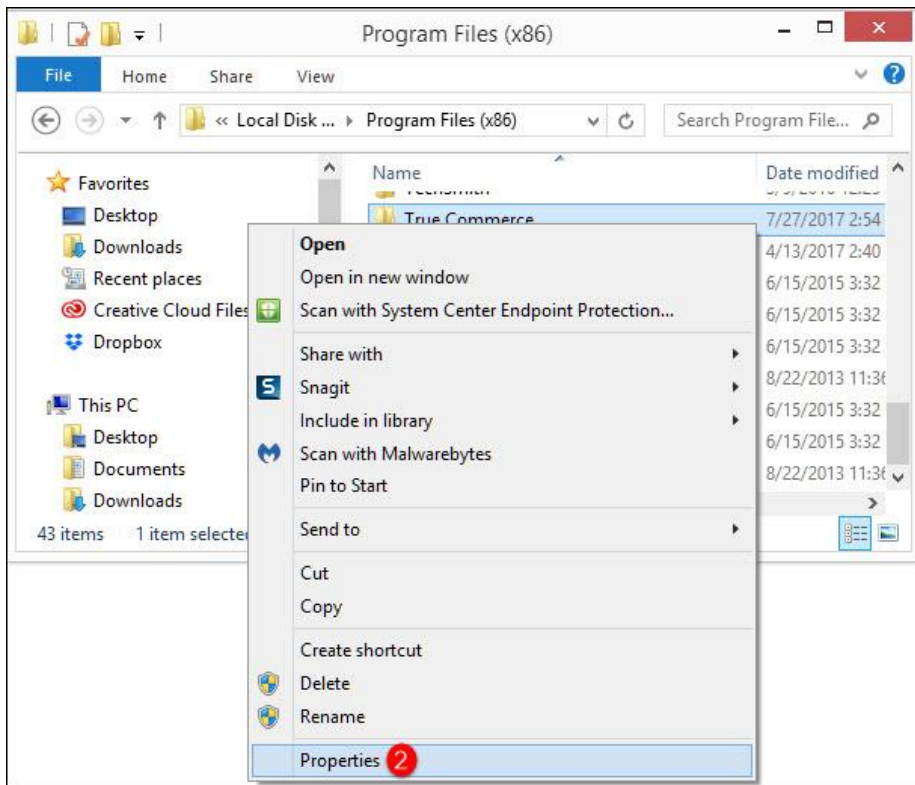
3. Select **Security | Edit | Add** and type 'Everyone' in the object names box, then click **OK**.
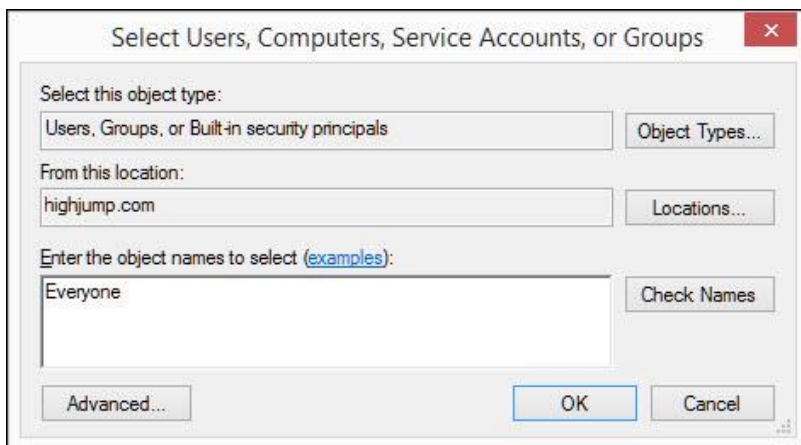
4. Check all boxes under 'Allow'.

5. Click Apply | OK.

6. Repeat previous steps for the TrueCommerce folder located directly in the C: drive.

Change Internet Options Settings

Once the Integration Service has been installed and permissions opened, changes will need to be made to add TrueCommerce as a trusted site in Internet Options. To accomplish this, perform the following steps:

1. Open a new browser page, then open **Internet Options**.

2. Click the Security tab, then select click **Sites | Trusted Sites**.

3. Uncheck the 'Require server verification' box.

4. Add the following sites:

   - https://tmointsvcs.truecommerce.com
   - http://tmointsvcs.truecommerce.com
   - https://transactionmanager.truecommerce.com
   - *.truecommerce.com
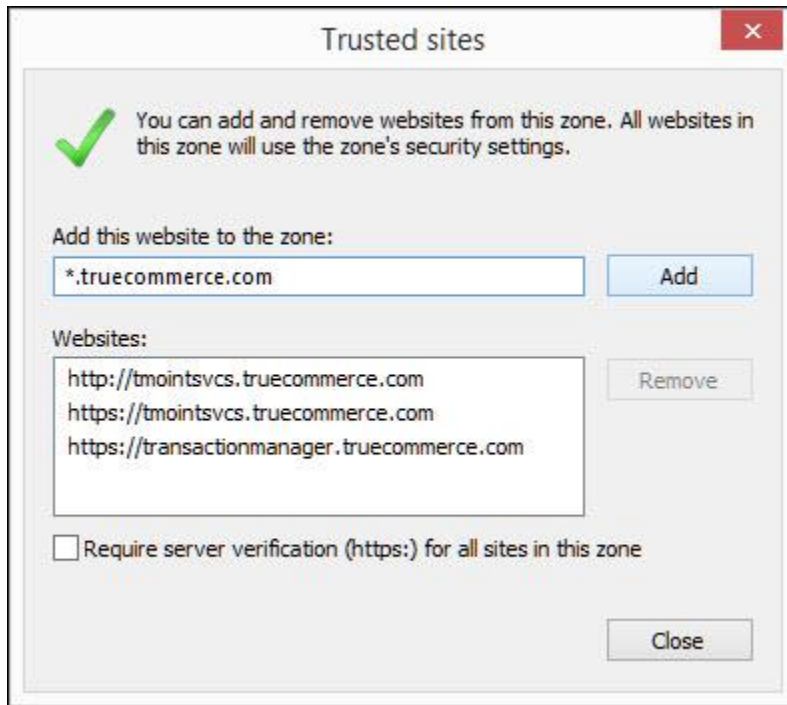
5. Click **Close**, then click **OK** to close out of Internet Options.

Chapter 2
Terminal Server Port Manager

Overview

The Terminal Server Port Manager tool is used to manipulate the file at C:/ProgramData/TrueCommerce/TmoIntegrationServiceUserPorts.xml. This User Interface (UI) tool is used to make working with the file easier and has some checks in place like duplicate ports, users, and more. It can also be used to register and unregister ports in the URLACL (you can view these from command line using "netsh http show urlacl" command). It will unregister users' ports when they are deleted as well. When deleting a user, the integration service detects when a new user logs in to the terminal server and automatically adds them to the Port Manager list/XML file if they don't exist already and registers their ports to the URLACL LIST.

This chapter provides instruction on how to add a single user, adjust the user list, and delete an existing user in the TMO Integration Service Port Manager.

> **NOTE** *This list needs to be streamlined by unchecking the* StartOnLogin *box for users who will not utilize it to prevent use of system resources. This is because, by default, any user who signs into the terminal server is automatically added to the port manager.*

New User Detection: Port Manager will detect new users that sign into the terminal server, automatically assign a port number not assigned to another user and set the user to StartOnLogin. This saves the Terminal Server admin from having to manually add users. You may need to close and reopen Port Manager to see the additional users.

> **NOTE** *When the user logs into the terminal server, a* Port Number Warning *prompt may display. If so, take note of the assigned port number, then click* **OK**. *This MUST be clicked before the service can begin.*

Add a Single User in TMO Integration Service Port Manager

Prior to setting up the TMO Integration Service Port Manager, ensure there are no users assigned port 29292. If a user does have that port number, delete it and manually set a new port number instead using a port within the range of 49152 to 65535. It is recommended to use 50000, 50100, 50200, or any available port number.

> **NOTE** *You must be logged into Terminal Server as a* **Local Administrator** *to add a single user in the TMO Integration Service Port Manager.*

Chapter 2
Terminal Server Port Manager

To add a single user in TMO Integration Service Port Manager, perform the following steps:

1. Navigate to the C: drive and access Program Files (x86) | True Commerce | TMOIntegrationServices | TMOIntegrationServiceUserPortManager (at the very bottom of the directory).

2. Right-click on TMOIntegrationServiceUserPortManager, then select Run as Administrator.
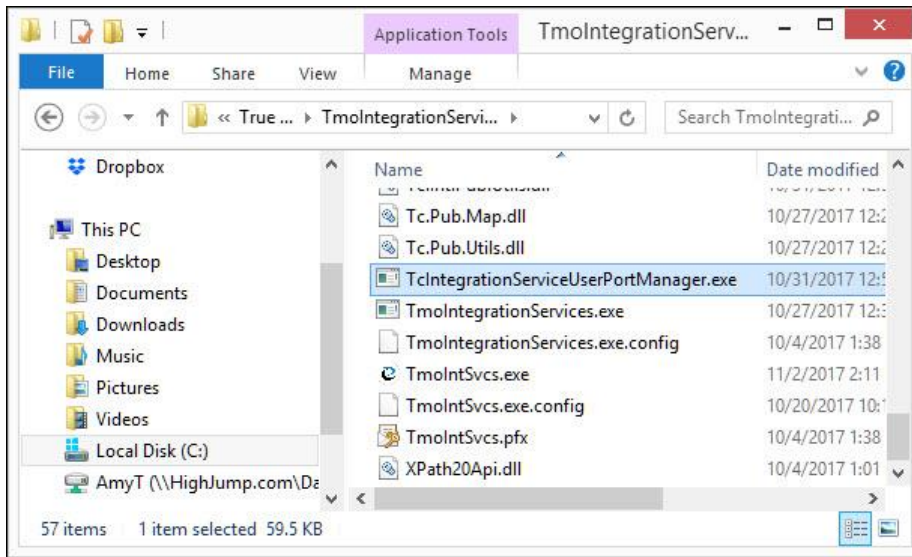
3. Add users as needed by placing the cursor in the next empty line, then type the desired **Username** and **Port** number. Make sure to follow the pattern in terms of the domain spelling/case lettering. Also ensure that the Username is properly spelled with no extra spaces at the end. Again, Port 29292 cannot be used in a terminal server environment. If any user has this port set, it will need to be changed to a valid port within range of 49152 TO 65535.
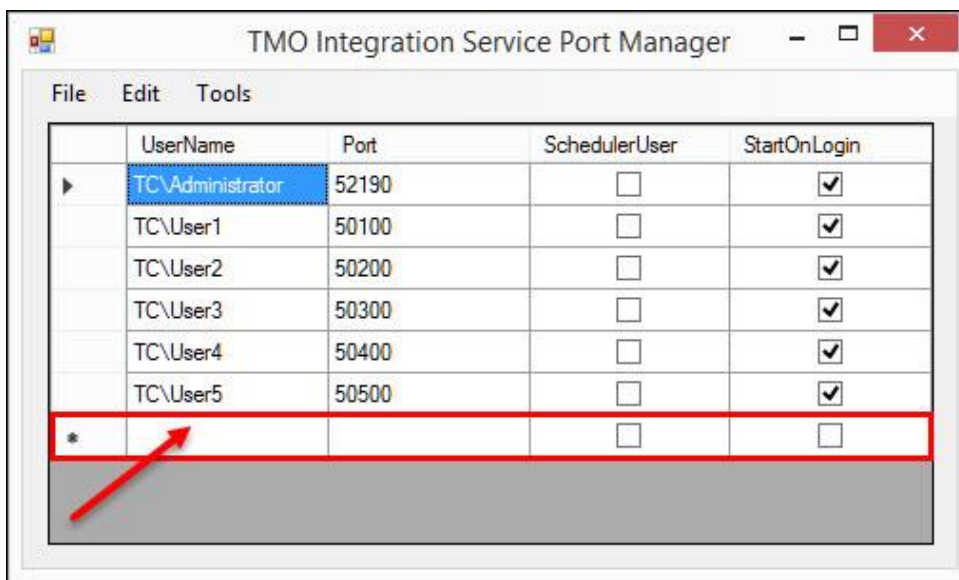
4. Check the **SchedulerUser** or **StartOnLogin** box, if applicable.

- **SchedulerUser** box: When checked, the service starts when the specified user logs in and will start Scheduler for that user. When the user logs out, it will restart Scheduler on that user's port.

> **IMPORTANT** | *Only one user can be specified as the SchedulerUser.*
>
> *In a Terminal Server environment, the SchedulerUser should ALWAYS be the local admin account.*

- **StartOnLogin** box: When checked, the Integration Service will start for that user. If left unchecked, the Integration Service will not start when that user logs in.

5. Select **File | Save** to save the new user(s) to the user list.
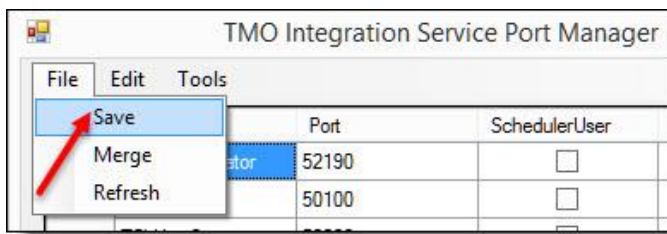
6. Open the **Services** program on the Terminal Server machine.

7. Search for and select the Transaction Manager Integration Service, then click the **Restart the Service** option.

> **IMPORTANT** | *This must be completed after performing ANY modification to the Port Manager or the TMO IntegrationServiceUserPorts.xml via adding, moving, or modifying user(s).*
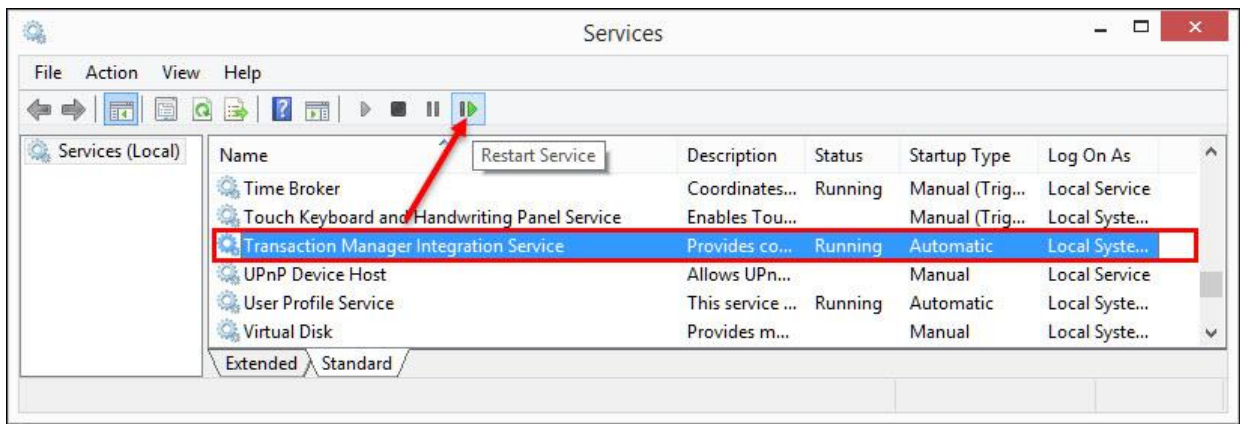
Adjust User List

> **NOTE**
>
> *You must be logged into Terminal Server as a **Local Administrator** to add a single user in the TMO Integration Service Port Manager.*

To adjust the user list in the TMO Integration Service Port Manager, perform the following steps:

1. Check the **StartOnLogin** box for the Username that you want to be logged on automatically.

2. Move the cursor from the checkbox field, then select **File | Save**.

3. Open the **Services** program on the Terminal Server machine, then search for and select the **Transaction Manager Integration Service**.

4. Click the Restart the Service option.

> **IMPORTANT**
>
> *This must be completed after performing ANY modification to the Port Manager or the TMO IntegrationServiceUserPorts.xml via adding, moving, or modifying user(s).*
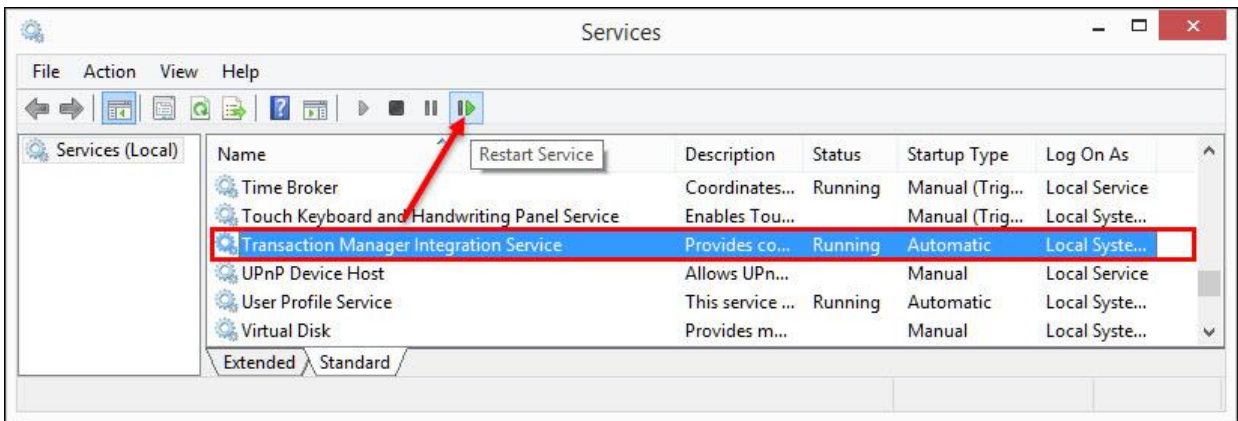
5. To verify that the Integration Service was turned on for that Username, connect remotely to the username setup in step 2 and verify in the notification bar that the Integration Service is running. If the Integration Service is not running, the icon will not appear in the notification tray.
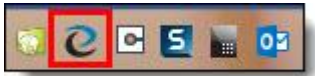
Integration Service activated

Delete a User

*You must be logged into the Terminal Server as a **Local Administrator** to add a single user in the TMO Integration Service Port Manager.*

To delete a user from the TMO Integration Service Port Manager, perform the following steps:

1. Select the user row to be deleted.

2. Select Edit | Delete Row(s).
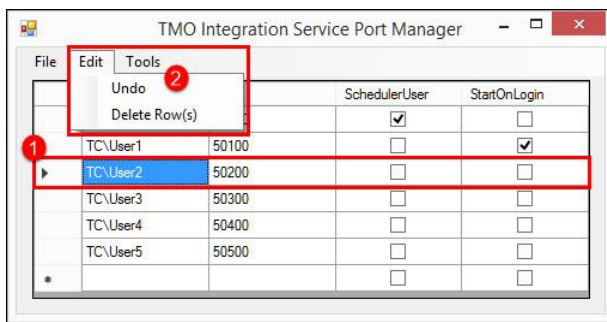
3. Select **Yes** to continue to delete the user(s) from the TMO Integration Service Port Manager.

4. After deleting the user(s) from the list, select **Tools | Unregister ports | All**.
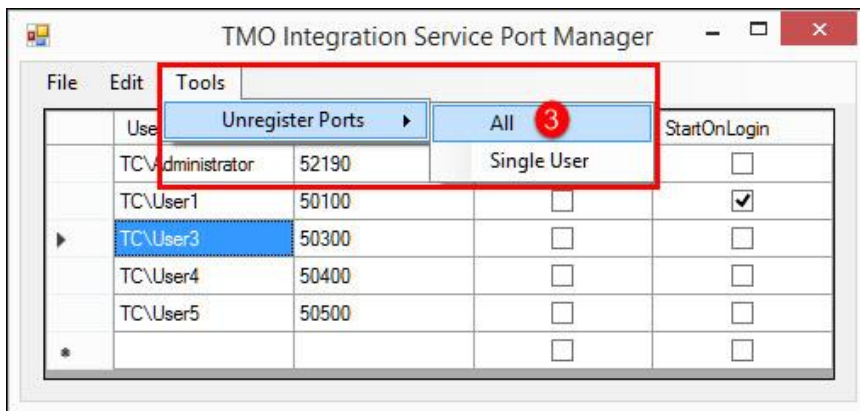
5. Open the **Services** program on the Terminal Server machine, then search for and select the **Transaction Manager Integration Service**.

6. Click the Restart the Service option.

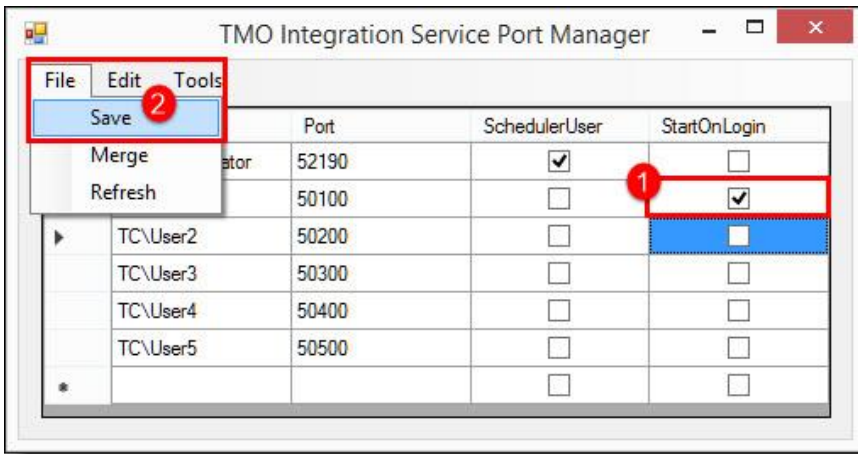| IMPORTANT | *This must be completed after performing ANY modification to the Port Manager or the TMO IntegrationServiceUserPorts.xml via adding, moving, or modifying user(s).* |
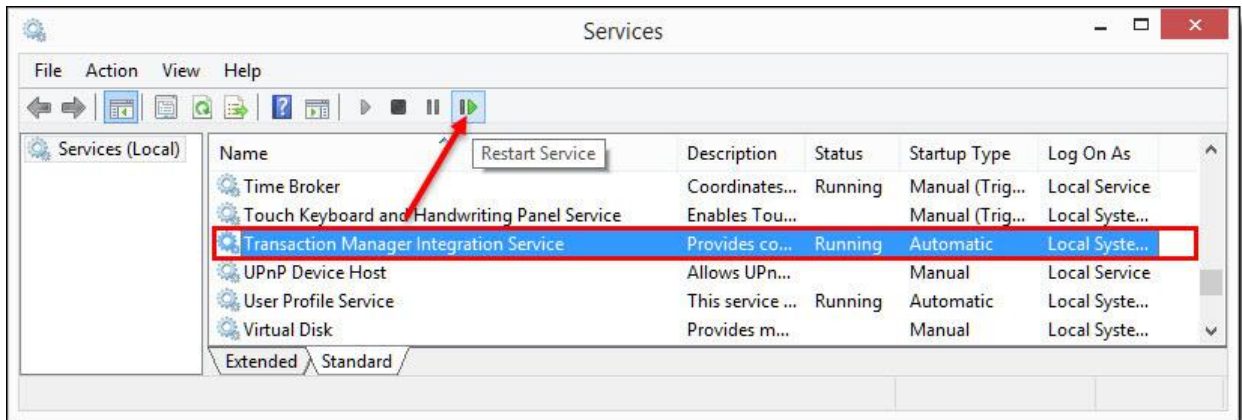
Chapter 3
Integration Service Configuration

Transaction Manager Notification

If you received the following notification from Transaction Manager there are two possible causes.

1. You do not have the TrueCommerce Integration Service Installed

2. The Integration Service is installed; however, it is not running or monitoring correctly
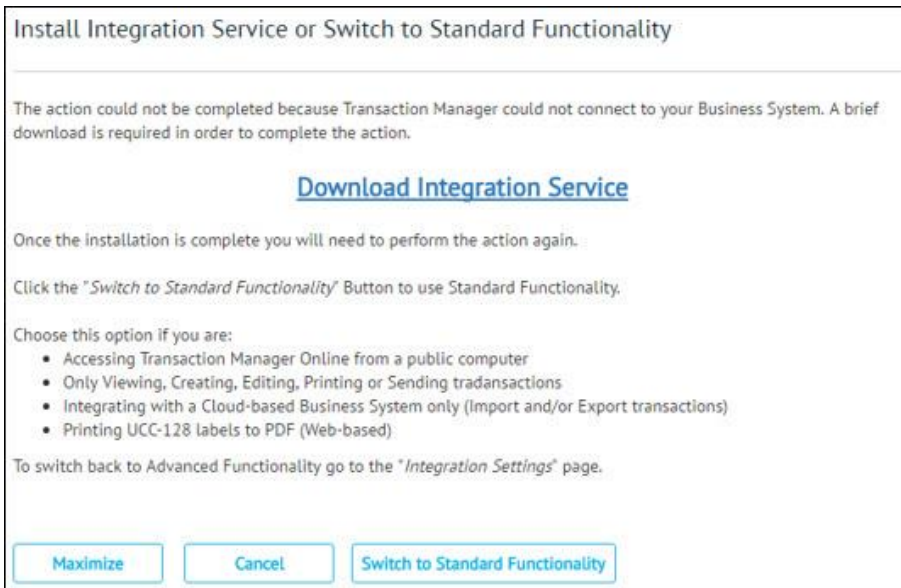
If you know that you need the Integration Service installed, continue to follow through this guide for common troubleshooting steps.

NOTE	**Do I need the TrueCommerce Integration Service?**
	TrueCommerce offers cloud-based integrations, which do not require the local Integration Service. Some example integrations include NetSuite, SAGE X3, *or the* QuickBooks Online *integration frameworks. If you are unsure as to whether you need the Integration Service locally or if you can take advantage of a complete cloud solution from TrueCommerce, contact the* **TrueCommerce Support team at (724) 940-5520, Option 3** *to speak to a representative who can help assess the situation before going any further.*

Validate the Integration Service is Installed

The first step is to validate that the Integration Service is installed on your system. To validate this, navigate to your computer's installed application list and look for the product:

<div align="center">**Transaction Manager Integration Service**</div>

If this application is not listed in your locally installed programs, follow the Transaction Manager prompt to download and install the latest service.

Validate the Integration Service is Running

Once it has been validated that the Integration Service is installed, you will need to validate that the service is actively running. The Integration Service will run in a minimized state located in your System Tray.

Look for the TrueCommerce icon in your system tray.

NOTE

Windows 8 and up will hide icons that are not commonly interacted with. Expand your icons as it may be hidden. Using the example above, expanding hidden icons is done by clicking on the arrow up symbol to the left of the screenshot.

If the service is not running, try the following troubleshooting steps:

1. <u>Restart your system</u> - The first step is to restart your computer to see if the service re-initiates. Once the computer is rebooted, validate if the service is running using the previous steps.

2. <u>Validate service is set to run</u> - Validate that the service is set to run on your computer. The following steps will help you accomplish this:

   - Launch the Windows Services Manager (Start Menu → Type 'Services' → launch the application)

   - Locate the service Transaction Manager Integration Service in the list.

   - Validate the Status is showing 'Running' and the Startup Type is showing 'Automatic'.

If the service is not running, use the **Start** option (or right click to start).

Validate the Integration Service and Transaction Manager are Synced

The Integration Service and Transaction Manager must be synced to the same port on your computer in order to allow them to communicate. To check if the ports are synced, perform the following steps:

1. Double-click on the Integration Service icon in your System Tray to launch the health dialog.
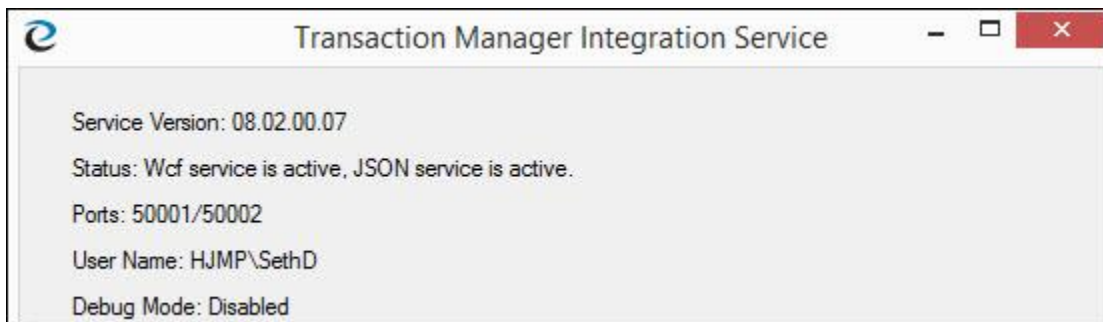

2. Locate the port that the service is using. Referring to the screenshot above, Ports includes the value **50002**. The port the service is using is 50002.

3. Log in to Transaction Manager and navigate to **Integration Settings** in the menu to validate that **Option 1 – Advanced Functionality** is selected and that the Integration Service Port contains the same value as your Integration Service.

> **NOTE**
> *If the integration service port is defaulting or clearing to mismatch the integration service settings, ensure that cookies are enabled within the browser settings and not being cleared upon browser close.*
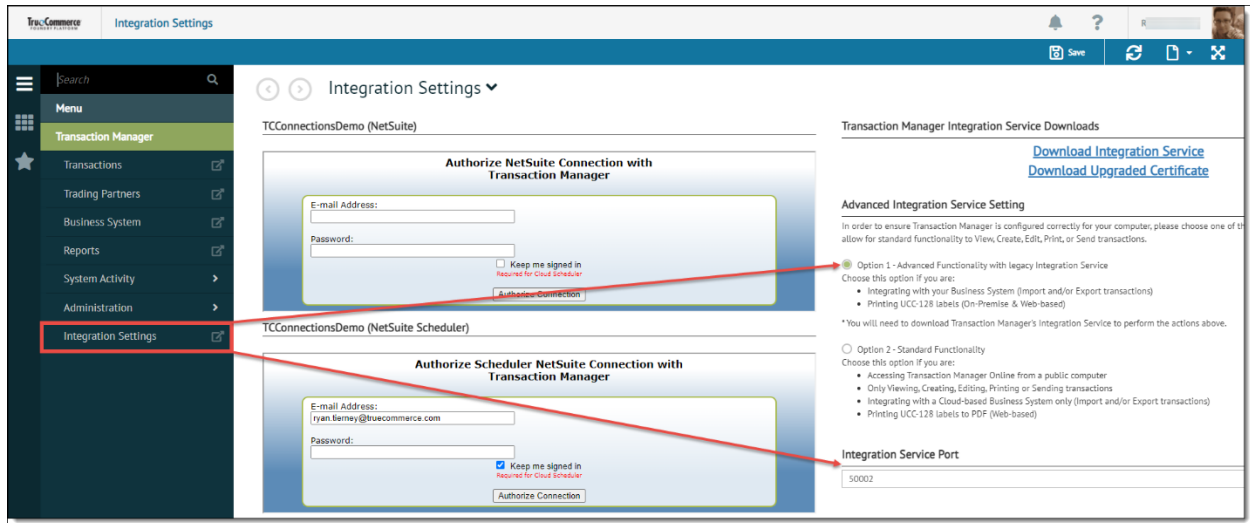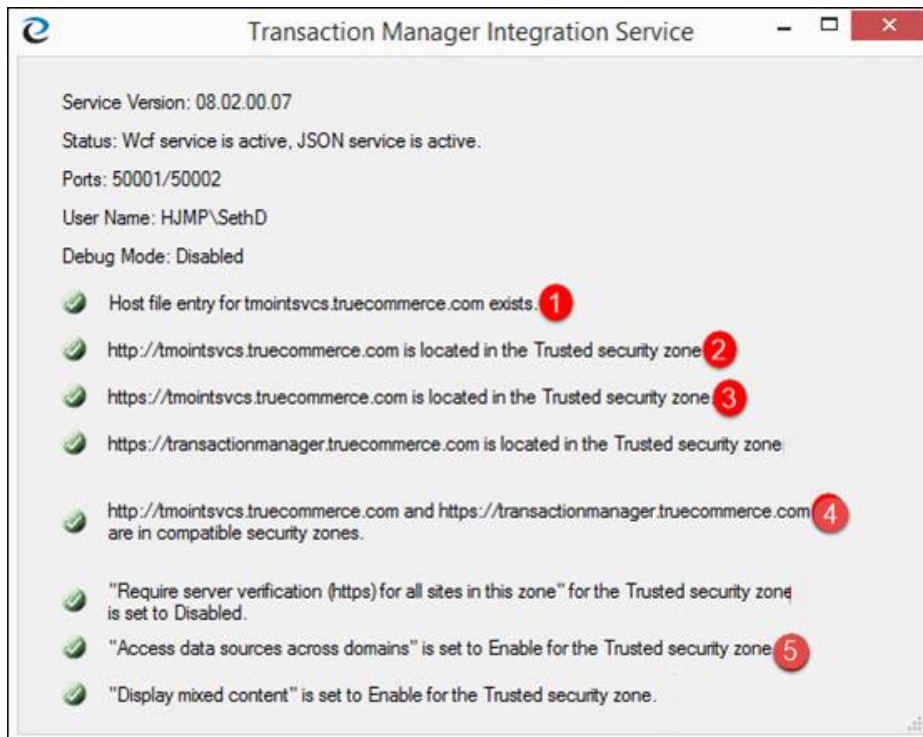
Transaction Manager - Integration Service Port

> **NOTE**
>
> *If you have completed all of the steps provided in this document and are still having problems with the Integration Service not functioning properly, please contact the* **TrueCommerce Support team at (724) 940-5520, option 3**.

Integration Service Messages

The table following the screenshot immediately below describes the breakdown of the TrueCommerce Integration Service screen with brief descriptions of each item.

Proprietary and Confidential
© 2022 True Commerce, Inc. All rights reserved.

	Message	Description
1	Host file entry for tmointsvcs.truecommerce.com exists	A host file entry is created so that the URL above is mapped to the localhost, which is the machine the integration service is running on. That means when the browser calls out to the integration service URL it is directed to the self-hosted WCF service on the local machine instead of trying to find that URL out on the web via a DNS server. You can find the host file at C:\Windows\System32\drivers\etc\hosts.
2	http://tmointsvcs.truecommerce.com is located in the Trusted security zone	This puts the URL for the entry point used by HTML5 into the trusted security zone so that it is not blocked when it attempts to communicate. These can be found in Internet Options	Security	Trusted Sites	Sites
3	https://transactionmanager.truecommerce.com is located in the Trusted security zone	This allows the integration service to communicate back to the transaction manager load balanced URL for the same reasons as #1 in this table.
4	http://tmointsvcs.truecommerce.com and https://transactionmanager.truecommerce.com are in compatible security zones	The integration service URL and transaction manager URL are both in the same security zone. If they are in different security zones, they cannot communicate.
5	"Access data sources across domains" is set to Enable for the Trusted security zone	The integration service and TMO are in different domains, so this needs to be enabled. Located in same place as above.

Ports

Port	Description
50002 (port on the right)	This is the port used by the **HTML 5** endpoint in the https URL. This is a restful JSON service, the URL is https://tmointsvcs.truecommerce.com/50002

Troubleshooting

Following are some common issues when using a Terminal Server environment.

Issue	Description
Transaction Manager Integration Service icon does NOT show up or the service immediately crashes	The Transaction Manager Integration Service MUST be installed on a Local Admin account and NOT a Domain Admin account in a Terminal Server environment.

Getting Additional Help

Live Training Sessions

TrueCommerce offers a wide range of live training sessions. Transaction Manager customers specifically should enroll in the Transaction Manager: "Day in the Life" course, and the Integration Basics course in TrueCommerce University. Click the following link to be directed to an article with instructions of how to sign up: Access TrueCommerce University

Help Menu

This guide provides information regarding the configuration of Transaction Manager. For more detailed information, access the online help manual from the **Help** menu in Transaction Manager. Transaction Manager's online help provides you with the means to locate information using the Table of Contents or you may search for information using keywords.

Contact Support

Account Management in Foundry has a downloadable integration and instructional user manuals which can provide answers and guidance on many of your questions.
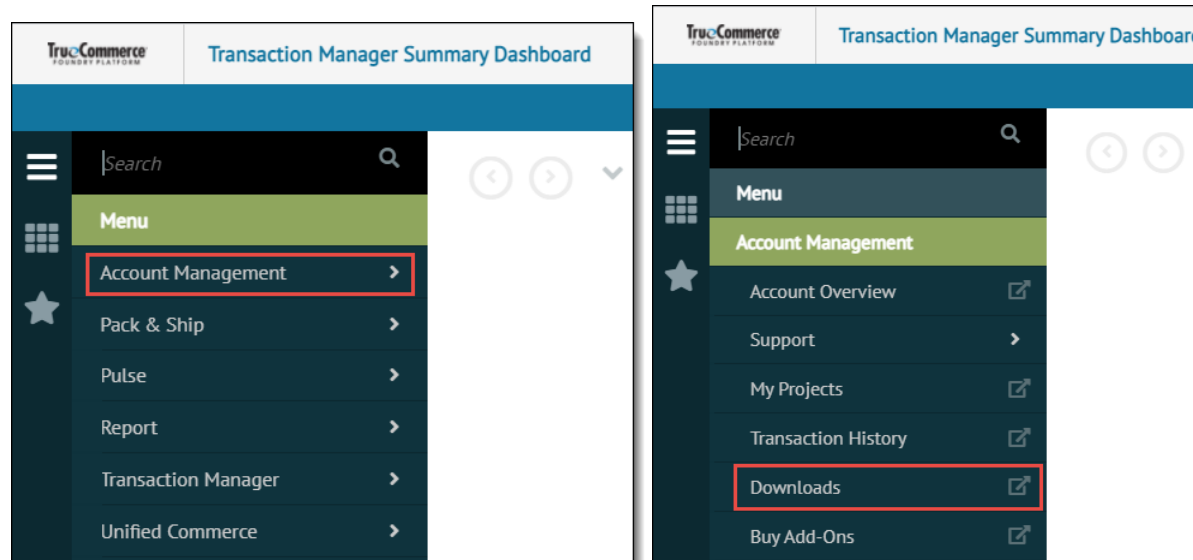
If you need to work with a Support Specialist, there are multiple ways to contact TrueCommerce Support:

- You may create and manage your support cases in Account Management.
- You may call (888) 430-4489 or (724) 940-5520. In either case, choose option 3 for Technical Support, or option 2 for Billing Support.

Note that for the most time-sensitive issues, calling will yield the quickest help, as your call is routed directly to a Support specialist.

Rev: 3/10/22