EPS Loyalty

Feature Reference

Date: March 21, 2023

Verifone®

EPS Loyalty

Using This Feature Reference

This Feature Reference provides detailed information on how to configure and use the EPS Loyalty feature on the Verifone Commander.

This document contains the following subsections:

- **Overview** - This section contains a brief description, requirements and the supported hardware configurations for the EPS Loyalty feature on Verifone Commander.

- **Using -** This section describes how to prepare Verifone Commander for the EPS Loyalty feature.

- **Configuring** - This section contains information on how to configure the EPS Loyalty feature on Verifone Commander.

- **Reporting** - This section contains a sample report with a detailed report description for the EPS Loyalty feature on Verifone Commander.

Revision History

Date	Description
09/25/2015	Reformatted and revised to include the Verifone Commander.
08/10/2016	Updated Loyalty Card Configuration to include configuration for GS-128 loyalty cards.
09/15/2016	Updated Format.
12/14/2016	Updated PCI private IP addressing requirements.
03/07/2018	Updated Integrated Partners List link.
06/15/2018	Updated Loyalty Program Configuration to include new screenshot and configuration for the Enable Card Download from Host flag.
10/08/2019	Added loyalty network connectivity diagrams, added a phone number entry method configuration, and added notes to the various inside and outside transaction flows for multiple loyalty.
03/21/2023	Updated the PCATS01 graphic and removed references to Enhanced Zone Router (EZR).

Contents

EPS Loyalty for Verifone Commander

Overview

Feature Description

Electronic Payment System (EPS) Loyalty Sales allow the processing and redemption of loyalty transactions, both inside at the Point of Sale (POS) and outside at the Dispenser Card Readers (DCR).

Loyalty transactions are processed through the EPS. EPS Loyalty Sales include:

- Inside Loyalty Sales
- Outside Loyalty Sales

Multiple loyalty programs can be configured and multiple EPS Loyalty Discounts can be applied.

Requirements

Hardware Requirements

- Verifone Commander with C18
- Verifone Commander with Topaz
- Verifone Commander with Ruby2
- Verifone RubyCi with C18
- Verifone RubyCi with Topaz
- Verifone RubyCi with Ruby2
- Verifone Commander 16 with C18
- Verifone Commander 16 with Topaz
- Verifone Commander 16 with Ruby2

Loyalty Connectivity Diagram

MNSP Router

The loyalty is processed though the MNSP Edge Router.

Commander Loyalty Connectivity
Using MNSP Router
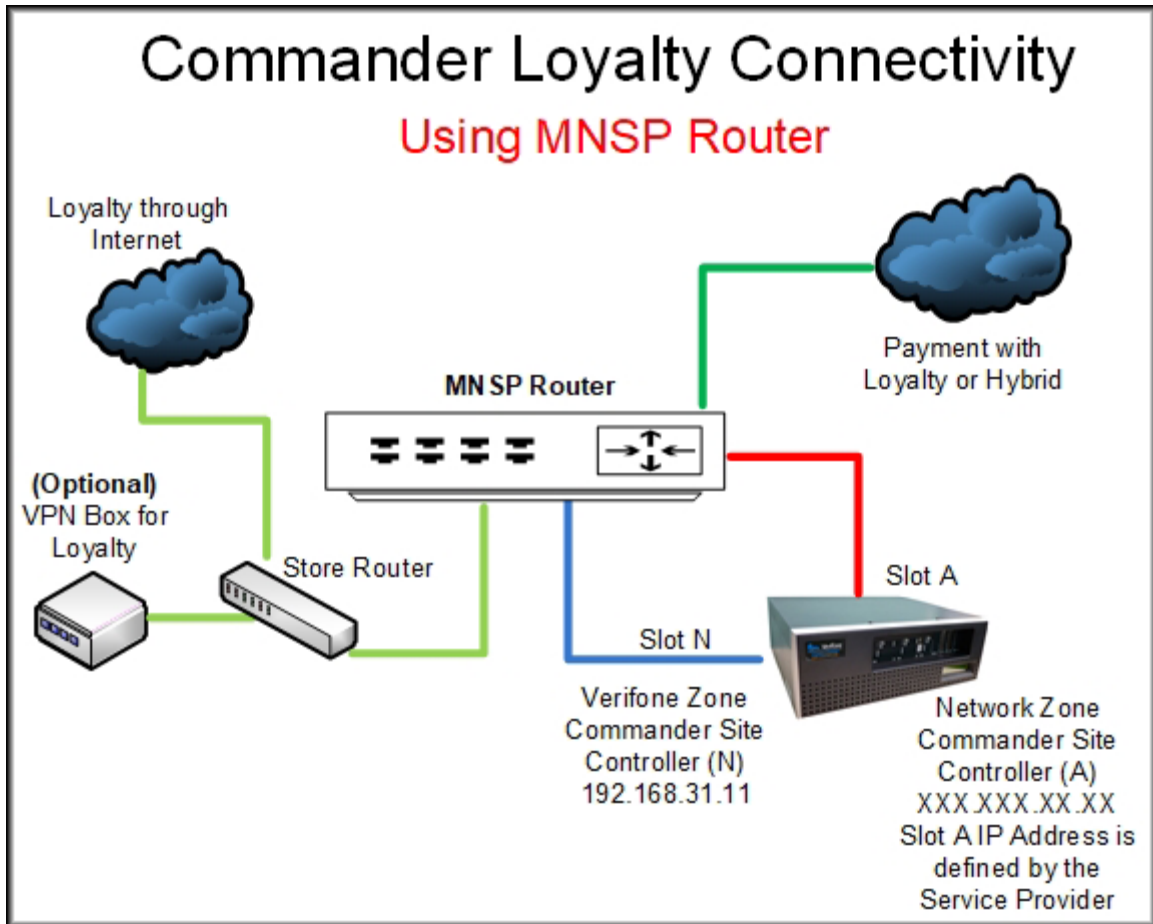
Configuring EPS Loyalty Sales

Advanced Preparation

Prior to configuring EPS Loyalty, the following information must be acquired:

- Loyalty Host IP.
- Port for IP communication with the Loyalty Host.
- Custom Reconciliation Period for reporting.
- Custom Reconciliation Period cut-off time for reconciliation periods.
- Upper and lower limit ISO range for POS Configuration.

Refer to the Verifone Petroleum and C-Store Integrated Partners webpage for a list of approved Loyalty Partners and their contact information:

https://www.verifone.com/en/us/petro-partners-program

Configuring with Verifone Commander Configuration Client

POS Configuration

1. From the Configuration Client, go to: Payment Controller > POS Configuration.

Security	Initial Setup	Store Operations	Promos and Discounts	Forecourt	Devices	Payment Controller	Reporting	Tools	Help	Log Out

POS Configuration
Mobile Payment Configuration
EPS Prepaid Configuration
EPS Configuration
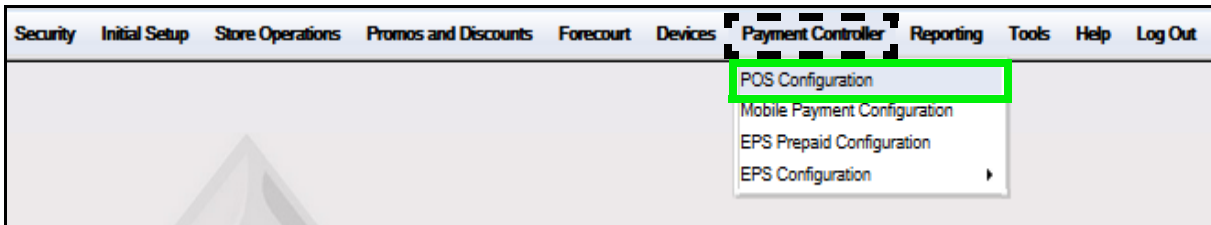
2. Select the **[POS]** tab.

3. Configure the Batch, Loyalty and Misc parameters:

Value	Description
Batch	
Batch Close Period	Determines when the batch is closed. • Period 1: close shift. • Period 2: close daily.
Loyalty	
Loyalty Enabled	Enables the loyalty packets to be sent to EPS, and must be selected.
Multiple Loyalty Discounts in same Transaction	Enables multiple loyalty discounts in the same transaction.

Value	Description

Auth on Total	Enables loyalty messages to be sent to EPS when the **[Total]** key is pressed.
	
	• If the *Auth On Total* option is enabled:
	  – The PCATS Loyalty Discount drops the item price down to $0.
	  – The system prompts for loyalty and authorizes it before the payment is tendered.
	
	• If the *Auth on Total* is not enabled:
	  – When an item is tendered with CASH, the system prompts for loyalty and determines the payment amount. The customer applies discount points for the item, and the sale total drops to $0 with an amount paid.
	
	When **[TOTAL]** is selected, the system prompts for loyalty and calculates the payment amount based on the loyalty response zero dollars. It does not require a tendered amount to complete the sale.

Force Cash Receipt	Sets cash receipt to print.
EPS PPG precedes POS PPG:	Enables EPS Loyalty Price Per Gallon (PPG) discounts to be stacked before the POP PPG discount.
Misc	
Message Display Duration	Sets the maximum time (in seconds) an auto-hide message will reain on the screen.
Print Customer Copy	Enables printing a customer receipt from the original transaction.

4. Select **[Save]** to accept, or **[Cancel]** to exit without saving changes.

5. To apply new settings, go to: Configuration Client > Tools > Refresh Configuration.

EPS Global Configuration

1. From the Configuration Client, go to: Payment Controller > EPS Configuration > EPS Global Configuration.
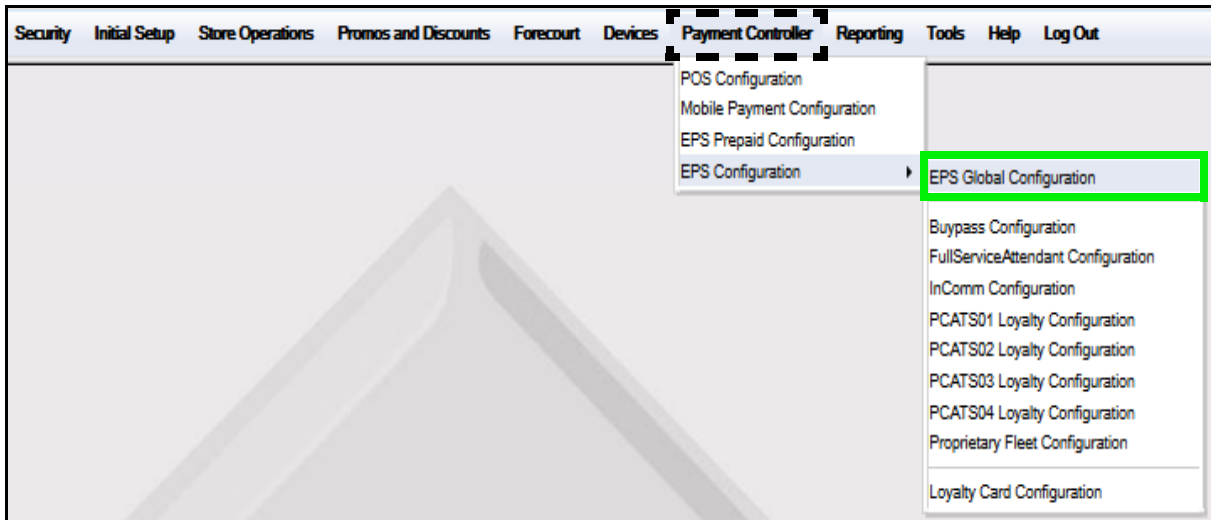
2. Select the **[Loyalty]** tab.
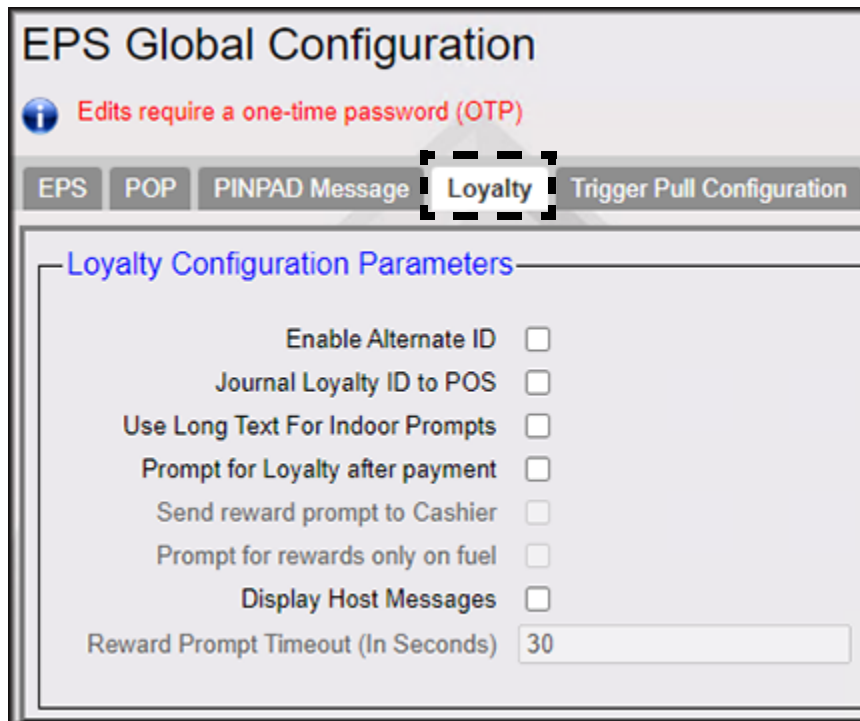
3. Configure the Loyalty Configuration parameters:

Value	Description
Loyalty Configuration	
Enable Alternate ID	Enables an Alternate ID.
Journal Loyalty ID to POS	Enables the Journal Loyalty ID to POS.
Use Long Text For Indoor Prompts	Enables the use of long text for indoor customer prompts.
Prompt for Loyalty after Payment	Enables the prompt for loyalty after payment.
Send reward prompt to Cashier	Enables the cashier to answer the PIN pad prompt from the POS if the customer hands the cash and leaves store without looking at the PIN pad display.
Prompt for rewards only on fuel	Enables the prompting for loyalty rewards only on fuel.
Display Host Messages	Enables the cashier to see loyalty messages from the host.
Reward Prompt Timeout (In Seconds)	Enables the specific timeout value (in seconds) for the prompt *"Reward customer? [Yes/No]."*

4. Select **[Save]** to accept, or **[Cancel]** to exit without saving changes.

5. To apply new settings, go to: Configuration Client > Tools > Refresh Configuration.

Loyalty Program Configuration

1. From the Configuration Client, go to: Payment Controller > EPS Configuration > PCATS Loyalty Configuration.
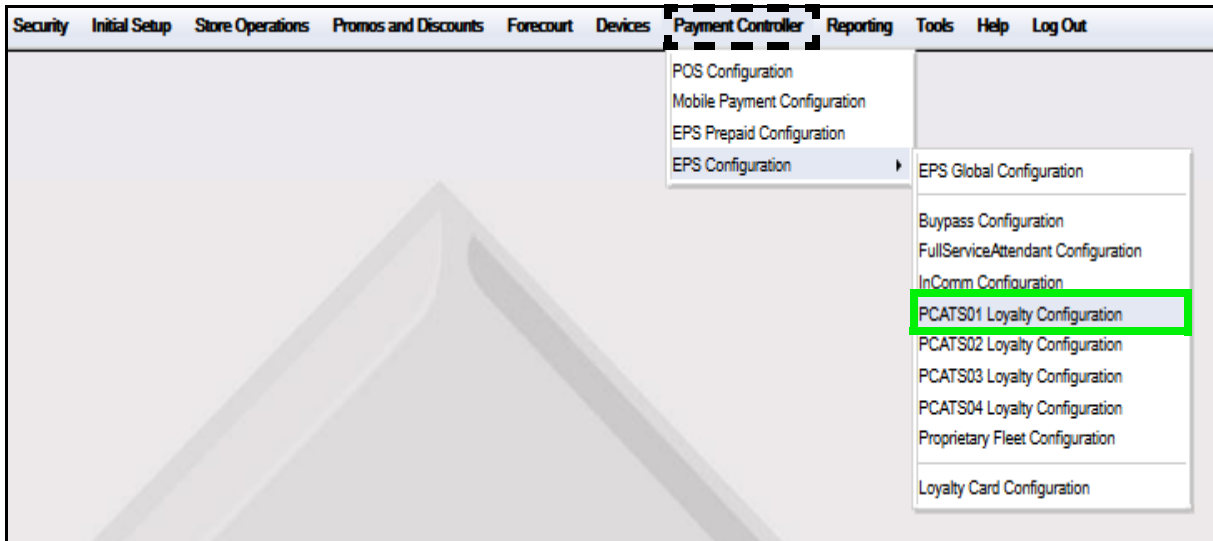
The Loyalty Configuration form displays for the PCATS selected.

PCATS01 Loyalty Configuration

Save Cancel

ℹ️ Edits require a one-time password (OTP)

Network

FEP Enabled	☑
Dealer ID	
Program Name	PROGRAM01
Loyalty Offline Receipt Message	
Enable Barcode Scan	☐
Enable Card Download from Host	☐
Display Loyalty Fep Offline to Hybrid Cards	☐
Display FEP Inside for multiple loyalty	☑
Display FEP outside for multiple loyalty	☑

Communication Options

Mode
- ◉ IP
- ○ Serial
- ○ Dial

Communication Options

IP/Domain Name	127.0.0.1
Port	9000
Enable TLS	☐
Heartbeat Timer	6000

FEP Parameters

Key Index 0

Reconciliation Period Options

Custom Reconciliation Period Enabled ☐

Custom Reconciliation Period Time 00 ⌄ 00 ⌄

2. Configure the Network, Communication and Reconciliation Period parameters:

Value	Description
Network	
FEP Enabled	Enables the loyalty program.
Dealer ID	Sets the Dealer ID provided by the network.
Program Name	Sets the Program ID for the loyalty program.
Loyalty Offline Receipt Message	Sets the loyalty offline receipt message
Enable Barcode Scan	Enables a Barcode Scanning for the related FEP. The flag default is disabled.
NOTE This flag must be enabled for Bar Code Scanning on the related FEP.	
Enable Card Download from Host	Enables the Loyalty Card Table Download that allows the Loyalty Host to send down card table entries. The flag default is disabled.
NOTE If this flag is disabled at a later date, the loyalty cards that were downloaded from the Host will be removed.	
Display Loyalty FEP Offline to Hybrid Cards	Enables Loyalty FEP Offline Prompt for Hybrid Cards.
Display FEP Inside for Multiple Loyalty	Displays Loyalty Program at the POS when multiple loyalty is used.
Display FEP Outside for Multiple Loyalty	Displays Loyalty Program at the DCR when multiple loyalty is used.
Communication Options	
Mode	Select **[IP]** as the communication mode.
IP Address (IPv4 Format)	Enter **[IP Address]** of the Loyalty Host.
NOTE Contact the Loyalty Host to provide the host IP address and port.	
Port	Enter the Primary Host **[Port].**
Enable TLS	Enables the use of a secure Transport Layer Security (TLS) connection to the loyalty host. When TLS is used, data is encrypted over the communication line.

Value	Description
Heartbeat Timer	Sets the interval in seconds between network status checks from the EPS to the Loyalty Host.
Reconciliation Period	
Custom Reconciliation Period Enabled	Enables the custom reconciliation period for reporting.
Custom Reconciliation Period Time	Cut-off time for custom reconciliation periods.

3. Select **[Save]** to accept, or **[Cancel]** to exit without saving changes.

4. To apply new settings, go to: Configuration Client > Tools > Refresh Configuration.

Loyalty Card Configuration

Loyalty cards include both *Mag-Stripe* (swiping) and *Bar Code* (scanning) for encoded account information.

Value	Description
Mag-Stripe	Account information is encoded in a magnetic stripe on the back of the loyalty card.
Standard Bar Code	Data is encoded in a bar code situated on the product (i.e., a coke can or candy bar wrapper).

NOTE

The Enable Bar Code Scan flag must be selected for the related FEP to enable bar code scanning. See Loyalty Program Configuration for the related FEP.

Value	Description
GS-128 Bar Codes	Account information is encoded on _both_ a magnetic stripe and a bar code on the back of the loyalty card. The loyalty card bar code is also encoded with **8018** in front of the account number. The GS-128 loyalty card has both a _mag-stripe_ and a _bar code_, and must have two entries in the Loyalty Card Configuration: • once as mag-stripe entry • once as bar code entry

NOTE The Enable Bar Code Scan flag must be selected for the related FEP to enable bar code scanning. See Loyalty Program Configuration for the related FEP.

See the parameter table below for Mag-Stripe, Standard Bar Code and GS-128 Bar Code loyalty card configuration details.

1. From the Configuration Client, go to: Payment Controller > EPS Configuration > Loyalty Card Configuration.
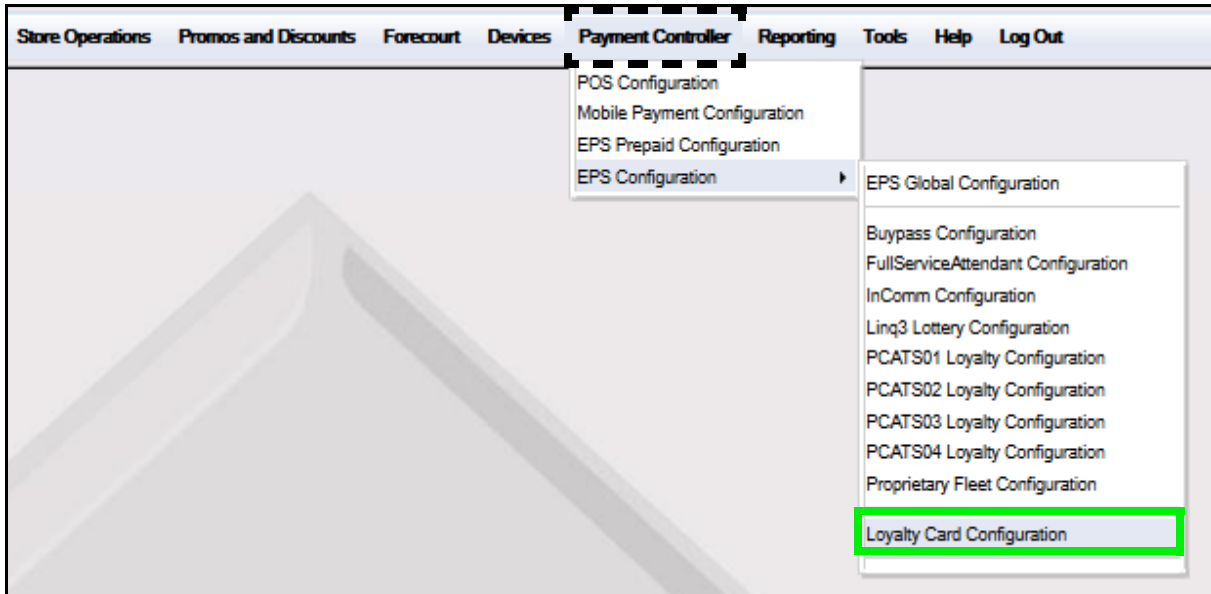
2. Select the **[Loyalty Card Configuration]** tab..
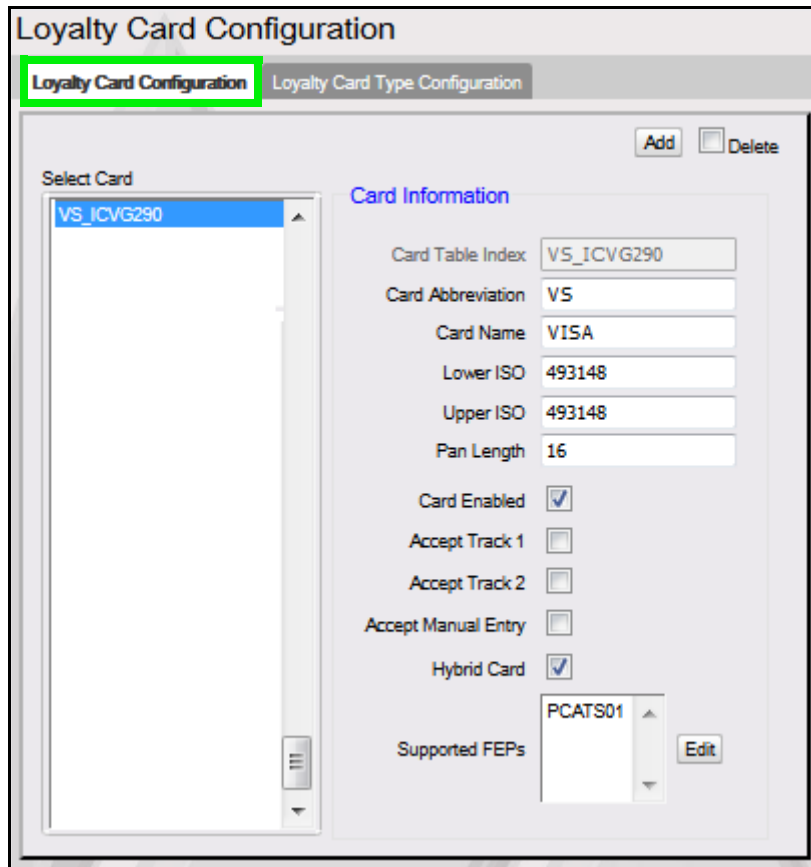
3. Select **[Add]** to configure a Loyalty Card.

4. Configure the Loyalty Card Information parameters:

Value	Definition	Mag Stripe	Standard Bar Code	GS-128 Bar Code
Card Information				
Card Table Index	Index entry in the card table.	Yes	Yes	Yes
Card Abbreviation	Sets a two digit abbreviation for the card.	Yes	Yes	Yes
Card Name	Name given to identify this entry.	Yes	Yes	Yes
Lower ISO	Sets the lower value of the card (bin) range. The entered card number must be greater than or equal to this number to match the table entry.	The first six digits of the card number.	The first six digits of the bar code.	**8018** is a special application ID and is required as the first four digits of the Lower ISO range followed by the first two digits of the bar code.
Upper ISO	Sets the upper value of the card (bin) range. The entered card number must be less than or equal to this number to match the table entry.	Same as the lower ISO or ending range value.	Same as the lower ISO or ending range value.	Same as the lower ISO or ending range value.
Pan Length	Sets the number of digits to be used with the card.	16 digits	12 digits	22 digits
Card Enabled	Enables the loyalty card.	Yes	Yes	Yes
Accept Track1	Allows a Track 1 entry. NOTE Either track 1 or 2 needs to be selected.	Required to accept track1 data.	No	Not required for the bar code entry. Either track 1 or 2 (or both) for the mag-stripe entry.
Accept Track2	Allows a Track 2 entry. NOTE Either track 1 or 2 needs to be selected.	Required to accept track2 data.	No	Not required for the bar code entry. Either track 1 or 2 (or both) for the mag-stripe entry.

Value	Definition	Mag Stripe	Standard Bar Code	GS-128 Bar Code
Accept Manual Entry	Sets manual entry for this card	Optional	Must be enabled.	Must be enabled for bar code entry. Optional for mag-stripe entry.
Hybrid Card	Sets the card as a hybrid card.	Optional	Optional	Optional for both bar code and mag-stripe.

5. Click **[Edit]** to select the supported FEPs. The Supported FEPs pop window displays.

6. Click the associated **<FEP>**.

NOTE	*One Loyalty Card can be configured to multiple FEPs.*

7. Click **[Done]** to save or **[Cancel]** to exit without saving.

8. Select **[SAVE]** or **[Cancel]** to exit without saving changes.

9. To apply new settings, go to: Configuration Client > Tools > Refresh Configuration.

Loyalty Card Configuration: Example #1

GS-128 Loyalty Card: <u>first</u> entry configured for the **Bar Code** scan based on the sample below:

Loyalty Card Configuration: Example #2

GS-128 Loyalty Card: <u>second</u> entry configured for the **Mag-Stripe** swipe based on the sample below:

Loyalty Card Configuration using a 10-Digit Phone Number

This method configures the site if they are using a 10-digit phone number for loyalty rewards.

1. From the Configuration Client, go to: Payment Controller > EPS Configuration > Loyalty Card Configuration.
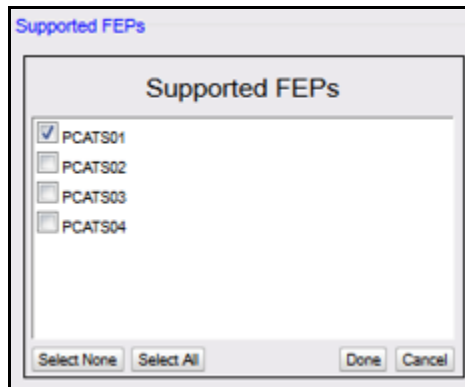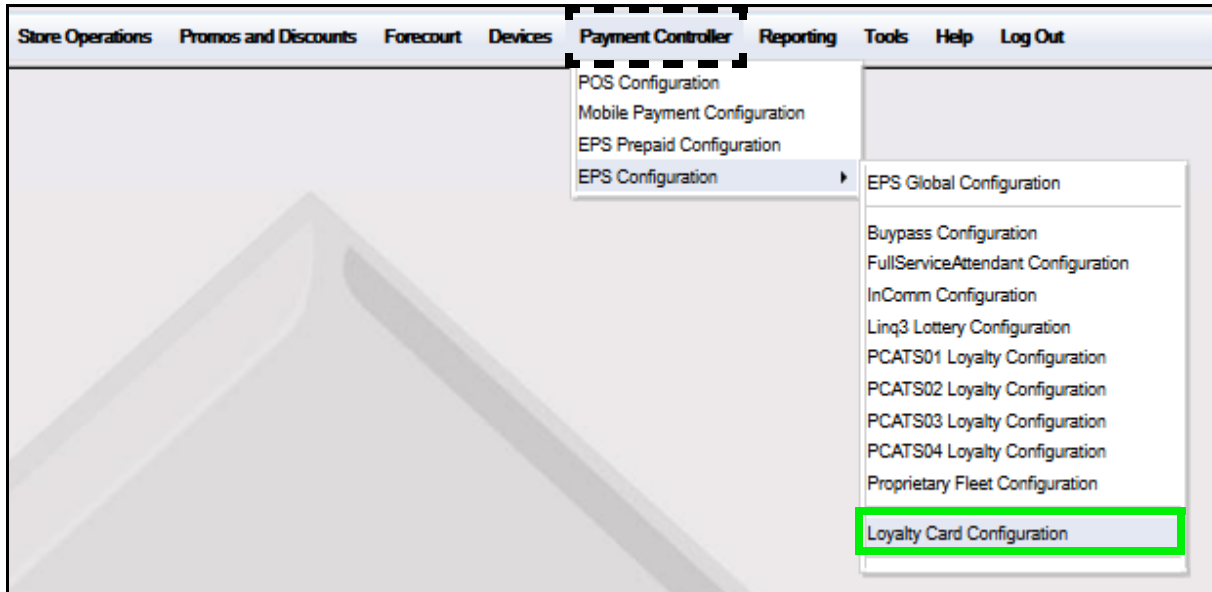
2. Select the **[Loyalty Card Configuration]** tab.

3. Select **[Add]** to configure a Loyalty Card.

4. Configure the Loyalty Card Information parameters for a 10-digit phone number:

Value	Definition	10-Digit Phone Number
Card Information		
Card Table Index	Index entry in the card table.	Yes
Card Abbreviation	Sets a two-digit abbreviation for the card.	Yes
Card Name	Name given to identify this entry.	Yes
Lower ISO	Sets the lower value of the card (bin) range.	Enter '000'.

Value	Definition	10-Digit Phone Number
Upper ISO	Sets the upper value of the card (bin) range.	Enter '9999'.
Pan Length	Sets the number of digits to be used with the card.	10-digits
Card Enabled	Enables the loyalty card.	Yes
Accept Track1	Allows a Track 1 entry.	Not required for the phone number entry.
Accept Track2	Allows a Track 2 entry.	Not required for the phone number entry.
Accept Manual Entry	Sets manual entry for this card	Must be enabled for phone number entry.
Hybrid Card	Sets the card as a hybrid card.	Not required for the phone number entry.

5. Click **[Edit]** to select the supported FEPs.
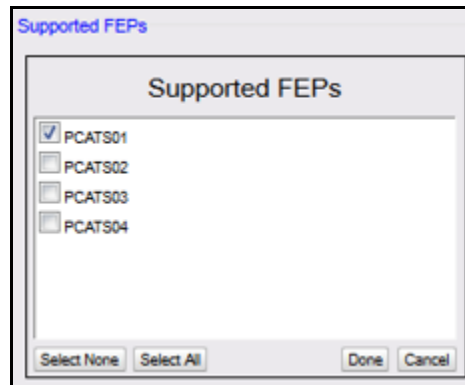
The Supported FEPs pop window displays.

6. Click the associated **<FEP>**.

> NOTE
> *One Loyalty Card can be configured to multiple FEPs.*

7. Click **[Done]** to save or **[Cancel]** to exit without saving.

8. Select **[SAVE]** or **[Cancel]** to exit without saving changes.

9. To apply new settings, go to: Configuration Client > Tools > Refresh Configuration.

Using EPS Loyalty Sales

Loyalty sales allow the processing and redemption of loyalty transactions both inside, at the POS, and outside at the DCRs.

EPS Loyalty Attributes

- Sites can enable both POP Discount and loyalty, but a customer can receive only one of these discounts per transaction.

- After the loyalty card has been swiped, VOID LINE or ERROR CORR cannot be used. VOID TICKET must be used instead.

- If the network denies the request, a message displays stating that the request was denied. The transaction continues as usual.

- The POS updates the loyalty report totals after each transaction.

Loyalty Sales Functions

- Inside EPS Loyalty Sales

  - Inside Price Per Gallon Loyalty Sale (Pre-Pay)

  - Inside Ticket-Level Loyalty Sale (Post-Pay)

  - Loyalty Outside Pay Inside

  - Merchandise Only Inside Loyalty Sale

- Outside EPS Loyalty Sale

  - Outside Price Per Gallon Loyalty Sale

  - Outside Ticket-Level Loyalty Sale

Inside EPS Loyalty Sales

The customer or host may authorize a loyalty discount during an inside loyalty sales transaction. The customer can be given discounts as well as be prompted to accept a discount depending on the host settings.

Inside Price Per Gallon (PPG) Loyalty Sale (Pre-Pay) Example

The customer went inside the store, swiped their loyalty card, and prepaid for the purchase.

The dispenser was preset for the purchase amount at the discounted PPG. Fuel was dispensed for the prepaid value of fuel at the discounted PPG.

> **NOTE**
> *The customer can authorize a discount during an inside loyalty sales transaction if the Loyalty Host provides an optional discount prompt.*

Pre-Pay Steps:

> **NOTE**
> *If Multiple Loyalty is configured, there will be a second prompt to swipe the next loyalty card, select a loyalty program from the screen, or press a button "I'm Done."*

1. Enter the **<Fuel Purchase>** amount.

2. Select the **[Method of Payment]**.

3. Slide or scan the loyalty card/ payment card, or manually enter the **<Card Account Number>**.

4. Select the **[Fuel product]**.

5. Tender the transaction and complete the sale.

6. The receipt prints displaying the pre-pay amount and the fueling point.Inside Ticket-Level Loyalty Sale (Post-Pay) Example.

```
        WELCOME TO ABC123
        Clearwater, FL 33765

     ***PRE ATHORIZED RECEIPT***

  Descr.            Qty        Amount
  ---------------   -----    -----------

  PREPAY CR #01       1           5.00
                                --------------
                    Subtotal        5.00
                         Tax        0.00
                    DISCOUNT       -0.25
                 Points Used       -0.05
  TOTAL                            4.70
                   PREAUTH $        4.70

  PREPAY Receipt
  Discover $4.70
  Acct/Card #: xxxxxxxxxxxx5672
  Auth #: 987654
  Resp Code: 2
  Stan: 000158
  Invoice #: 7
  Shift #: 1

  Store #: 123456789
  SITE ID: VP13007411001
  CUSTOMER COPY

  LINE 1 MESSAGE 1
  Card Balance: Unknown
  Last Line

  Loyalty Program: PROGRAM01
  Card: Kickback
  Acct/Card #: xxxxxxxxx2454
  Trace #: 4
  Stan: 000158

        THANK YOU FOR COMING
        Please Come Again!

  ST# ABC123  TILL XXXX  DR# 1  TRAN # 1010005
  CSH: 1                   08/02/16  16:53:36
```

Inside Ticket-Level Loyalty Sale (Post-Pay) Example

The customer pulled up to a fueling position outside and pressed the **[Pay Inside]** option at the DCR. After fueling was completed, the customer went inside and swiped their loyalty card followed by a payment.

Since this transaction began outside and was completed inside, the loyalty card was not swiped prior to fueling, and no PPG discount was given. However, the host did issue a transaction level EPS Loyalty Discount for the sale.

> **NOTE**
>
> *The information printed on their receipt may vary depending on the loyalty program in place.*

Post-Pay Steps:

> **NOTE**
>
> *If Multiple Loyalty is configured, there will be a second prompt to swipe the next loyalty card, select a loyalty program from the screen, or press a button "I'm Done."*

1. Enter the **<Sales Item(s)>**.

2. Press **[Total]**.

3. Slide or scan the loyalty/payment card or manually enter the <**Card Account Number>**.

4. If the Auth on Total Key is enabled, the information is sent to the network and the discount is applied to adjust the ticket balance.

5. If the Auth on Total Key is not enabled, the discount is not applied until after the MOP is selected.

6. Tender and complete the sale.

7. The receipt prints displaying the loyalty discount amount applied to the ticket and any other messages from the Loyalty Host.

```
<CUSTOMER COPY>

  Description          Qty        Amount
  -----------          ---        ------
T  ITEM F               1          9.74
   9.99 Dsc -0.25
                                 --------
              Subtotal            9.74
                   Tax            2.44
          DISCOUNT               -1.00
     TOTAL                       11.18
              Credit $           11.18

AMEX $11.18
Acct/Card #:  XXXXXXXXXX2376
Auth #:  990143
Resp Code: 0
Stan: 0001230
Invoice #: 22
SITE ID: FE12008179001
CUSTOMER COPY

APPROVED 990143

Loyalty Program: PROGRAM 01
Card: AMEX
Acct/Card: XXXXXXXXXX2376
Trace #: 3
Stan: 0001230
Thanks for Shopping with Us
Enjoy Your Rewards
Come back soon
Discount From: SIM
```

Loyalty Outside Pay Inside Example

The customer swiped the loyalty card at the DCR and received a PPG discount. The customer then selected to pay inside.

Pay Inside Steps:

> **NOTE** *If Multiple Loyalty is configured, there will be a second prompt to swipe the next loyalty card, select a loyalty program from the screen, or press a button "I'm Done."*

1. Enter the **<Sales Item(s)>.**

2. Press **[Total]**.

3. If the Auth on Total Key is enabled, the information is sent to the network and the discount is applied to adjust the ticket balance.

4. If the Auth on Total Key is not enabled, the discount is not applied until after the MOP is selected.

5. Tender and complete the sale.

6. The receipt prints displaying the loyalty discount amount applied to the ticket and any other messages from the Loyalty Host.

```
        WELCOME TO ABC123
        Clearwater. FL 33765

<CUSTOMER COPY>

    Description        Qty      Amount
    -----------        ---      ------
  T  ITEM F             1        9.64
     9.99 Dsc -0.35

  T  ITEM F             1        9.64
     9.99 Dsc -0.35
                                ----------
              Subtotal            19.28
                   Tax             4.82
              DISCOUNT            -0.25
            Points Used           -0.20
       TOTAL                      23.65
                                  20.65

Discover $23.65
Acct/Card #: XXXXXXXXX5672
Auth #: 987654
Resp Code: 0
Stan: 000168
Invoice #: 10
Shift #: 1

Store #: 123456789
SITE ID: VP13007411001
CUSTOMER COPY

LINE 1 MESSAGE 1
Card Balance: Unknown
Last Line

Loyalty Program: PROGRAM 01
Card: Kickback
Acct/Card #: XXXXXXXXX2454
Trace #: 5
Stan: 000168
Thanks for Shopping with Us
Enjoy Your Rewards
Come back soon
Discount From: PCATS01

      THANK YOU FOR COMING
       Please Come Again!

ST# ABC123 TILL XXXX DR# 1 TRAN# 1010006
CSH: 1                  08/18/16  16:55:31
```

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Merchandise Only Inside Loyalty Sale Example

The customer went inside and purchased several items. The customer swiped the loyalty card and received the appropriate line item or ticket level discount from the host.

Merchandise Only Inside Loyalty Sale Steps:

> **NOTE** *If Multiple Loyalty is configured, there will be a second prompt to swipe the next loyalty card, select a loyalty program from the screen, or press a button "I'm Done."*

1. Enter the **<Sales Item(s)>.**

2. Press **[Total]**.

3. If the Auth on Total Key is enabled, the information is sent to the network and the discount is applied to adjust the ticket balance.

4. If the Auth on Total Key is not enabled, the discount is not applied until after the MOP is selected.

5. Tender and complete the sale.

6. The receipt prints displaying the loyalty discount amount applied to the ticket and any other messages from the Loyalty Host.

Outside EPS Loyalty Sales

The customer can authorize a loyalty discount during an outside loyalty sales transaction. If needed, Loyalty card account numbers can be entered manually at the DCR by selecting the **[Loyalty]** softkey.

Outside Price Per Gallon

```
WELCOME TO ABC123
Clearwater, FL 33765

Descr.              Qty       Amount
----------------   -----    -----------
T  ITEM F             1          9.99
                            ----------------
              Subtotal           9.99
                  Tax            2.50
       TOTAL                    12.49
              Credit $          12.49

DISCOVER  $12.49
Acct/Card #: xxxxxxxxx0000000
Auth #: 000410
Ref: 10558028
Resp Code: 000
Term ID: 01200
Stan: 00305445

SITE ID: 9999103
MERCHANT COPY

REWARD
Acct/Card: xxxxxxxxxxxx3033
Trace #: 244369
Stan: 00305445
THANK YOU FOR USING
PUMP REWARDS

   THANK YOU FOR COMING
    Please Come Again!

ST# ABC123  TILL XXXX  DR# 1  TRAN # 1020085
CSH: 1                    08/02/16  13:10:15
```

Loyalty Sale Example

The customer pulled to a fueling position outside, swiped their loyalty card, chose to use an available PPG discount and pay outside at the DCR. The dispenser adjusted the PPG to the discounted amount. Fuel was dispensed and paid for at the discounted PPG.

> **NOTE** *The information printed on their receipt may vary depending on the loyalty program in place.*

Outside Price Per Gallon Loyalty Sale Steps:

> **NOTE** *If Multiple Loyalty is configured, there will be a second prompt to swipe the next loyalty card, select a loyalty program from the screen, or press a button "I'm Done."*

1. The Customer swipes the loyalty card at the DCR.

2. The loyalty network asks the customer if they want the discount.

3. The loyalty transaction is sent to the loyalty network.

4. The loyalty network replies with a text message from the host and a price per gallon discount off the purchase.

5. The customer swipes the payment card.

6. The receipt prints displaying the discounted PPG amount sent by the network and any message send by the Loyalty Host.

```
DATE 06/05/16      12:28
PUMP # 01
SERVICE LEVEL: SELF
PRODUCT: UNLD
GALLONS:          4.395
PRICE / G:     $ 1.561
FUEL SALE:     $  6.86
600649XXXXXXXXX7834
Stn # 00001986
MASTERCARD
Inv #  3604505
Auth #   72766

Earn 10 cents / gal
fuel credits with
the xxxxxxx and
xxxxxxxx  Visa Card
Call 1.800.373.3277

VCMG
Acct / Card #:
xxxxxxx6792
Stan: 0000220105
Rwd ID: 540633
Four Rewards Amount
$ 0.20 / gallon
```

Outside Ticket-Level Loyalty Sale Example

The customer pulled up to fueling position and pressed the pay outside button at the DCR. After fueling was complete, the customer swiped their loyalty card followed by completing payment for the purchase.

> **NOTE** *The information printed on their receipt may vary depending on the loyalty program that is in place.*

Outside Ticket-Level Steps

> **NOTE** *If Multiple Loyalty is configured, there will be a second prompt to swipe the next loyalty card, select a loyalty program from the screen, or press a button "I'm Done."*

1. The Customer swipes the loyalty card at the DCR.

2. The loyalty transaction is sent to the loyalty network.

3. The loyalty network replies with a text message from the host and a price per gallon discount off the purchase.

4. The customer swipes the payment card.

5. The receipt prints displaying the ticket-level discount.

```
     WELCOME TO ABC123
     Clearwater, FL 33765

DATE 08/19/16        14:34
TRAN # 9010006
PUMP # 01
SERVICE LEVEL: SELF
PRODUCT: UNLD
GALLONS:            1.701
PRICE/G:        $  1.121
FUEL SALE       $    1.90
    DISCOUNT    -   1.00
    CREDIT          0.90

AMEX
XXXXXXXXXXXX2376
Auth #: 990156
Resp Code: 0
Stan: 0001240
Invoice #: 26
SITE ID: FE120081790
01

  THANK YOU FOR COMING
     Please Come Again!
```

Reporting

EPS Reports from the POS Terminal

1. To access EPS Reports from the POS Terminal, go to: CSR Func > Network Menu.
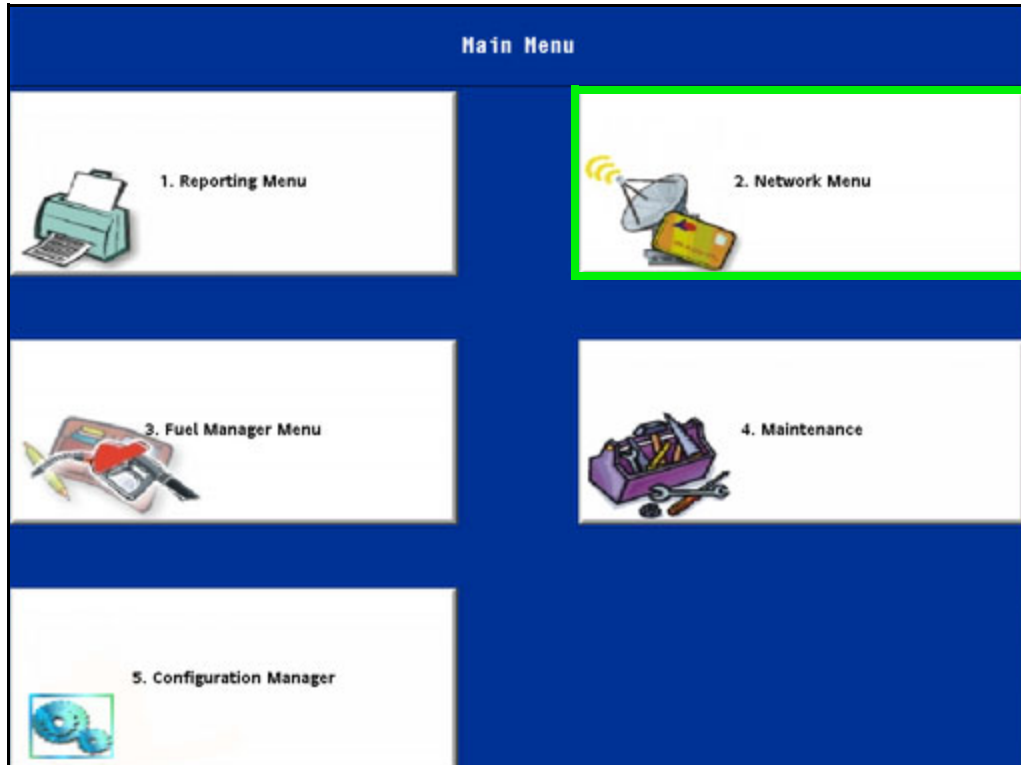
> **NOTE**
> *Some reports contain sensitive information.*
> *POS security levels should be set to limit access to these reports.*

2. Select the Report Types from the POS Network Menu:
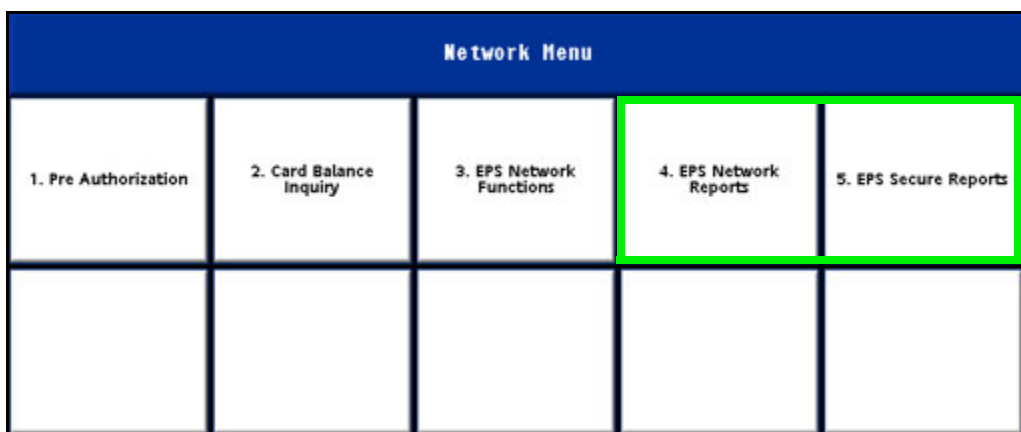
EPS Network and Secure Reports

The EPS Network Reports are specific to a particular host network and can vary across customer implementations.

EPS Loyalty Reports

Below are samples of the EPS Loyalty Reports.

Based on the parameter file settings, the account number may be masked.

> ⚠️ **Because of the sensitive nature of the data included in Loyalty Detail Reports, it is critical that proper security levels be set for report access.**

Terminal Batch Loyalty Detail Report

The Terminal Batch Loyalty Detail Report is requested by terminal batch number.

Report Details:

- **TITLE:** Terminal Batch Loyalty Detail Report.

- **DLR #:** Dealer identification number.

- **PRINTED:** Date and time the report printed.

  - **MM/DD/YY:** Date in month, date year format.

  - **HH:MM:SS:** Time in hour, minutes, and seconds.

- **WORKSTATION ID:** Workstation identification number.

- **TERMINAL BATCH:** Terminal batch number.

- **LOYALTY HOST:** Loyalty host name.

  - **ACCOUNT NO:** Account number.

  - **TOTAL:** Total transaction amount.

  - **DISCOUNT:** Transaction discount applied to the transaction.

- **SUMMARY DISCOUNTS FOR ALL LOYALTY HOSTS:** Displays the summary of discounts applied for all loyalty hosts in a batch transaction.

  - **TICKET TOTAL:** Total amount in a batch transaction.

  - **DISCOUNT TOTAL:** Total discount in a batch transaction.

```
        EPS NETWORK REPORT
-------------------------------------------

     Terminal Batch Loyalty Detail Report
             DLR # 9999999
        Printed: 08/27/16 16:12:20
          WORKSTATION ID POS001
            Terminal Batch 1

         Loyalty Host: PCATS01

Account No.                Total     Discount
XXXXXXXXXXXXXXXX0015        0.00         0.00
XXXXXXXXXXXXXXXX0015       14.93        10.00
XXXXXXXXXXXXXXXX0015       24.05          .70
XXXXXXXXXXXXXXXX0015        8.88        10.45
XXXXXXXXXXXXXXXX0015       14.93        10.00
XXXXXXXXXXXXXXXX0015        2.64         0.45
XXXXXXXXXXXXXXXX0015        1.67         0.45
XXXXXXXXXXXXXXXX0015        1.12         0.45
            TICKET TOTAL            68.22
            DISCOUNT TOTAL          32.50

Summary Discounts for all Loyalty Hosts

            TICKET TOTAL            68.22
            DISCOUNT TOTAL          32.50
```

Loyalty Discounts by Type Report

The Loyalty Discounts by Type Report contains a summary, and grand totals for all PPG, transaction-level, and item-level discounts given during the selected terminal batch period.

This report provides the total of the network loyalty discounts taken through EPS.

```
EPS NETWORK REPORT
-------------------------------------- .

   Loyalty Discounts By Type Report
          DLR # 9999999
   Printed: 08/27/16   16:11:48

           Terminal Batch 1

PPU      TICKET    ITEM     TOTAL $
DISC     DISC      DISC
1.80     30.00     0.70     32.50
```

Report Details:

- **TITLE:** Loyalty Discounts By Type Report.

- **DLR #:** Dealer identification number.

- **PRINTED:** Date and time the report printed.

  – **MM/DD/YY:** Date in month, date year format.

  – **HH:MM:SS:** Time in hour, minutes, and seconds.

- **TERMINAL BATCH**: Terminal batch number.

- **PPU DISC:** PPU Discount in a transaction.

- **TICKET DISC:** Total discount in a transaction.

- **ITEM DISC:** Discount by item.

- **TOTAL $:** Total amount in dollars.

Loyalty PPU Totals by Grade Report

The Loyalty PPU Totals by Grade Report provides the total of network loyalty discounts taken by fuel grade through the EPS. The report is requested by terminal batch number.

The total number of discounted fuel transactions are included in the report.

For fuel sales with loyalty, the report will contain a list of fuel product codes sold, along with the total volume by product code and the total dollar amount of discounts by product code.

Fuel sales without loyalty are not included.

```
              EPS NETWORK REPORT
         ----------------------------------------

           Loyalty PPU Totals By Grade Report
                    DLR # 9999999
              Printed: 08/27/16 16:12:49

                    Terminal Batch 1

        GRADE   COUNT   VOLUME   DISCOUNTS $
        001       2      2.00          0.90
        002       1      1.00          0.45
        003       1      1.00          0.45
```

Report Details:

- **TITLE:** Loyalty PPU Totals By Grade Report.

- **DLR #:** Dealer identification number.

- **PRINTED:** Date and time the report printed
    - **MM/DD/YY:** date in month, date year format.
    - **HH:MM:SS:** Time in hour, minutes, and seconds.

- **TERMINAL BATCH:** Terminal batch number.

- **GRADE:** Type of fuel grade.

- **COUNT:** Count.

- **VOLUME:** Total volume of fuel dispensed.

- **DISCOUNT $:** Discount in dollars.

Loyalty PPU Transaction Detail Report

The Loyalty PPU Transaction Detail Report contains information about the entire fuel sale with a Loyalty PPU discount. This report is sorted on transaction date and time and is requested by Terminal Batch Number.

For each sale, the report contains the date and time, fueling position, grade, original price as reported by POS, PPU discount amount, volume, total dollar amount of the discount, total amount of the fuel sale, and the loyalty card number

Report Details:

- **TITLE:** Loyalty PPU Transaction Detail Report.

- **DLR #:** Dealer identification number.

- **PRINTED:** Report print date and time.
  - **MM/DD/YY:** Date in month, date year format.
  - **HH:MM:SS:** Time in hour, minutes, and seconds.

- **TERMINAL BATCH:** Terminal batch number.

- **HEADINGS:**
  - **DATE:** Transaction date.
  - **TIME:** Transaction time.
  - **MEMBER ID:** Loyalty card number.
  - **PUMP#:** Pump number.
  - **GRADE:** Fuel grade.
  - **STREET-PRICE:** Original fuel price.
  - **FUELED PRICE:** Discount fuel price.
  - **PPU DISC:** PPU discount.
  - **VOLUME:** Volume of fuel dispensed.
  - **TOTAL DISC:** Total discounts applied.
  - **TOTAL SALE:** Total transaction amount.

```
          EPS NETWORK REPORT
-----------------------------------------

    Loyalty PPU Transaction Detail Report
             DLR # 9999999
          Printed: 08/27/16 16:22:31

              Terminal Batch 1

Date      Time       Member ID
  Pump#   Grade       StreetPrice    FueledPrice
PPUDisc   Volume    Total-Disc       Total-Sale

08/27/16   16:07    XXXXXXXXXXXXXXXX0015
   1        001         1.121           0.671
 0.450     1.000         0.45           0.67

08/27/16   16:10    XXXXXXXXXXXXXXXX0015
   1        002         2.121           1.871
 0.450     1.000         0.45           1.87

08/27/16   16.09    XXXXXXXXXXXXXXXX0015
   1        001         1.121           0.671
 0.450     1.000         0.45           0.67

08/27/16   16:11    XXXXXXXXXXXXXXXX0015
   1        003         3.121           2.641
 0.450     1.000         0.45           2.64

Total Volume                     4.000
Total Discount                   1.80
Total Sale Amount                5.95
```

- **TRANSACTIONS APPROVED BY FIRST LOYALTY HOST:** List of individual transactions for the first loyalty host; data for each transaction.

- **TOTAL VOLUME:** Total volume of fuel sales for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL DISCOUNT:** Total ticket discount for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL SALE AMOUNT:** Total sale amount for all transactions approved by this loyalty host in this terminal batch.

Loyalty Transactions Approved by Hosts (Terminal Batch Period) Report

The Loyalty Transactions Approved by Host Report prints all loyalty transactions within a given terminal batch. To account for sites with multiple loyalty hosts, transactions are organized by the approving host

If a transaction is approved by multiple loyalty hosts, it will be included in each host's list of transactions.

Report Details:

- **TITLE:** Loyalty Transactions Approved by Loyalty Hosts.

- **DLR #:** Dealer identification number.

- **PRINTED:** Date and time the report was printed.
  - **MM/DD/YY:** Date in month, date year format.
  - **HH:MM:SS:** Time in hour, minutes, and seconds.

- **TERMINAL BATCH:** Terminal batch number.

- **HEADINGS:**
  - **STAN:** System traced audit number (Transaction ID), a unique key for a transaction.
  - **DATE/TIME:** Date and time of transaction.
  - **LOYACT#:** Last four digits of loyalty. account
  - **FUEL:** Cost of fuel products purchased.
  - **VOLUME:** Volume of fuel products purchased. Includes all fuel-specific discounts.
  - **NONFUEL:** Includes any non-fuel transaction item, such as tax.
  - **TKT DISC:** Total ticket level discount on transaction. Does not include line item or price per gallon discounts.
  - **SALEAMT:** Total transaction as reported to user. Contains only ticket level discounts applied to this transaction.
  - **TRACE NUMBER:** Sequence number assigned by loyalty host. If the sequence number is greater than 40 characters long, only the last 40 will be returned.

- **FIRST LOYALTY HOST NAME:** Program name of the loyalty host which displays the receipt.

- **FIRST LOYALTY HOST DEALER NUMBER:** Dealer ID for this site as reported to the First loyalty host.

- **TRANSACTIONS APPROVED BY FIRST LOYALTY HOST:** List of individual transactions for the first loyalty host; data for each transaction.

```
          EPS NETWORK REPORT
      -----------------------------------------
      Loyalty Transactions Approved by Host
              DLR # VP13007411001
          Printed: 08/18/16    15:10:29

                Terminal Batch 1
     STAN          Date/Time              LoyAct #
     Fuel     Volume     NonFuel   TktDisc    SaleAmt
     Trace Number (Last 40)

                  Test Program 1
               DLR # 0123456789

     0001477    08/18/16 15:10             0015
     0.00       0.000      37.39     0.00     37.39
     20

     0001524    08/18/16 15:10             0015
     0.00       0.000      37.39     26.00    11.39
     3

     Total Fuel Sales:                      0.00
     Total Fuel Volume:                     0.000
     Total Nonfuel Sales:                   74.78
     Total Ticket Disc Amount:              26.00
     Total Sale Amount:                     48.78

                  Test Program 2
               DLR # 987654321

     0001524    08/18/16 15:10             1755
     0.00       0.000      37.39     26.00    11.39
     3

     Total Fuel Sales:                      0.00
     Total Fuel Volume:                     0.000
     Total Nonfuel Sales:                   37.39
     Total Ticket Disc Amount:              26.00
     Total Sale Amount:                     11.39
```

33

- **TOTAL FUEL SALES:** Total cost of fuel sales for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL FUEL VOLUME:** Total volume of fuel sales for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL NONFUEL SALES:** Total cost of non-fuel sales for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL TICKET DISCOUNT**: Total ticket discount for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL SALE AMOUNT**: Total sale amount for all transactions approved by this loyalty host in this terminal batch.

- **Lines #13 - 20**: Are the same as lines 5-12, but for a second possible loyalty host.
    - As noted above, if a transaction is approved by more than one loyalty host, it will appear in this report for all hosts that approved it.
    - The only difference between each of these entries is the sequence number provided by the loyalty host.

Loyalty Transactions Approved by Host (Configured Period) Report

The Loyalty Transactions Approved by Host Report prints all approved transactions within the reconciliation window. The report prints one host's transactions at a time because in a multiple-loyalty environment, each loyalty host can be configured with its own reconciliation period.

Reporting one host at a time resolves any conflicts resulting from multiple reconciliation periods. The reconciliation period is not related to the terminal batch period, and is configured on a per-host basis.

When this report is generated, the POS will prompt the user for the host name to run the report on, and an index. This index refers to the period for which the report should be generated. Zero will represent the most recent period, one the period before that, and so on.

This report only details a single host; that host's program name and dealer number will appear at the top of the report. The fields for ticket-level discount and sequence number will be added to each transaction, as well as appropriate headings.

The data contained in this report is similar to the Loyalty Transactions Approved by Hosts (Terminal Batch Period) Report. However, this report only contains data for a single loyalty host's reconciliation period. The user will be prompted to select which host, and which reconciliation period index, prior to printing the report.

> **NOTE** *The total ticket discount amount in this report includes ticket level discounts from all sources, not just the selected loyalty host.*

Report Details:

- **TITLE:** Loyalty Transactions Approved by Host.

```
EPS NETWORK REPORT
----------------------------------------
Loyalty Transactions Approved by Host
            DLR # 987654321
      Printed: 08/18/16   15:11:41

               Test Two
  Period: 08/18/16 04:00 - 08/19/16 04:00


STAN        Date/Time             LoyAct #
Fuel     Volume    NonFuel   TktDisc   SaleAmt
Trace Number (Last 40)

0001524   08/18/16 15:10              1755
0.00      0.000      37.39    26.00    11.39
3

Total Fuel Sales:                     0.00
Total Fuel Volume:                    0.000
Total Nonfuel Sales:                  37.39
Total Ticket Disc Amount:             26.00
Total Sale Amount:                    11.39
```

- **DLR #:** Dealer identification number.

- **PRINTED:** Date and time the report was printed.

  - **MM/DD/YY:** Date in month, date year format.

  - **HH:MM:SS:** Time in hour, minutes, and seconds.

- **FIRST LOYALTY HOST NAME**: Program name of the loyalty host which displays the receipt.

- **FIRST LOYALTY HOST DEALER NUMBER**: Dealer ID for this site as reported to the first loyalty host.

- **RECONCILIATION PERIOD:** Reconciliation period start/end date.

- **HEADINGS:**

  - **STAN:** System traced audit number (Transaction ID).

  - **DATE/TIME:** Date and time of transaction.

  - **LOYACT#:** Last four digits of loyalty account.

  - **FUEL:** Cost of fuel products purchased.

  - **VOLUME:** Includes all fuel-specific discounts and the volume of fuel products purchased.

  - **NONFUEL:** Includes any non-fuel transaction item, such as tax.

  - **TKT DISC:** Total ticket level discount on transaction. Does not include line item or price per gallon discounts.

- – **SALEAMT:** Total transaction as reported to user. Contains only ticket level discounts applied to this transaction.
  - – **TRACE NUMBER:** Sequence number assigned by loyalty host. If the sequence number is greater than 40 characters long, only the last 40 will be returned.

- **TRANSACTIONS APPROVED BY FIRST LOYALTY HOST:** List of individual transactions for the first loyalty host; data for each transaction.

- **TOTAL FUEL SALES:** Total cost of fuel sales for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL FUEL VOLUME:** Total volume of fuel sales for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL NONFUEL SALES:** Total cost of non-fuel sales for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL TICKET DISCOUNT**: Total ticket discount for all transactions approved by this loyalty host in this terminal batch.

- **TOTAL SALE AMOUNT**: Total sale amount for all transactions approved by this loyalty host in this terminal batch.

Loyalty Discounts/Redemptions Report

The Loyalty Discounts and Redemptions Report contains transactions with a ticket level discount granted by a loyalty host that falls within the selected reconciliation period.

This report will be changed to be printed on a per-host basis. The host program name and dealer number will be added to the report header. In addition, the sequence number assigned by the loyalty host will be added to each transaction entry.

Report Details:

- **TITLE:** Loyalty Discounts/ Redemptions.

- **DLR #:** Dealer identification number.

- **PRINTED:** Date and time the report was printed.

  - – **MM/DD/YY:** Date in month, date year format.

  - – **HH:MM:SS:** Time in hour, minutes, and seconds.

- **FIRST LOYALTY HOST NAME:** Program name of the loyalty host which displays the receipt.

- **FIRST LOYALTY HOST DEALER NUMBER**: Dealer ID for this site as reported to the First loyalty host.

```
        EPS NETWORK REPORT
-------------------------------------
   Loyalty Discounts/Redemptions
          DLR # 0123456789
    Printed: 08/18/16 15:11:14

          Test Program 1

   Period: 08/17/16 - 08/18/16 20:00

 STAN      Date/Time        Disc   LoyAct #
 Trace Number (last 40)

 0001524  08/18/16 15:10    13.00     0015
 3

 Total Discount                      13.00
-------------------------------------
```

- **RECONCILIATION PERIOD:** Reconciliation period start /end date.
- **HEADINGS:**
  - **STAN:** System traced audit number (Transaction ID), a unique key for a transaction.
  - **DATE/TIME:** Date and time of the transaction.
  - **DISC:** Ticket-level discount on transaction from this loyalty host.
  - **LOYACT#:** Last four digits of loyalty account.
  - **TRACE NUMBER**: Sequence number for this transaction assigned by the selected loyalty host.
- **TRANSACTIONS APPROVED BY FIRST LOYALTY HOST:** List of individual transactions for the first loyalty host; data for each transaction.
- **TOTAL DISCOUNT:** Total discount for all transactions in this reconciliation period.

GLOSSARY OF TERMS

The following terms and definitions will assist the reader with understanding the content of the Feature Reference.

Terms	Definitions
Bar Code	Data is encoded in a bar code situated on the product (i.e., a coke can or candy bar wrapper).
DCR	Dispenser Card Reader
EPS	Electronic Payment System
FEP	Front End Processor
GS-128 Loyalty Card	Account information is encoded on <u>both</u> a magnetic stripe and a bar code on the back of the loyalty card. The loyalty card bar code is also encoded with **8018** in front of the account number. The GS-128 loyalty card has both a *mag-stripe* and a *bar code*, and must have two entries in the Loyalty Card Configuration.
IFSF	International Forecourt Standards Forum
Loyalty Transaction	Any transaction approved by a loyalty host, including earn transactions and discount redemptions.
Mag-Stripe	Magnetic stripe on the back of the loyalty card encoded with Account information.
MOP	Method of Payment
PCATS	Petroleum Convenience Alliance for Technology Standards
POP	Point of Purchase
POS System	Includes the POS (Point of Sale) terminals, site controller and the Electronic Payment System (EPS).
PPG	Price Per Gallon
PPU	Price Per Unit