



# Using WinSCP

April 2009

## Overview

You can upload files to and download files from Optimal Payments securely via SFTP.



*In order to be configured to upload and download files via SFTP, contact Technical Support at [support@optimalpayments.com](mailto:support@optimalpayments.com).*

### Steps required to use WinSCP:

1. Create two new folders on your PC, where you will keep the files we email you, as well as the files you upload to Optimal Payments.
2. Create a security key, using an application we supply to you, that allows you to create a secure FTP connection between you and Optimal Payments. See *Creating your security key* on page 3.
3. Configure WinSCP, which is an application we supply to you. You will use it to upload files. See *Configuring WinSCP* on page 6.



*You only have to complete steps 1–3 once, to configure your system to upload files securely.*

4. Store your files in the designated folder.
5. Upload your files to Optimal Payments.



*Optimal Payments recommends WinSCP because it is freeware. However, you can use whatever SFTP client you prefer.*

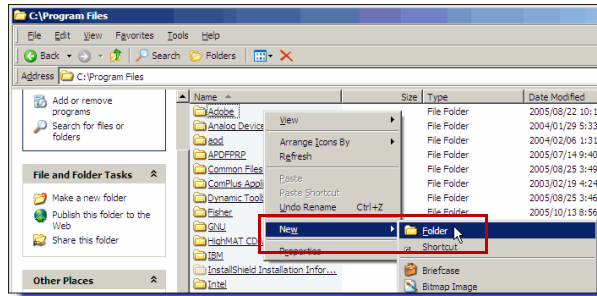
## Creating your folders

In order to be able to install and configure the applications we have sent you and to upload files, we recommend that you create two folders (or directories):

- You will use the first to store the two files we will provide to you upon request (*puttygen.exe* and *WinSCP.exe*), and to store your security key, once you have created it (see *Creating your security key* on page 3).
- You will use the second – which will be a subfolder of your first folder – to store your files before using WinSCP (a secure FTP protocol we provide) to upload them.

### To create your new folders:

1. On your PC, go to C:\Program Files.
2. Right-click with your mouse, and select New>Folder.




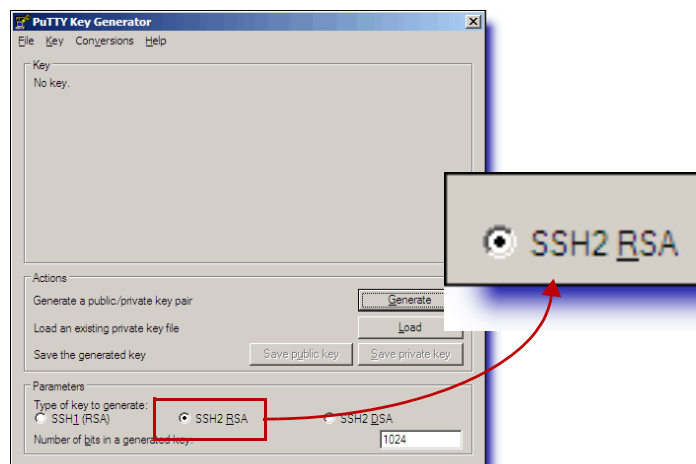
3. Type "sftp" to name the folder you have just created. You should now copy the two files that Optimal Payments emailed you (*puttygen.exe* and *WinSCP.exe*) into this folder.
4. Open the new folder named "sftp".
5. Right-click with your mouse, and select New>Folder.
6. Type "Report Files" to name the new folder you have just created. We recommend that you use this folder to keep your files in, as this will simplify the task of uploading them.

## Creating your security key

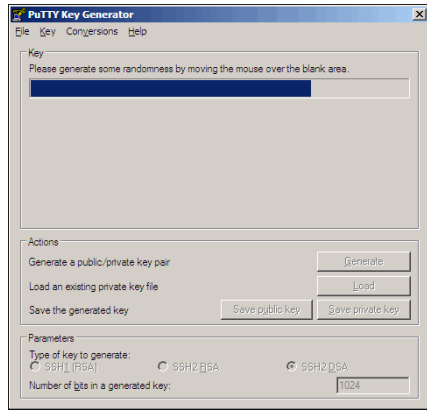
When you upload files, they contain sensitive merchant data. For this reason, it is necessary to upload these files over a secure FTP connection. Part of this process includes creating a security key, which is used by WinSCP when connecting with Optimal Payments. This security key actually has two parts: a private key, which you keep on your PC, and a public key, which you will upload to Optimal Payments using the merchant back office.

### To create your security key:

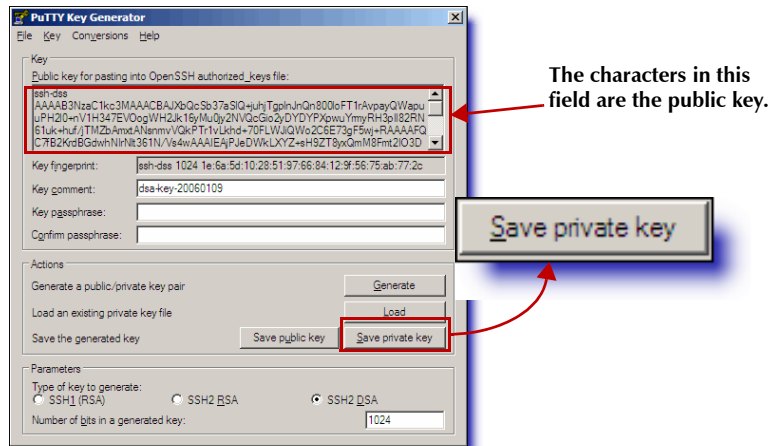
1. In your folder "sftp", double-click the *puttygen.exe* icon . The PuTTY Key Generator window opens.



2. Select the SSH2 RSA radio button.
3. Click Generate. The key generator begins to generate a security key.



4. While the security key is generating, move your cursor around the screen until the status bar is completed. This action contributes to the randomness of the security key.



5. Copy all the data (which is, in fact, the key) from the field named "Public key for pasting into OpenSSH authorized\_keys file".
6. In the Optimal Payments merchant back office, go to the Settings area of the Customer Support tab and paste the public key data in the SFTP Public Key field, and then click Save at the bottom right. (If you cannot see the Settings area, contact Technical Support.)

Account Statement Virtual Terminal Batch Upload Reports Recurring Billing Customer Support

Messages Contact Us Feedback Documentation Password Change Tutorial Videos Settings

**General**

Default Start Page: Reports

Enable Recurring Billing Consumer Notification

From Email Address:

SFTP Public Key:

Before you can upload batch files via SFTP, you must first configure WinSCP. Use the following value for the "User name" field:  
 ustepheng

\* [Click here for more information on configuring WinSCP.](#)

Save



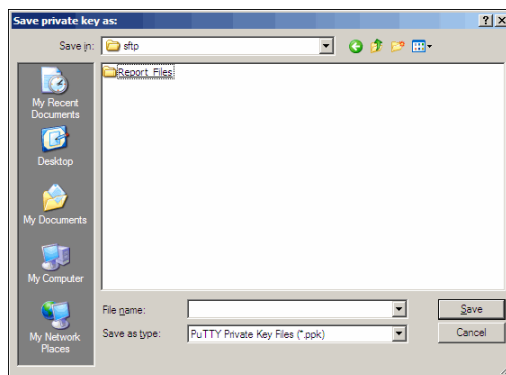
*Make sure you copy all of the information in this field in the PuTTY Key Generator application to paste in the SFTP Public Key field in the merchant back office.*

7. Enter a password in the "Key passphrase" field.
8. Re-enter this password in the "Confirm passphrase" field.



*Store this password in a safe place. You will need it when you use WinSCP to upload files to Optimal Payments. The only way to reset this password is to create a new security key.*

9. Click the "Save private key" button.



10. Save your private key in C:\Program Files\sftp, using your merchant user name as your key name. Your merchant name is the same as the User name value in Table 1: *Session Fields* on page 6.
11. Close the PuTTY Key Generator window.

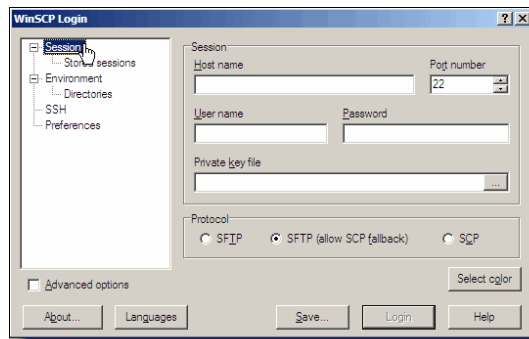
When we have received your public key and our own setup is complete, we will email you a confirmation. Once you receive this confirmation, you can begin using WinSCP to upload files.

## Configuring WinSCP

We attached a copy of WinSCP (*WinSCP.exe*) in an email. This is a freeware program (i.e., you can use it without charge) for establishing secure FTP connections between computers. You have to configure WinSCP before you can upload files to Optimal Payments, but you need to configure it only once. Once configured, it is easy to use.

### To configure WinSCP:

1. In your folder "sftp", double-click the *WinSCP.exe* icon . The WinSCP Login window opens.

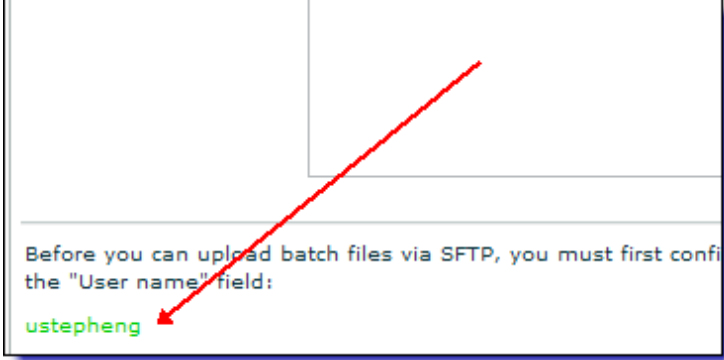



2. In the left pane, click Session.
3. Complete the following fields:

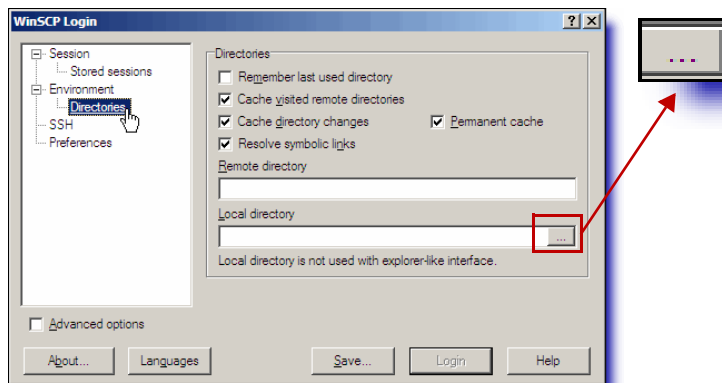
**Table 1: Session Fields**


Field	Value
Host name	Enter the following data: mercbatch.firepay.com
Port number	This is 22 by default.

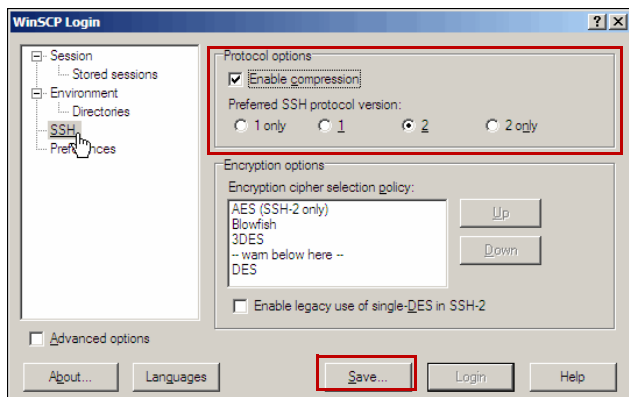
**Table 1: Session Fields**

Field	Value
User name	<p>Enter your case-sensitive user name. Once you have uploaded your public key (see <i>Creating your security key</i> on page 3), you can find your user name in the bottom left corner of the Settings area of the Customer Support tab in the merchant back office.</p> 
Private key file	Click on the  icon and browse to the private key you created (see <i>Creating your security key</i> on page 3).
Protocol	Select the radio button for “SFTP (allow SCP fallback)”.

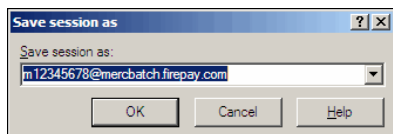
- In the left pane, click Directories.



- In the “Local directory” field, click the  icon, and browse to C:\Program Files\sftp\Report Files (which you created in *Creating your folders* on page 2). When you run WinSCP to upload files to Optimal Payments, it will default to this folder.
- In the left pane, click SSH.



7. In the “Protocol options” section, select the following:
  - The “Enable compression” check box
  - The radio button “2” for “Preferred SSH protocol version”
8. Click Save. The “Save session as” window opens.



9. Click OK. This session is now saved and will be used each time you open WinSCP to upload files with Optimal Payments.

## If you need help

If you follow these instructions you should have no trouble uploading files to Optimal Payments. If, however, you encounter any difficulties, contact technical support.

- [support@optimalpayments.com](mailto:support@optimalpayments.com)
- 1-888-709-8753