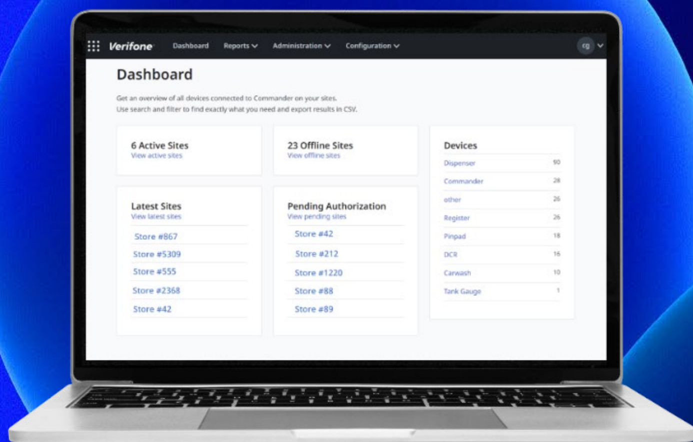
Verifone C-Site Management

User Guide



verifone

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Verifone C-Site Management
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Comments? Please e-mail all comments on this document to your local Verifone Support Team.

Revision History

Date	Description
04/13/2021	Initial Release.
10/18/2021	Added One-Time Password (OTP) chapter, and updated the Introduction to include the OTP, Connect Device to Cloud, and Reports information, as well as updating the appropriate site controller release information to 53.20+.
03/28/2022	Updates to the Reports chapter: • Changed screenshot to show active Download Report button. • Added info on Download Report • Added TLog Viewer feature. Updated the Introduction section to add the applicable Reports information, and the most current software release. Edited to conform to newest branding guidelines.
04/12/2022	Added a table with search/report criteria to the Site Assets section of the Reports chapter, as well as a screenshot of a sample Site Assets report.
07/15/2022	Updated the Connect Device to Cloud section to reflect UI updates. Changed front matter to reflect new branding guidelines.
02/28/2023	Updated to include Bulk Site Upload and Mobile Payment Configuration. Updated My Accounts, Reports > Summary, and Connect Device to Cloud sections. Added additional permissions into the Roles section.
04/17/2023	Reviewed and updated UI changes throughout document, Download Report for T-Log added, MID Bulk Upload feature added, Acknowledgment Added, User Table added.
04/27/2023	Added C-Site Requirement notice.
06/30/2023	Added Loyalty Configuration.
07/14/2023	Added Site Configuration Section: MOP, Currencies, Fees, Tax Rates, Categories, Departments, Blue Laws, ID Checks
08/21/2023	Updated Branding for C-Site and Documentation
09/11/2023	Added Sign up process information.
10/4/2023	Added Website URL, DNS requirement for Onboarding, new onboarding process, added Appendix I details for Onboarding Requirements, Fuel Tax Exemption, and POS Security levels.
11/15/2023	T-Log Viewer Type on Search is Financial by default, Note added for software support error messaging added to Site Configuration forms, Automatic Site Creation Note added

02/09/2024	Added PLU Configuration, Sales Configuration, Login/Logout Message, Fuel Pricing, and Fuel Config – In Effect, Version support notification messaging, Added additional information about account onboarding.
03/25/2024	Updated software 'base' reference to 'release', Added instructions on how to create an additional Petro Site Administrator, Updated Site Asset Data to include new columns for Site ID and Location ID, Updated Instructions on how to access Loyalty Enterprise Configuration and Mobile Enterprise Configurations and any associated instructions

Content

1. Introduction

Verifone C-Site Management is a web application that enables Petroleum Merchants and Major Oil administrators to maintain a centralized point for site data, monitor sites remotely, and provides a convenient platform for synchronous oversight and configuration.

Verifone C-Site Management does not require a technician to visit each location to make changes and updates. Updates can be done selectively or all at once from the web application.

This guide covers the following topics:

- Hierarchy: Setting up and managing hierarchy, the arrangement of groups and sites to reflect your business structure (e.g. National > Regional > Western > Pacific).
- Sites: Setting up and managing sites (individual business locations) within the hierarchy.
- User Administration: Creating and managing users with various roles and permissions (e.g. access to administrative or reporting features within the C-Site Management application)
- Dashboard: An overview of the application's dashboard, from which you can access features, view configuration steps (and their completion status), and find information on additional help and support.
- My Account: Information for users on viewing their account information. Editing user information is not available currently.
- Reports: Reporting allows near-real-time data for Transaction Logs (T-Logs), Site Assets, and Summary details to be readily viewed.
- Configuration: Remotely manage and synchronize site configurations for Mobile Payment, Loyalty Configuration, Viper Card Tables, and various site price book configurations.
- Connect Device to Cloud: This feature allows you to connect the Verifone Commander to the Verifone C-Site Management cloud application.
- One-Time Password: This feature allows you to send a One-Time Password (OTP) from the Verifone Commander to an email address to access the OTP-dependent features of the Verifone Commander.

System Requirements

WARNING

If the Verifone Commander is not onboarded to the Verifone C-Site Management within a certain amount of time, it will not be able to perform merchandise and fuel transactions.

See the Appendix I section for specific details.

In release 55.01 the requirement to onboard onto C-Site still exists, but merchandise and fuel functionality will not be disabled.

Software Requirements

- Verifone Software Release: Support begins in 53.35+
- Web Browser: Microsoft Edge, Chrome, Firefox, or Safari accessed through a computer.

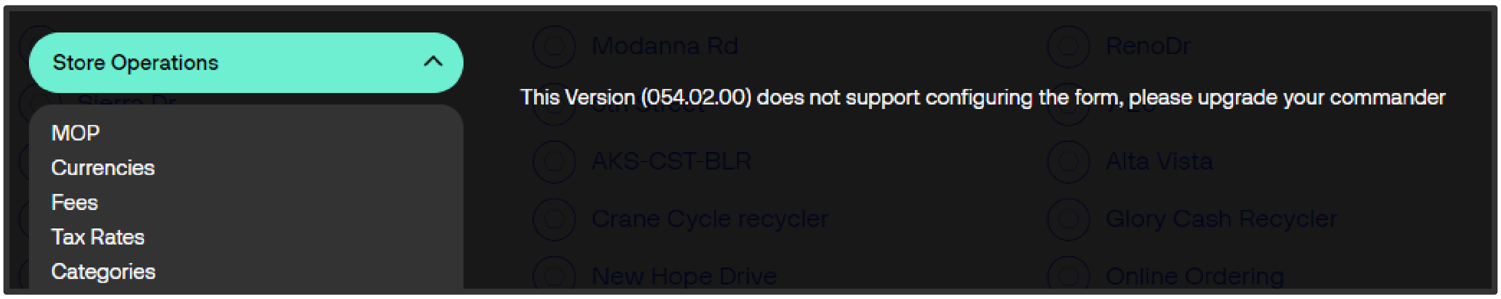
Software Release Specific Implementation

Release	Features Supported
53.35	TLog Viewer, Site Assets, OTP
53.41	Mobile Payment Config, Viper Table Set Management
54.00	Loyalty Configuration
54.01	POS Configuration, Commander Configuration Acknowledgment
54.02	POS Security, Fuel Tax Exemptions, Enhanced C-Site Onboarding Support, Major oil accounts can use loyalty configuration from C-Site Management
55.00	PLUs, Sales Configuration, Login/Logout Message, Fuel Pricing – Pending, Fuel Config – In Effect
55.01	Dealer Location ID Presented in Site Asset Report

Version Support Notification

C-Site Management has been enhanced to display when the connected site's software release version does not support specific forms. Messaging will appear that states 'This Version (xxx.xx.xx) does not support configuring the form, please upgrade your Commander.'

Software upgrades can be requested through Verifone's Remote Software Delivery (VRSD) process. Refer to the VRSD Implementation Guide for more details.



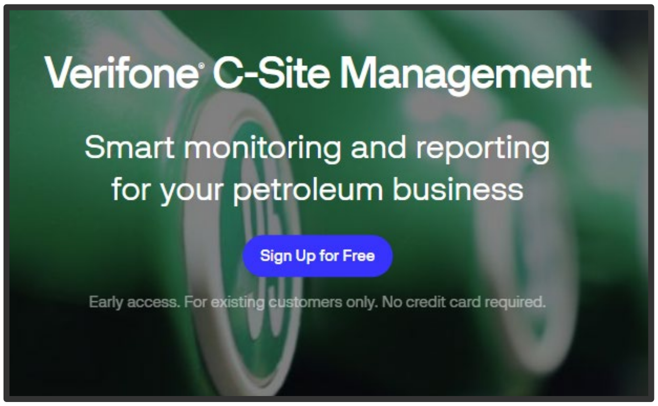
Hardware Requirements

- Verifone Commander with supported POS
- Computer (Desktop or Laptop) with the most recent security updates
- Managed Network Service Provider (MNSP) Implemented
- Broadband Internet Connection

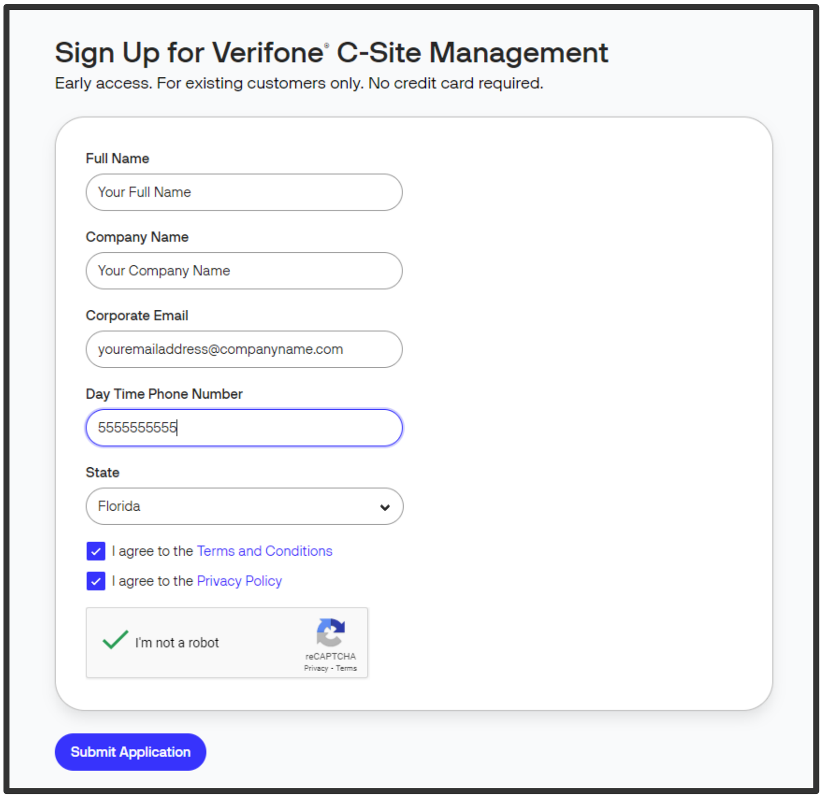
Account Sign Up

1. To create an account for Verifone C-Site Management, navigate to the following URL and select '**Sign Up for Free**'.

- https://petromop.verifone.cloud/home



2. Complete and submit the form presented.



NOTE

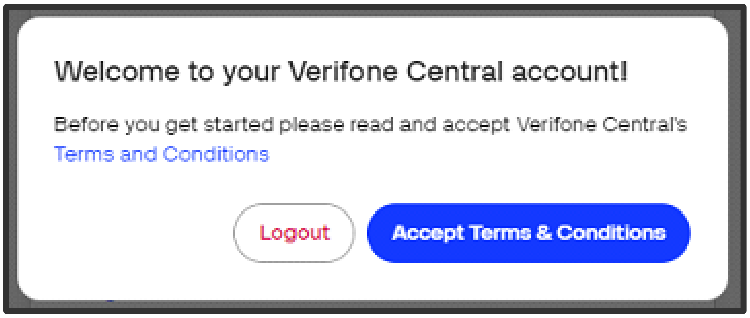
If the administrator has more than one store, only one account is needed.

All sites should be onboarded to one account.

Terms and Conditions

When you log into C-Site a prompt will appear to accept the terms and conditions. To log into the application, you must accept the terms and conditions to proceed.

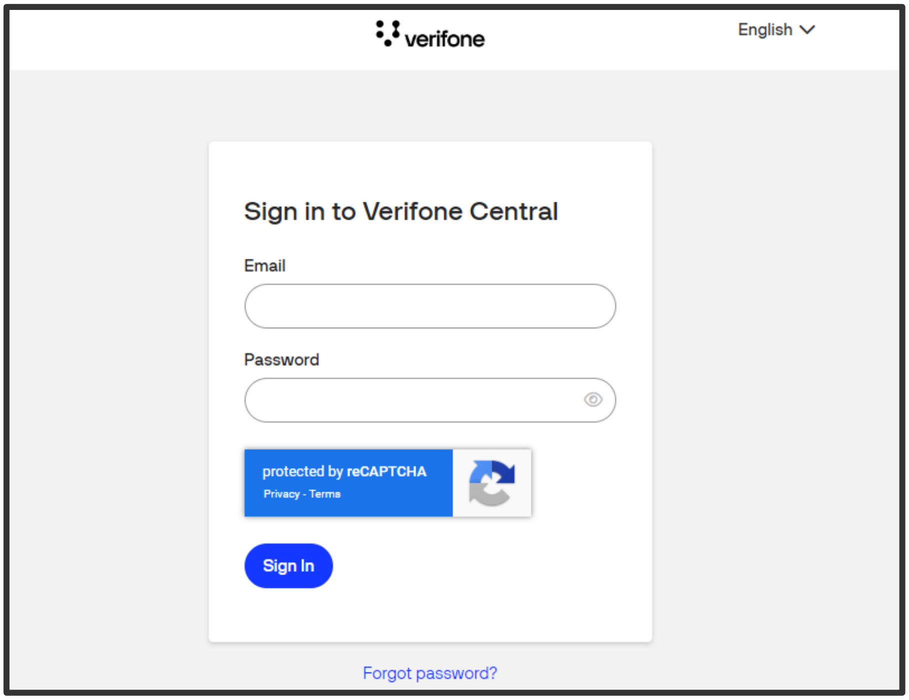
To view the Terms and Conditions, select the blue text in the prompt.



Website URL

To access Verifone C-Site Management, navigate to the following URL using a web browser:

https://us.live.verifone.cloud/

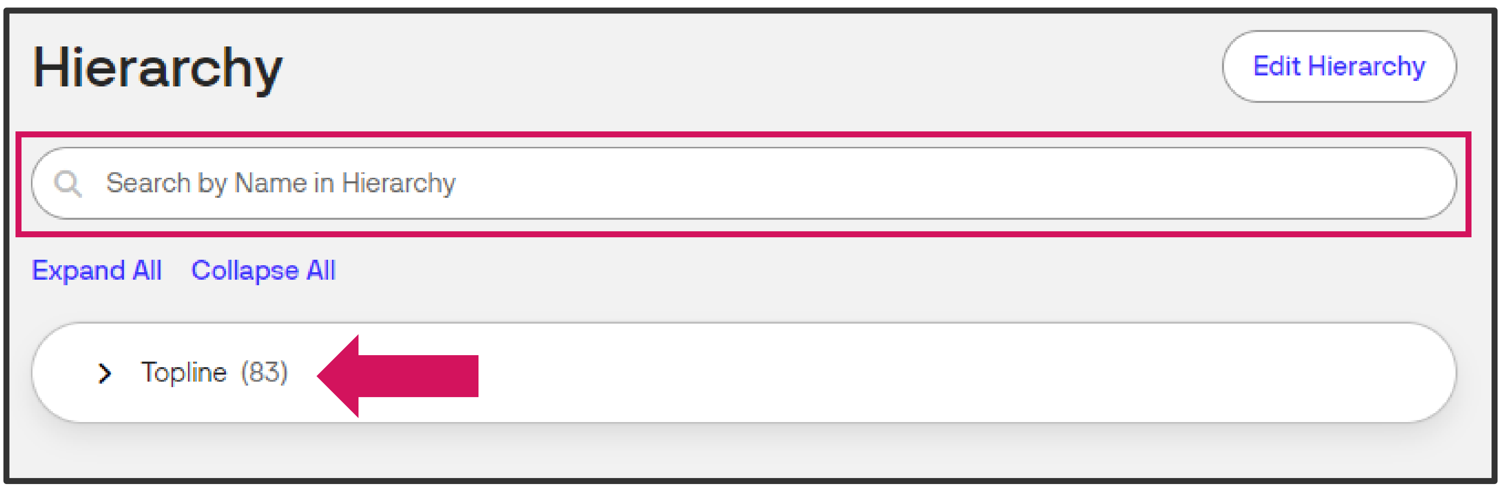


2. Hierarchy

This section provides an overview of how to edit and manipulate hierarchies on the Merchant Admin page. A hierarchy structure allows you to build or map the structure of your business within Verifone C-Site Management. Hierarchies should be configured before adding sites to Verifone C-Site Management. This allows more effective use of the Bulk Site Upload feature.

View Hierarchy

1. Log in to the Verifone C-Site Management application.
2. Click on **Administration > Hierarchy.**
3. Use the **Search bar** to search for the name or use the **collapsible menu** below the search bar.

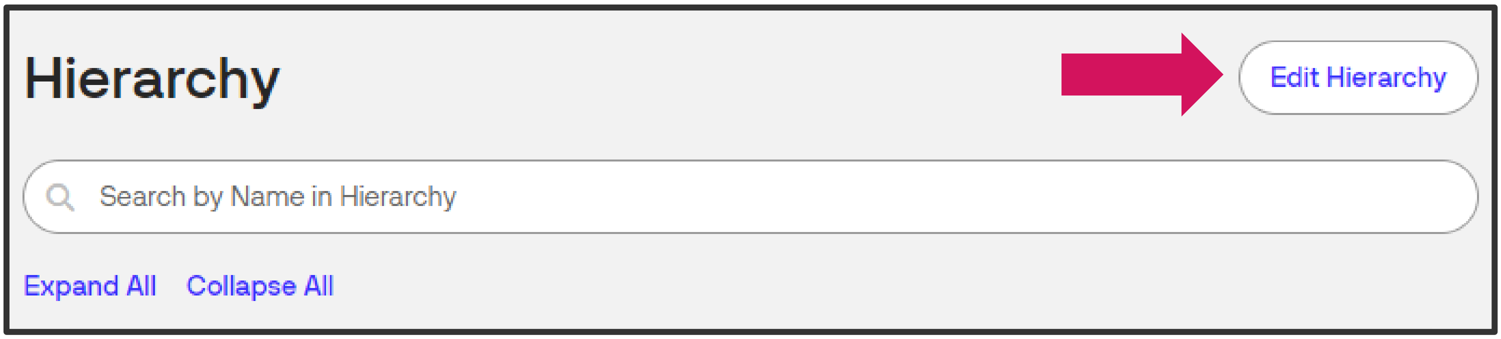


Edit Hierarchy

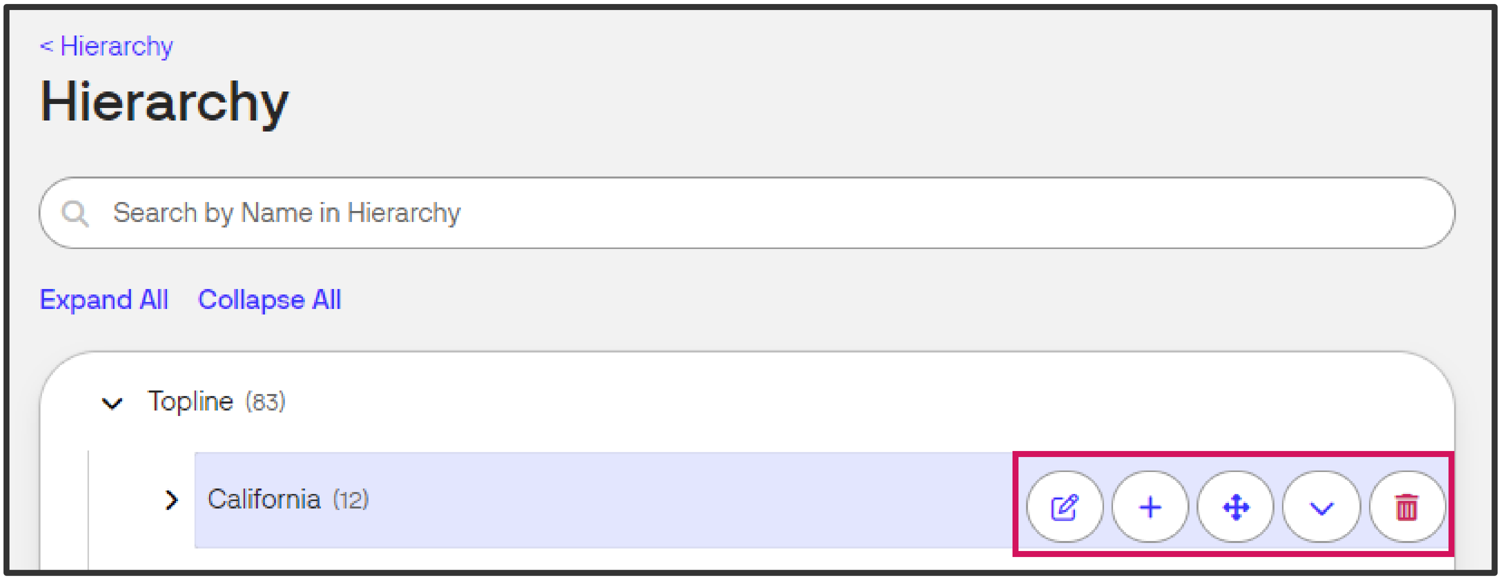
NOTE

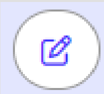
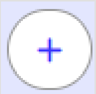
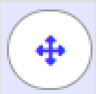
If a new Merchant Administrator has not set up any hierarchy for the account, the display page will show the company name with any sub-entries all in one group.

1. Hierarchies can be edited by selected the **Edit Hierarchy** button in the top right corner of the Hierarchy window.



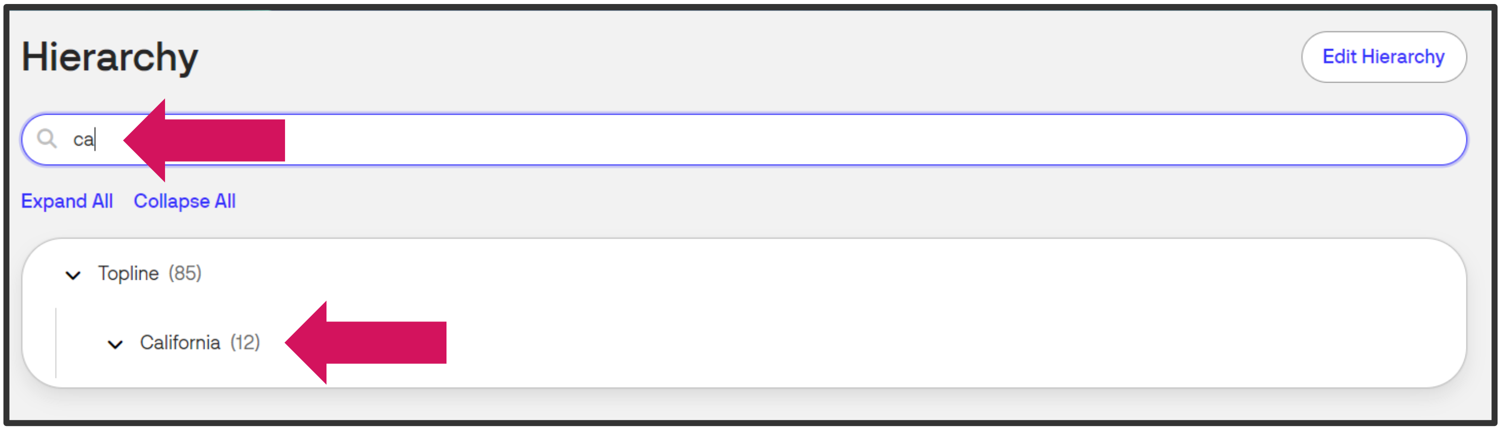
2. The following icons will appear next to the hierarchy names. Not all icons will appear next to each name based on the available functions for that row.



Icon	Description
	Edits an existing groups name.
	Adds a sub-group to an existing group.
	Reorders icons by selecting the group to move from the list, and then dragging and dropping the group.
	Adds a new group to the highlighted row. The new group name prompt will appear below this line when selecting this icon. 
	Deletes a group

Search

Key in the name of the group in the search field to narrow down the hierarchy to the entered characters.



3. Sites

Sites (stores) are the individual C-store/gas station at which the Verifone Commander resides. The Verifone Commander at each location must be setup to communicate to the Verifone C-Site Management system in addition to being onboarded through Verifone C-Site Management. Those details are discussed in the Connect Device to Cloud section. This section will discuss how to add or onboard sites to the Verifone C-Site Management system individually or in bulk.

Required Site Information

The following information must be obtained from the sites you wish to onboard to Verifone C-Site management:

- Verifone Service ID as shown in the site's contract.
- Site's Name
- Site's Address
- Site's Phone number

NOTE Make sure the hierarchies used for the site are configured prior to adding the location to the dashboard.

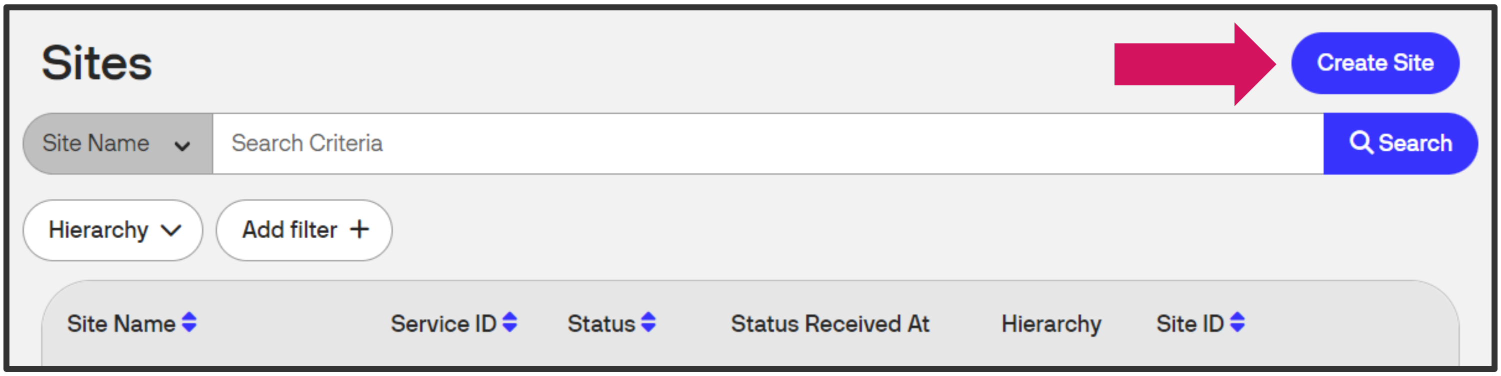
Bulk Site Creation

Bulk site creation is used to onboard up to 2,000 sites to Verifone's C-Site Management rather than one site at a time. This feature utilizes an Excel Spreadsheet where site information such as service ID, address, and hierarchy assignment are entered in a spreadsheet and then uploaded to the cloud. The data entered is checked for validity once it is uploaded to the cloud and a Bulk Upload Report is generated to provide information on whether the site creation was successful.

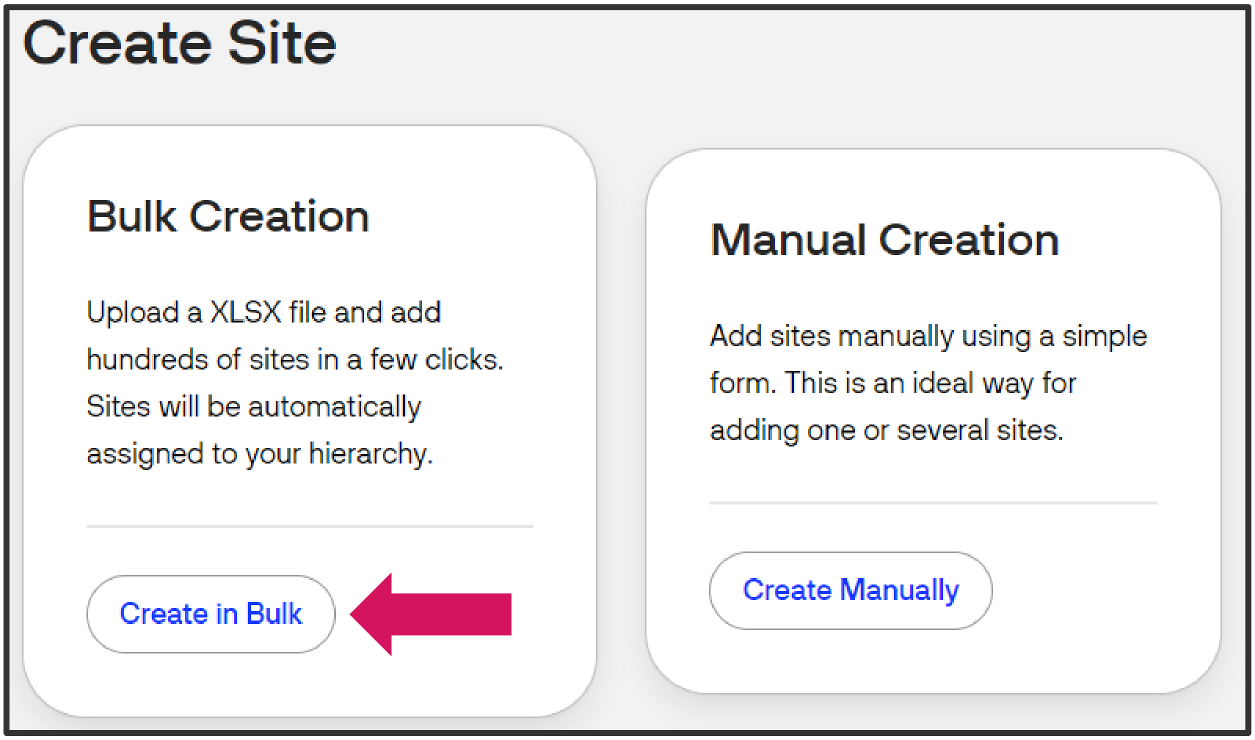
Downloading the Template

1. Navigate to **Administration > Sites**.

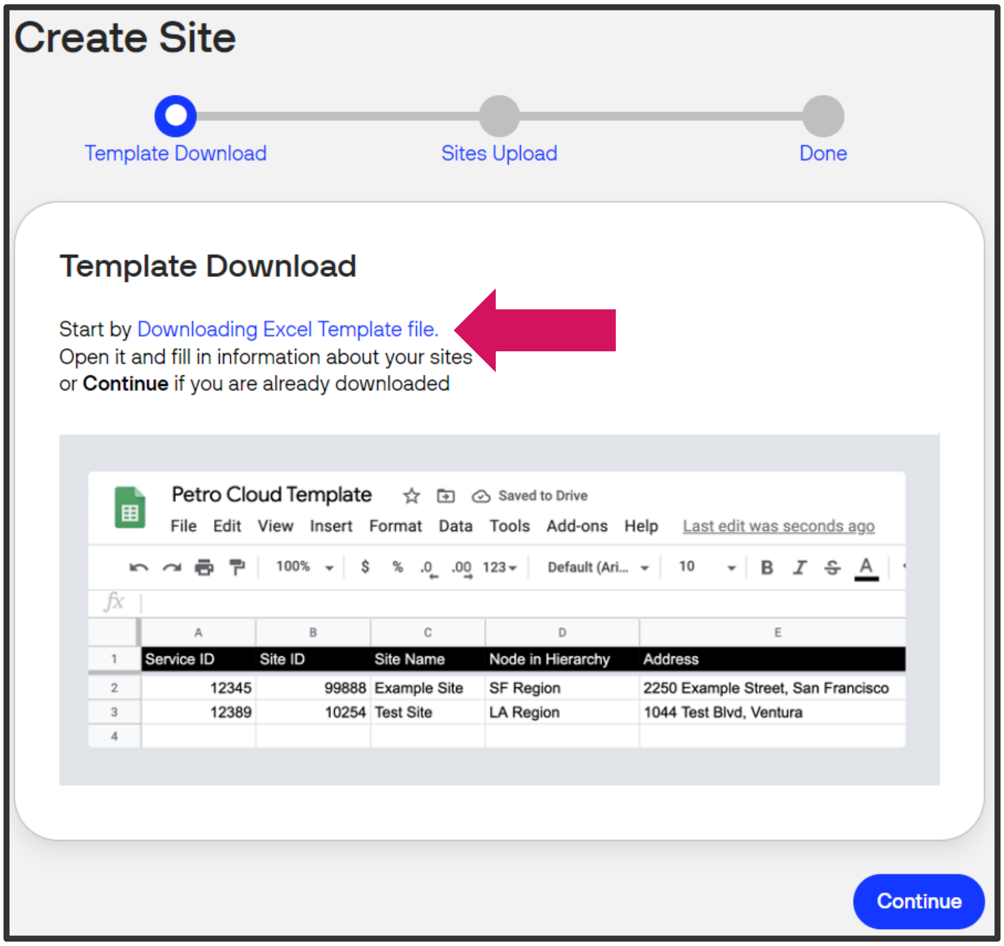
2. Select **Create Site** in the top right corner of the menu.



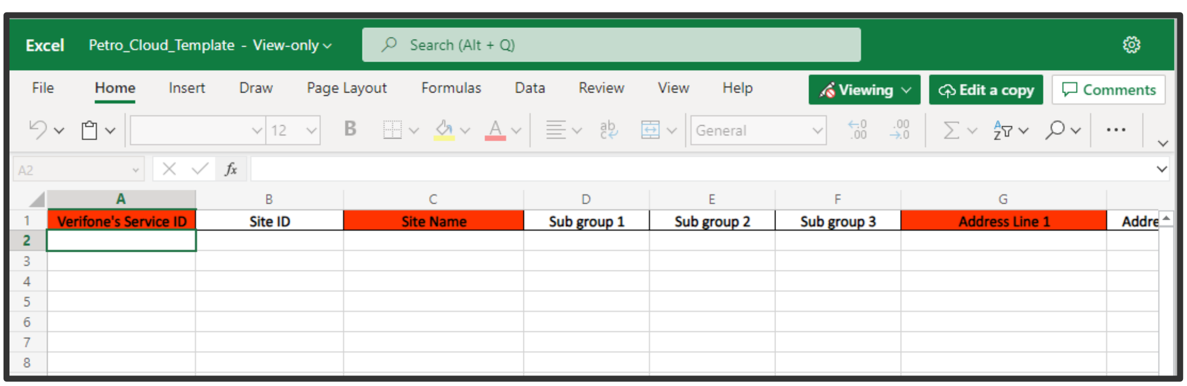
3. Select **Create in Bulk**.



4. Click on **Downloading Excel Template File.**



5. Download the Excel document titled **'Petro_Cloud_Template.xlsx'**. When you open the document, you may need to Enable Editing depending upon your Microsoft Excel version.



6. **Enter in the site information, one site per row.** All fields that have an asterisk (*) are required. After all the entries are completed, **save the changes** made to the spreadsheet.

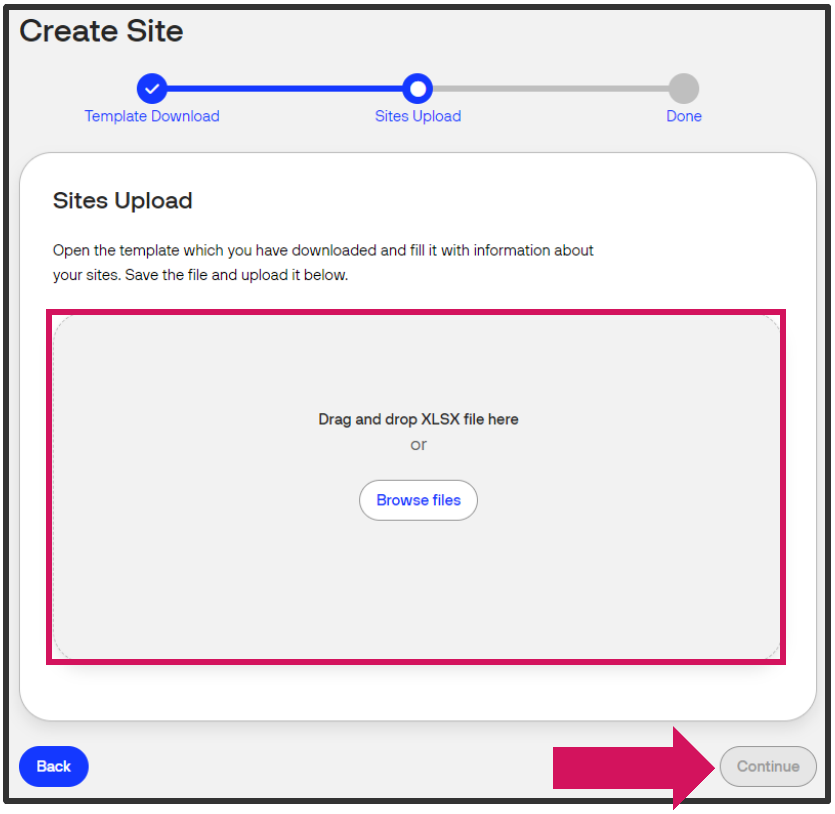
Field	Description
Service ID*	The Verifone Service ID shown in the site's contract with Verifone.
Site ID	Any ID number used by the organization operating the site.
Site Name*	The name of the site. This is useful when searching for sites. Site names must be unique to the site.
Sub Groups*	Assign a site to a location in the hierarchy using the Sub groups. The hierarchy subgroups must exist before bulk upload, or the site will be added to the root company
Street Address*	The physical address of the site.
City*	The municipality in which the site is located (or equivalent).
Zip Code*	The ZIP code for the site.
State*	Choose a state from the drop-down list.
Custom Attributes	You can create your own attributes for sorting and filtering sites. Please see below for more information.

WARNING

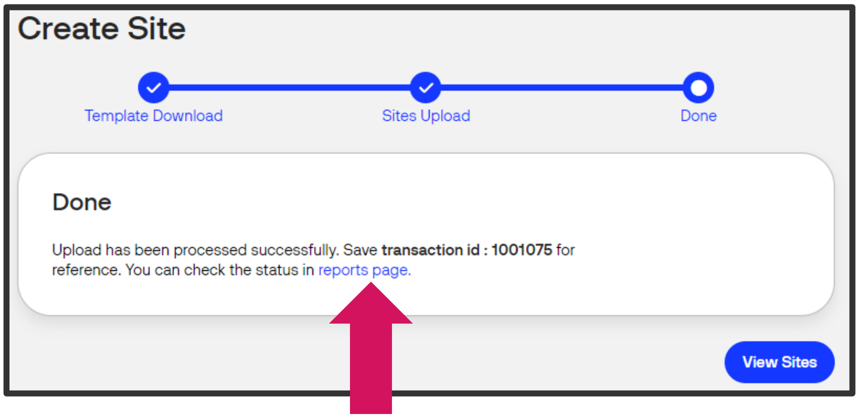
A valid Verifone Service ID **MUST** be entered. If the entry is incorrect the site will not be onboarded.

7. Return to the **Template Download** page on Verifone C-Site Management and select **Continue** at the bottom of the page.

8. **Drag and drop** the Petro Cloud Template Spread sheet in the dotted area or Browse files and locate the file to upload.



9. Once the file is ready to transfer, the 'Drag and drop XLS file here' will update to the name of the file selected. Click **Continue** to upload the file.
10. The Done screen will appear. A **transaction ID** for the upload will be generated for your reference. From here, you can select reports page on the screen to view the **Bulk Upload Report**, or you can navigate to View Sites.



Bulk Upload Report

After a bulk site upload is completed, a Bulk Upload report is generated to provide details on which sites were successfully added to Verifone C-Site Management.

The report can be accessed by selecting the 'reports page' text in blue (shown above) or by navigating to **Administration > Bulk Upload Report**. Each Bulk Upload performed has a Transaction ID generated, allowing you to review the specific Transaction ID in the reports list.

A status is generated to let you know if there was an Error in the upload, or if the upload completed successfully. Since multiple sites can be uploaded at the same time, an Error response will appear even if there is only one site that had an issue. If all sites upload without any errors, the Status will show a green Success.

Bulk Upload Report Errors

The following errors may occur during upload. Utilize the table below to resolve any errors that occurred during the upload. Be sure to select the Transaction ID associated with the upload.

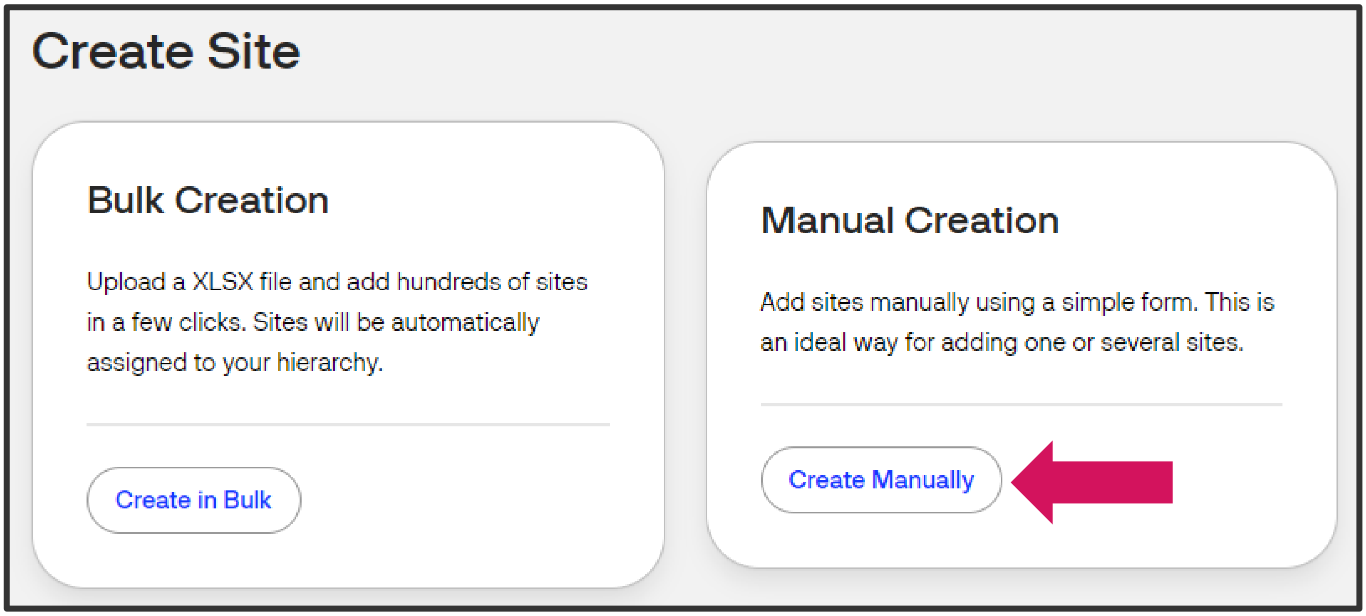
Field	Description	Resolution
Mandatory Fields Required	If any mandatory fields are missing (Service ID, Site Name, Address Line 1, Country, State, City, or Zipcode)	Confirm that the information is present in the mandatory fields and upload the site again.
Invalid Service ID Range	If the Service ID Length is less than 7-Digits	Confirm the Service ID entered is 7-Digits.
Service ID Not Found	Service ID Not found in CRM Database	Confirm the Service ID is a valid Service ID.
Site Created Successfully	Site Created Successfully	Upload completed without any errors.
Invalid Attribute. Site Created Successfully.	Site created successfully and an invalid attribute was found.	The site was added to the Sites list, but an attribute was invalid. Make corrections to the site on the Administration > Sites page.
Invalid Subgroup Combination Found. Invalid Attribute. Site Created Successfully.	Site created successfully but has an invalid subgroup name and attribute combination.	An invalid attribute and subgroups (hierarchy assignment) were found in the uploaded document. Make corrections to the site on the Administration > Sites page.

Invalid subgroup combination found. Site Created Successfully	Site created successfully but subgroup combination is incorrect.	The subgroups (hierarchy assignment) were invalid in the uploaded document. Make corrections to the site on the Administration > Sites page.
Site Name Already Exists	The site name already exists in sites table.	Either change the existing site record's name or change the site name in the upload document. The site will need to be added again once changes are made.
Duplicate Service ID and Site Name	A duplicate Service Id and siteName combination found in the upload document.	Remove the duplicate records and upload the site again.
Duplicate Service ID	A duplicate Service ID was found in the upload document.	Remove the duplicate service ID and upload the site again.
Duplicate Site Name	A duplicate site name combination was found in the upload document.	Remove the duplicate site name and upload the site again.
Site: Entity Service Error	Site entity service failure.	Attempt the upload again.
Address: Entity Service Error	Address entity service failure.	Attempt the upload again.
Mandatory Fields Required	If any mandatory fields are missing (Service ID, Site Name, Address Line 1, Country, State, City, or Zipcode)	Confirm that the information is present in the mandatory fields and upload the site again.
Invalid Service ID Range	If the Service ID Length is less than 7-Digits	Confirm the Service ID entered is 7-Digits.

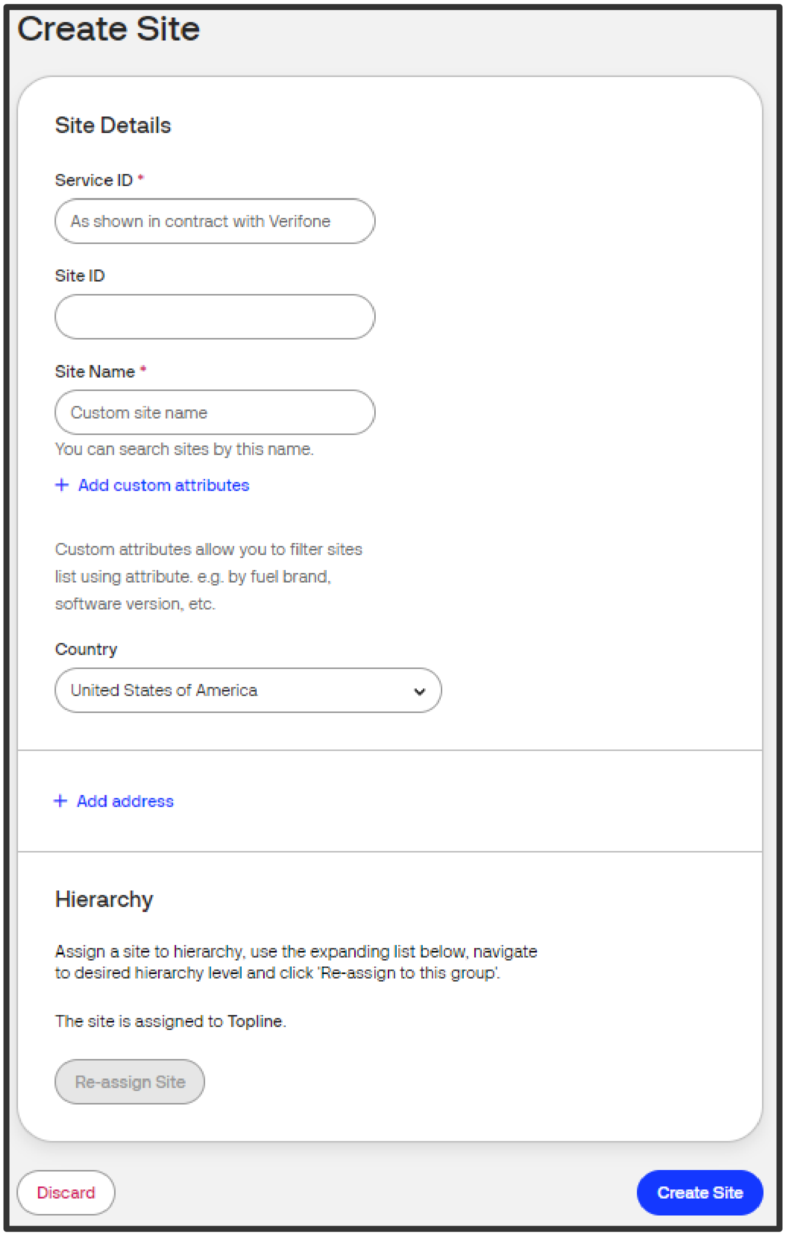
Manual Site Creation

Manual creation is intended to be used to **add one site at a time**. To add multiple sites, use Bulk Site Creation. Manual creation utilizes a web form to fill in the required site details to onboard the site to Verifone C-Site Management System.

1. Navigate to **Administration > Sites.**
2. Select **Create Site** in the top right corner of the menu.
3. Select **Create Manually** under the Manual Creation section.



4. Complete the Site Details form. Service ID, Site Name, Address Line 1, Country, State, City, and Zip Code are required (*) fields.



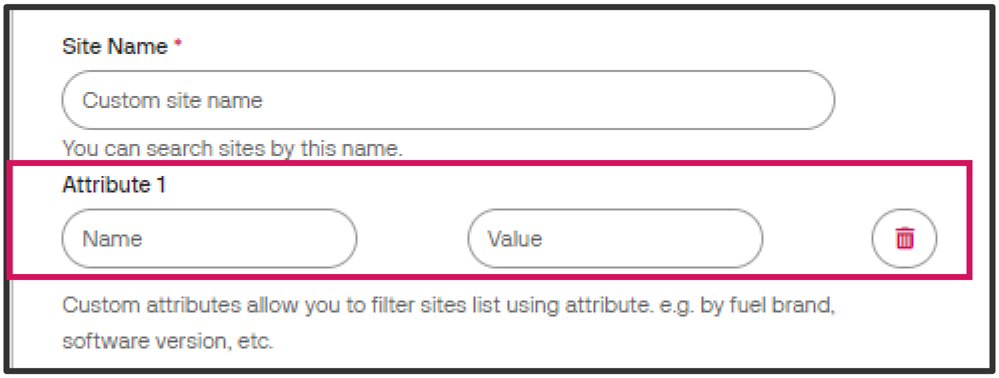
Field	Description
Service ID*	The Verifone Service ID shown in the site's contract with Verifone.
Site ID	Any ID number used by the organization operating the site.
Site Name*	The name of the site. This is used when searching for sites. **Note:** Site name will display the site's service id if the site did not exist in C-Site and was onboarded with Configuration Client.
Custom Attributes	You can create your own attributes for sorting and filtering sites. Please see below for more information.
Street Address*	The physical address of the site.
City*	The municipality in which the site is located (or equivalent).
Zip Code*	The ZIP code for the site.
State*	Choose a state from the drop-down list.
Hierarchy*	Assign a site to a location in the hierarchy using this feature, by navigating to the correct location in the hierarchy, clicking on it, and then clicking "Re-assign site."

5. Once you have completed filling in the fields, click **Create Site** to add the new site or Discard to return to the Sites window.

Adding Custom Attributes

Custom attributes allow users to search for sites based on specific criteria relevant to those sites, such as brand of fuel sold, software version on the site controller, type of installation, etc. Up to five attributes can be added per site.

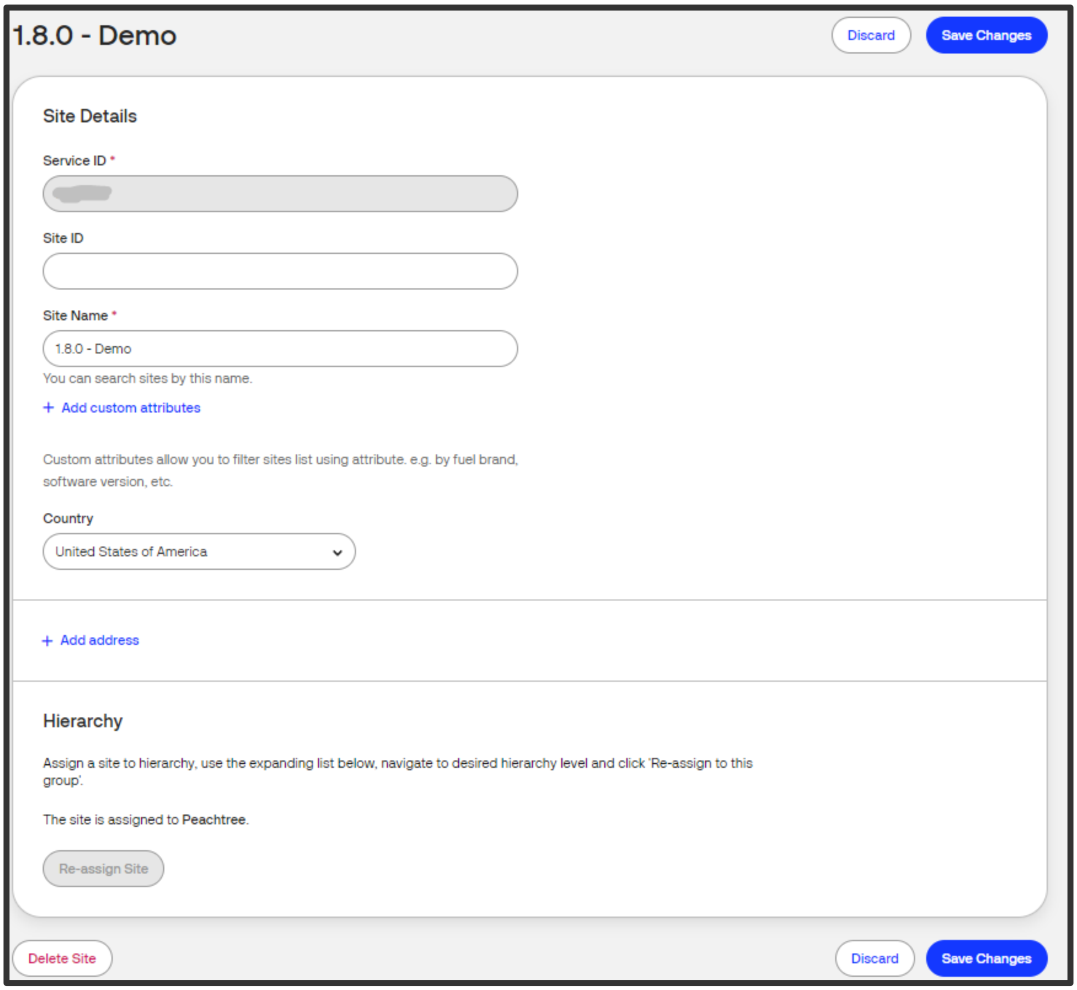
1. Select the **+ Add custom attributes** within the create site form under the Manual Site Creation form.
2. Enter the name for the attribute in the field that appears.
3. Enter a value in the field provided.



4. To delete an attribute, select the Trash can icon.
5. When you select **Create Site**, the custom attributes will be added along with the rest of the site data.

Editing Existing Sites

1. To edit a site, select the site from the site list.
2. In the top right corner of the screen, select **Edit Site**.
3. Changes can be saved (Save Changes) or Discarded (Discard). The site can also be deleted by selecting Delete Site on the bottom left corner.



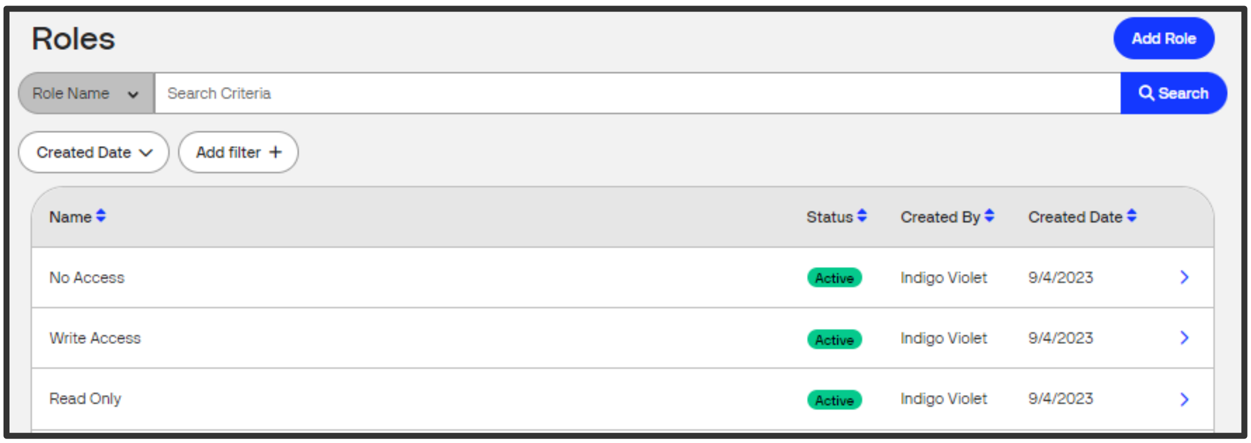
NOTE

To re-assign a site's hierarchy, select the **'Re-Assign Site'** button on the Site Details page (before selecting the Edit Site button).

4. Roles

The Roles feature is used to assign different permissions and features to a single or multiple users. It can restrict users or groups of users from accessing various features.

To navigate to Roles, select **Administration > Roles**.

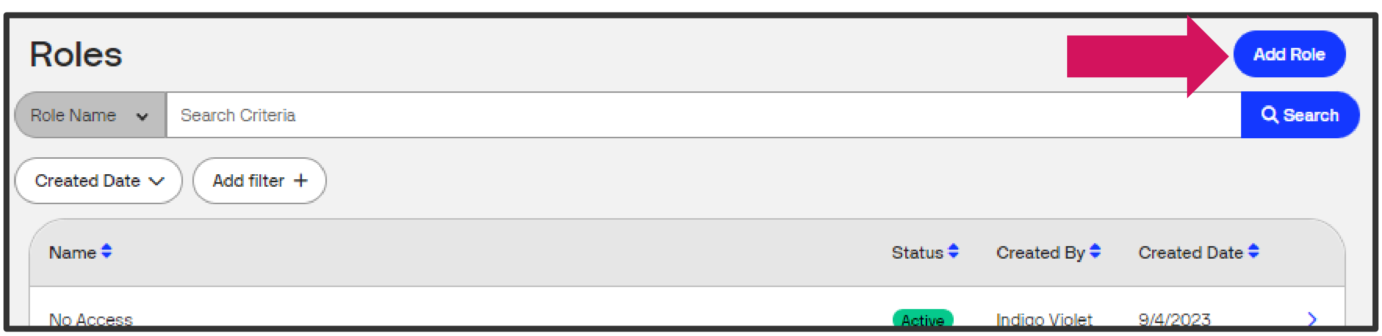


NOTE

Verifone will configure default role permissions for the application. Administrator users will need to create roles using the permissions, and then assign them to users.

Adding User Roles

1. To add user roles, navigate to **Administrator > Roles** and select **Add Role** at the top of the page.



2. Complete the form by entering at least a role name and selecting appropriate permissions. Use the table below for more details.

Field	Description
Role Name	A name to easily identify the role that is unique and accurately describes the permissions assigned to the user. Ex. Store Manager, Pricebook Manager, Accounting
Role Description	An optional field where you can describe the roles' purpose and function.
Status	Allows the role to be enabled to deactivated.
Copy Permission from role	Clones all permissions from one user role to another. Useful if you want to then add or remove a single item.
Administration	**Site Management**: Allows the user to access the Sites features under the Administration menu. (For more information, see the Site Management section.) **Roles Management**: Allows the user to access the User Roles functions. **User Management**: Allows the user to access the Users functions under the Administration menu. (For more information, see the User Management section.)
Configuration	**Store Operations:** Allows the user to access site specific configurations related to store operations such as MOP, Tax rates, Departments, Access Control, Fuel Prices, Fuel Configuration, etc. **Payment Partner Configuration:** Allows the user to edit and/or access Mobile Payment & Loyalty Programs and site-specific configurations (For more information see the Mobile Payment / Loyalty section.)
Reports	**Site Assets**: Allows the user to run Site Asset reports. **TLog**: Allows the user to run Transaction Log reports. **Summary Report:** Allows the user to run Summary Reports.

5. Create Users

NOTE Before creating users, Hierarchies, Sites, and User Roles must already be configured.

1. To create new users, navigate to **Administration > Users**.
2. Click **Add User** in the top right corner of the screen.
3. Complete the required fields using the table below for reference.

Field	Description
Name	Enter in the name of the user. It is recommended to use the First and Last name in the name field.
Email	Enter in the email address for the user. It is recommended to use company email addresses when possible. The email address is used for logging into the Verifone C-Site application.
Status	Users can be set to active or deactivated if they no longer need access to the Verifone C-Site Application.
Role	Assign the role from the list that best fits the users job functions. Refer to the Roles section for more detail on roles and role permissions.
Site Assignments	Users can be assigned to specific hierarchies, meaning they can be permitted access to only a subset of sites. If the user requires access to all sites, then select the first option under site assignments which will select all locations.

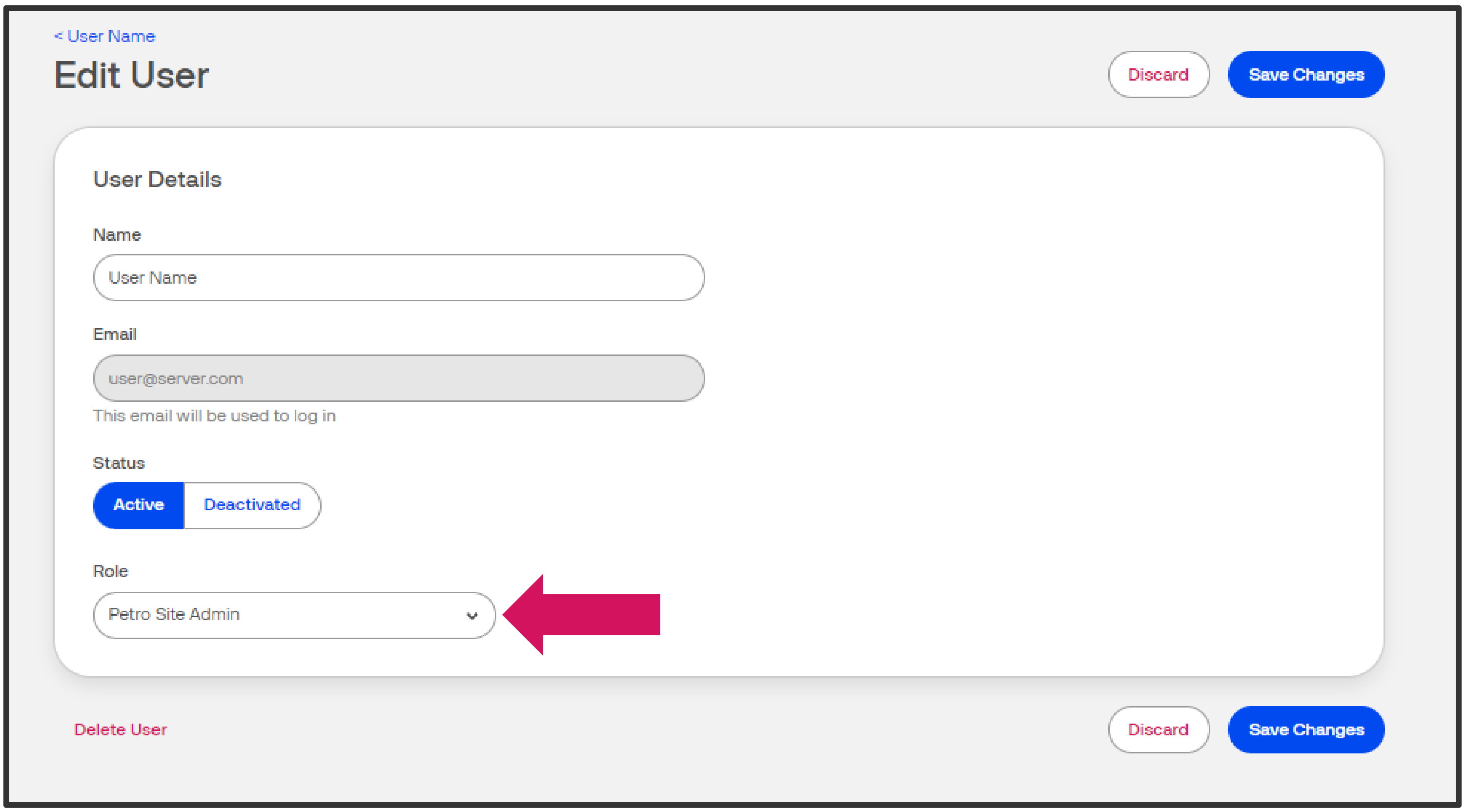
Deleting a User

1. To delete users, navigate to **Administration > Users**.
2. Select the user from the list.
3. Select Delete User on the bottom left corner of the User Detail screen. To utilize the same email address, the Verifone Helpdesk must be contacted to fully remove the users email address.

Creating an Additional Administrator Account

Only one site administrator exists when the account is created initially. If you need to create additional users with the same access level then the user's role will need to be modified.

1. Login with the current Petro Site Administrator account.
2. Navigate to the newly created or existing user and select them from the user list under **Administration > Users**.
3. Once the user is selected, click **Edit User** from the top right corner.
4. Update the user's role to **Petro Site Admin** from the Role drop down.
5. Click **Save Changes.**



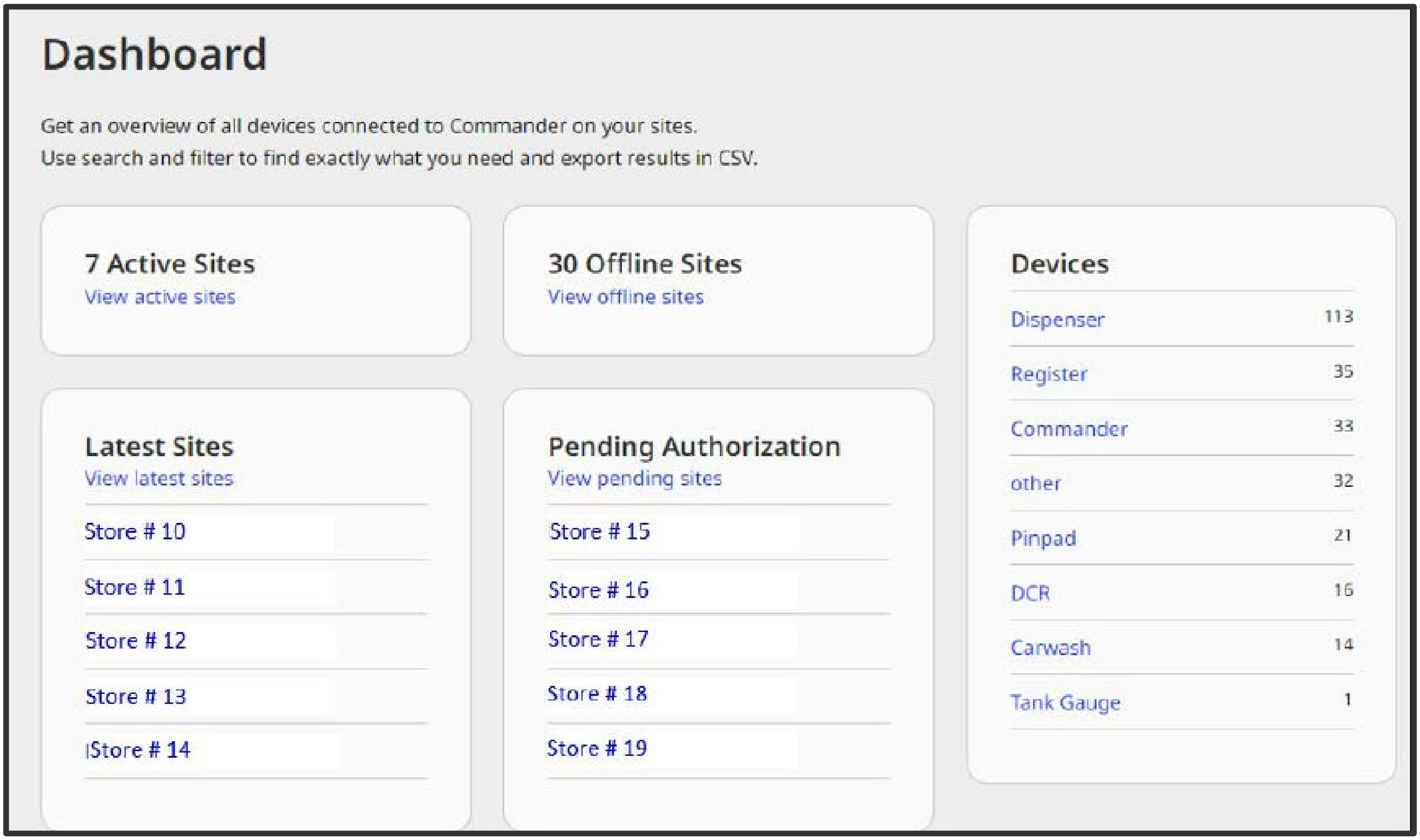
6. Dashboard

This section discusses the Verifone C-Site Management application Dashboard. The dashboard provides information on active sites, offline sites, latest sites added, pending authorization sites, and devices.

The Dashboard is located under **C-Site Management > Overview > Dashboard.**

NOTE

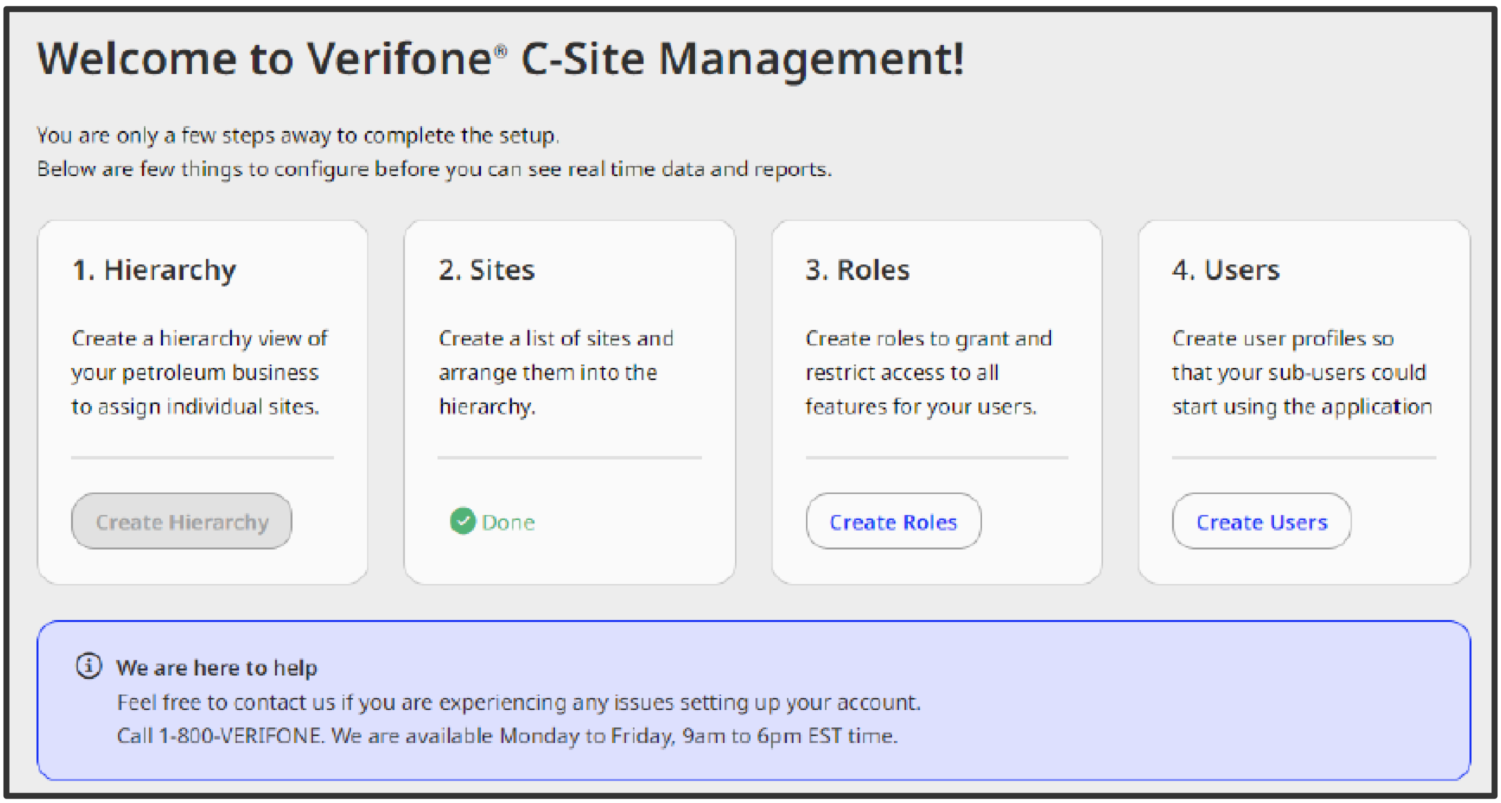
Not all users will have access to all these features. Feature access will depend on a user's permissions. See the User Role and Users sections for more information.



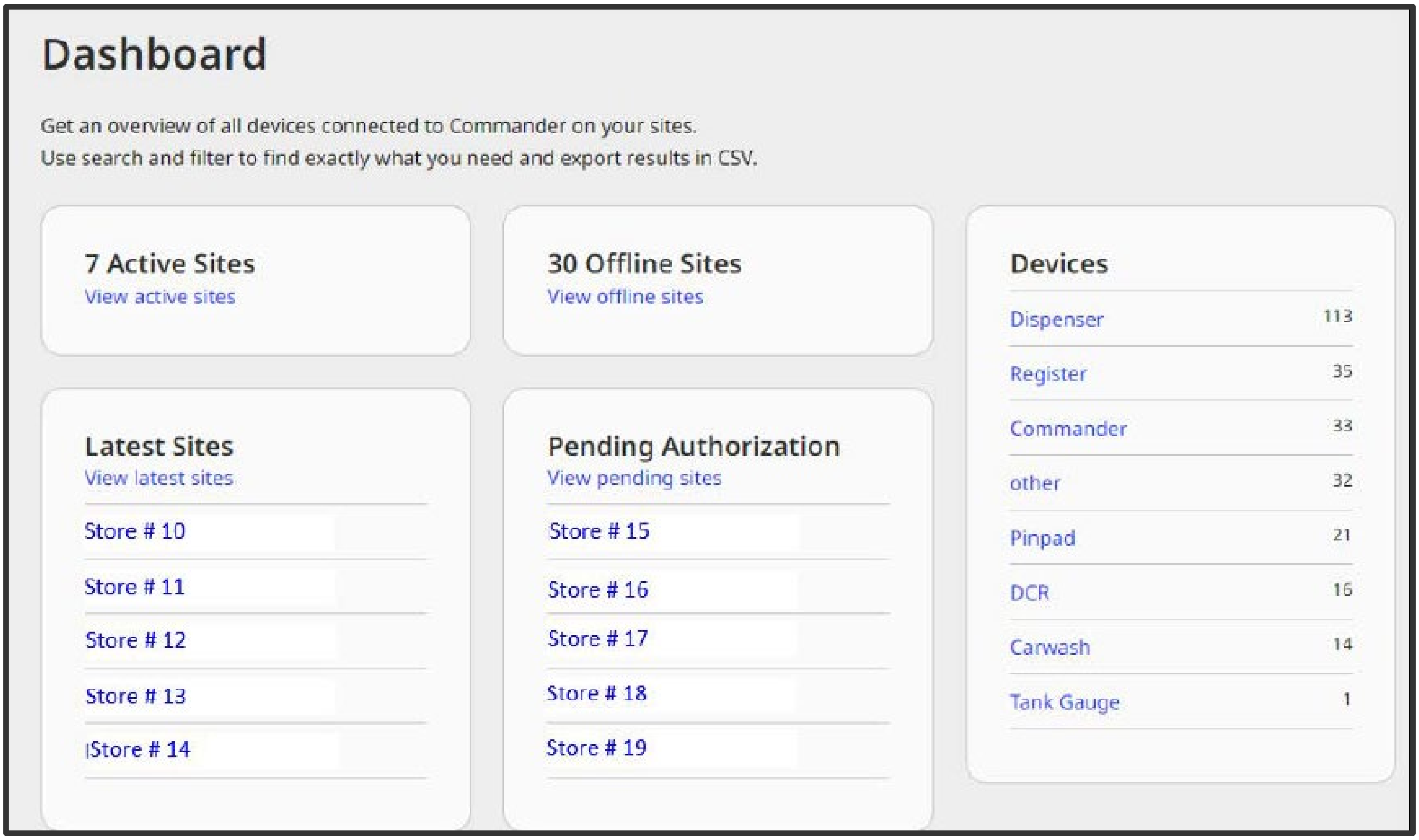
Dashboard on Initial Login

Here is a sample dashboard layout with some steps already completed. You should work through each step-in sequence to properly configure the application. Please see the Hierarchy, Sites, Roles, and Users sections of the documentation for information on configuring each of these areas.

1. **Hierarchy**: Add and view hierarchies, which are lists of groups of sites as your business organizes them, e.g., National > Regional > State, etc.
2. **Sites**: Create and manipulate lists of sites that sit in various levels of the hierarchy.
3. **Roles**: Create user roles so you can assign permissions (configured by Verifone) to individual users or groups of users at one time.
4. **Users**: Create and manage user profiles for users who need to log in to perform various functions in the Cloud application.



Once you have completed all the setup steps, and have active Sites, the Dashboard will look like this:



7. My Account

The My Account section allows you to view and edit details regarding to your specific user account including your name, language, and password.

To view your account information, **click on the initial icon** in the top right corner of the Verifone C-Site Management web page after logging in. Select **My Account** from the drop down.

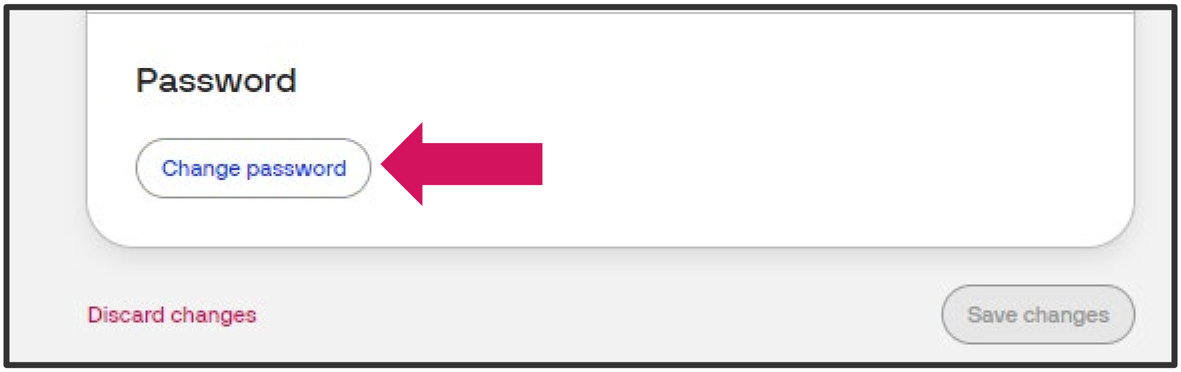
The first page will display the account's General Information. **To make any changes select the Edit User button in the lower right corner.**

Field	Description
First name, Middle name, Last name	Shows the users First, Middle (Optional), and Last (Optional) Name. **Note:** For some users the First Name may display the users email address or their first and last name. This can be updated in Edit User.
Organization	Shows the organizations (company) name to which the user belongs.
Organization ID	Shows the Organization ID assigned to the company. This is a unique ID that is specific to the organization.
Email	Shows the user's email address.
Roles	Shows all user roles assigned to the user. Role assignments cannot be changed in My Account. They are changed under **Administration > Users.**
Status	Shows if the account is enabled or disabled.

Changing Password

1. To change your password, login with your current username and password.
2. Select the **initial icon** in the top right corner of the Verifone C-Site Management website and choose My Account.
3. Select the **Edit user** button under the General Information section.

4. Towards the bottom of the page select the **Change password** button.



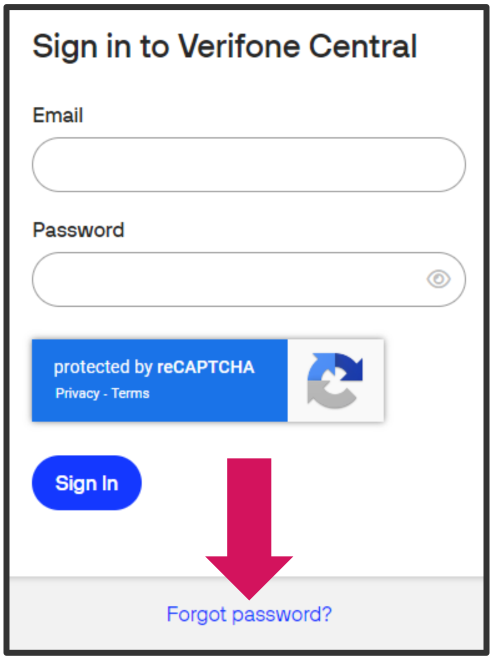
5. Enter in the current password in the first field. Type in the new password in the new password and Confirm new Password fields. Select Update to apply the new password.

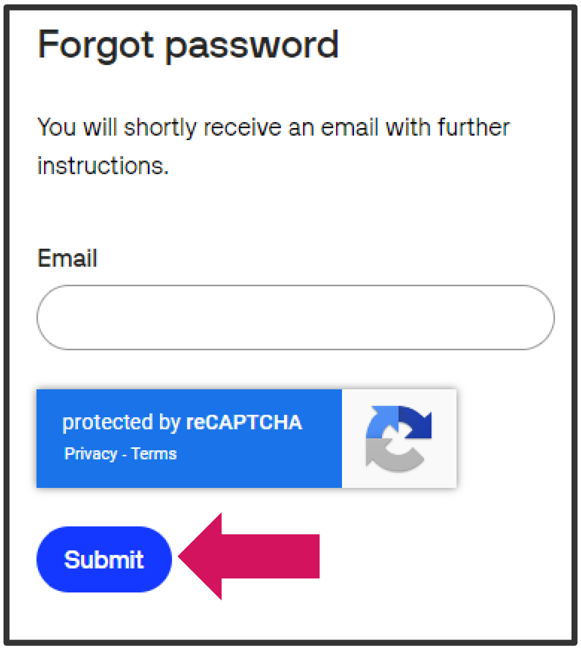
- Passwords must be at least 8 characters long and contain at least 1 number, at least 1 capital letter, at least 1 lowercase letter, and at least 1 symbol.
- Passwords must be different from the users last 10 passwords.

Forgot Password

In the event a user has forgotten their password, there is a Forgot Password option at the login screen of Verifone C-Site Management.

1. To reset your password, **enter your email and select the submit button**. Once the email has been sent, the user can no longer log in with their previous password. The user must reset their password following the email instructions.

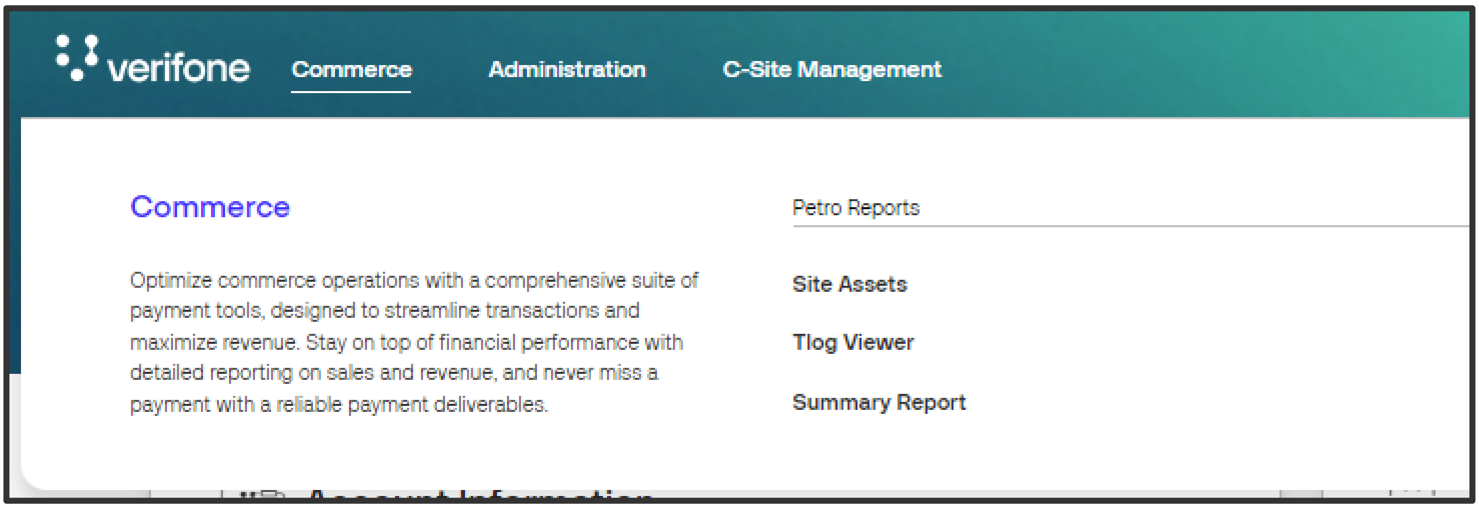




2. Once the password has been reset, the user must log in with the new password.

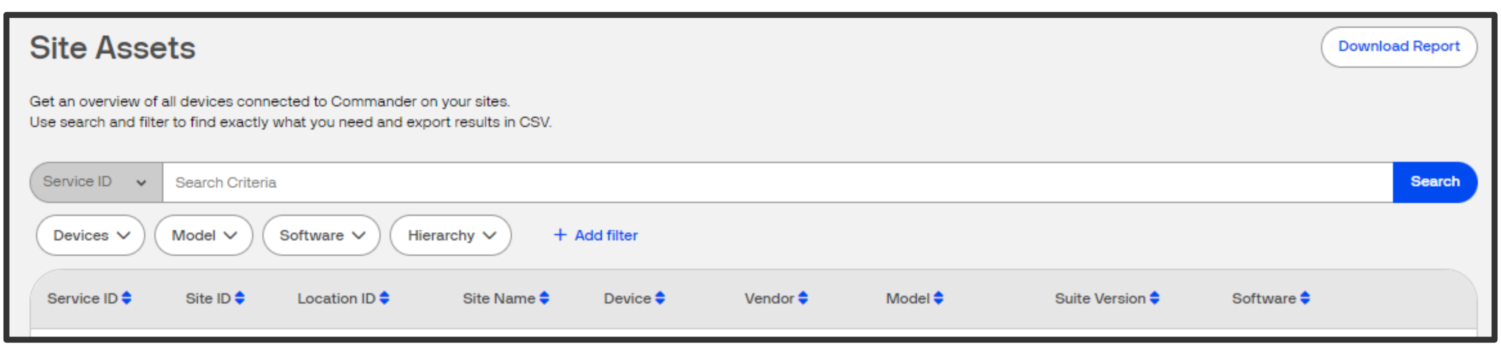
8. Reports

There are three different reporting options currently available within Verifone C-Site Management: Site Assets, Tlog Viewer, & Summary Report. Reports are located under **Commerce > Petro Reports.**

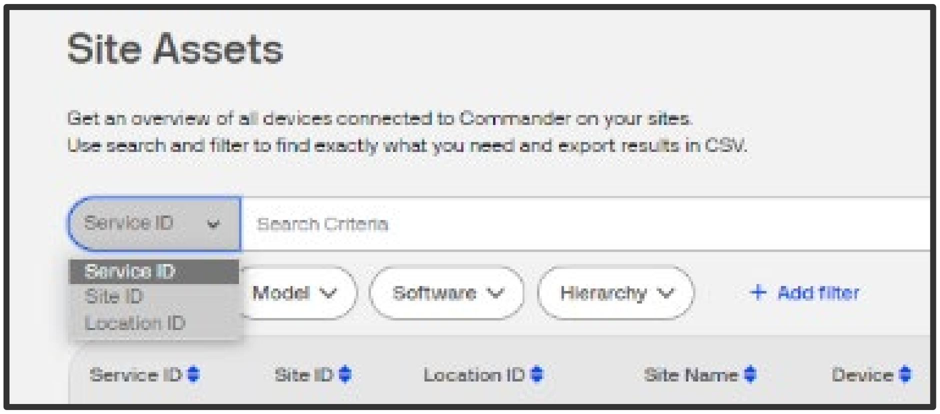


Site Asset Reports

The site asset report provides an overview of all devices connected to the Commander at the onboarded locations. **To locate the Site Asset Report, select Commerce > Site Assets.**



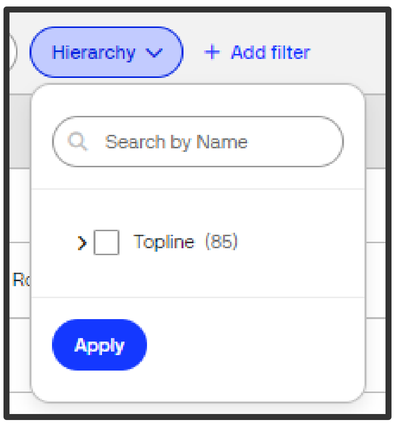
Search Functions in Site Asset Reports



To **search by Service ID**, enter the Service ID in the search field and click Search.

To **search by Site ID or Location ID**, click the Service ID drop down and change the selection. Location ID information is only available in release versions 55.01+.

To **search by name** within the Hierarchy, click the Hierarchy button and enter the name for which you wish to search, and click Apply.



To **filter results by item in the hierarchy**, click the Hierarchy button and use the checkboxes to select items (i.e., Florida and California in the screenshot below). When you have configured your search, click Apply.

The search results will appear on the Site Assets Report page.

NOTE

The items that appear beside the check boxes under the filter criteria buttons (e.g., Commander, Register, Carwash in the screenshot above) depend on the equipment that is present at the site(s) you are including in the report.

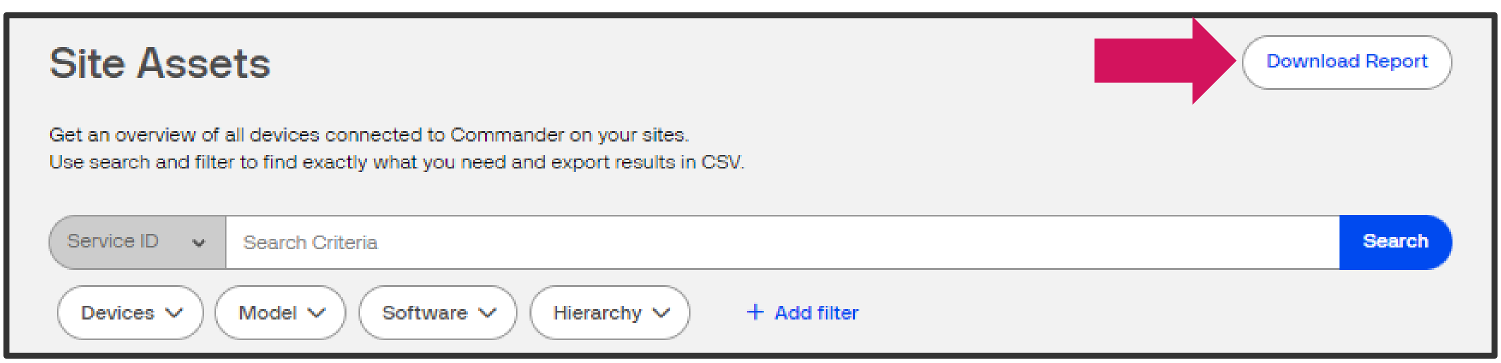
Reports can be filtered using the following criteria:

Field	Description
Devices	Shows the device type such as Dispenser, Register, Commander, PIN Pad, Other, DCR, etc.
Vendor	Shows the Vendor of the product when applicable. For example, dispensers will show the dispenser brand name when that information is available. Click + Add filter to see this option.
Model	Select from the model information available (e.g., Commander > Ruby Ci)
Software	Searches from the specific software for the device. For Commander software, this area shows the Release version of the software. For PIN pads it will display the entire software name and version.
Suite Version	Displays the specific Commander application version and green box version when applicable. Click + Add filter to see this option.
Hierarchy	Allows for the search information to narrow down locations based on their hierarchy organization. Multiple or individual sites can be selected using this option.

Download Site Asset Report

The information shown can be downloaded in a **.csv file format** and saved to the local computer. If the information is filtered/searched, then the report download will populate with the displayed information.

Selecting **Download Report** on the Site Assets main page will prompt for the report to be downloaded.



Tlog Viewer

The Tlog viewer feature allows for financial transaction logs or transaction journal entries to be viewed from Verifone C-Site Management. Only the last 7-days of Tlogs are available for review.

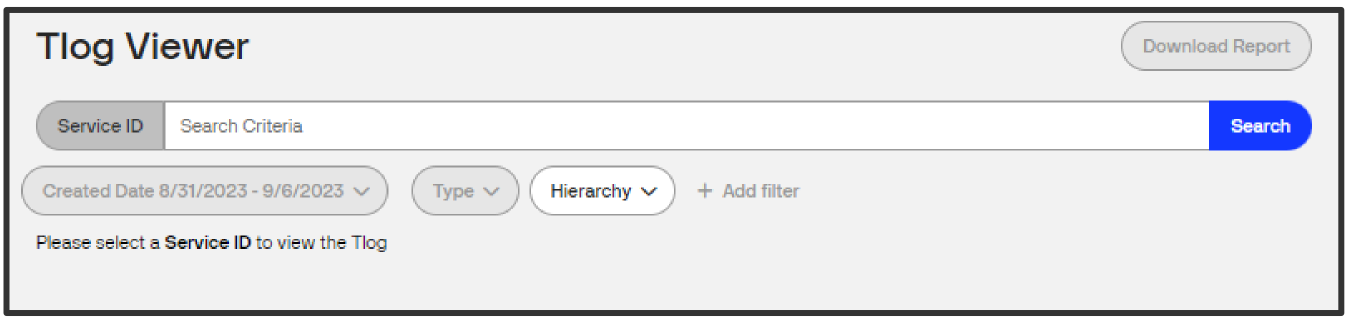
To locate the Site Asset Report, select Commerce > Tlog Viewer.

NOTE

This feature is only available to Merchants and Retailers.

Search Functions in Tlog Viewer

The Tlog viewer search requires a service ID or a site (one) selected from the Hierarchy drop down to perform a search.



Field	Description
Service ID	(Default) Select Service ID from the drop-down menu to the left of the search criteria text box and enter the site's service ID.
Date: Predefined	Choose from Today, Yesterday, or up to the **last 7 Days.**
Date: Custom	Select a date using the calendar controls. You can only select the last 7 days.
Type	Use the check boxes to select Financial and/or Journal entries. Financial is selected by default but can be changed by selecting the Type drop down.
Hierarchy	Use the check boxes to select Site Names from the Hierarchies configured within C-Site.

Add Filter: Trans Types	Use the check boxes to select from the transaction types configured on the system.
Add Filter: Journal Types	Use the check boxes to select from the journal entry types configured on the system.
Results per Page	Select how many entries you wish to view at a time (Default is 10).

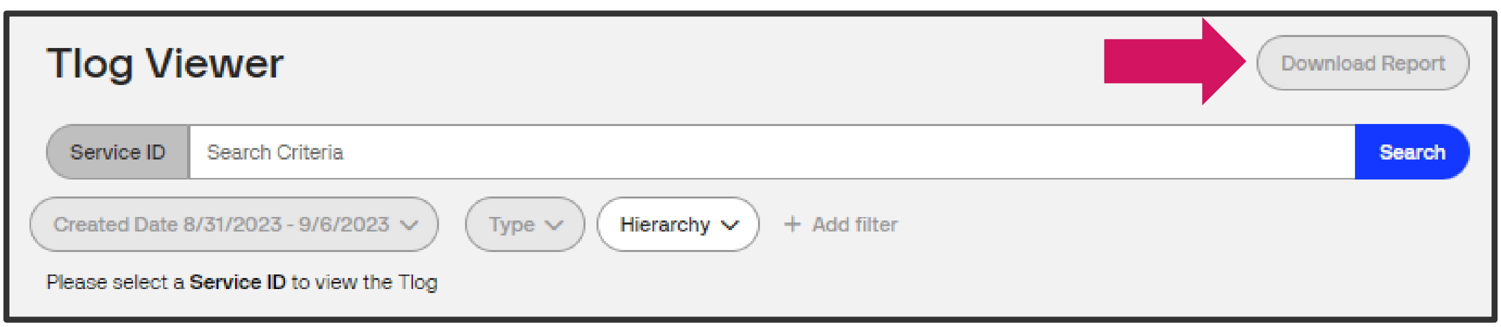
NOTE

Click on the record to view the transaction details. Details will vary based on the transaction type selected. Transaction logs will never display full card numbers.

Download Site Asset Report

The information shown can be downloaded in a **.csv file format** and saved to the local computer. If the information is filtered/searched, then the report download will populate with the displayed information.

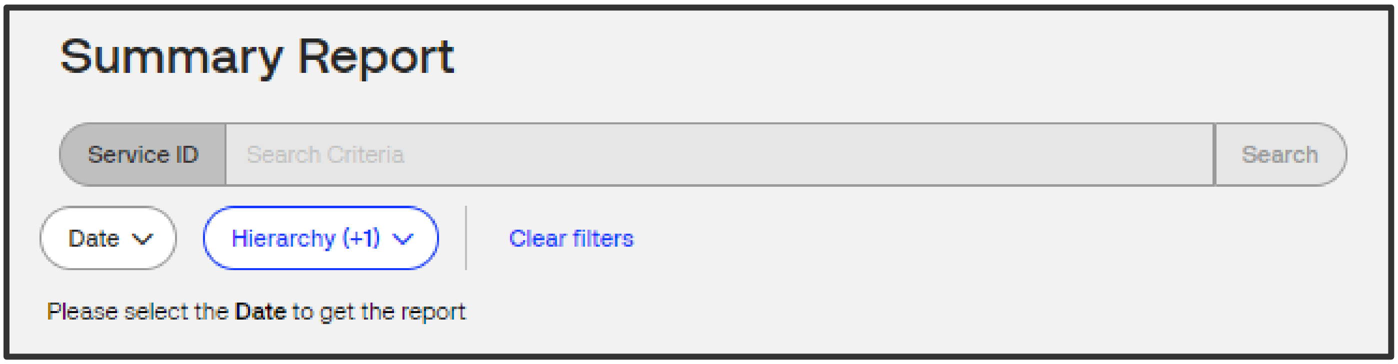
Selecting **Download Report** on the Tlog Viewer page will prompt for the report to be downloaded.



Summary Report

The Summary Report provides data about merchandise sales by category and fuel sales. To access the summary report in Verifone C-Site Management go to **Commerce > Summary Report.**

NOTE This feature is only available to Retail administrators and their users.



To **view the summary report**, a date and location must be selected. Location can be located by using the Service ID or the Hierarchy selection. **Select the date and sequence number result to view the summary report details.**

NOTE Only **one date can be selected** at a time. **Reports are archived within Verifone C-Site Management and accessible for only one week**. The week is based on a calendar week and not the site's day close.

Summary Report Details

Field	Description
Site Information	Shown in the top row. From here, you can click See Site Info to view the site's information, but this will exit the report and you will have to generate it again.
Period Open/Close	Shows the date selected for the report.

Merchandise Sales	
Category	Shows the Category number for the transactions.
Description	Shows the category description for the transactions. This is configured in the POS system itself.
Sales	Shows the sale amount for each transaction.
Void Amount	Shows the dollar amount on sales cancelled by the cashier.
Void Count	Shows the number of cancelled sales.
Overall Total	This row shows the totals for each column for every transaction in the period.
Fuel Sales	
Fuel Cnt	Shows the total number of fuel sales transactions.
Fuel Amt	Shows the dollar amount of fuel sales.
Fuel Gallons	Shows the number of gallons of fuel sold per transaction.
Void Fuel Cnt	Shows the total number of fuel sales cancelled by the cashier.
Void Fuel Amt	Shows the dollar amount of cancelled fuel sales.
Drive Off Cnt	Shows the number of fuel sale transactions that were not paid for.
Drive Off Amt	Shows the total dollar amount from unpaid-for fuel sale transactions.

9. Loyalty Configuration

Loyalty Configuration in Verifone C-Site Management allows for Loyalty settings to be configured and managed in the cloud, and then transmitted to a single or multiple sites. Support Loyalty remote management within the Verifone C-Site Management application requires software **Release 54.00** or higher.

Configuration Syncing

Initial Onboarding

When the Verifone Commander is initially onboarded into the cloud, if it is on Release 54.00 or higher, it will transmit its current Loyalty configuration to the Verifone C-Site Management application.

The current configuration is only transmitted to the Verifone C-Site Management application during the initial onboarding.

Configuration Updates

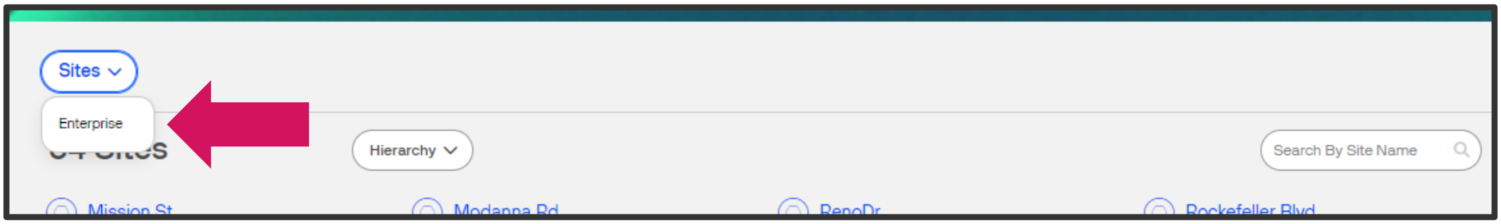
- After the initial upload of the current configuration, any updates made in Verifone C-Site Management can be accessed and transferred to the site by either the major oil provider and/or the merchant administrator (if applicable.)
- Once the site is onboarded to the cloud, Loyalty Configuration will still be available within Verifone Configuration Client.
- If there are local changes within Verifone Configuration Client made to the Loyalty Payment Configuration at the site, these changes will **NOT** be transmitted to Verifone C-Site Management.
- If updates are sent to the site from Verifone C-Site Management, the last update sent will override previously transmitted or locally stored data.

Create Loyalty Programs

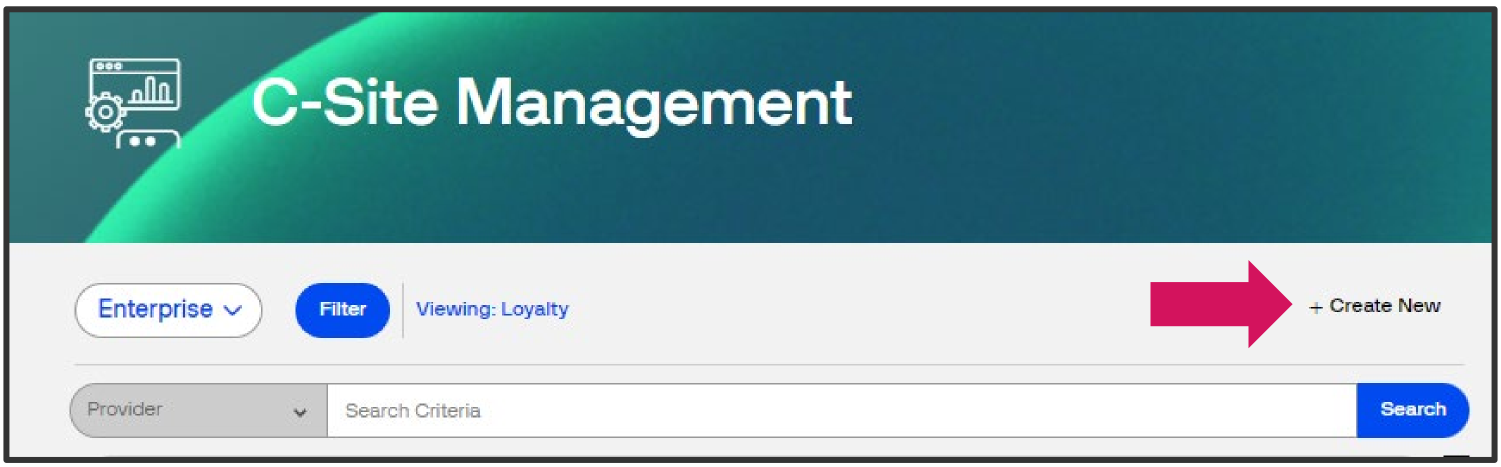
The loyalty payment program allows for different loyalty programs to be generated and assigned to multiple sites with specific Merchant IDs (MIDs) for each location. Loyalty Programs can be created in Verifone C-Site Management, or they can be added when the site is onboarded to Verifone C-Site Management.

Create Program

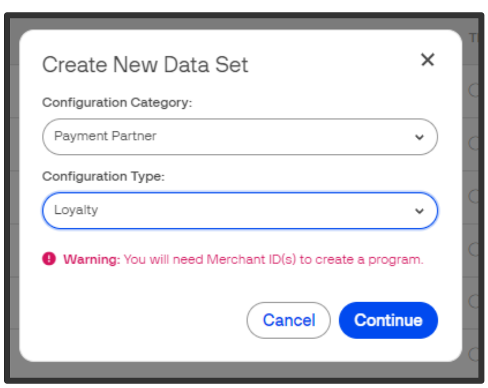
1. To create a new Loyalty program, navigate to **C-Site Management > Site Management > Select the Sites drop down** and switch the view to **Enterprise.**



2. Once you're on the Enterprise view, select **+ Create New** in the top right corner.

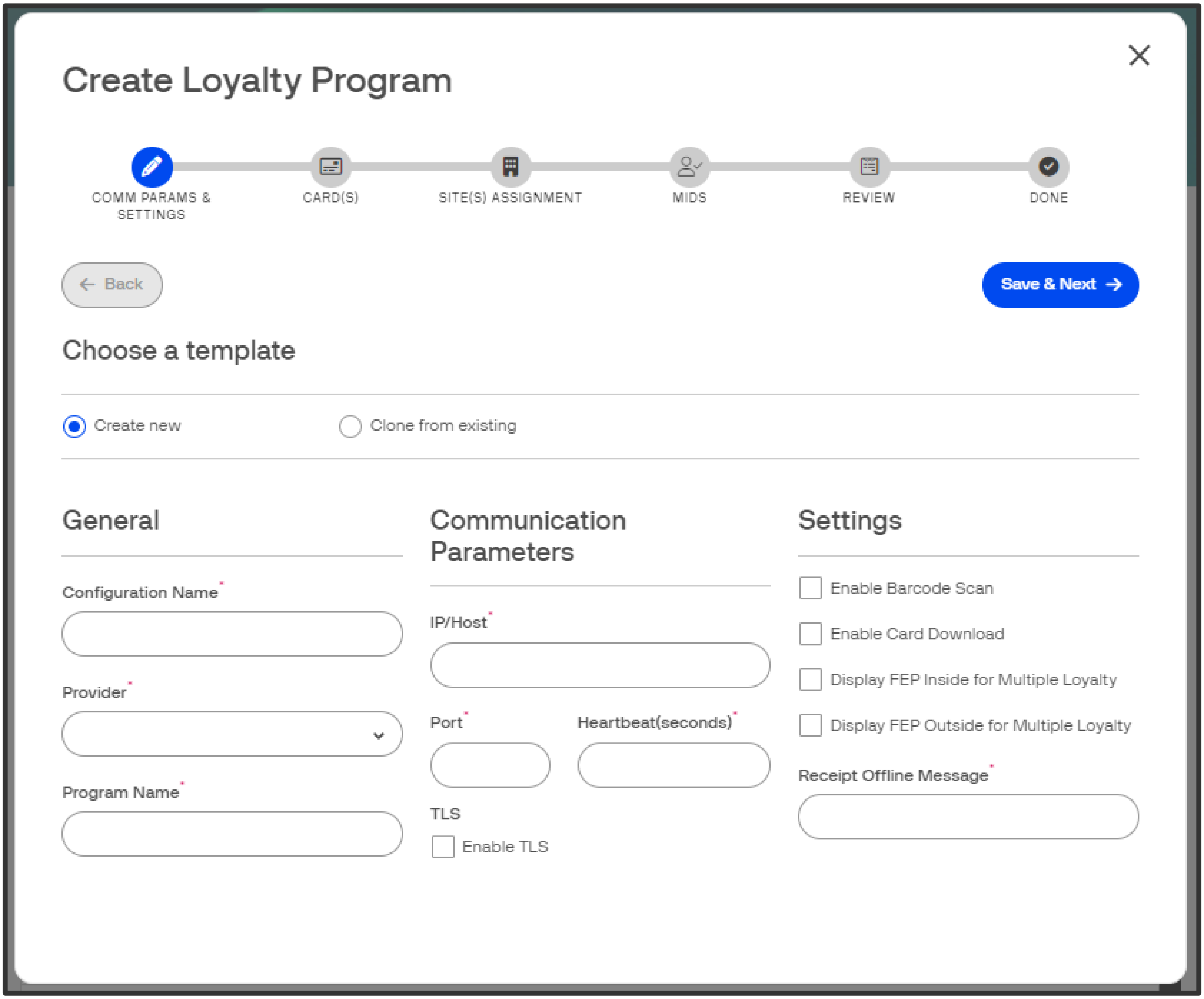


3. From the Create New Data Set pop up, select the Configuration Category of **Payment Partner**. Select the Configuration Type of **Loyalty**.



4. Click **Continue** to open the creation form.

3. Complete the following parameters shown specific to the Loyalty Program being configured. **See table below for details on each field.**

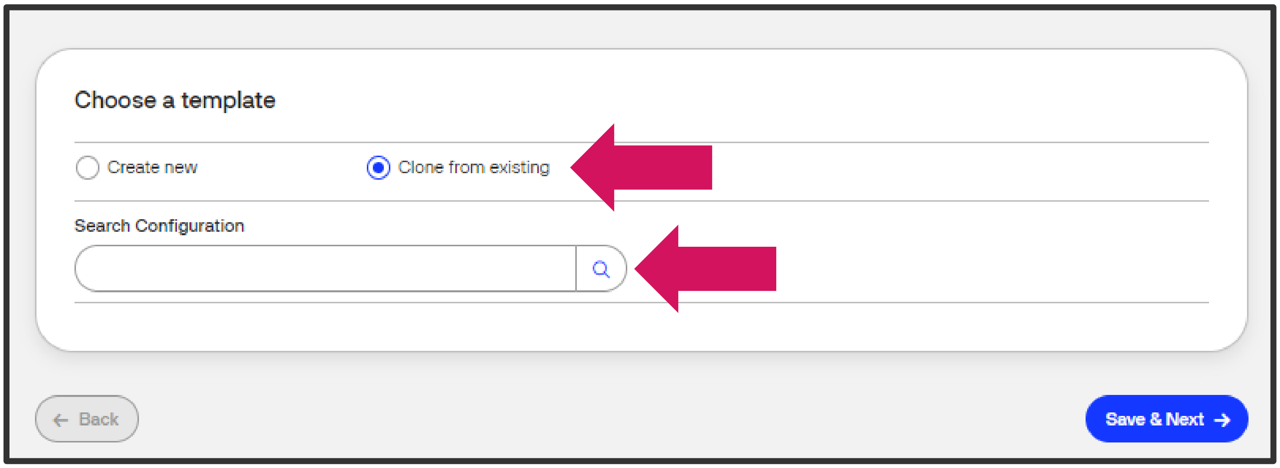


Field	Description
Create New or Clone from Existing	To create a new loyalty program, select the Create New bullet. To copy settings from another loyalty program to be modified, select Clone from existing. (See next section for more details)
Configuration Name	The specific name for the loyalty provider.
Provider	Select the loyalty provider from the list that is used to host the name. The list is a pre-defined selection of approved loyalty hosts.
Program Name	Sets the Program ID for the loyalty program.
IP/Host	Sets the IP address of the loyalty host. (Provided by loyalty host)
Port	Communication Port Number for the primary loyalty host (Provided by loyalty host)
Heartbeat (seconds)	Sets the interval in seconds between network status checks from the Electronic Payment Server to the Loyalty Host. Minimum amount allowed is 120 seconds.
Enable TLS	Enables the use of secure Transport Layer Security (TLS) connection to the loyalty host. When TLS is used, data is encrypted over the communication line.
Program Settings	Enable Bar code Scan - Enables bar code scanning for the related FEP. Display FEP inside for Multiple Loyalty -Displays loyalty programs at the POS when multiple loyalty is used. Enable Card Download - Allows the loyalty host to send down loyalty cards through the Loyalty Card Table Download function. Display FEP Outside for Multiple Loyalty - Displays the Loyalty Program at the DCR when multiple loyalty is used.
Receipt Offline Message	When loyalty is offline the message entered here will print on the receipt.

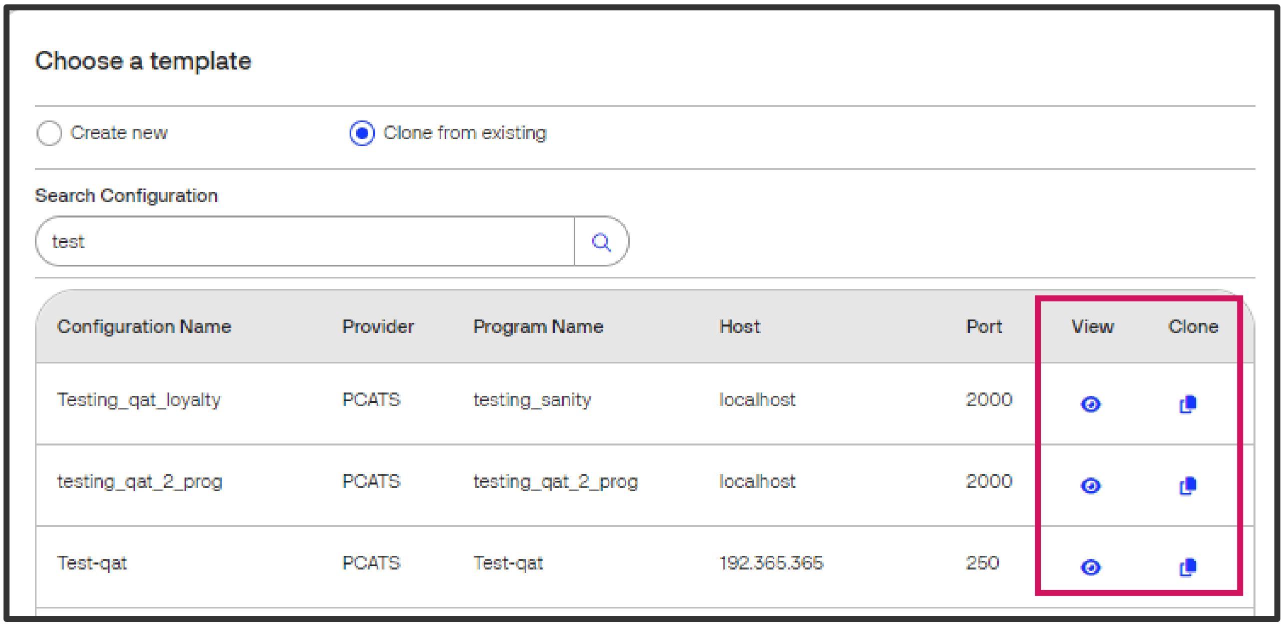
4. Select **Save & Next** to save the parameters entered.

Clone from Existing Program

1. If the Clone from Existing Program is selected on the Create Program form, it will prompt you to search for the name of the program you wish to clone.



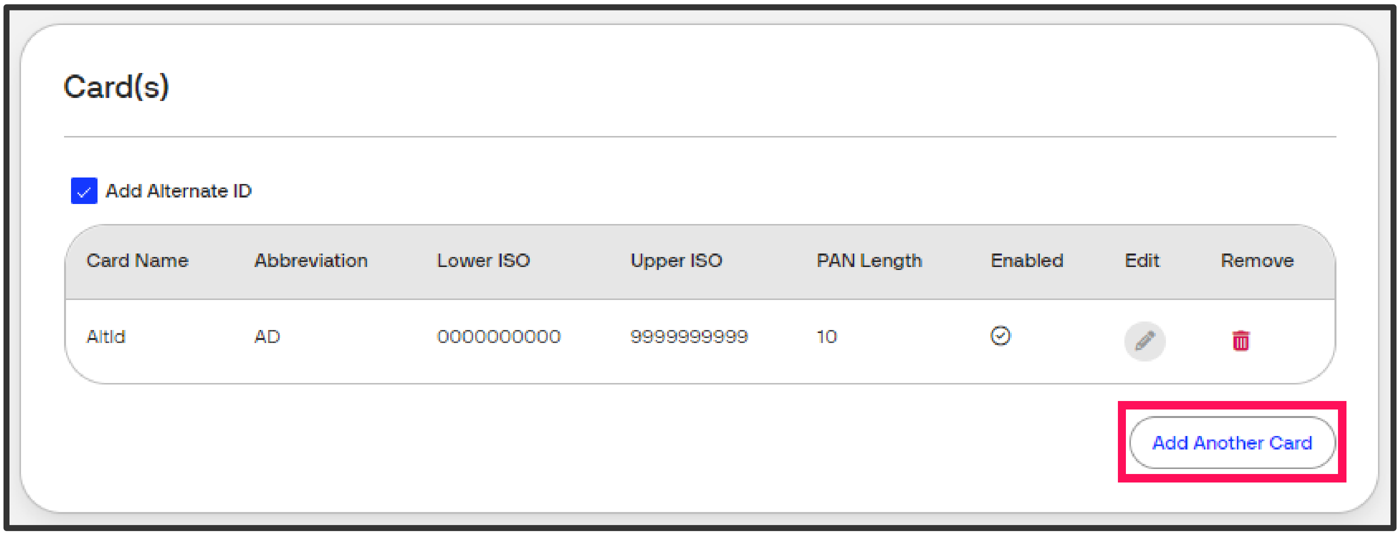
2. After completing the search function, select clone or view from the return list displayed.



3. Enter in the Configuration Name and Program Name for the configuration. Make any additional changes to the communication parameters and program settings before continuing. **Refer to the table above for more details on each field.**

Add Loyalty Cards

1. The next section on the Create Program form allows loyalty cards to be added to the program.
2. If an Alternate ID is allowed with the loyalty card, select the check mark next to 'Add Alternate ID'. An Alt ID Card name will be automatically added to the table. Alternate ID cannot be edited, it is only enabled by being added to the card table.
3. Select '**Add Another Card**' to add additional loyalty cards to the list.



4. Complete the entry fields for the specific loyalty card being used.

Field	Description
Card Disabled	Disables the loyalty card
Card Abbreviation	Two-character abbreviation for the card.
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. For standard bar codes and mag stripe loyalty cards this will be the first six digits. For GS-128 bar codes '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 this number to match the table entry. For standard bar codes, GS-128 bar codes, and mag stripe this will be the same as the lower ISO range or ending range value.
Pan Length	Sets the number of digits that are used with each card or barcode. Magstripe loyalty cards use 16. Standard bar codes used 12 digits. GS-128 bar codes use 22 digits.

5. Select **Save in the Card** window to save the card. Add any additional cards needed for the specific loyalty program.
6. Select **Save & Next** to proceed to the Site Assignment Area.

Site Assignment

The site assignment section displays a list of sites that have been onboarded to your C-Site account.

1. Select the sites this loyalty should apply to from the list. Selecting the top level of a group will select all sites within that group.
2. Select **Save & Next** once the sites are selected.

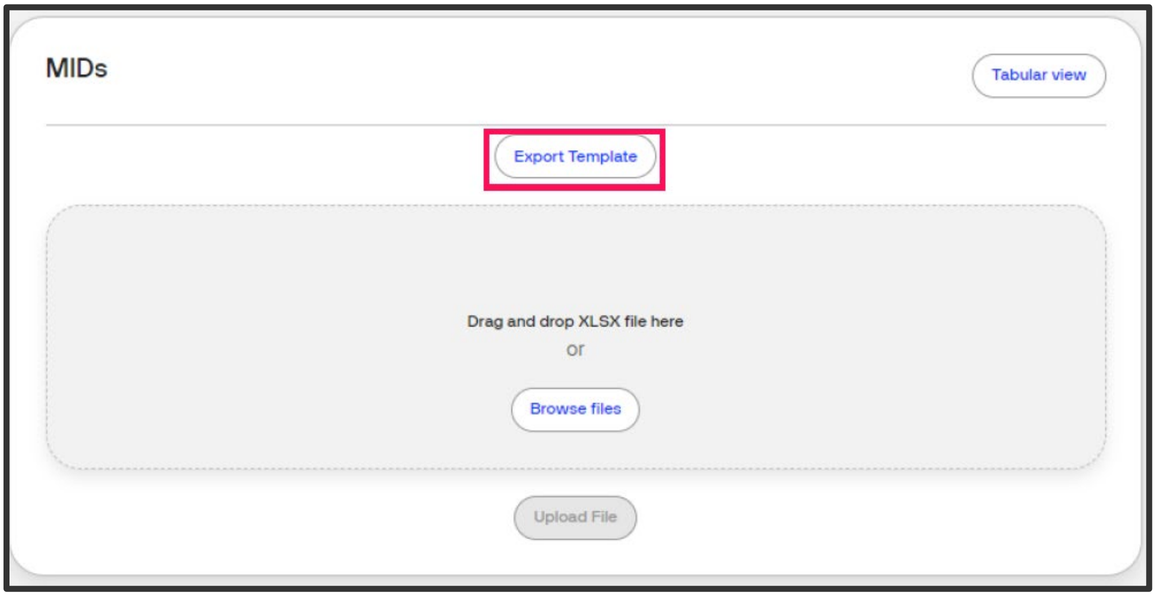
Loyalty Merchant ID (MID)

Each location must have a merchant ID (MID) assigned to it for the loyalty provider. The MID allows the loyalty host to identify the site for transactions. Every location will have a unique MID.

1. Enter in the Merchant ID to the right of each selected location. Be sure to enter in the correct MID for each site as it is the loyalty provider's unique identifier for the site.

There is an optional **Bulk Upload** feature that allows a spreadsheet to be utilized to import multiple MIDs at once.

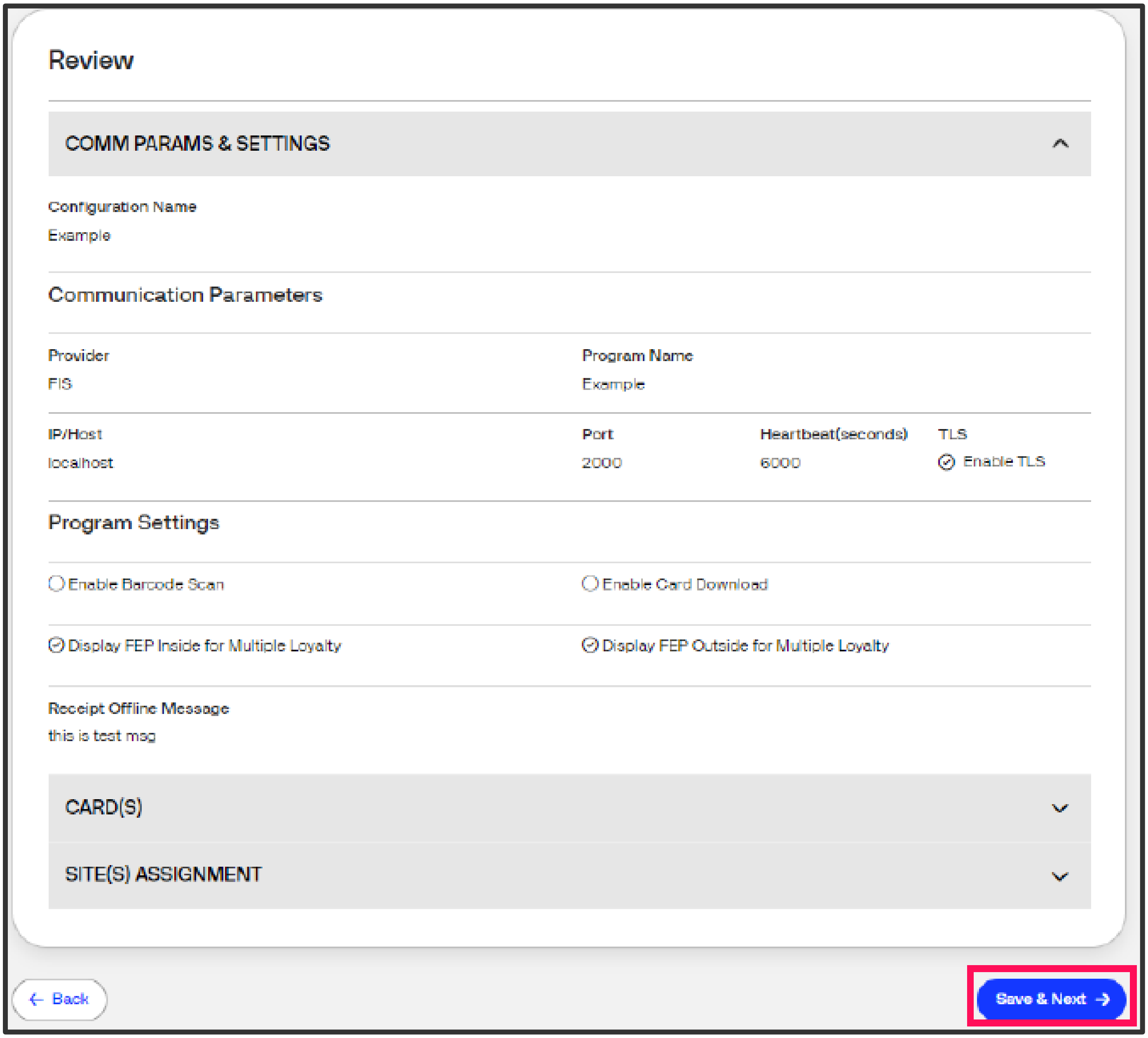
To complete a Bulk Upload for Loyalty MIDs, select the Bulk Upload button on the form, export the template, complete the form, and upload the file to the MID section.



Review the Parameters

Before applying the parameters, you can review the selections and entries made to confirm they are correct. At the bottom of the form, the Card(s) and Site(s) Assignment are collapsed. To expand those sections, click the title to expand or collapse those sections.

Click **Save & Next** to apply the configuration.

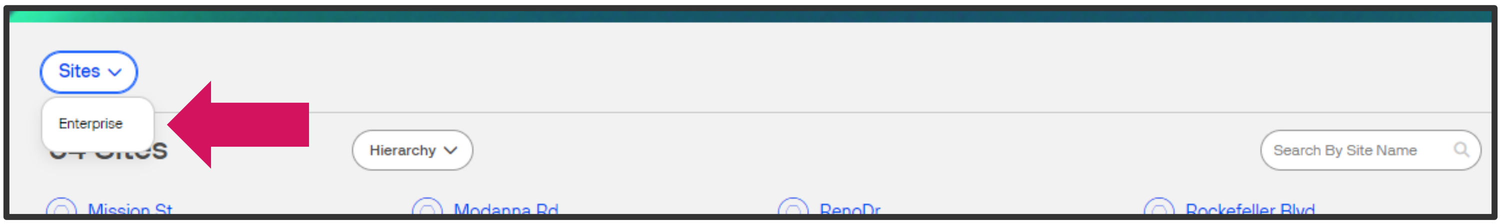


Manage Loyalty Programs

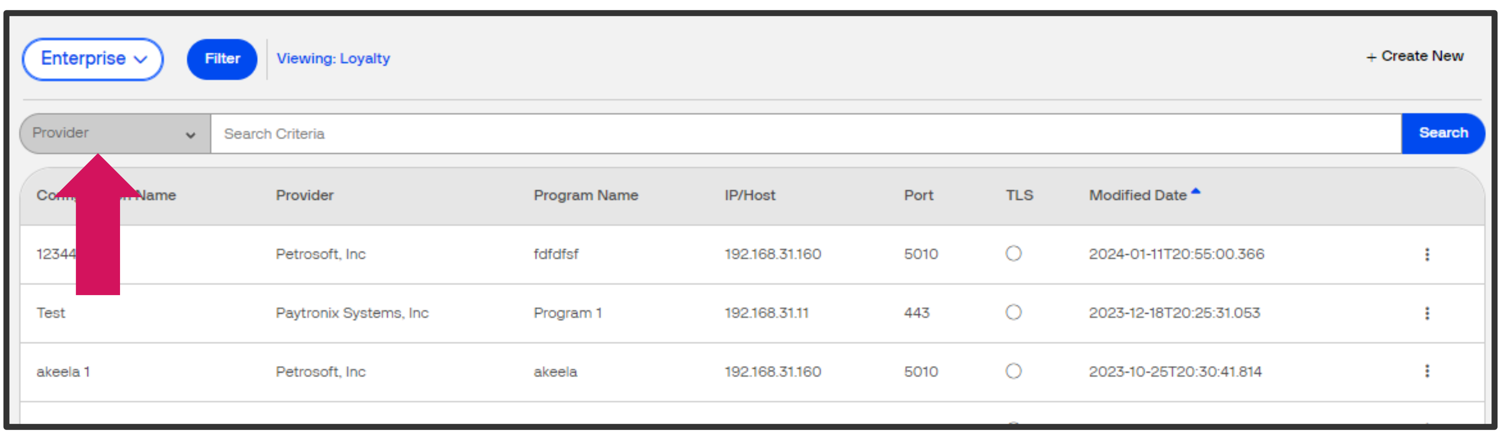
Each Configuration Name used for loyalty will create a different loyalty program entry within Manage Programs.

View Existing Loyalty Programs

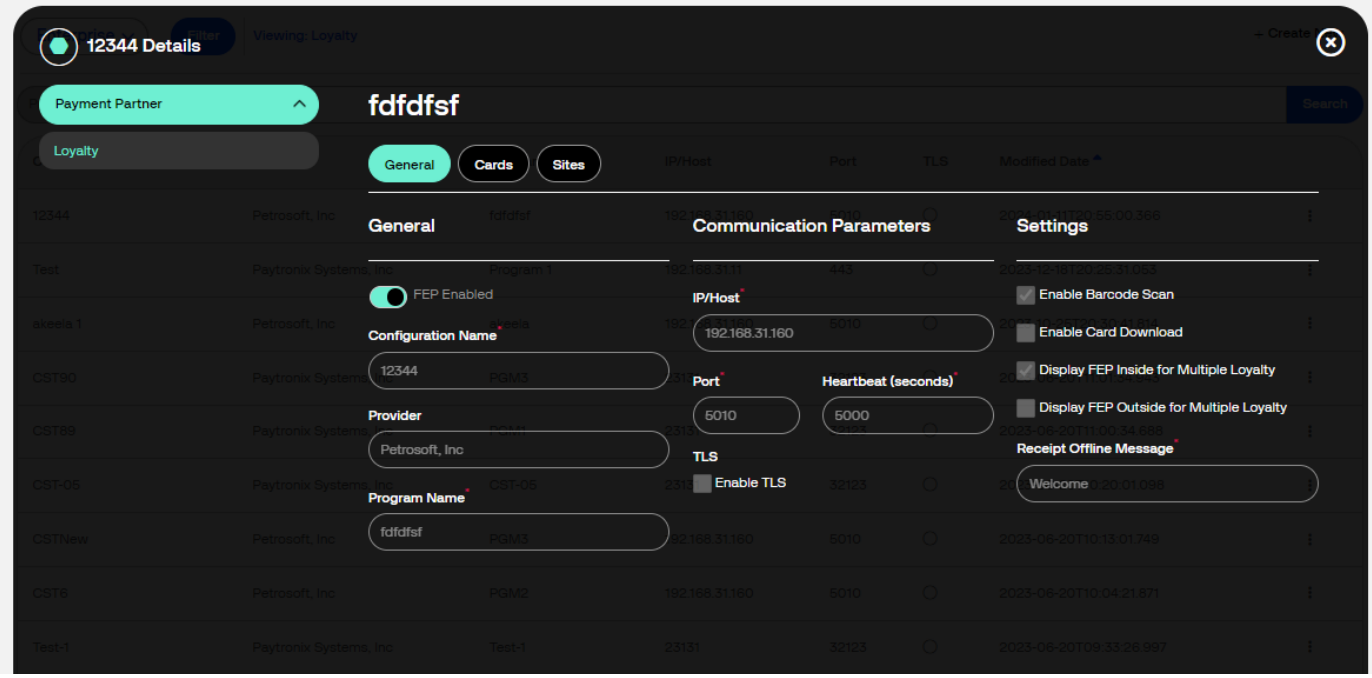
1. To create a new Loyalty program, navigate to **C-Site Management > Site Management > Select the Sites drop down** and switch the view to **Enterprise.**



2. Check the Viewing selection to the right of the filter button. If it is set to **Viewing: Mobile,** then use the Filter function to switch to Mobile (Configuration Category: Payment Partner | Configuration Type: Loyalty).
3. All loyalty programs will be displayed. To search for a specific loyalty configuration, use the drop down to the left of the search criteria bar to switch between loyalty provider, configuration name, or program name.
4. Select the **three dots** to the right of the Program Name view.
5. Click **View.**



> **NOTE** Loyalty programs cannot currently be edited in the Enterprise view, but the configuration can be viewed or cloned in the Create Program section discussed above.



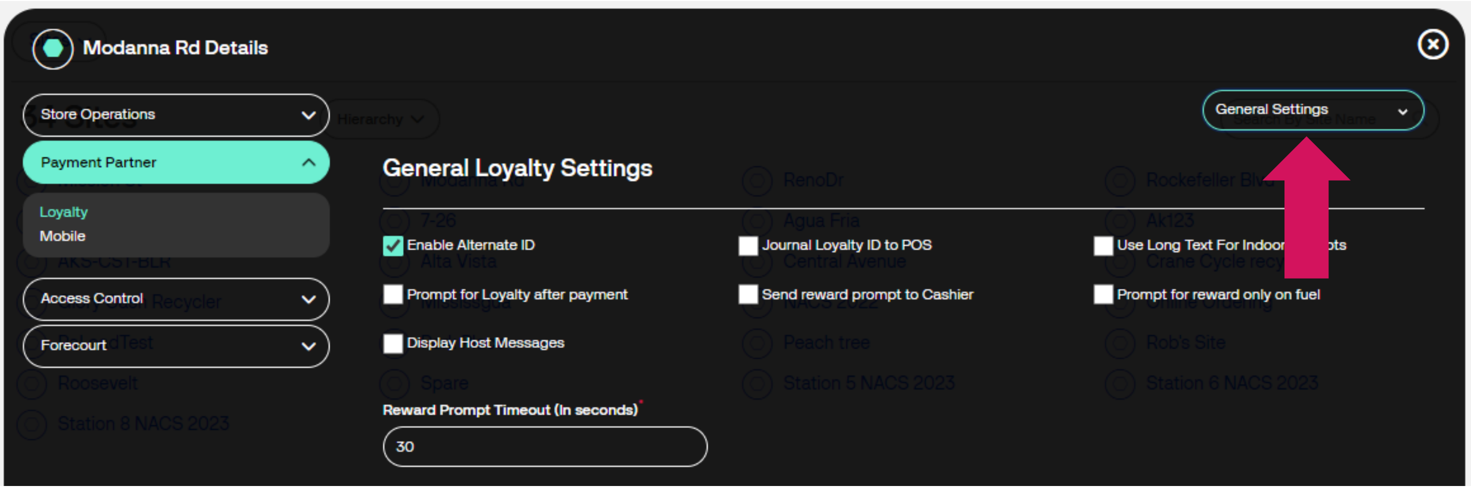
Manage Site Loyalty Configurations

Each locations loyalty configuration can be viewed and modified for individual sites.

View or Edit Site Loyalty Configurations

1. To view or edit individual site loyalty configurations navigate to **C-Site Management > Site Management**
2. Use the search by **Site name** or **Hierarchy** drop down to locate the site you wish to modify the loyalty configurations for. Once the site name is located, **click on the name** to open the site configuration.

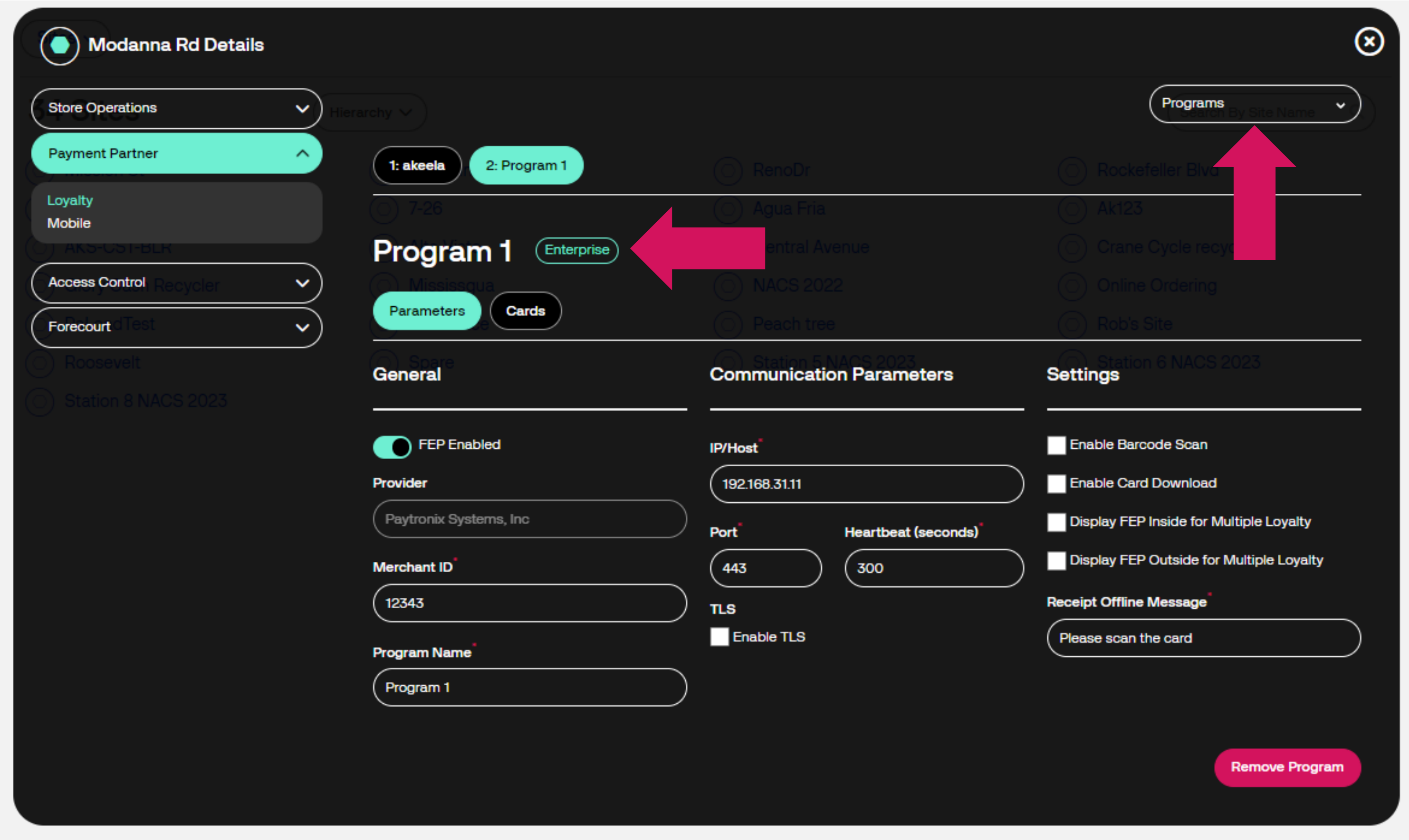
3. Select **Payment Partner > Loyalty** from the left column to view the site’s loyalty parameters.
4. To view the site’s general loyalty settings, use the drop down on the top left column to switch from the loyalty programs to **General Settings**.



Field	Description
Enable Alternate ID	Enables the payment device to prompt for an alternative ID for loyalty.
Prompt for Loyalty after payment	Prompts the customer for loyalty after they have paid for the transaction.
Display Host Messages	Loyalty messages will appear on the POS from the loyalty host.
Journal Loyalty ID to POS	Captures the customer’s loyalty ID in the site’s POS journal logs.
Send Reward prompt to Cashier	Enables the cashier to answer the PIN pad prompt from the POS in the event the customer hands the cashier cash and leaves the store without using the PIN pad display.
Reward Prompt Timeout (in seconds)	Sets a time out value for the loyalty reward prompt in seconds.
Use Long Test for Indoor Prompts	Shows longer prompts inside for loyalty rather than abbreviating them.
Prompt for reward on fuel only	Enabling this setting will only prompt the customer for loyalty if they are purchasing fuel.

5. Loyalty Programs (PCATs Loyalty in Commander's Configuration Client) assigned to the site will be found under the **Programs** drop down.

   If the loyalty program is managed through Enterprise configuration, then it will have a label next to the program name indicating **'Enterprise'.**



10. Mobile Payment Configuration

Mobile Payment Configuration in Verifone C-Site Management allows for Mobile Payment settings to be configured and managed in the cloud, and then transmitted to a single or multiple sites. Support Mobile Payment remote management within the Verifone C-Site Management application requires software **Release 53.41** or higher.

Mobile Payment Configuration in Verifone C-Site Management does NOT set up the Method of Payment (MOP), touchscreen, and DCRs. For details on how to configure Mobile Payments locally within Verifone Configuration Client refer to the Mobile Payment Feature Reference guide.

Configuration Syncing

Initial Onboarding

- When the Verifone Commander is initially onboarded into the cloud, if it is on Release 53.41 or higher, it will transmit its current Mobile Payment configuration to the Verifone C-Site Management application.
- The current configuration is only transmitted to the Verifone C-Site Management application during the initial onboarding. If the Program Name does not exist, then the Verifone C-Site Management application will create a Program Name and store it.
- If a Program Name exists in Verifone C-Site Management that matches the Program Name in the site's local Mobile Payment Configuration, Verifone C-Site Management program will automatically update the site's configuration.

Configuration Updates

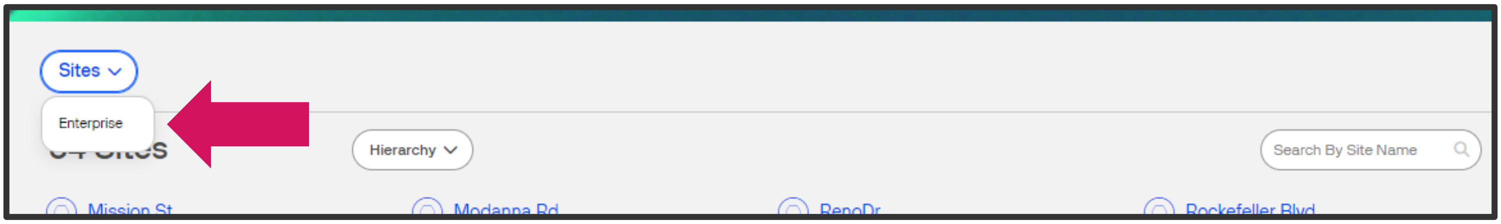
- After the initial upload of the current configuration, any updates made in Verifone C-Site Management can be sent to the site by either the major oil provider and/or the merchant administrator (if applicable.)
- Once the site is onboarded to the cloud, Mobile Payment Configuration management will still be available within Verifone Configuration Client.
- If there are local changes within Verifone Configuration Client made to the Mobile Payment Configuration at the site, these changes will NOT be transmitted to Verifone C-Site Management.
- If updates are sent to the site from Verifone C-Site Management, the last update sent will override previously transmitted or locally stored data.

Mobile Payment Programs

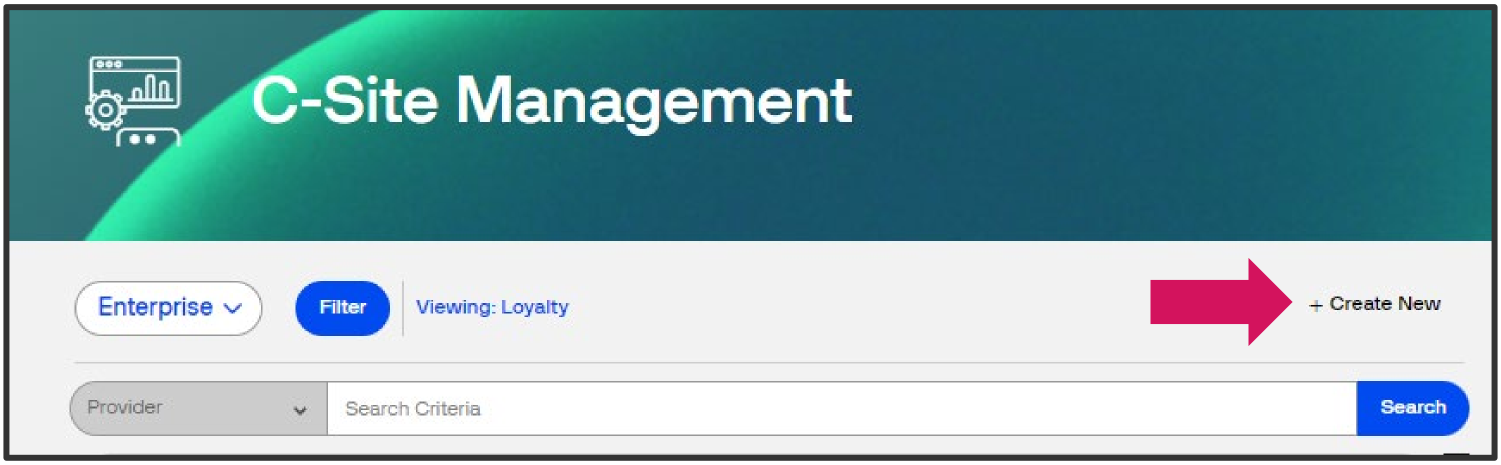
The Mobile Payment Program page allows multiple mobile payment configurations to be built and assigned to each site. Each program has a specific individual Program Name. Programs can be created in Verifone C-Site Management, or they can be added when the site is onboarded to Verifone C-Site Management.

Create Program (Enterprise)

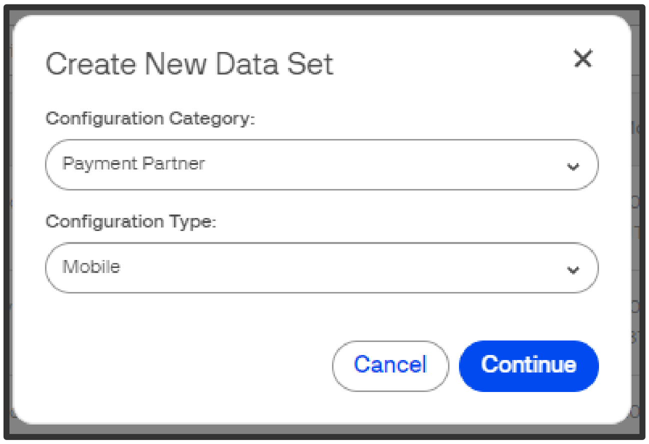
1. To create a new Loyalty program, navigate to **C-Site Management > Site Management > Select the Sites drop down** and switch the view to **Enterprise.**



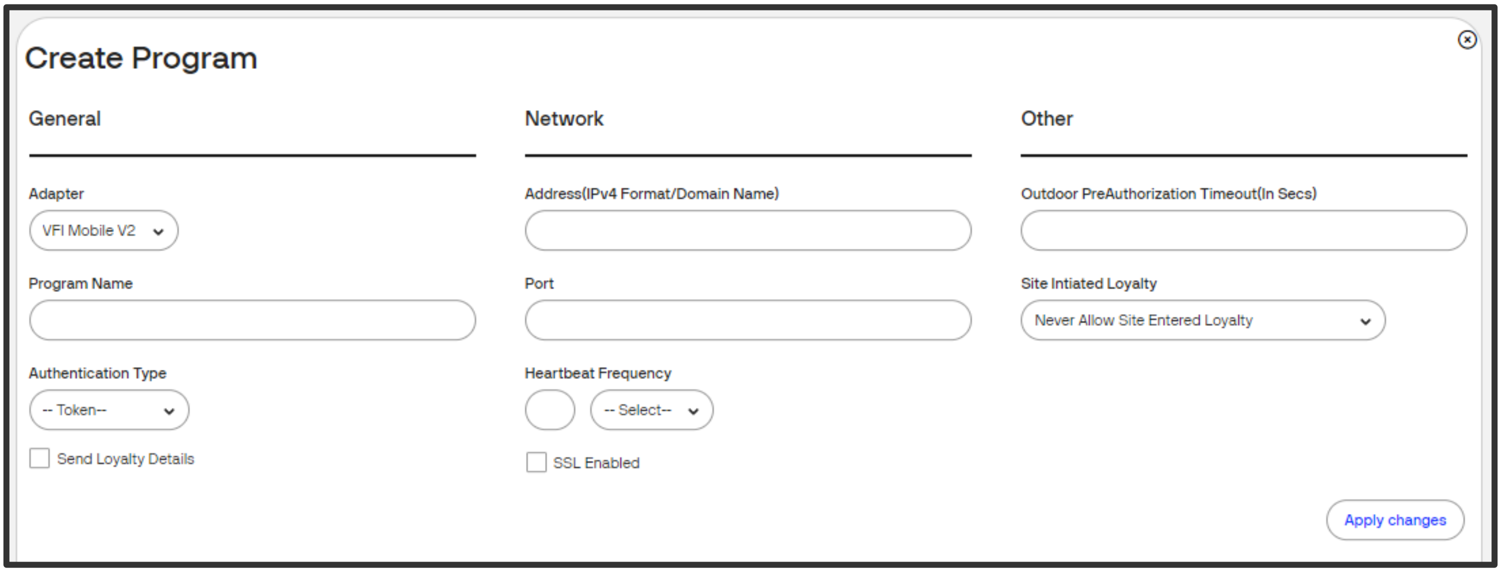
2. Once you're on the Enterprise view, select **+ Create New** in the top right corner.



3. From the Create New Data Set pop up, select the Configuration Category of **Payment Partner**. Select the Configuration Type of **Mobile**.



4. Click **Continue** to open the creation form.
7. Complete the following parameters shown specific to the Mobile Payment Host being configured. **See table below for details on each field**.

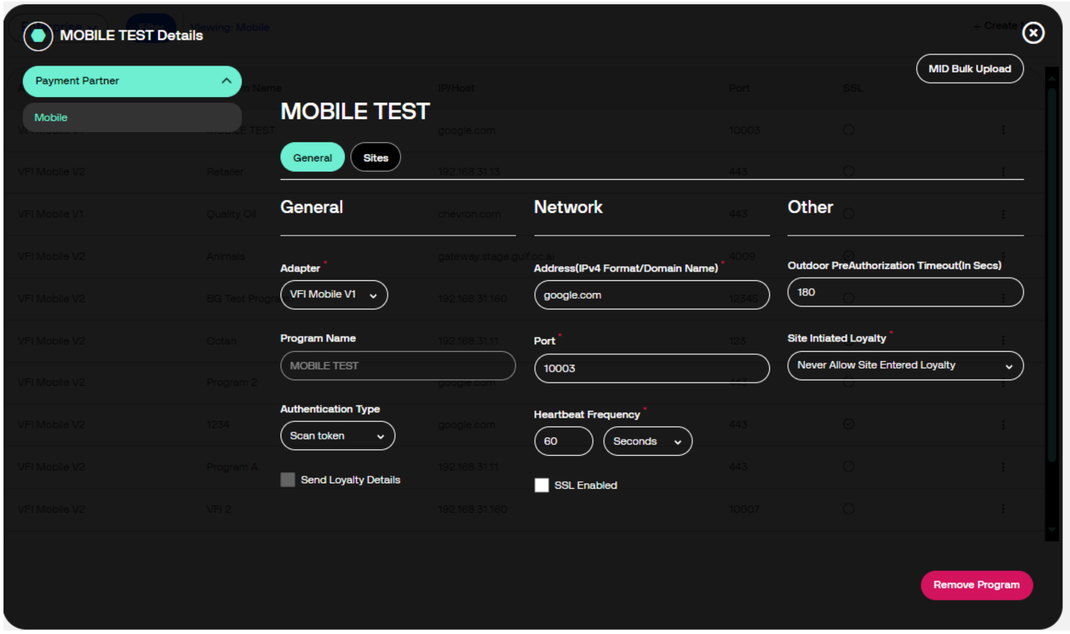


8. Select **Apply Changes** to save the parameters entered.

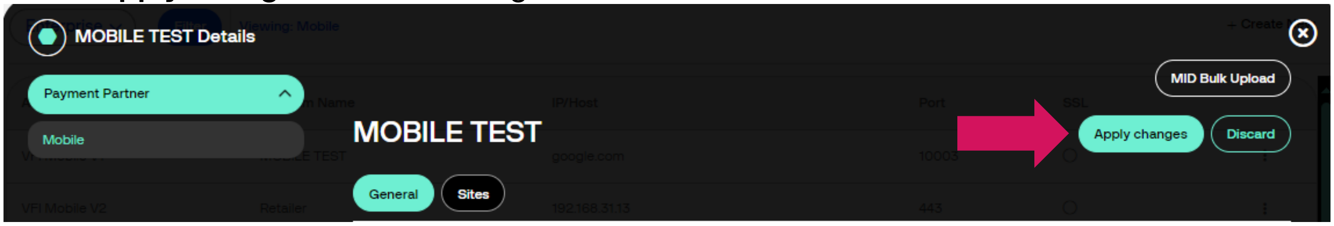
Field	Description
Adapter	Select the communication standard being used: • VFI Mobile V1 - Connexxus V1 Standard • VFI Mobile V2 - Connexxus V2 Standard
Program Name	The program name is specific to the Mobile Payment Configuration. This parameter must be unique as it is the identifier for the Mobile Payment Configuration.
Authentication Type	• Scan Token - QR Code Generated on the Mobile Payment Application is scanned using the POS Scanner • Enter Token - Customer or cashier enters a token on the PIN pad. • Display Token - Token for the customer to enter on PIN pad. • Generate Token - Both Display Token and Generate Token display a token on the PIN pad to be scanned or entered for authenticating the transaction. If a site has different Mobile Payment programs configured with Generate Token authentication type for all, the customer is not prompted to select a mobile payment program during the transaction. After selecting the mobile MOP, the PIN pad displays a QR code instead of a mobile payment programs election.
Send Loyalty Details	Enabling this flag sends SLA/EPS loyalty program details to the Mobile Host Provider.
Address (IPv4 Format/Domain Name)	Host IP or URL (IPv4 Format or HTTP domain name)
Port	Communication Port Number
Heartbeat Frequency	The time after which the Verifone Commander pings the mobile program host to check connection. If the host is offline, a mobile host offline alarm message will appear on the POS.
SSL Enabled	Enables Secure Socket Layer (SSL) for client/host communications.
Outdoor PreAuthorization Timeout (In Secs)	The DCR pre-authorization time out in seconds.
Site Initiated Loyalty	Select the site-initiated loyalty settings for outdoor transactions: • Never Allow Site Entered Loyalty - Only allows mobile loyalty. • Allow Site Entry i.e., Swiped Loyalty Card- Both swiped and mobile loyalties allowed. • Allow Site Entered Loyalty if no Mobile Loyalty - Allows swiped loyalty is there is no mobile loyalty.

Edit an Existing Program

1. To edit an existing Loyalty program, navigate to **C-Site Management > Site Management > Select the Sites drop down** and switch the view to **Enterprise.**
2. Check the Viewing selection to the right of the filter button. If it is not set to **Viewing: Mobile,** then use the Filter function to switch to Mobile (Configuration Category: Payment Partner | Configuration Type: Mobile).
3. Select the **three dots** to the right of the Program Name view/edit.
4. Click **View/Edit.**
5. The **General** tab will display by default. The **Sites** tab will show which locations have this program applied.



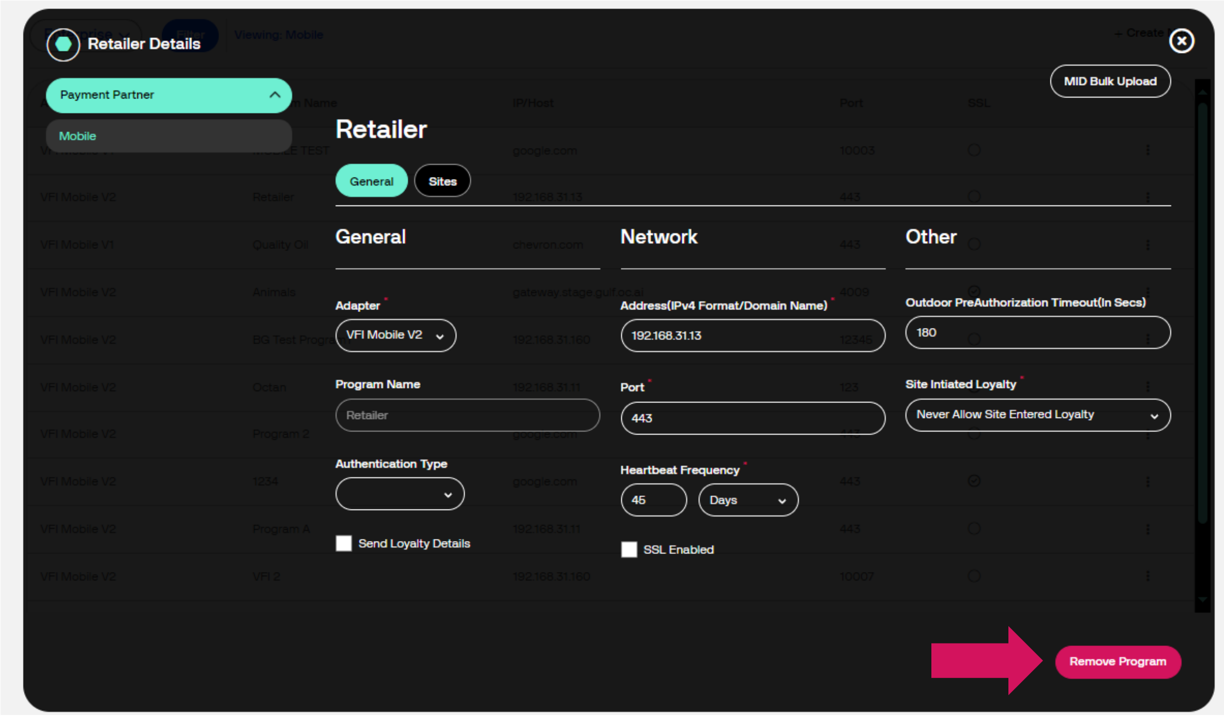
6. After you've made the changes to the configuration, confirm that those changes are correct and select **Apply changes** in the lower right corner of the screen.



Delete an Existing Program

WARNING Deleting the existing program within the Enterprise configuration will delete the Mobile configuration from any associated sites.

1. To delete an existing Mobile program, navigate to **C-Site Management > Site Management > Select the Sites drop down** and switch the view to **Enterprise.**
2. Check the Viewing selection to the right of the filter button. If it is not set to **Viewing: Mobile,** then use the Filter function to switch to Mobile (Configuration Category: Payment Partner | Configuration Type: Mobile).
3. Select the **three dots** to the right of the Program Name you wish to remove.
4. Click **View/Edit.**
5. Use the **Sites** tab to see which sites have the loyalty program applied to it**.**
6. Use the **General** tab to remove the program, by selecting **Remove Program** in the bottom right corner of the screen.

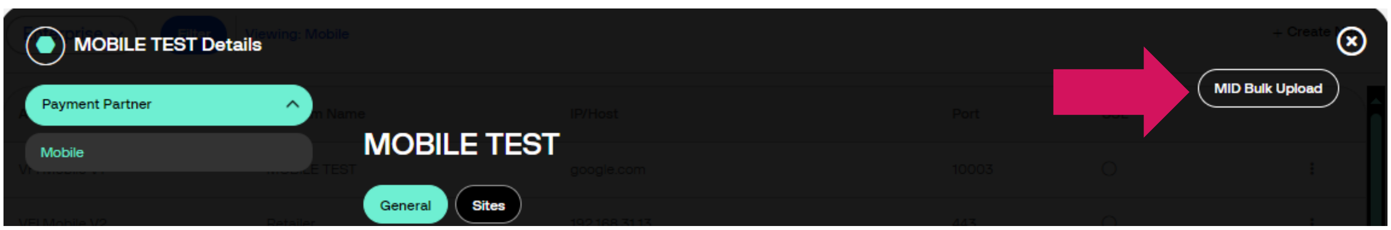


MID Bulk Upload

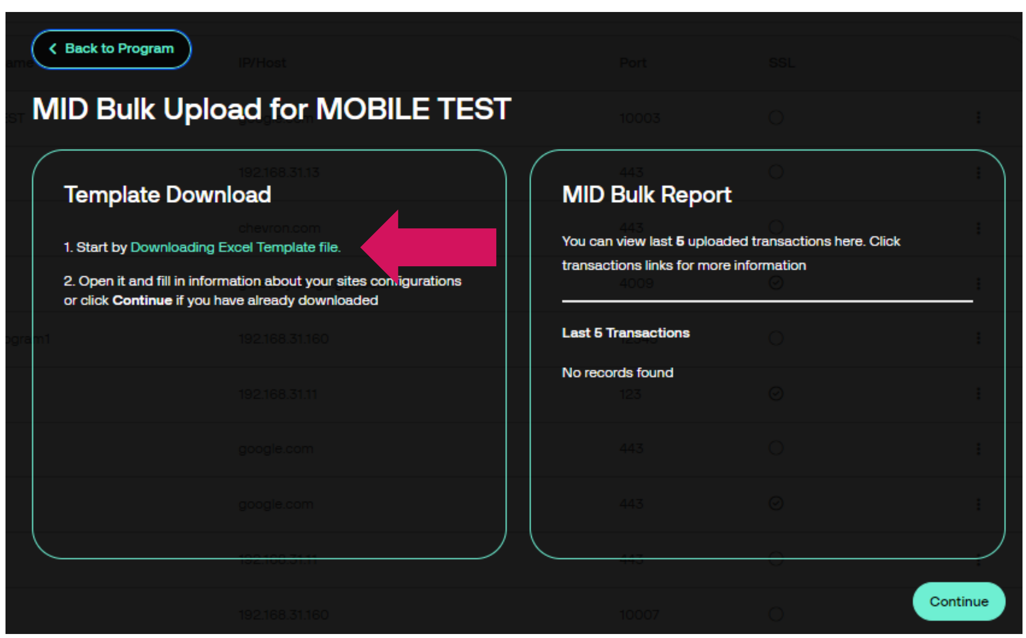
MID Bulk Upload feature allows for site specific MIDs to be added in bulk for one specific program. This feature is useful for onboarding multiple sites within a new Mobile Payment host program.

The MID Bulk upload feature requires the site's service ID and the site specific MID to be known.

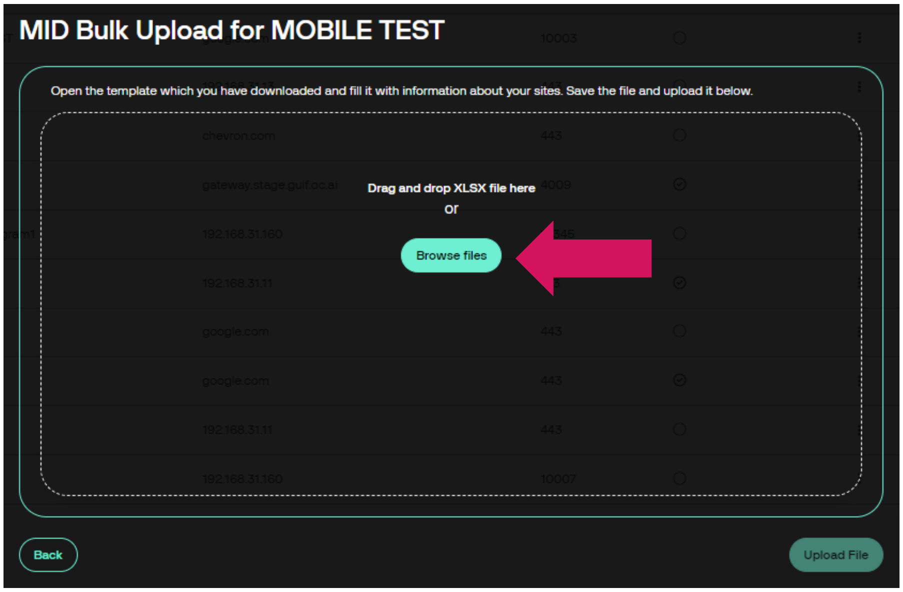
1. To use MID Bulk Upload, navigate to **C-Site Management > Site Management > Select the Sites drop down** and switch the view to **Enterprise.**
2. Check the Viewing selection to the right of the filter button. If it is not set to **Viewing: Mobile,** then use the Filter function to switch to Mobile (Configuration Category: Payment Partner | Configuration Type: Mobile).
3. Select the **three dots** to the right of the Program Name you wish to remove.
4. Click **View/Edit.**
5. Select **MID Bulk Upload** in the top right corner of the Site selection screen.



6. Select the **Downloading Excel Template File** link on the Template Download screen. Once the template is downloaded, fill in the Service ID fields along with the associated site MIDs.
7. **Save the document to your computer** and click Continue on the Template Download screen.

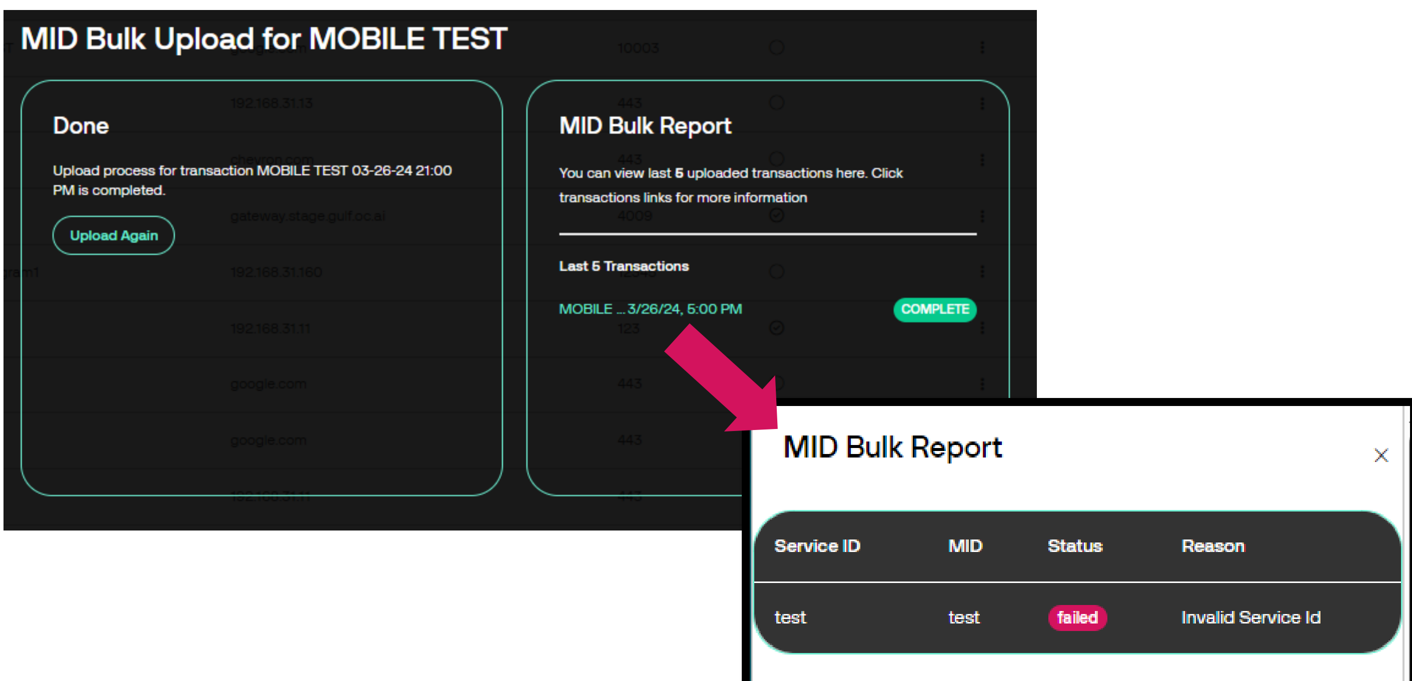


8. Either drag and drop the saved Service ID / MID list file into the dotted lines or browser for the files. Once the file is found, select the **Upload File** button.



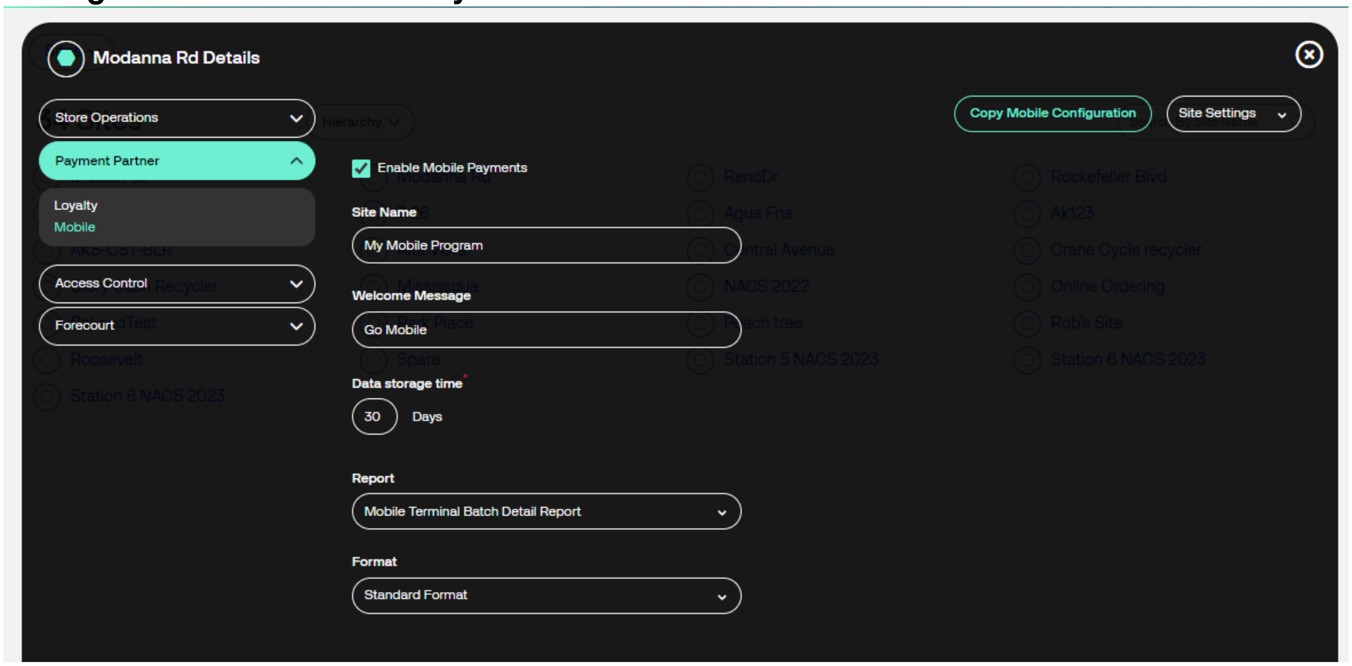
9. The screen will return to the MID Bulk Upload form. A 'Done´message will appear in the left side of the screen. To upload more MID's to the selected program, select **Upload Again.**

   To view the result of the upload, select the MID Bulk Report on the left column. The **MID Bulk Report** will display the last five MID Bulk Upload results. It is recommended to review the results after the upload to confirm if the MID was successfully uploaded to the entered Service ID.



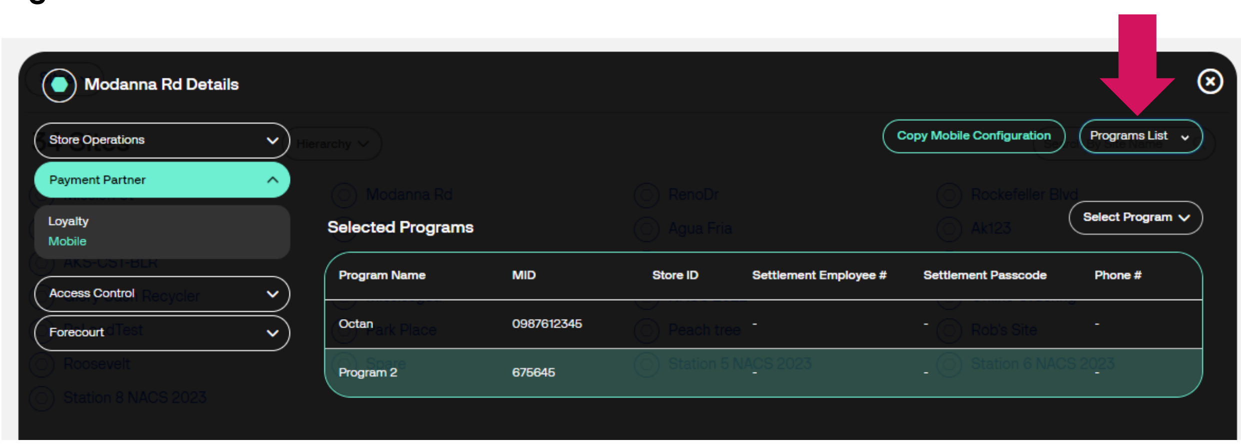
Mobile Payment Site Configuration

Individual site configurations for mobile payments is found under **C-Site Management > Site Management > Site Name > Payment Partner > Mobile.**

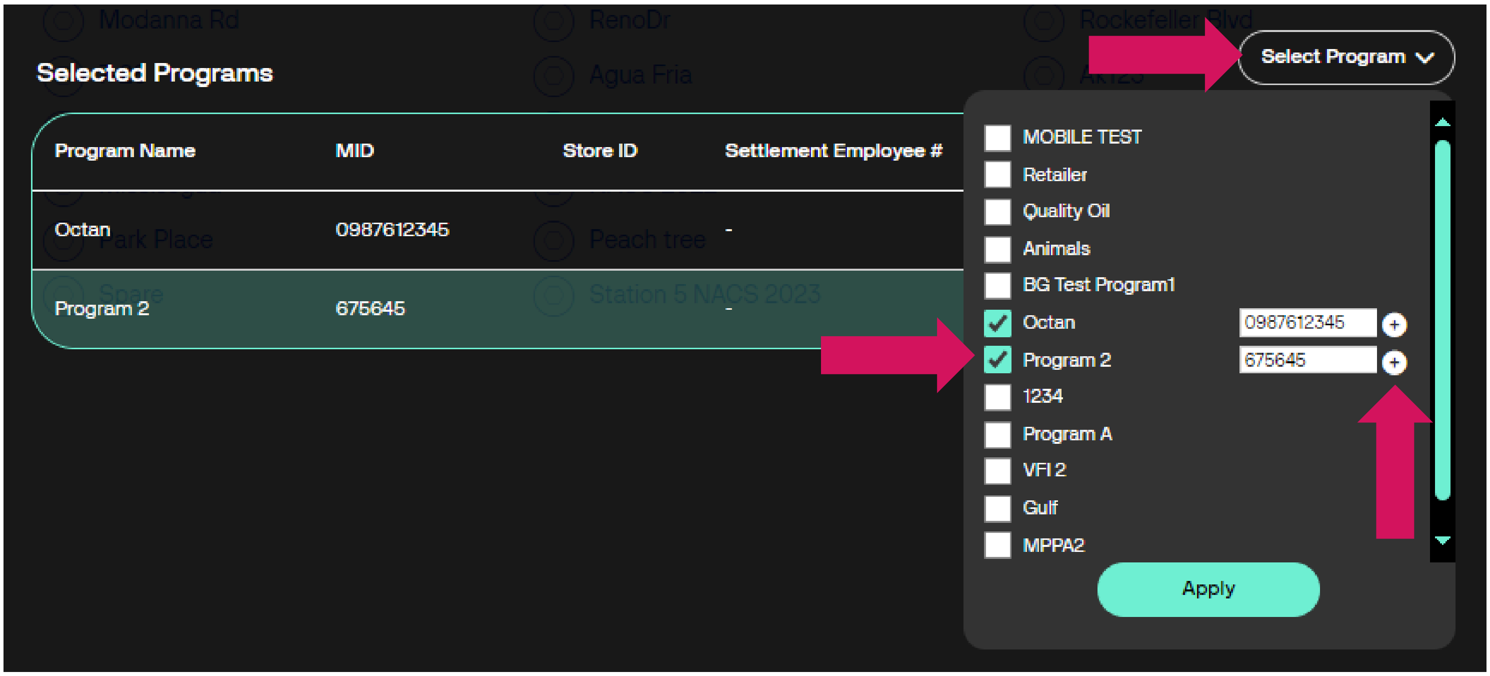


Edit Site Details for Mobile Payment Configuration

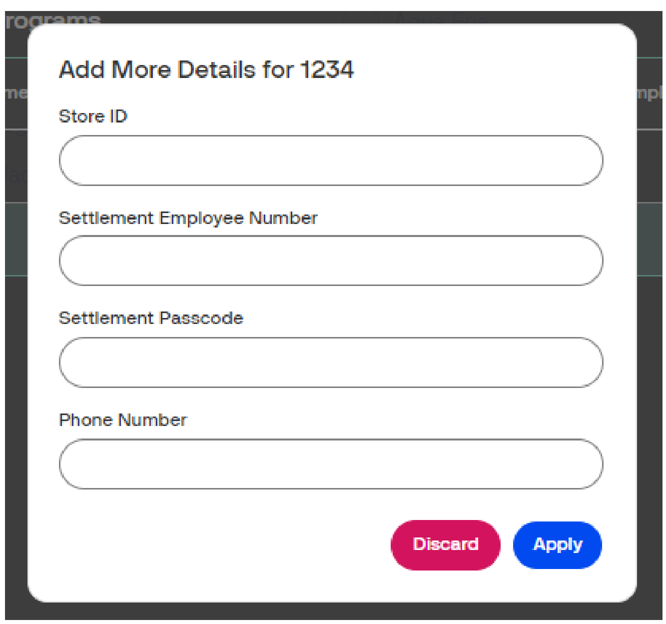
1. To edit site mobile configurations, navigate to **C-Site Management > Site Management > Select the Site Name** from the list.
2. Select **Payment Partner > Mobile**.
3. The **Site Settings** are presented by default. To modify the programs, switch the drop down to **Program List.**



4. Use the **Select Program** drop down under **Program List** to modify any site specific MID's. They must have the **checkbox enabled** to add any site specific details.

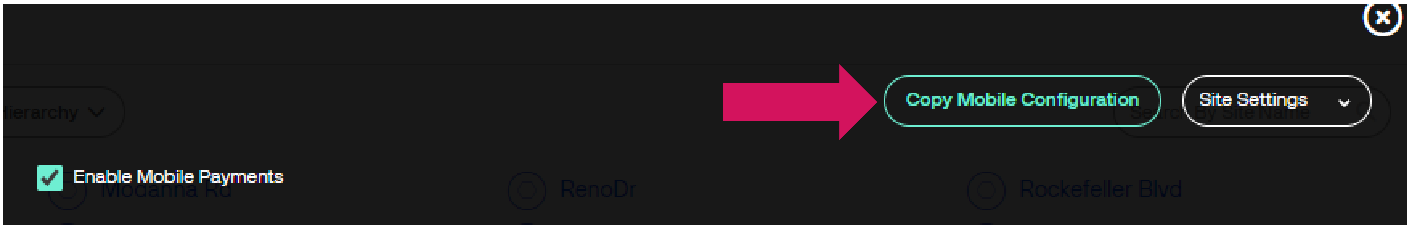


5. Use the **(+)** next to the MID to add additional details such as Store ID, Settlement Employee Number, Settlement Passcode, and Phone Number.

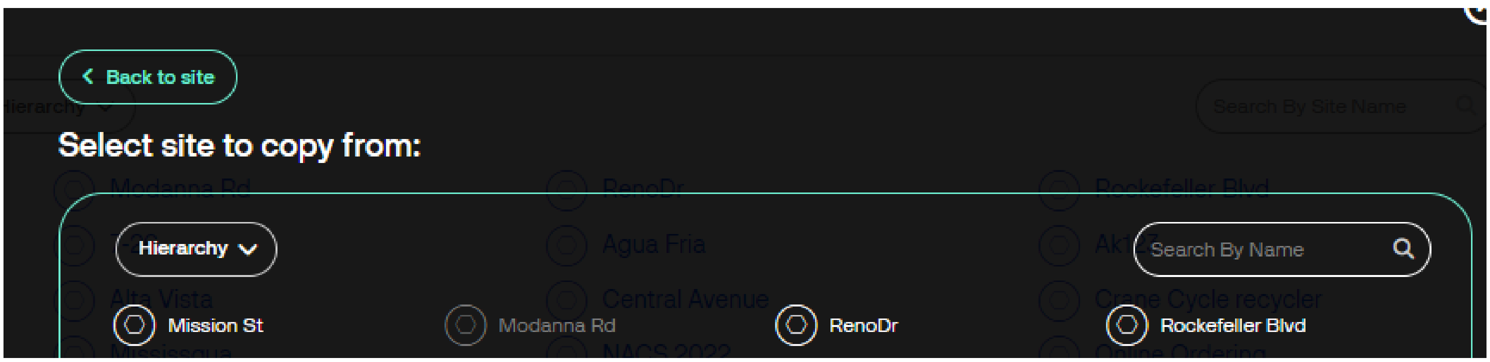


Copy Mobile Configuration

1. To edit site mobile configurations, navigate to **C-Site Management > Site Management > Select the Site Name** from the list.
2. Select **Payment Partner > Mobile**.
3. Click **Copy Mobile Configuration** from the top left corner of the screen.

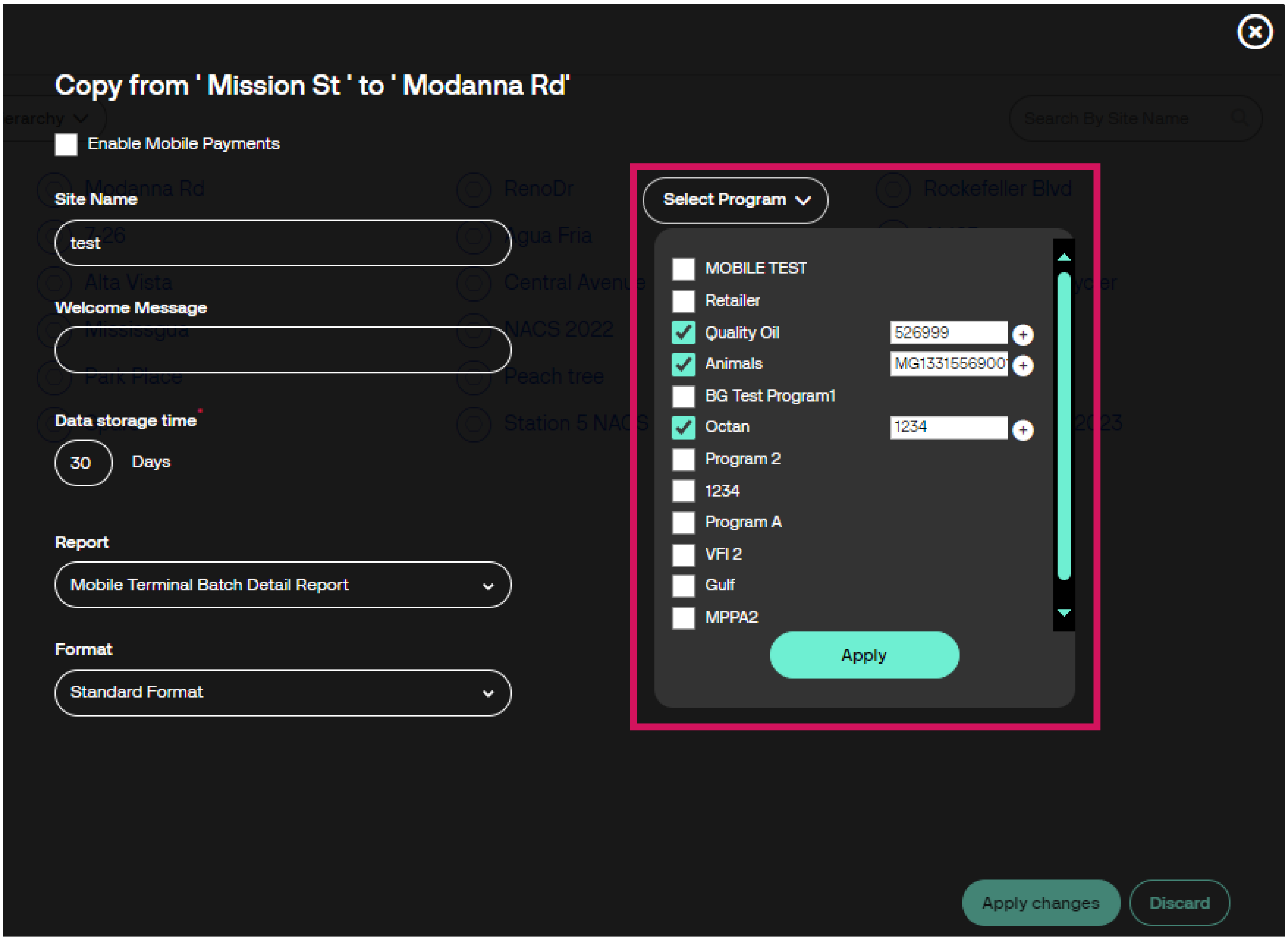


4. A list of sites will appear to select a location to copy the configuration <u>**from**</u>. Use the Hierarchy drop down or the search by name function to narrow down the site.
   Select the site you want to copy the Mobile Program from.



5. The copy form will open after the site is selected. The MIDs are copied from the store selected on the previous screen, along with their configurations. **Make sure you click the Select Program button to edit and update the MIDs for the location.**

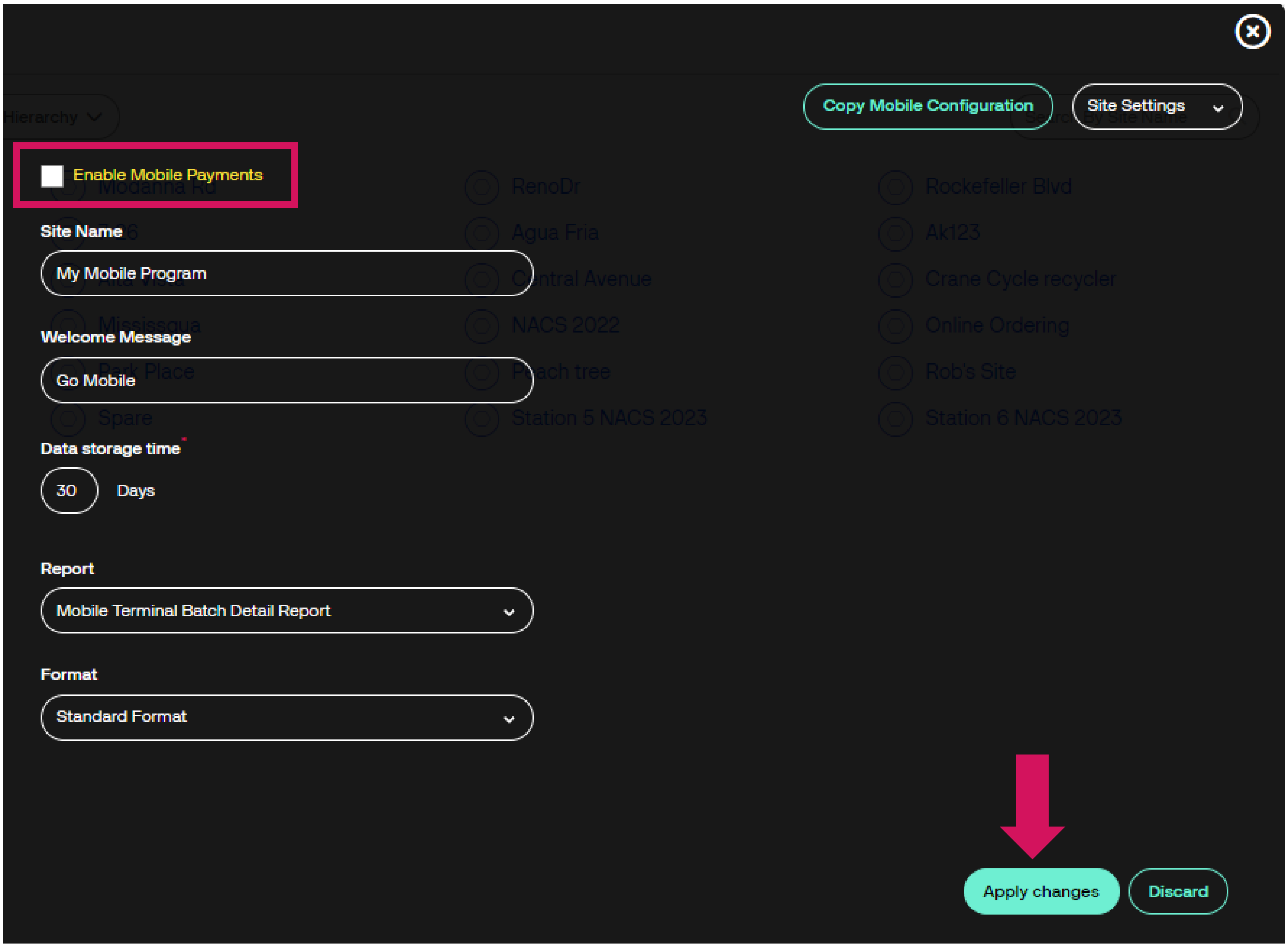
   Selecting the + next to the MID will allow entry of additional configuration parameters: Store ID, Settlement Employee Number, Settlement Passcode, and Phone number.



6. Once all changes are made select **Apply changes.**

Disable Mobile Payments for an Individual Site

1. To edit site mobile configurations, navigate to **C-Site Management > Site Management > Select the Site Name** from the list.
2. Select **Payment Partner > Mobile**.
3. Deselect the **Enable Mobile Payments** check box.



4. Click **Apply changes** in the bottom right corner.

Mobile Payment Configuration Acknowledgment

As of software Release 54, the Verifone Commander will support a new feature that will transmit acknowledgments from the site to the Verifone C-Site Management application and provide a status on the last updated configuration.

To confirm if a Mobile Payment Configuration was successfully transmitted to a site, navigate to **C-Site Management > Mobile Payment > Site Configuration.**

Select each site to view whether the configuration was updated on the Commander.

Three different statuses will appear:

- **Unknown** - The software may be pre-release 54 or the site has not been onboarded with Verifone C-Site Management
- **Success** - Indicates that the upload was successful for the configuration.
- **Failure** - The upload did was not transmitted and/or applied to the site.

Mobile Payment Configuration Troubleshooting

Mobile Site Configuration Not Found

1. If the site is Active, confirm they are on Release 53.41 software or higher. Site Assets can be checked under Reports > Site Assets. Search for the Service ID of the location and then confirm the Commander's Software Release is showing 53.41 or higher.

Mobile Payment Program Adapter is Blank

1. The Mobile Payment Program Adapter selection only supports VFI Mobile 1 and VFI Mobile 2. If the program was imported from a site that had FDC Mobile or Local MPPA selected, then the field will be blank in the Mobile Payment Program once its imported.

11. Site Configuration

Site Configuration in Verifone C-Site Management allows for site level price book configurations to be configured and managed in the cloud, and then transmitted to a single or multiple sites. Support for Site Configurations remote management within the Verifone C-Site Management application requires software **Release 54.01** or higher.

Site Configurations consists of the information previously located under Store Operations in Configuration Client.

Configuration Syncing

Initial Onboarding

- When the Verifone Commander is initially onboarded into the cloud, if it is on Release 54.01 or higher, it will transmit its current Site configuration to the Verifone C-Site Management application.
- The current configuration is only transmitted to the Verifone C-Site Management application during the initial onboarding.

Configuration Updates

- After the initial upload of the current configuration, any updates made in Verifone C-Site Management can be sent to the site by the merchant administrator.
- If updates are sent to the site from Verifone C-Site Management, the last update sent will override previously transmitted or locally stored data.
- Any changes performed on the local site Commander will sync to the Verifone C-Site management.

NOTE

A message will be displayed on Site Configuration forms when the Verifone Commander software release version doesn't support configuring the form.

Site Search

1. Site Configurations are uploaded and managed by each individual site. To search for the specific site, navigate to C-Site Management > POS Configuration > Site Configuration.

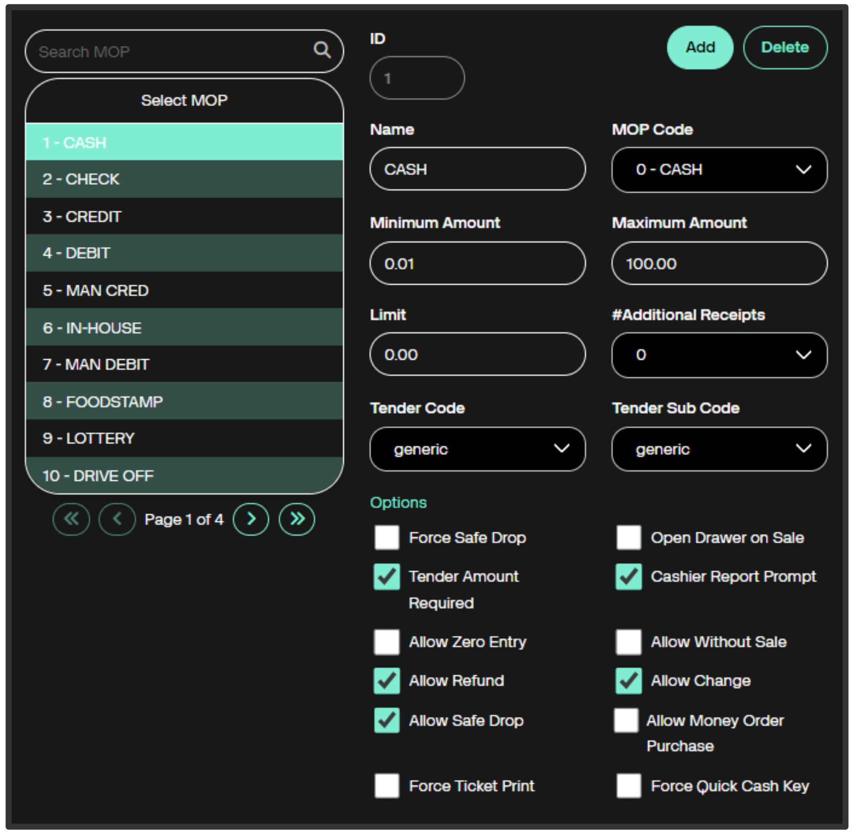
2. Sites can be searched in three ways:
    - Searching by site name.
    - Using the Hierarchy drop down to filter specific groups of sites.
    - Paging through the site listings.

3. Once you've located the site you wish to view select it from the list to open the site configurations.

Store Operations

The following Store Operation configurations are currently available under **C-Site Management > POS Configuration > Site Configuration**:

- MOP - Method of Payment
- Currencies
- Fees
- Tax Rates
- Categories
- Departments
- PLU
- Blue Laws
- ID Checks
- Sales



Method of Payment (MOP)

Method of Payment configuration allows payments that are accepted at the store to be configured and modified.

Pre-configured MOPs are loaded into the Verifone Commander at the time of installation.

MOPs can only be selected if they are configured on the point-of-sale touch screen or self-checkout.

It is best practice to leave any unused MOP configurations available in case they are needed in the future.

Field	Description
ID	The record number for the Method of Payment.
Name	The name of the method of payment is entered here. The name will appear on receipts and reports.

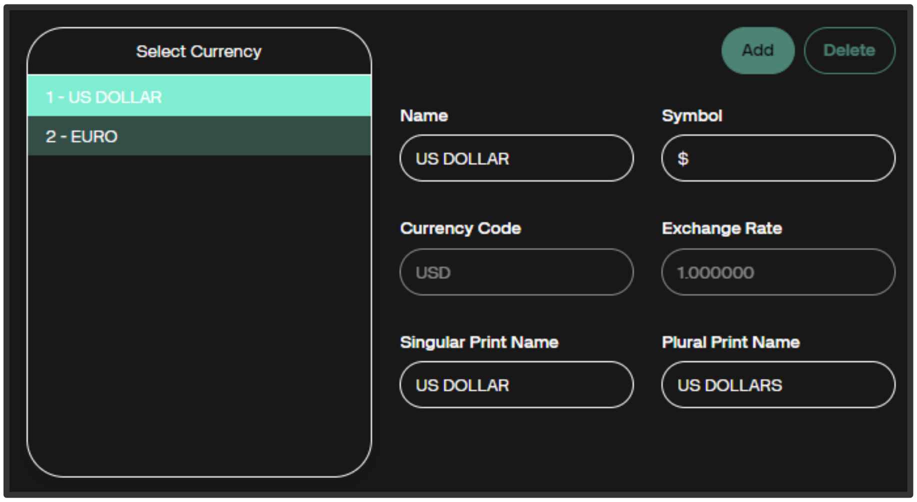
MOP Code	The MOP Code defines how the MOP should function. Review the list to determine which MOP should be used. Selection may vary depending upon the network configuration: **0 - Cash** : Used for cash transactions that will be accepted at the POS. **1 - Credit** : Used for credit cards sent through the card network. Some reports may show this MOP as 'Charges' or by card name. **2 - Debit :** Used for debit cards that require a PIN entry prompt on the PIN pad. Tender amount required should not be selected for this option. **3 - Manual Credit :** Used for credit cards not sent through a credit card network. **4 - Manual Debit** : Used for debit cards not sent through a credit or debit card network. **5 - Lotto** : Used for winning lotto tickets tendered as MOPs. **6 - Check** : Used for written checks. If customers are not permitted to write checks for more than the amount of purchase, do not enable 'Change Allowed' setting. **7 - Tax_Coupon** : Use for product coupons as MOPs. The 'Change Allowed' parameter should not be enabled. **8 - $1 Cash** : Automatically enters the tendered amount as $1.00 cash. 'Tender Amount Required' should not be selected for this option. **9 - $5 Cash** : Automatically enters the tendered amount as $5.00 cash. 'Tender Amount Required' should not be selected for this option. **10 - $10 Cash** : Automatically enters the tendered amount as $10.00 cash. 'Tender Amount Required' should not be selected for this option. **11 - $20 Cash** : Automatically enters the tendered amount as $20.00 cash. 'Tender Amount Required' should not be selected for this option. **12 - $50 Cash** : Automatically enters the tendered amount as $50.00 cash. 'Tender Amount Required' should not be selected for this option. **13 - Food Stamp** : Used for paper food stamps only. Amounts entered must be as whole dollars for this MOP. **14 - Drive Off** : Used to setup an MOP for clearing fuel sales for customers that drive off without paying for dispensed fuel. **15 - Special Discount** : A MOP used to provide a percentage based discount applied to PLUs and Department sales enabled for special discounts. See the Special Discount Feature Reference for more details. **16 - Manual** FS : Electronic, non-paper food stamps. **17 - Lottery** : Used for scratch-off lottery tickets tendered as MOPs. **18 - In-House** : Store credit method of payment used to provide local vendors/customers a store manage invoicing payment type. See the In-House Account Feature Reference for more details. **19 - Pump Test** : Used for testing dispensers. Typically, used during installation of new dispensers and POS equipment. **20 - EBT Food Stamp** : Electronic, non-paper food stamps. **21 - EBT Cash Benefit** : Electronic, non-paper cash benefit. **22 - Manual EBT CB** : Manual non-paper cash benefit. **23 - ECheck** : Standalone electronic check processing. The balance of the ticket amount is sent to the host for approval. **24 - Stored Value Card** : Used for prepaid stored value cards.

	25 - Manual Entry : Selected for manual entry of credit card numbers. Check with the card processing network to see if this functionality is permitted. **26 - Force Post** : This MOP is used when entering transactions that were processed when the host was offline. **27 - Post Entry** **28 - Mobile** : Used for Mobile Payment. See the Mobile Payment Feature Reference guide for more information. **29 - Unattended Refund** : Used refunding unattended fuel sales. **30 - Non-Tax Coupon** : Used for Product coupons as MOPs. Tax due may be reduced because of applying this coupon. **31 - Fuel Voucher** : Used for fuel vouches (paper) only. **32 - Tax Exempt Voucher** : When applied, the MOP will reduce the amount due based on which taxes are configured to be exempt. Multiple types of tax exemptions can be configured, and the appropriate prompts will be presented to the cashier based on the configurations. **33 - Fleet Check** : Fleet Checks can be exchanged for cash or be used as MOP in a transaction. Refer to the Fleet Cards feature reference for more information.
Min. Amount	The minimum amount accepted by the MOP. (0.00-9999.99)
Max Amount	The maximum amount accepted for this MOP (0.00 - 9999.99)
Limit	The drawer limit amount is entered in this field. When the limit is reached the POS will prompt the cashier to perform a Safe Drop. Ensure Allow Safedrop is selected when a drawer limit is set.
# of Additional Receipts	Prints additional receipts for the MOP. Force Ticket Print must be selected to enable this parameter. Some transaction types and MOPs will print additional receipts regardless of this setting.
Tender Code	Used to assign the NACs tender code to Verifone MOPs. Helps to create the NAXML POS Journal from the transaction log without manually looking up or mapping the tender. The recommended value is the default values for each MOP. In order to select a new value from the list or enter a new value other than from the list, delete the default value first.
Tender Sub Code	Used to assign the NACs tender code to Verifone MOPs. Helps to create the NAXML POS Journal from the transaction log without manually looking up or mapping the tender. The recommended value is the default values for each MOP. In order to select a new value from the list or enter a new value other than from the list, delete the default value first.
Force Safe Drop	Forces the cashier to perform a safe drop before any further sales can be performed on the register. This selection will automatically enable Allow Safe Drop. A limit (drawer limit) must also be configured for this functionality to work properly.

Open Drawer on Sale	Opens the cash drawer when the method of payment is selected.
Tender Amount Required	Requires the cashier to enter the amount tendered (cash/payment given) before selecting the method of payment.
Cashier Report Prompt	Prompts the cashier to enter the actual (counted) drawer total for this MOP when printing the cashier report under CSR Functions > Reports > Print Cashier Report.
Allow Zero Entry	Allows the amount of zero to be entered when entering the actual (counted) drawer totals for this mop when printing the cashier report.
Allow Without Sale	Allows the method of payment to be used when there are no sales / items rang into the register. For example, if the MOP was cashing winning lottery tickets, then the customer would not need to purchase anything in the store.
Allow Refund	Allows this method of payment to be used for Refunds.
Allow Change	Allows the cashier to provide change to the customer when the tendered amount is more than the transaction total. Used for cash transactions and when the store allows cash back for checks.
Allow Safe Drop	Allows this method of payment to be used with the safe drop function. If a drawer limit is set, then this function must be enabled.
Allow Money Order Purchase	Allows this method of payment to be used for the purchase of money orders. See the Money Order Feature Reference for more details.
Force Ticket Print	Forces the receipt to print at the end of a transaction.

Currencies

Currencies are used to define an alternative currency that can be accepted at the store along with the exchange rate. Up to two currencies can be configured, with the default currency set to US Dollars.

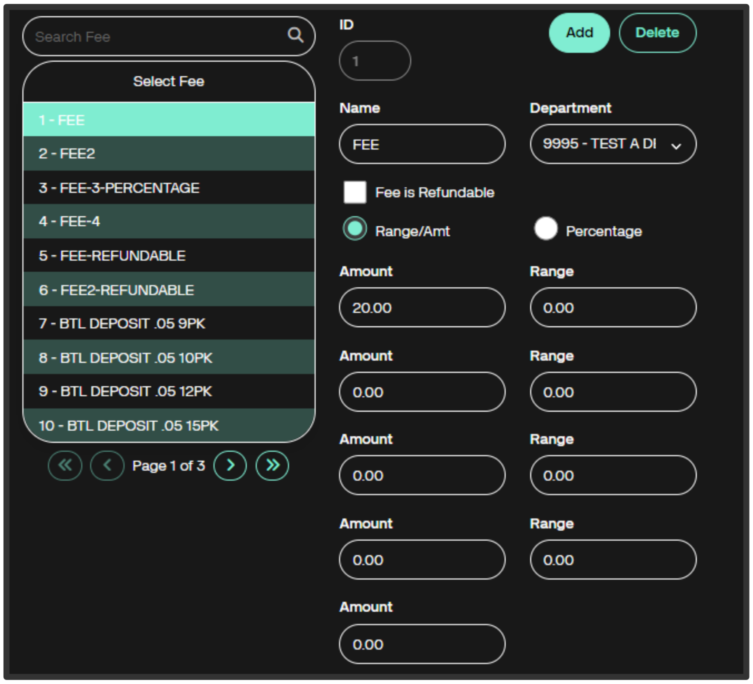


Field	Description
Name	The name of the currency. All method of payments uses the default US Dollar currency unless the Other Currency function (must be added to the touchscreen) is used.
Symbol	The symbol that will appear on the receipt representing the currency.
Currency Code	The official 3 letter ISO 4217 currency code. For example, USD stands for US Dollar and CAD stands for Canadian Dollar.
Exchange Rate	For the default currency, the exchange rate will always be 1.00000, however when setting a secondary currency, the exchange rate will be the exchange rate based off the software release / default currency. For example, the exchange rate for the Canadian Dollar would be entered as $1.32 (According to the July 14th,2023 exchange rate.)
Singular Print Name	Allows the singular printed name for the currency to be modified.
Plural Print Name	Allows the plural printed name for the currency to be modified.

Fees

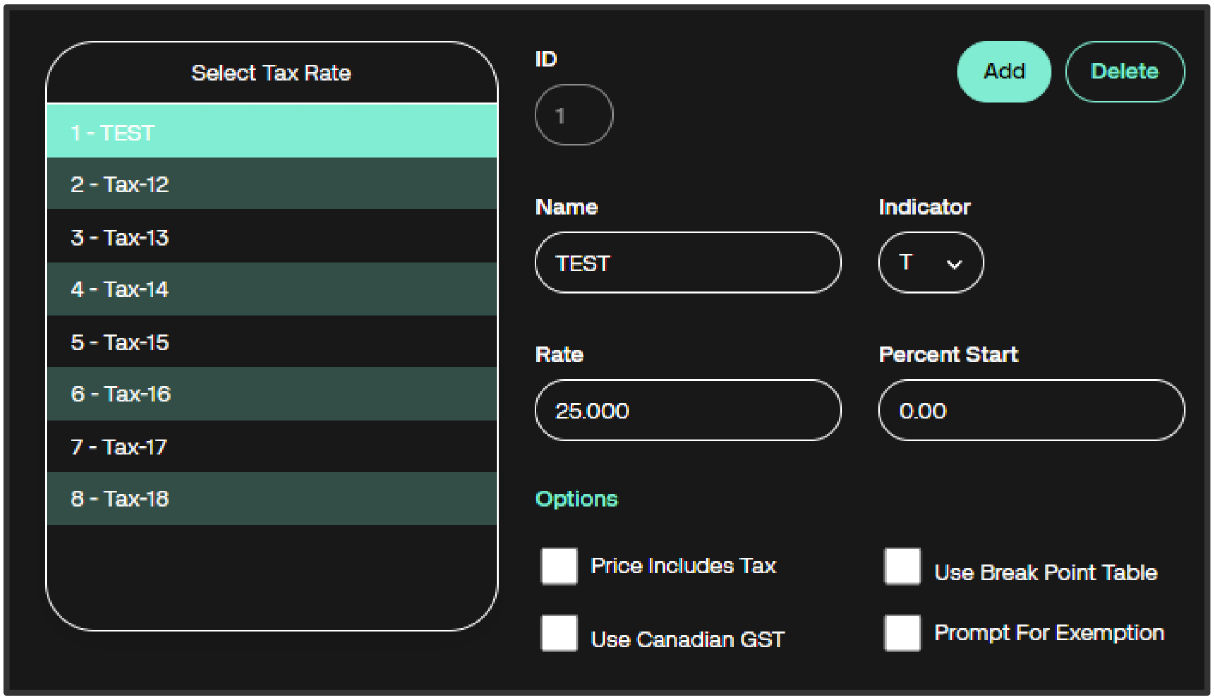
Fees are used to charge an additional amount to a department or PLU. Up to 99 different fees can be added.

Field	Description
Name	Enter a descriptive name for the fee. The name prints on the receipt.
Department	The department assigned here is where the fee totals will appear in reports.
Fee is Refundable	Allows the fee to be refunded with the original sale.
Fee Type	Percentage - Enter a flat percentage that will be charged for the department or PLU sale.
Amount	Range/Amount - Calculates the fee amount based on the department or PLU sale. This fee type uses a dollar range to determine the fee amount.
Range	The ending dollar amount for which the fee will be charged. If left at 0.00 it will default to the maximum amount allowed by the register. The starting dollar range for the first fee is always 0.00. The first range entry (top right) is from $0.00 to $xx.xx. The second range value will start at the next cent of the previous range.



Tax Rates

Tax rates configurations allows for up to eight different tax rates to be configured at one location. Tax rates can be added to departments or PLU's after they have been created to ensure the correct tax amount is collected on different types of sales.

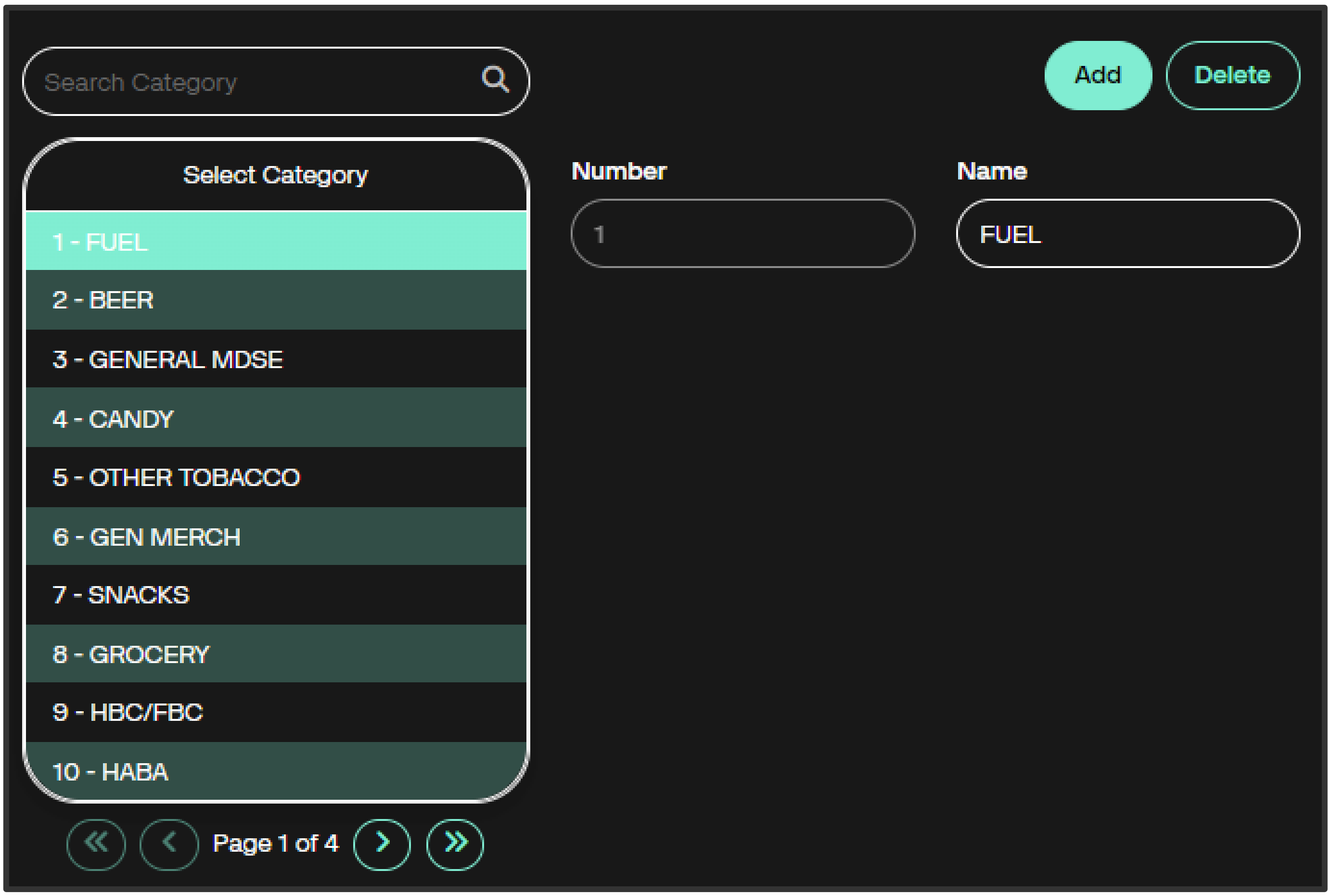


Field	Description
Name	Enter a descriptive name for the fee. The name prints on the receipt.
Indicator	Assigns an indicator to the item the tax was added to. The indicator will print out on the receipt to indicate one or more taxes were applied to specific departments or plus.
Rate	Enter in the percentage of the tax rate. For example, if the state tax rate was 7% then the rate would be 7.
Percent Start	The minimum dollar amount that can be taxed. For example, if taxes did not apply to transactions less than $0.10 then the percent start would be $0.10.

Price Includes Tax	Select this option if the price includes taxes.
Use Canadian GST	Used for Canadian Goods and Services tax.
Use Breakpoint Table	Select this option if the taxes configured require a breakpoint table. A breakpoint table specifies the taxable amount for the department or PLU it is assigned based on the cost of the individual line item.
Prompt for Exemption	See the Commander User Reference for more details on Breakpoint Tax configurations.

Categories

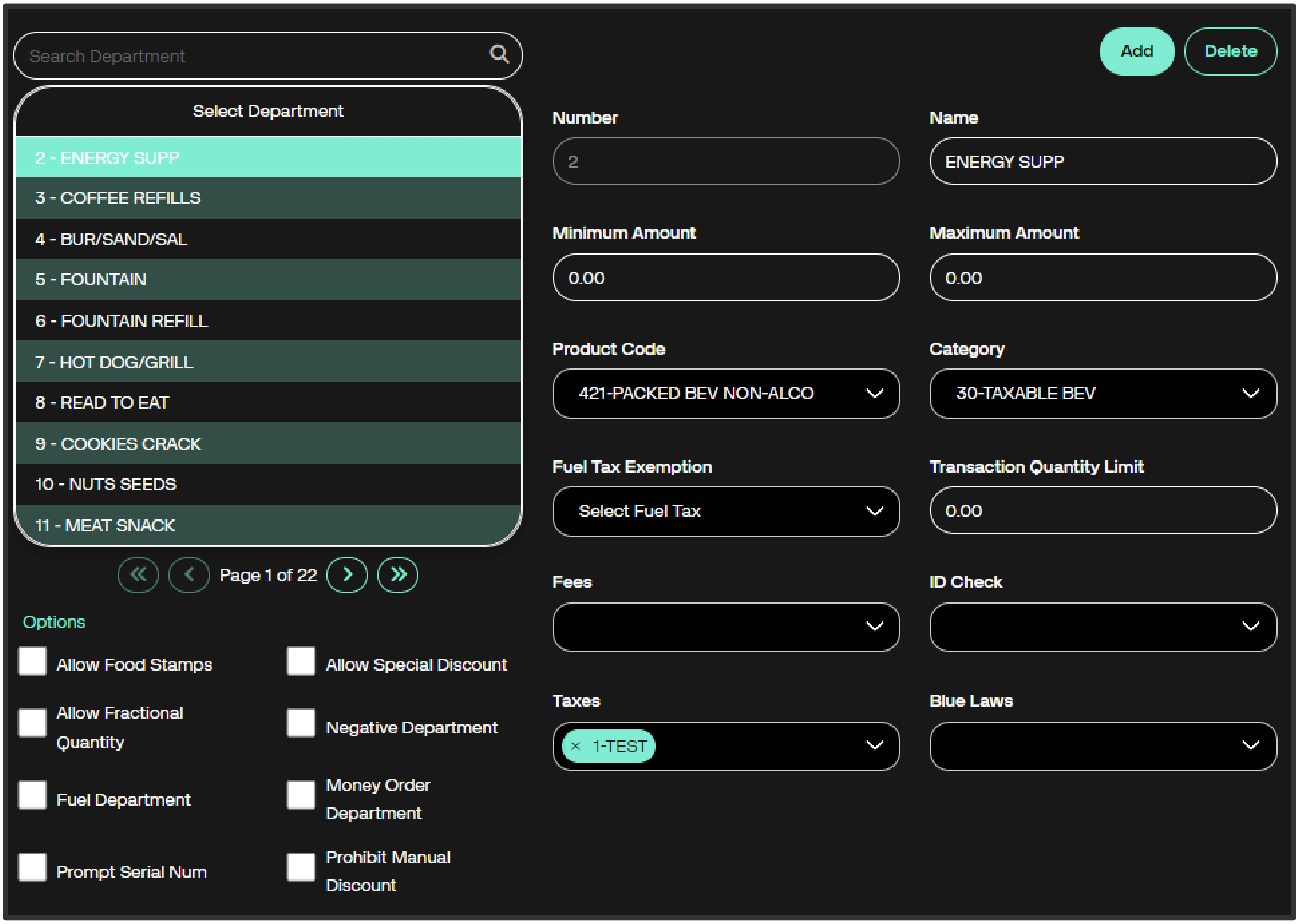
Categories are used to group departments for reporting purposes. Categories consist of a number from 1-9999 and a Name. Use the **Add** button to add a new category or **Delete** to remove an existing category.



Departments

A department is a group of similar PLUs/items. For example, the Frozen Foods department may consist of ice cream, popsicles, and frozen pizzas. Up to 9999 departments can exist within the configuration.

Do not use Departments 9990-9999 as they are reserved for specific purposes.



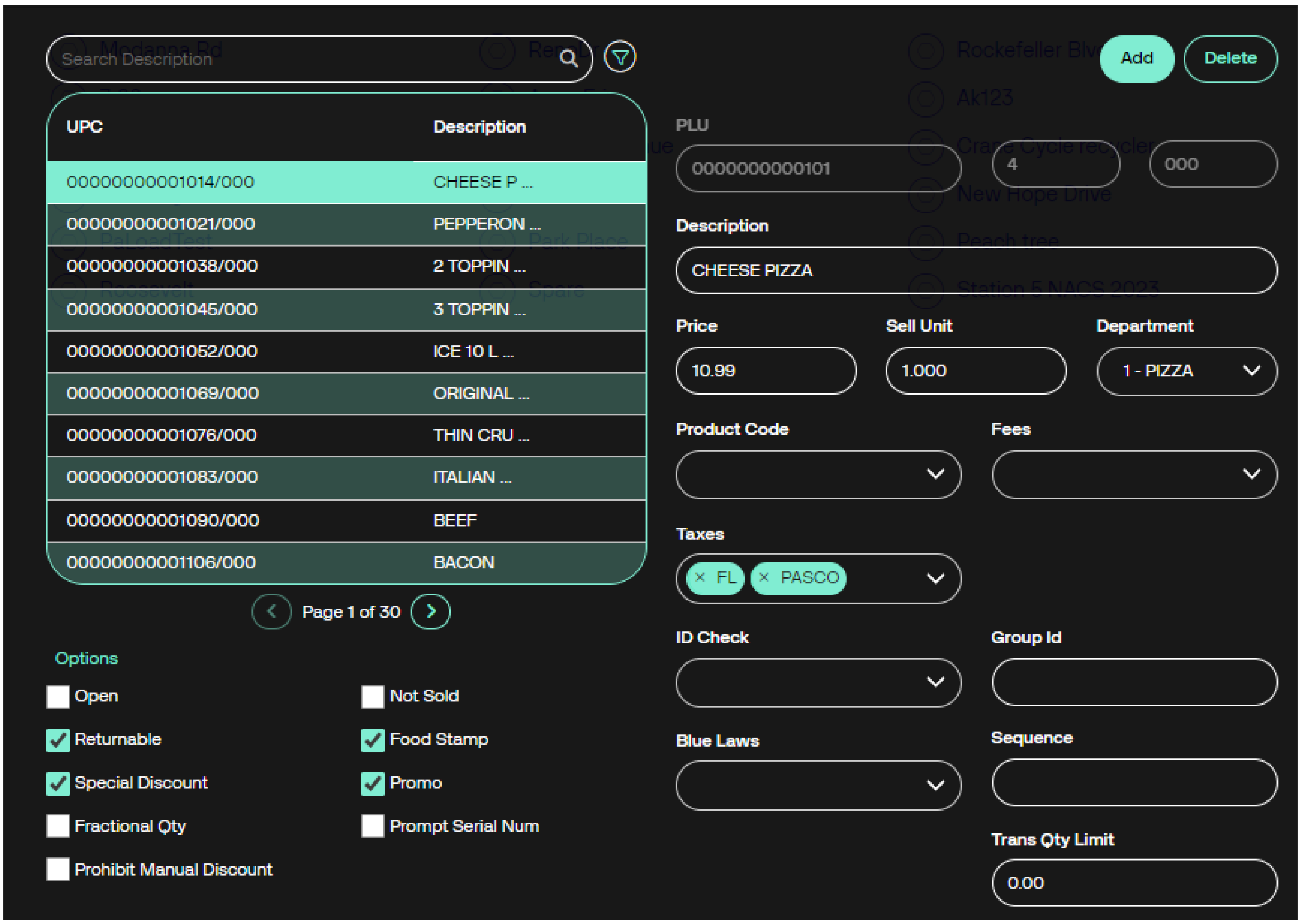
Field	Description
Number	Enter in an unused number from 1-9990
Name	Enter the name of the department. If items are rung in using the department the name will appear on the receipt.
Minimum Amount	The minimum allowable dollar amount for a line-item sale using this department or an item within this department.
Maximum Amount	The maximum allowable dollar amount for a line-item sale using this department or an item within this department.
Product Code	Assign a product code that categorizes the products sold accurately. Product codes are used by the card processing network to properly categorize items and may prohibit the sale of certain items for specific cards. If you are unsure what product code to use for a specific item, contact your card processing network for direction. Departments MUST have a product code assigned.
Category	Departments can be assigned to categories for reporting purposes. Categories are not required.
Fuel Tax Exemption	Only used by fuel departments that allow a fuel tax exemption to be applied to the sale.
Transaction Quantity Limit	Limits the number of line items per transaction. The default value of 0.00 indicates there are no restrictions.
Fees	Assigns a pre-defined fee to the department that will be assessed based on the Fee configuration. Multiple fees can be assigned to a single department.
ID Checks	Prompts for an ID check when a transaction using the specified department is used. Multiple ID checks can be assigned to a single department.
Taxes	Charges different tax rates that are selected for the specified department. Multiple taxes can be assigned to a department.
Blue Laws	If the sale of an item is restricted to specific times and/or days, then a blue law can be assigned. Multiple blue laws can be assigned to the department.
Allow Food Stamps	Select this option if the department qualifies for food stamps.

Fractional Quantity	Select this option if items are sold by weight. For example, if the quantity is 1 3/4 lbs of turkey, then entering in the value of 175 and selecting a department with fractional quantity enabled will enter in 1.75 instead of 175.
Fuel Department	If the Department is used for Fuel, then this option should be selected.
Prompt Serial Number	Enable this to prompt for the serial number that is entered by the cashier and printed on the receipt. For example, if the store is selling electronic devices they may want to prompt for serial numbers or warranty or return purposes.
Special Discount	Select this parameter if special discounts can be applied to this department.
Negative Department	Select this option if the items rang into this department, are a negative value. For example, a coupon department would subtract from the transaction total rather than add to it.
Money Order Department	If the department is used for selling Money Orders, then this option should be selected. See the Money Order Feature Reference for more details.
Prohibit Manual Discount	Prohibits discounts configured to be applied using the discount function. This parameter does not affect PLU promotions, NAXML Promos, or Loyalty line-item discounts.

PLUs

PLU or Price Loop Ups are the individual items added to the price book. PLUs may be scannable (representing a barcode) or may be assigned to buttons or menus on the touch screen. PLUs can be created within **Site Configuration > Location Name > Store Operations > PLUs**.

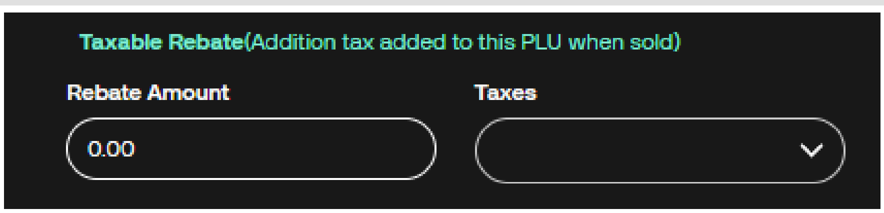
The add and delete button can be used to create new PLUs or delete the selected PLU from the store's price book.



Field	Description
Search Description	Use this area to search for the description of an item. The filter icon next to the search description box allows the search to be filtered by UPC, Description, Department, Product Code, and Price.

PLU	The PLU number is the number used to identify the product. The field supports up to 14 digits. If the item has a barcode, then the PLU will be based on the barcode information. If the item does not have a barcode, the PLU can be any unused number in the pricebook. PLUs can be assigned to a touchscreen button, a menu, a key, or entered in manual using the on screen keypad when in sales mode.
Check Digit	This field will automatically be entered upon saving a new PLU. It cannot be modified
Modifier	The modifier is used to create a PLU using the same PLU number but allow different pricing points or PLU configurations to be set. For example, if you sold a 6 pack of soda the barcode would be the same if you sold them in individual cans. If a modifier is added to the single can or 6 pack PLU, when scanned the POS will present two options for the cashier to select the correct option the customer is purchasing. A maximum of 3 digits is supported. If modifiers are not used with the PLU, then this is left at 000.
Description	The name that appears on the POS, line-item display, and customer receipt to identify the item.
Price	The price of the item.
Sell Unit	The smallest unit of a product that is sold to a customer. This is typically left at 1.
Department	The department is used to group PLUs and is a required field for PLUs. Select the drop down to assign the appropriate department to the PLU. If one does not exist, refer to the previous section to create a new department for the item.
Product Code	Assign a product code that categorizes the products sold accurately. Product codes are used by the card processing network to properly categorize items and may prohibit the sale of certain items for specific cards. If you are unsure what product code to use for a specific item, contact your card processing network for direction.
Fees	Assigns a pre-defined fee to the department that will be assessed based on the Fee configuration. Multiple fees can be assigned to a single PLU.
Taxes	Charges different tax rates that are selected for the specified department. Multiple taxes can be assigned to a PLU.
ID Check	Prompts for an ID check when a transaction using the specified department is used. Multiple ID checks can be assigned to a single PLU.
Blue Laws	If the sale of an item is restricted to specific times and/or days, then a blue law can be assigned. Multiple blue laws can be assigned to a PLU.
Group ID	The group ID to which the PLU belongs. When one of the items in the group is scanned, the system will allow the cashier to select from a menu of the grouped items. The selected item is

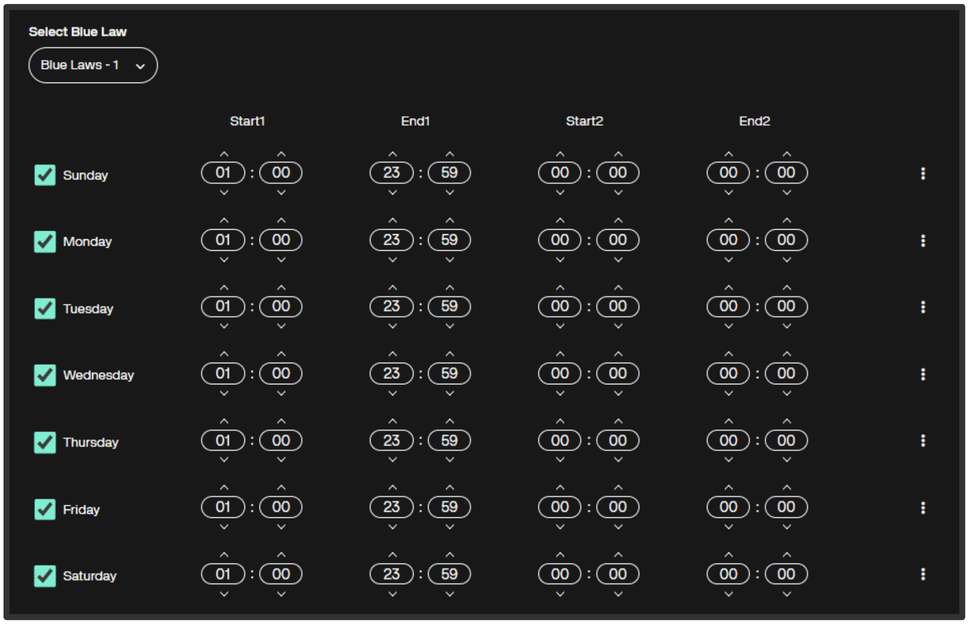
	added to the ticket, which may not be the original item scanned. This feature only works if enabled within System Properties at the store level.
Sequence	The sequence number is used with the Group ID to determine the order of the PLU in the group.
Trans Qty Limit	Limits the quantity of the item that can be sold in a single transaction.
Open	When enabled, allows the price to be entered when the item is sold. Creates a PLU that functions like a department sale but can be used to be more specific.
Returnable	Determines whether the item can be returned to the store by using the refund function on within sales mode on the POS. If the item is not returnable, then deselect this option. It is enabled by default.
Special Discount	Select this parameter if special discounts can be applied to this PLU.
Fractional Quantity	Select this option if items are sold by weight. For example, if the quantity is 1 3/4 lbs of turkey, then entering in the value of 175 and selecting the PLU with fractional quantity enabled will enter in 1.75 instead of 175.
Prohibit Manual Discount	Prohibits discounts configured to be applied using the discount function. This parameter does not affect PLU promotions, NAXML Promos, or Loyalty line-item discounts.
Not Sold	Select this option if the PLU cannot be sold within sales mode, but still needs to remain in the price book for reporting purposes.
Food Stamp	Select this option if the department qualifies for food stamps.
Promo	The promo options allows the PLU to be used within a PLU Promotion. This option is enabled by default. If the item isn't set up within PLU Promotions, then it will not apply any promotion.
Prompt Serial Number	Enable this to prompt for the serial number that is entered by the cashier and printed on the receipt. For example, if the store is selling electronic devices they may want to prompt for serial numbers or warranty or return purposes.
Taxable Rebate	The rebate amount and taxes that are applied to the rebate amount can be assigned here. Taxable Rebate must be enabled within **Sales Configuration > Enable Receipt Tax Detail**.



Blue Laws

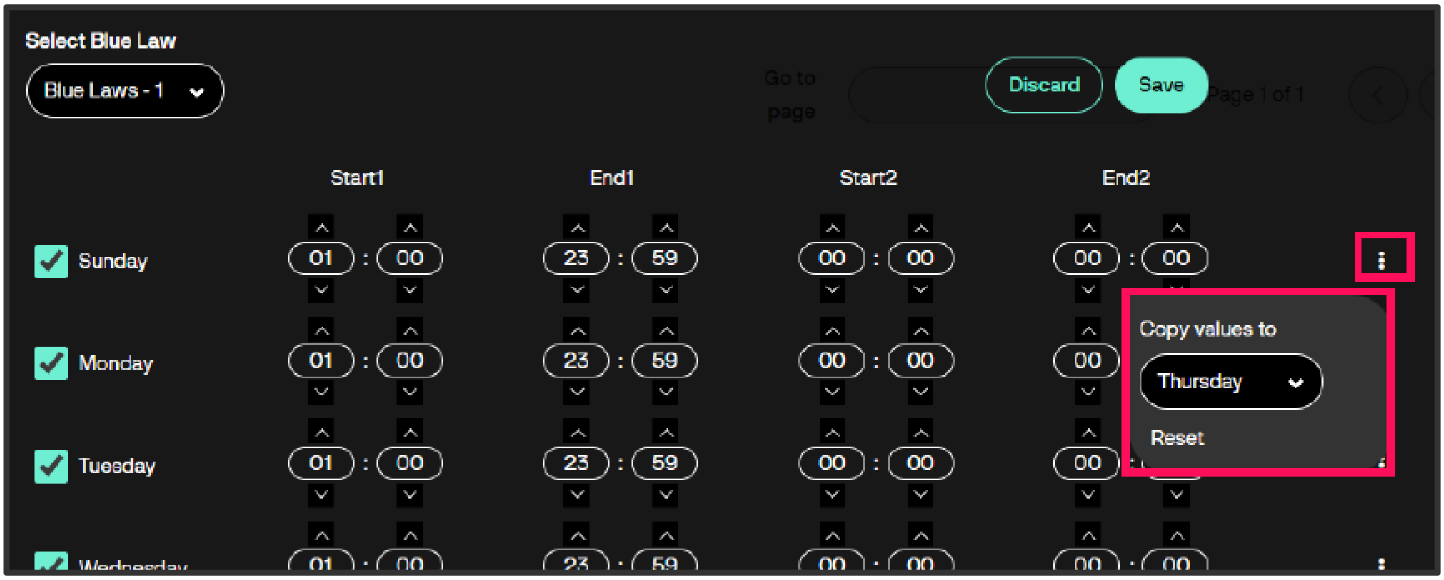
Blue laws prohibit the sale of certain items during specific days and times. **Blue Laws are dependent upon local government laws/regulations.**

Up to two blue laws can be configured.



Adding a Blue Law

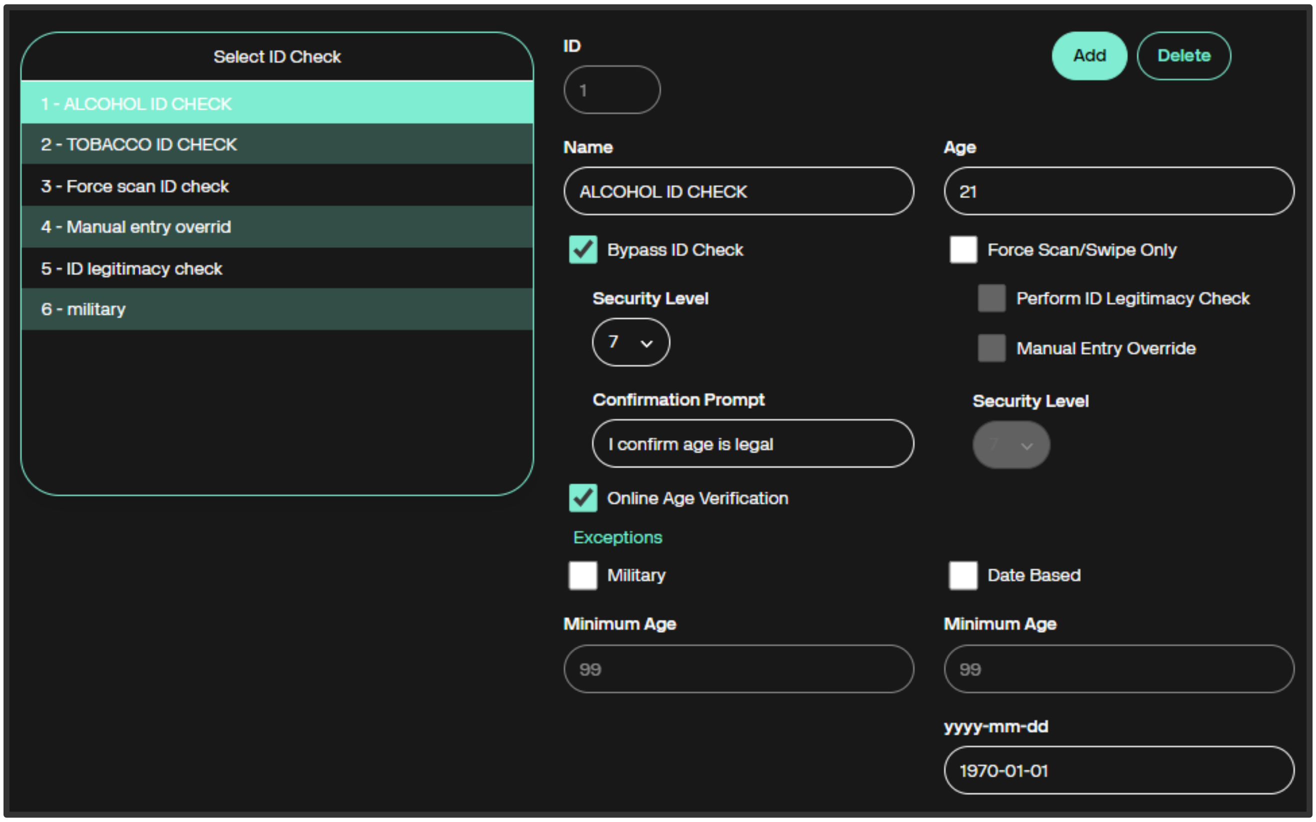
1. Select the Blue law from the drop-down list in the top left corner.
2. Select the **days of the week** the blue law applies.
3. **Enter in the start and end times for the blue law.** Times are entered based on military time. There are two start and end times that can be used in the event the blue law starts at midnight and ends in the morning, but then starts again in the afternoon.
4. Values can be copied to different days of the week by selecting the three dots to the right of the End 2 time. The change applies to the selected day of the week **immediately** upon selection.



5. Blue Laws can be assigned to Departments and PLUs once they are created.

ID Checks

ID Checks allow the point of sale to prompt the cashier to collect the customer's ID information to confirm they are old enough to purchase the product. There can be up to six different ID Checks configured. See the Age Restriction Feature Reference Manual for more information on ID Check configuration.

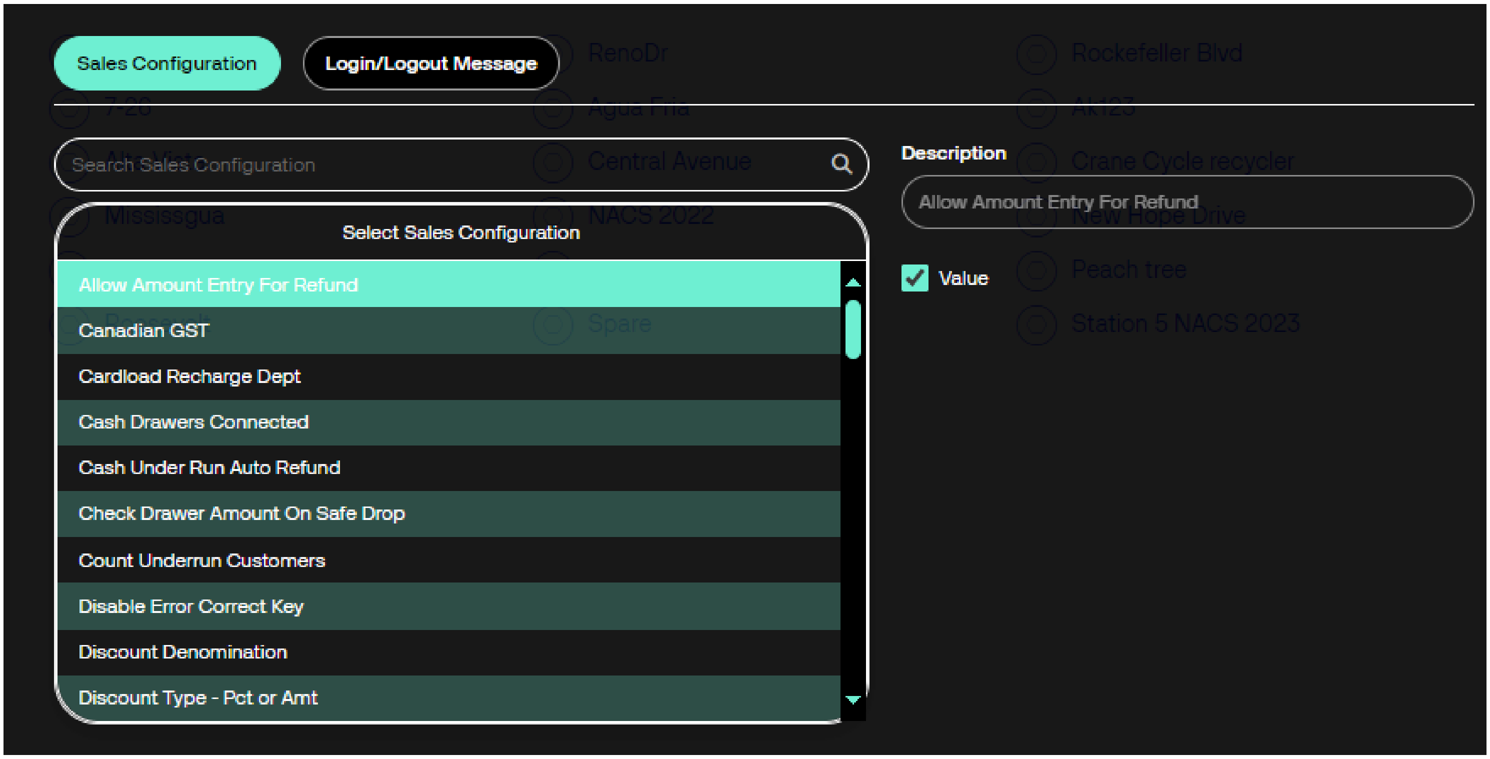


Field	Description
Name	The name of the ID check will be entered here.
Age	The minimum age of the customer who can purchase the item. The date calculation is based off the local Commander's date and time settings.
Bypass ID Check	If this parameter is enabled, it allows the cashier to skip the ID Check and confirm the customer is allowed to purchase the item. If the cashier does not select confirm, then the item is not added to the transaction.

Security Level	This setting is used with the Bypass ID Check field. The security level field sets a security level for the Bypass ID function. For example, if the security level was set to 7 then POS users with security level of 7 would be able to use the Bypass ID check function.
Confirmation Prompt	This setting is used with the Bypass ID Check field. It will prompt the cashier to accept the confirmation prompt that the customer is permitted to buy the item.
Force Scan / Swipe Only	When Force Scan/Swipe Only is enabled, the cashier is not allowed to enter the details manually. A bar code scanner or magnetic strip reader (MSR) captures birth date information from the ID card's bar code or magnetic stripe. The collected information will perform an automated mathematical check to ensure the consumer meets the minimum age requirement to approve the transaction. If the consumer is below the minimum age requirement, the transaction will not complete.
Perform ID Legitimacy Check	This setting is used with Force Scan/Swipe Only. A bar code scanner or MSR captures at least two pieces of personal information from the ID card's bar code/magnetic stripe and temporarily display them to the clerk on the POS screen. • Piece of personal information #1: ID Card Full Name • Piece of personal information #2: License Number The cashier compares the information displayed on the POS screen with the information on the physical ID. If there is no mismatch the cashier can approve the transaction, or they can decline the transaction if there is a mismatch between the information presented.
Manual Security Override	This setting is used with Force Scan/Swipe Only. When selected, a POS user with a high enough security level can manually enter ID details even when 'Force Scan/Swipe Only' is selected. The **Security Level** drop down below this option is the security level set for Manual Security Override.
Online Age Verification	Enable for TruAge Digital ID verification. Additional settings are needed for this functionality to work. See the Age Restriction Feature Reference for more details.
Exceptions	Military and date-based exceptions can be configured for each ID Check. **Military Exception** - After manual entry of the date of birth (DOB) from the ID, if the DOB fails standard minimum age limit check, but passes military minimum age limit test, a prompt will appear for the cashier to confirm if it is a military ID. **Date Based or Grandfather Exception** - Grandfather age check is based on a past minimum age requirement. If the DOB check meets this secondary date-based exception, the transaction can be completed.

Sales > Sales Configuration

The sales configuration form is used to configure sales functions such as Print Receipt, Force DOB on ID Check, Error correction Security level, and other sales related functions.



Field	Description
Allow Amount Entry for Refund	Allows amount entry for refund so that the cashier can give the amount entered as refund to the customer as a roundoff figure after taking the difference from the customer.
Canadian GST	Select if the site collects Canadian GST tax. Special prompts for Canadian GST appear in the Tax Rate File.
Cardload Recharge Dept	Select to assign the department number for cardload recharge.
Cash Drawers Connected	Allows the number of cash drawers connected to the POS to be increased from one to a maximum of two cash drawers. Connecting two cash drawers allows two cashiers to utilize one point of sale, while keeping their drawer totals separate.

Cash Under Run Auto Refund	If disabled, cashier must complete the underrun transaction by selecting a MOP. If enabled, when cashier claims the fuel sale, amount is automatically refunded.
Check Drawer Amount on Safe Drop	Select to compare the amount of the MOP entered to the calculated amount currently in the cash drawer.
Count Underrun Customers	When a cashier completes a prepay underrun transaction, the underrun customer count is incremented in the Summary Report, Shift Report and Daily Report with the attribute "Underrun Customer".
Disable Error Correct Key	"Error Correct" button is not displayed on the POS touchscreen when this parameter is enabled.
Discount Denomination	Refer to Discount Denominations in the Commander User Reference for configuring discounts. Select so that when the cashier selects the discount key (hard key, soft key, or touch-to-modify menu), any configured discounts are displayed as part of the discount overlay.
Discount Type – Pct or Amt	Select the type of discount to apply when the Discount function/button is used. **Percent** — The discount is calculated as a percentage of the price and then subtracted from the price of the item. **Amount** – The Discount is directly subtracted as a dollar amount from the price of the item.
Display PLU Not Found Department List	Select to set a department number to assign to PLUs that are not in the PLU department list.
Drawer Alarm Timer	Enter the number of seconds a cash drawer is allowed to remain open before an alarm is triggered (0-99). "Drawer Open During Sale" must not be selected for the drawer alarm time to work.
Drawer Open During Sales	Allows the cash drawer to remain open during transactions. If it is not selected, the cash drawer must be closed before the next transaction can be started.
Employee Number Login	Allows a cashier to login using their Employee Number instead of their POS ID number. The employee number is assigned within Security > POS Security > Employees. When enabled all employees must login with their employee number.
Enable Auto Settle Overrun	Select to determine whether to apply a charge on a prepaid sale in case of an overrun. When enabled, the overrun amount should automatically be settled to "Drive Off" MOP to complete the transaction.
Enable Managed Update	Enable to provide an interim approval step during the PLU file update process and to allow updates to take effect within the POS system immediately upon approval. No restart required after approval.

Enable Receipt Tax Detail	Enable to print the tax details on the receipt. Even if this feature is disabled, if there is a taxable rebate in the transaction, the tax details are printed on the receipt.
Error Message Prompt Timer	Enter the length of time (in seconds) that error messages display (2 - 30).
Fixed Discount Rate	If “Is Fixed Discount” is selected, enter the percent or amount (set in “Discount Type”) that is automatically applied when the Discount button is pressed.
Food Service Default PLU	Not Used.
Force DOB on ID Check	Select to force ID checks by displaying messages, beeping, and restricting sales until a birth date is entered, scanned, or swiped.
Force No Sale Print	Prints a receipt for any No Sales that are completed.
Force Refund Print	Prints a receipt for any Refunds completed.
Force Void Line Print	Prints a receipt for any transactions that contain a Void Line.
Force Void Transaction Print	Prints a receipt for any transactions that were Voided.
Fuel Discount	Enter the dollar amount per gallon discount that is applied when a fuel discount key is used (0.00 – 99.99).
Fuel Discount Title	To rename Fuel Discount with a descriptive name, enter up to 30 characters.
Idle Prompt Displays Due Sale	Not Used.
Is Fixed Discount	Select to automatically enter discounts (set in “Discount Type” as a percent or amount) for the amount entered in “Fixed Discount Rate” when the Discount button is pressed. If it is not selected all discounts must be entered as individual amounts.
Is cashier # required for each sale	Select to require the cashier/employee number and password before starting each sale.
Is subtotal required	Requires the cashier to select the Total button before the Method of Payment (MOP) can be selected.
Is total in double	Prints the transaction in Double-Wide characters on the Receipt.

Maximum Amount	Enter the maximum amount that any one department item may cost if ‘0’ is entered for Department > Maximum Amt (0.00 – 9999.99)
Maximum Discount	Enter the maximum discount (either percent or dollar as set in “Discount Type”) that can be applied to an item when using the Discount button (0.00 – 99.99).
Maximum Quantity	Enter the maximum quantity of any one item that may be sold in one transaction (0.00 – 9999).
Maximum Till Transaction Amount	Enter the maximum transaction amount.
Minimum Amount	Enter the minimum amount that any one department item may cost if ‘0’ is entered for Department > Min Amt (0.00 – 9999.99).
Minimum Discount	Enter the minimum discount (either percent or dollar as set in “Discount Type”) that can be applied to an item when using the Discount button (0.00 – 99.99).
Money Order Low	Enter the number of checks remaining before an alarm message indicates that the money order machine needs to have more checks loaded (0 - 99). Refer to the Money Order Feature Reference for more information on this feature.
One Cashier Per Drawer	Select to limit login to one cashier per cash drawer until totals are closed. This can be overridden by personnel with higher security levels than the cashier. If not selected, more than one cashier is allowed per cash drawer.
Open Drawer Cashier Close	Select to close open drawer before another cashier can use the cash drawer.
PLU Not Found Department	Enter a department number to assign to PLUs that are not on the PLU File and are entered as a sale (0 – 9999). Entering a value of 0000 disables the department not found function. The department record must be available within the Department configuration.
Prepaid Card Activate Department	Enter the department number for prepaid card activation sales transactions.
Prepaid Card Recharge Department	Enter the department number for prepaid card recharge sales transactions.
Prevent Modify Key Cycling	Not Used.
Print DOB on Journal	Select to print DOB on journal logs.

Print DOB on Receipt	Select to print DOB on receipt.
Print Receipt	Select to print a receipt for every transaction (if not selected, a receipt will only print for No Sale, Pay In, Pay Out, Clock In/Clock Out, Void, Car Wash, POP Discounts, Credit Transactions).
Print UPC on Receipt	When this feature is enabled, the actual UPC or PLU will be printed on the receipt, along with the description.
Prompt Dine In	Select to prompt dine in for food orders.
Prompt Food Order Name	Enable to prompt for entering customer name for food orders.
Prompt Food Order Phone #	Enable to prompt for entering customer name for food orders.
Prompt Loyalty for PLU Not Found	When enabled, if a scanned barcode or manually entered number comes as “PLU Not Found”, the system asks the user if the number is a Loyalty Card.
Receipt Print PPG Discount Table	Enable to print clearer breakdown of discounts on the fuel receipt. This includes pop, loyalty, and any other discounts taken off fuel prices.
Receipt Print Program Name	Receipt prints loyalty program name.
Register Time-Out Timer	Enter the number of minutes (001 – 999) after which an idle terminal automatically switches out of Sales Mode. Entering 000 indicates that an idle terminal will not log out of sales mode.
Release Terminal During Close	Select to allow the terminal to return immediately to Sales mode after a close shift or close daily is started.
Reminder to Use Imprinter	Not Used.
Reset Display on Drawer Close	Idle sales message returns when the drawer closes.
Reset Display on Timeout	Enter the time (in seconds) before the idle sales message returns to the operator display after a transaction is complete. When “Reset Display on Time-out” is selected, a value must be entered here (2 – 3600). 1 = 2 seconds. 0 disables the option to reset display on time-out.
Stack Manual Discount	If enabled, multiple manual discounts can be applied on a line item. Cannot apply multiple discounts if item has NAXML discount applied to it.

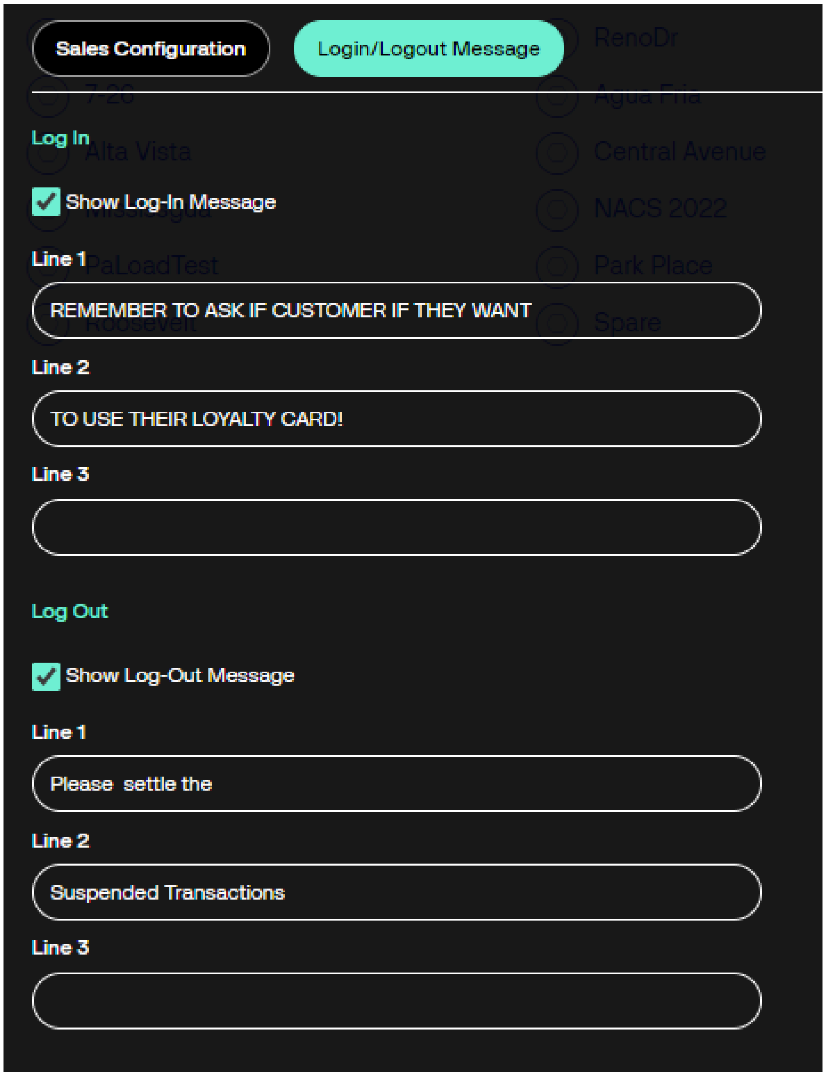
Store Number	Enter the number or name that identifies the store. This information is printed on receipts and reports (alphanumeric, 1 - 5 characters).
Value Added Tax (VAT)	Select if value added tax (VAT) is collected at the site. Special prompts for VAT appear in the Tax Rate File (U.S. and Canadian sites usually do not collect VAT).

Refer to the Commander User Reference in the event the function is not listed above.

Sales > Login/Logout Message

The Sales Login/Logout Messages display a message when logging in or out of sales mode for the cashier to review. The messages only appear at the time of logging in or out of sales.

Messages will appear for all cashiers.



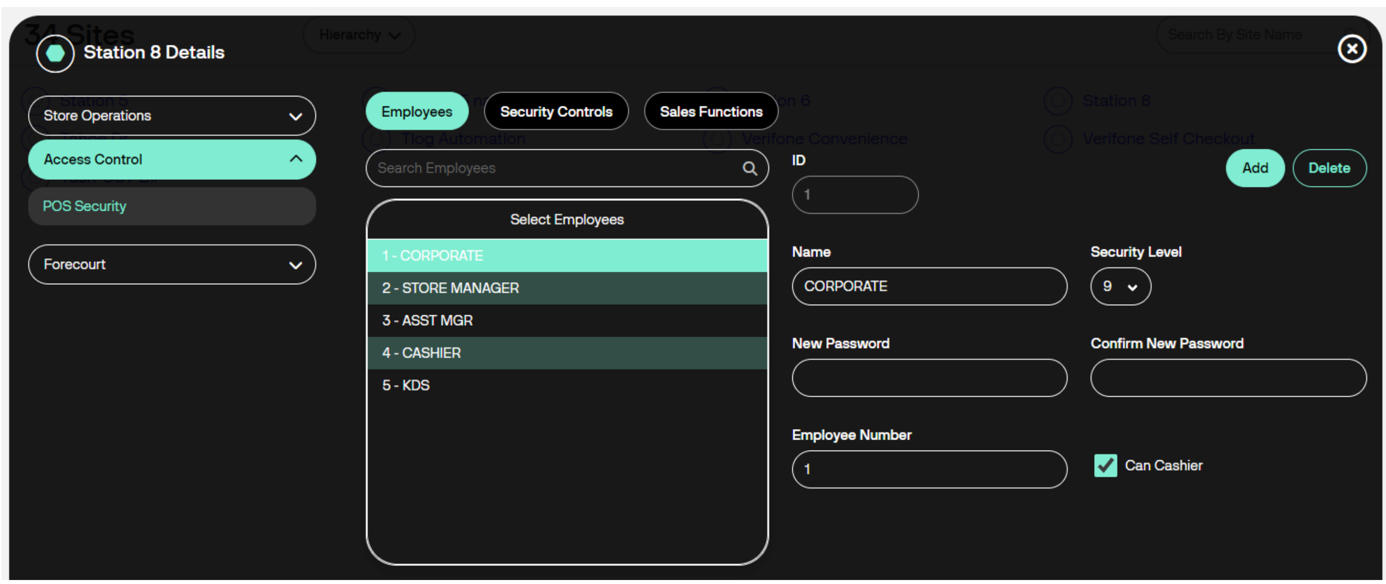
Access Control

POS Security

The POS Security section is located under **C-Site Management > Site Management > (Select Site) > Access Control**. POS Security is used for creating POS users, such as cashiers, and controlling their access levels to functions within the POS. Changes made at the site will sync with the dashboard, and changes made within Verifone C-Site will sync with the store once saved.

Employees

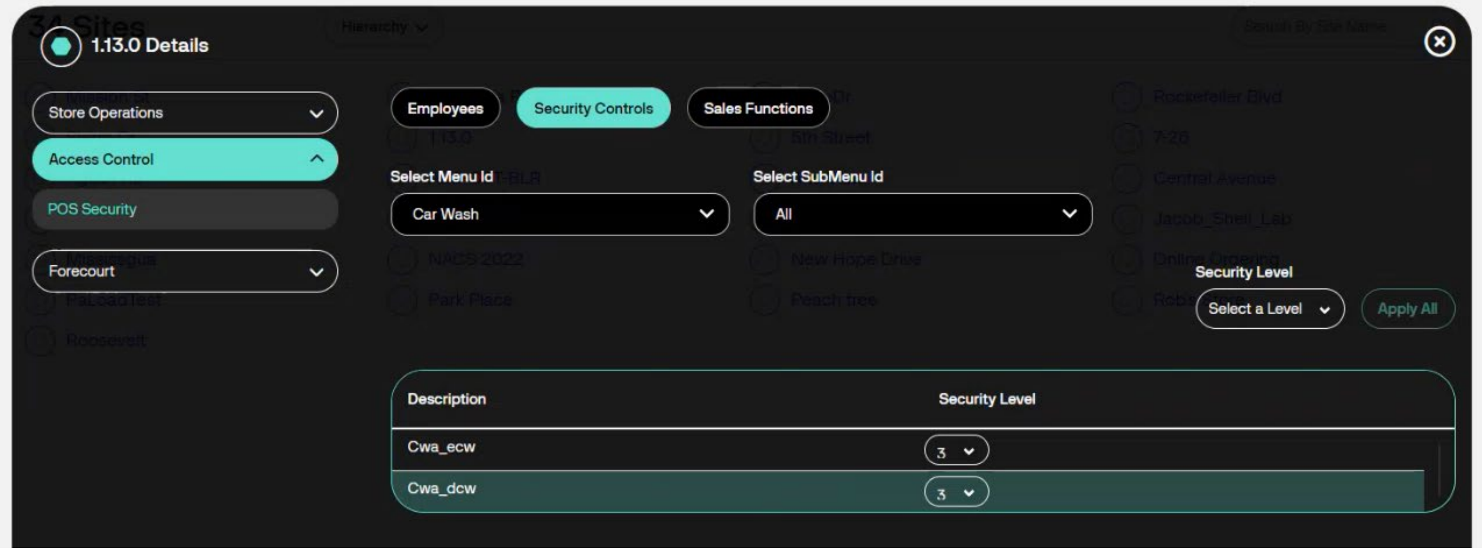
The employees tab is used to add new employees who can access the point of sale. The ID number assigned to the employee will be entered into the POS at the time of login along with the password.



Field	Description
Search Employees	Allows for employees to be searched by their name or exact ID number entered.
Select Employees	Displays a list of existing employees.
ID	The number entered in when a cashier or store personnel log into the register. The ID assigned must be a unique number from 1-2000.
Name	Used to identify the pos user/employee.

Security Level	A value between 0 and 9 that defines what areas the employee has access to on the point of sale. The level of 9 provides the most access to areas within the POS. Specific details on what security levels are required for functions on the POS can be found within the Security Controls tab and the Sales Functions tab.
New Password / Confirm password	The password used when the employee logs into the POS. The value can letters and numbers.
Employee Number	The employee number is a required field. This number is used for payroll reports.
Can Cashier	Enabling the Can Cashier check box allows the employee to log into sales mode (CSR Functions) on the register. If this option is disabled, they will not be able to log into the register and ring in sales.

Security Controls



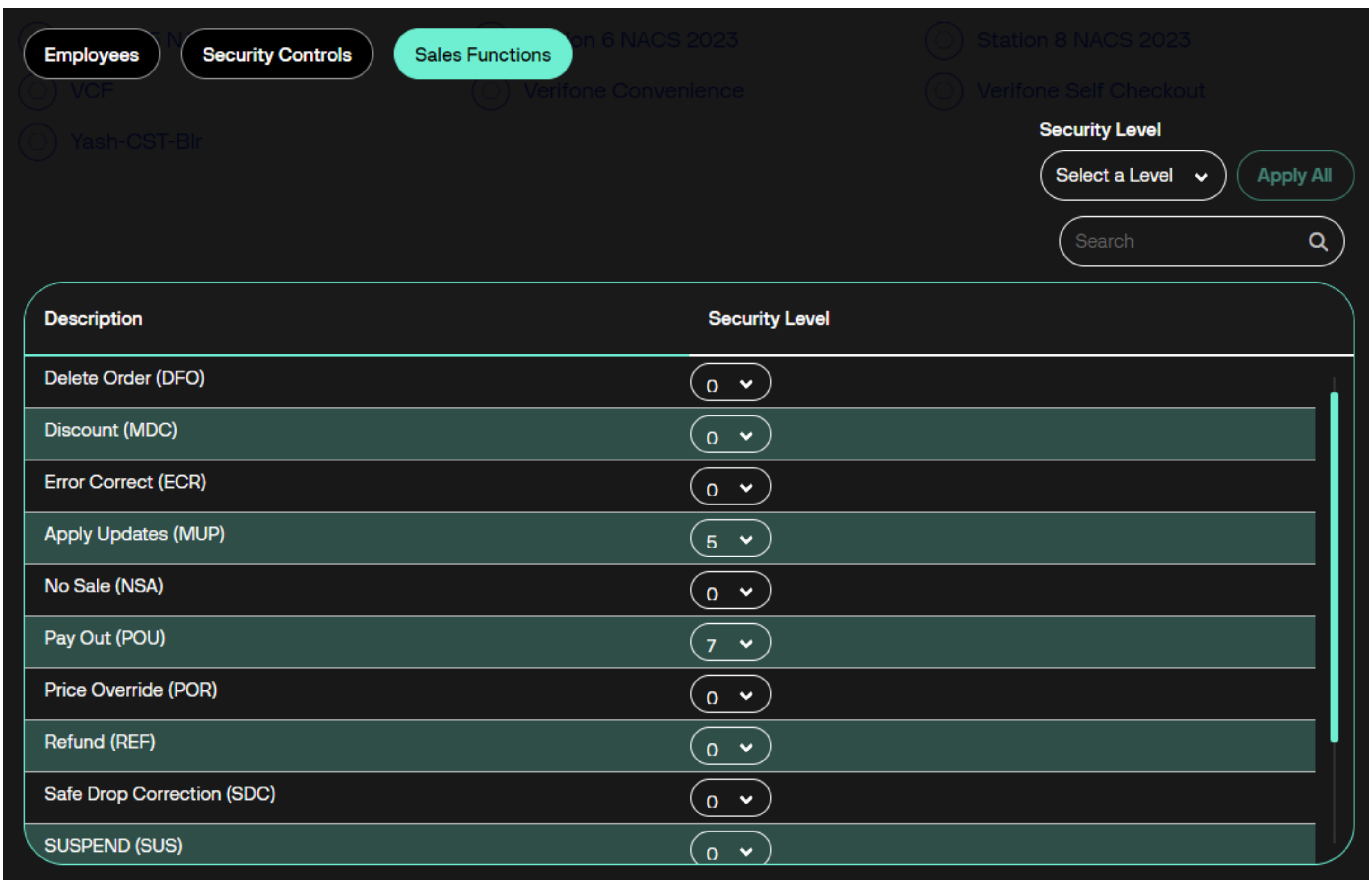
Field	Description
Select Menu ID	Allows the category
Select SubMenu ID	Allows further filtering of specific security controls within a selected security control menu ID. This field will vary depending upon the Select Menu ID options.
Description & Security Level Table	Shows the description of the security function along with the minimum required security level to utilize that function.

Apply All / Security Level Function	The security level drop down and Apply All button allows the security level for all the displayed security controls to be changed in bulk to the selected Security level. Select the Security level from the drop down and select Apply All to see the change. Select Apply Changes on the form to save the changes. Use Discard to clear any changes made.

Sales Functions

Functions that are tied to sales are separated into the Sales Functions tab. Options such as Error Correct, No Sale, Suspend, and Price Override can be found here. If the security level is 0, then all users with the cashier checkbox enabled can perform the function.

The **security level drop down** allows a security level to be set for all sales functions shown. An additional **search box** allows the functions to be filtered down searching for the first letter of the description. For example, typing A will display apply updates.



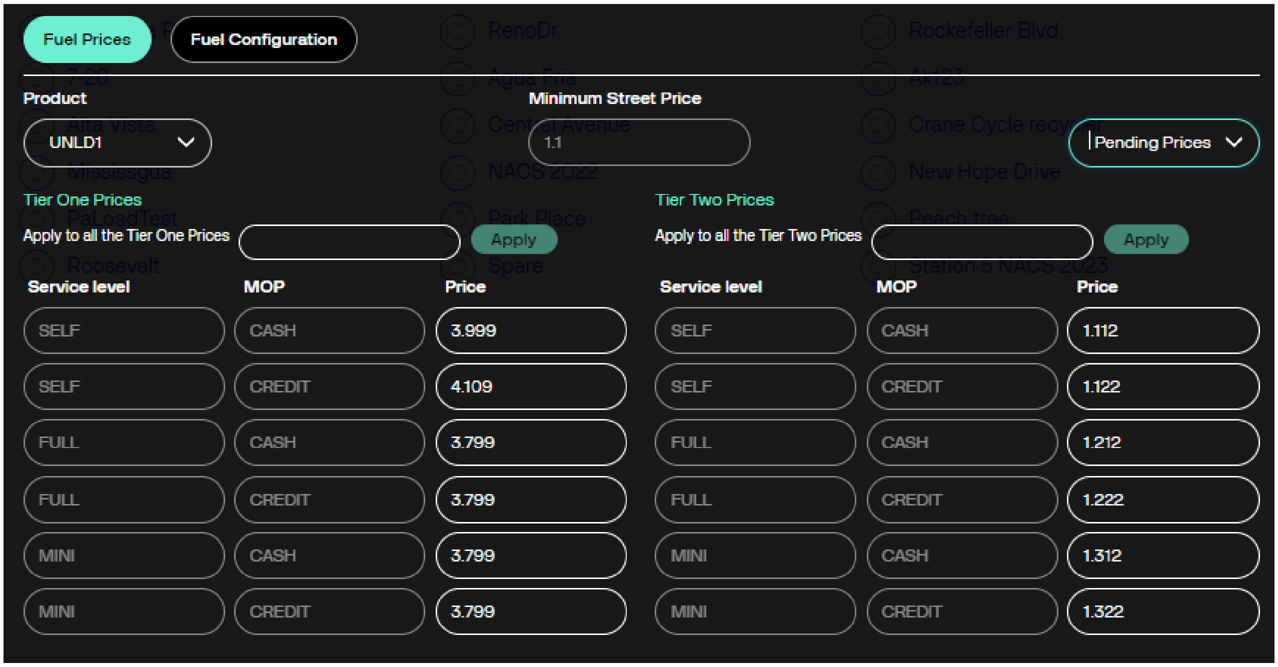
Forecourt

Fuel

Fuel Prices

Location fuel prices can be modified by selecting the Pending Prices option on the right side of the screen. Prices that are currently active at the store will be found by selecting ‘In Effect Prices’.

Fuel prices are set based on the products and service levels assigned at the location. If you’re not sure which products are assigned at the dispensers, refer to the Fuel Configuration – In Effect tab > Fuel Positions.



Once the product is selected, the price can be changed for all the service level and MOP options by entering in an amount in the ‘Apply to all the Tier One (Two) Prices’ field and selecting Apply. Prices can also be entered in for each Service Level and MOP.

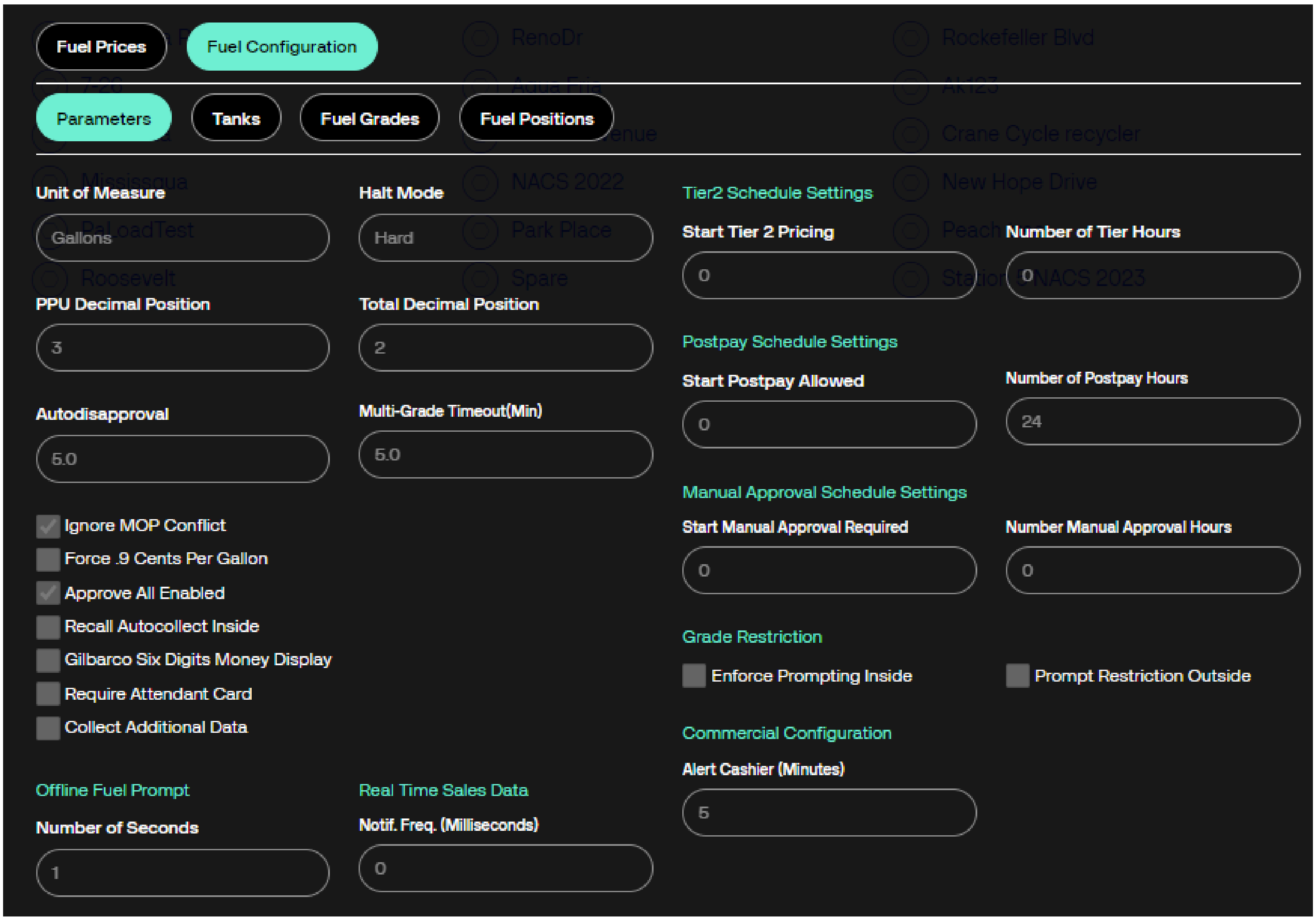
The Minimum Street Price is currently a read only field and sets the minimum amount that fuel prices can be set to. This field is intended to prevent incorrect fuel prices from being assigned.

Select **Apply Changes** on the bottom of the page to save the updates. Select **Discard** to undo any changes made.

Fuel Configuration

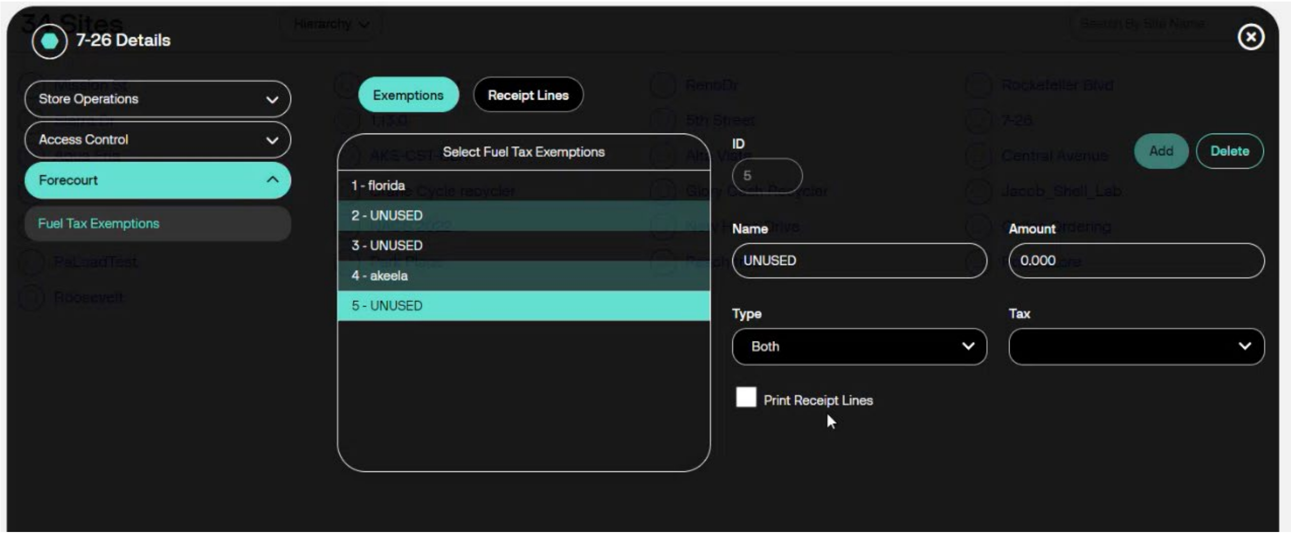
The Fuel Configuration area is **read only** shows the Fuel Configuration that is 'In effect' at the site. Fuel configuration is set up at the time of installation by a Verifone Authorized Service Contractor (VASC).

> **CAUTION**
>
> Modifications to the store's fuel configuration can negatively impact site functionality. Please consult the Verifone Helpdesk or a Verifone Authorized Service Contractor (VASC) prior to making changes.



Fuel Tax Exemptions

The Fuel Tax Exemption section is located under **C-Site Management > Site Management > (Select Site) > Forecourt.** Fuel Tax Exemptions are used to configure tax exemptions on fuel sales that can be applied to post pay fuel sales. The Fuel Tax Exemption configuration form allows up to five fuel tax exemptions to be entered. The exemption can be based on an amount per gallon, tax rate configuration, or both.



Field	Description
Fuel Tax Exempt Record ID	A record number must be entered from 1-5 for the fuel tax exemption.
Name	Enter a description for the fuel tax exemption.
Amount	Enter the amount for fuel tax exemption if amount per gallon or both are selected for the Type drop down.
Type	Select between Amount Per Gallon, Tax File Entry, or both to determine how the tax exemption is applied. If Tax File Entry or Both are selected, a tax will need to be selected from the tax drop down.
Print Receipt Line (Signature Line)	Determines whether the fuel tax receipt lines configured will print with the sale or not.
Fuel Tax Receipt Line	Allows the receipt printed for transactions with fuel tax exemption to include specialized receipt information.

12. Viper Table Management

Viper Table Set Management is intended to perform scheduled updates to the card tables in the Verifone Commander. Table updates are XML formatted and must be specifically formatted to ensure no errors occur.

Updates should not be performed without assistance from Verifone at this time.

CAUTION	**Updates should not be performed without assistance from Verifone at this time.**

13. Connect Device to Cloud

The Connect Device to Cloud section will provide details on how to enable the Cloud Connect feature in Verifone Configuration Client. Each Verifone Commander must be onboarded to the cloud within Verifone Configuration Client and added to Verifone C-Site Management.

NOTE

If the site's information was not added to Verifone C-Site Management prior to completing the Verifone Configuration Client onboarding steps, the site will automatically be added to Sites within Verifone C-Site Management.
The site name will be the site's service ID and the hierarchy will need to be modified.

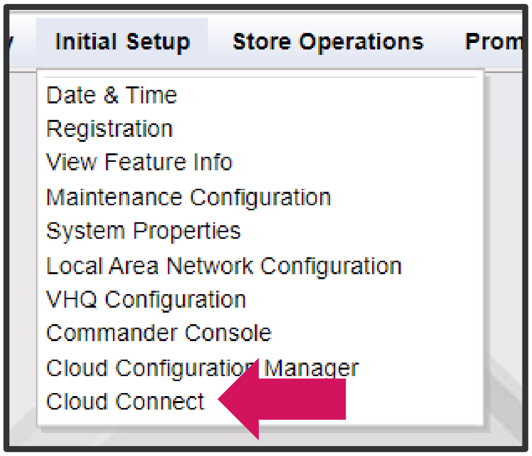
Requirements

- The site where the device is located is set up within Verifone C-Site Management within **Administration > Sites**.
- The Verifone Commander onboarder must have credentials for Verifone C-Site Management.
- DNS must be enabled within Verifone Configuration Client (Local Area Network Configuration) for the connection to be successful.

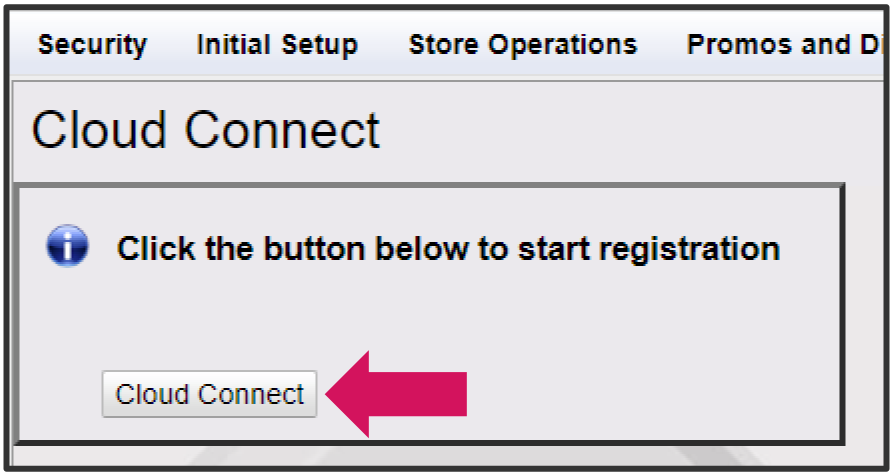
Pre-Release 54.02 - Connecting the Device to the Verifone C-Site Management Application

Please ensure that you are following the instructions for the correct software release installed on the Verifone Commander prior to beginning onboarding. To begin the process of attaching the Verifone Commander to the cloud:

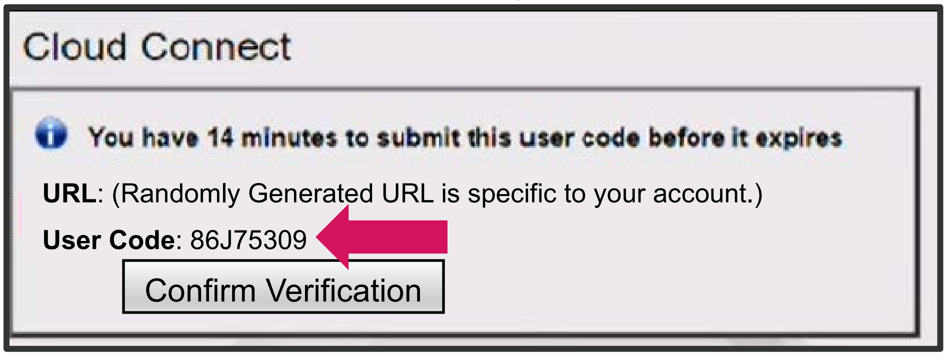
1. Log in as Manager in Verifone Configuration Client and navigate to **Initial Setup > Cloud Connect.**



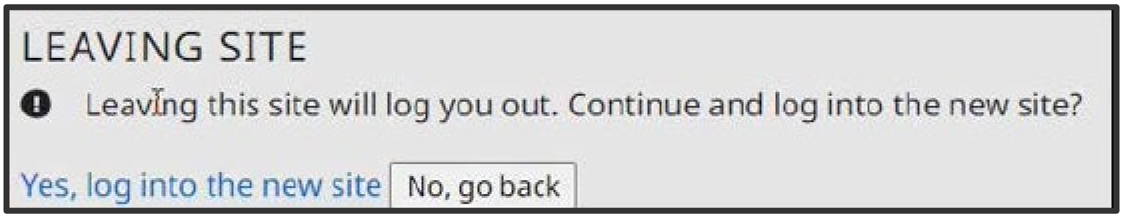
2. Select the Cloud Connect button from the screen.



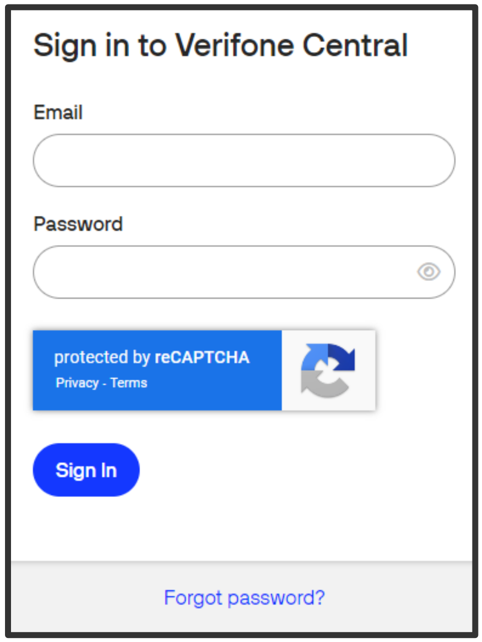
3. A URL and a user code is generated. **Copy the User Code** that was generated on your Configuration Client and then **select the URL on your screen**.



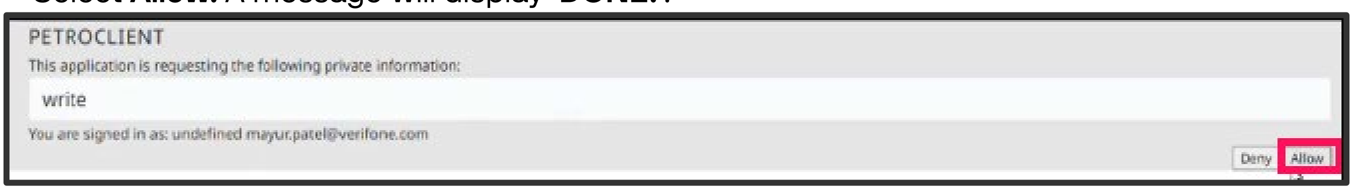
4. Once the URL opens, enter the user code from Configuration Client into the **'Enter your code here'** field and click **Submit**.



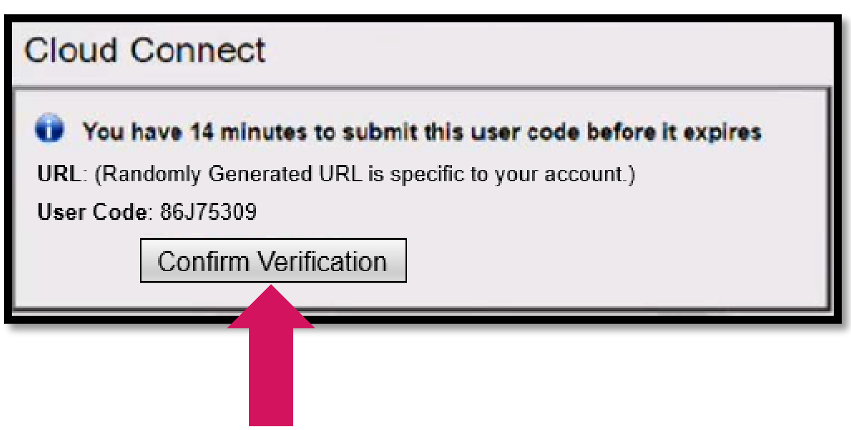
6. Click **Yes, log into the new site**. A page will open that will prompt you to log into C-Site Management**.**
7. Login with the credentials for Verifone C-Site Management.



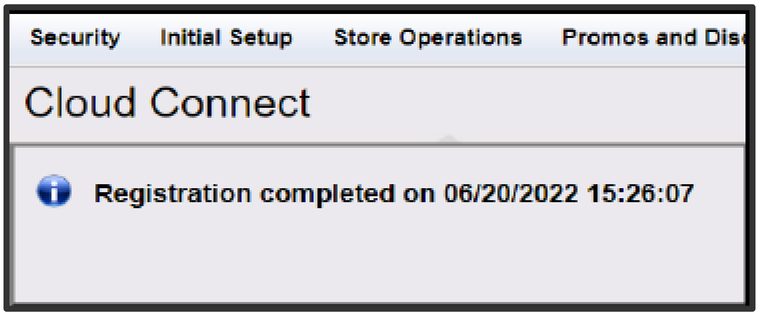
8. The next prompt will prompt you to allow sharing the information from the Verifone Commander. Select **Allow.** A message will display ‘**DONE!**’.



9. **Return to the Configuration Client page.** Select **Confirm Verification** from the Cloud Connect window.



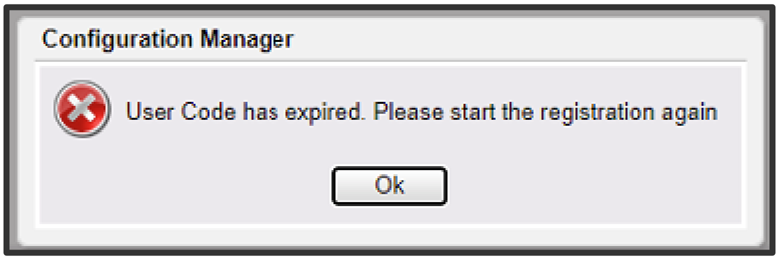
11. The Cloud Connect window will display 'Registration completed on (Date / Time)'



NOTE	There is a 5-minute delay from when the site will show Active within Verifone C-Site Management after it is registered.
WARNING	**If DNS is not enabled in Configuration Client > Initial Setup > Local Area Network Connection, then the Verifone Commander will not be able to resolve the IP from the URL and onboarding will fail.**

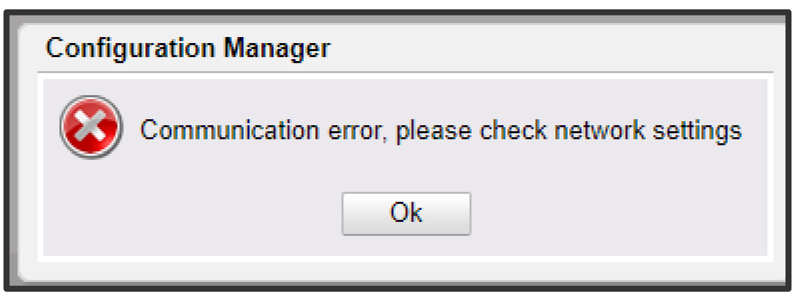
Troubleshooting

Error response ‘User Code has Expired. Please star the registration again.’



- Make sure the user trying to onboard the Commander has the ‘**Commander Onboarder Role’** assigned within Verifone C-Site. If the role has been assigned to the user, then contact the Verifone Helpdesk. The expiration time for the user code is 14 minutes, but the role assignment issue will appear immediately.

Error response ‘Communication error, please check network settings.’



1. For the following payment networks, no routes need to be added into Initial setup > LAN Configuration as the MNSP will make the changes needed: BP, Sunoco, and Chevron*. Chevron is making the changes to the MNSP with the assumption that the Payment NIC is configured for the default route. If the Payment NIC is not the default route, then it needs to be changed to the default route, saved, and the Commander must be rebooted. See the Chevron Playbook for more details.
2. For Shell, Generic Buypass, etc. where the Payment NIC is **NOT** the default route, then DNS routes are required. DNS 1 8.8.8.8 and DNS 2 8.8.4.4 – Unless other DNS routes are required by the site’s network administrator.

3. Site such as Exxon, Generic Buypass (Gulf, Sinclair, etc.) and others who do not have their own IP scheme and has the Payment NIC set as the default route would need to add the following Host Routes and DNS settings into Initial Setup > LAN Configuration:

Host Routes

Host Route Description	IP Address	Gateway	Subnet
C-Site VAM 1	23.23.135.174	192.168.31.31	255.255.255.255
C-Site VAM 2	18.213.229.217	192.168.31.31	255.255.255.255
C-Site GSC 1	184.72.129.214	192.168.31.31	255.255.255.255
C-Site GSC 2	54.221.203.197	192.168.31.31	255.255.255.255
C-Site GSC 3	52.72.155.235	192.168.31.31	255.255.255.255
C-Site MQTT 1	184.73.231.196	192.168.31.31	255.255.255.255
C-Site MQTT 2	3.212.149.223	192.168.31.31	255.255.255.255
C-Site MQTT3	52.6.28.56	192.168.31.31	255.255.255.255
DNS 1	8.8.8.8	192.168.31.31	255.255.255.255
DNS 2	8.8.4.4	192.168.31.31	255.255.255.255

DNS Settings

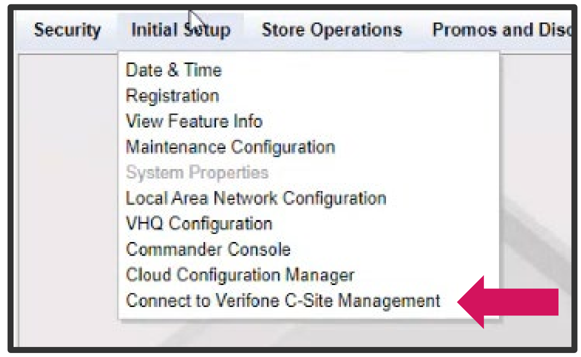
- DNS 1: 8.8.8.8
- DNS 2: 8.8.4.4

Release 54.02+ - Connecting the Device to the Verifone C-Site Management Application

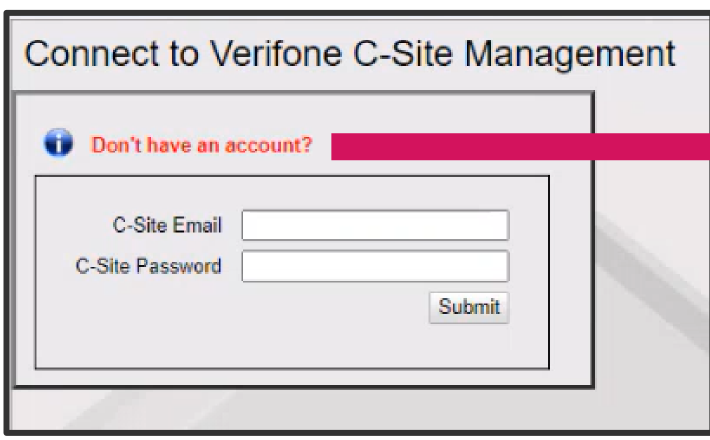
In Commander software release 54.02 and higher, there have been enhancements made to onboard the Verifone Commander. The steps have been simplified from previous releases.

Please ensure that you are following the instructions for the correct software release installed on the Verifone Commander prior to beginning onboarding.

1. Log into Configuration Client and navigate to **Initial Setup > Connect to Verifone C-Site Management**.

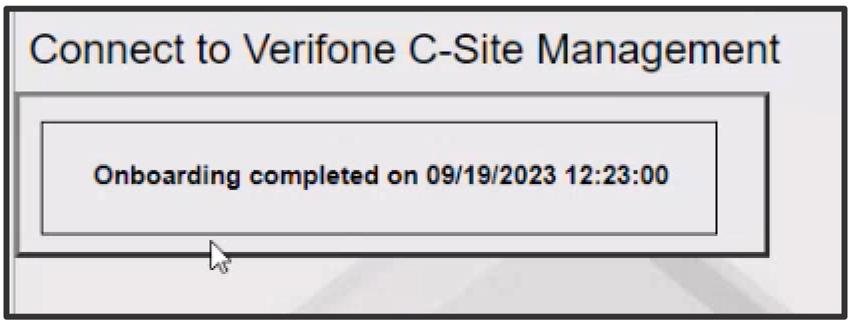


2. Enter in the C-Site Email and Password to connect the Verifone Commander to C-Site. Do not use the Configuration Client Credentials – they will not work. If the site doesn't have an account, selecting the 'Don't have an account?' option will provide information for the site to sign up for Verifone C-Site Management.



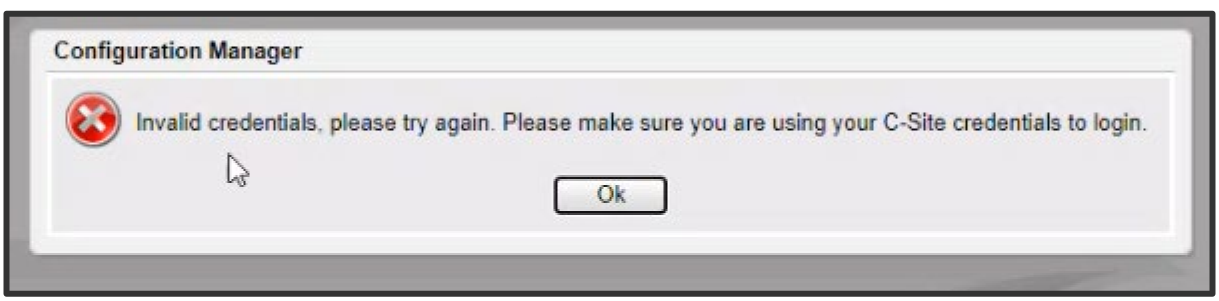
3. When the correct crednetials are entered in, Configuration Client will display ‘**Connecting to Verifone C-Site Management in Progress**’.

4. Once the onboarding is complete, then below message will be displayed.



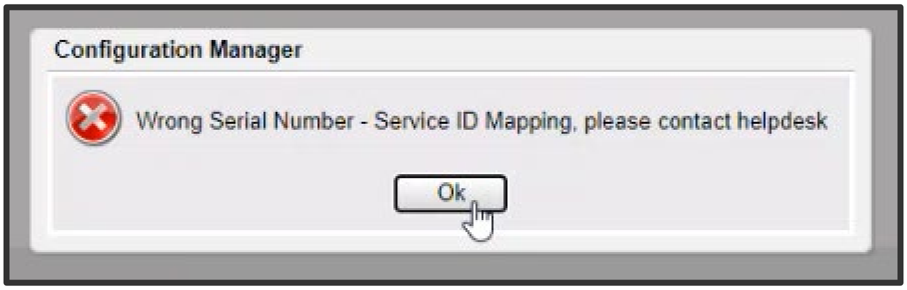
Troubleshooting

Error message ‘Invalid credentials, please try again. Please make sure you are using your C-Site credentials to login’:



- Confirm the Verifone C-Site Credentials are being used and not the Verifone Configuration Client Credentials.

Error message ‘Wrong Serial Number – Service ID Mapping. Please contact helpdesk’:



- The service ID may be incorrect in the Commander. Confirm the site's service ID is entered in by navigating to Help > Support in Configuration client to verify it is correct. If the service ID entered is incorrect, contact the Verifone helpdesk to correct the service ID.
- Commander serial number may not match what the site has registered. Reach out to the Verifone Helpdesk to correct the Commander Serial number and/or Service ID.

14. One-Time Password

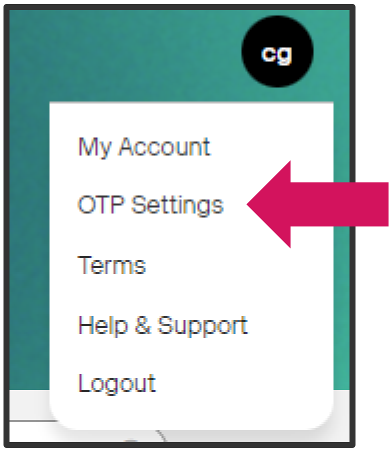
The One-Time Password feature allows a one-time password (OTP) for a site's Verifone Commander to be sent to an email address. An OTP may be required to make changes to specific areas within Verifone Configuration Client, such as Manage Users. However, the OTP is only displayed locally on the Verifone Commander or Verifone POS.

Requirements

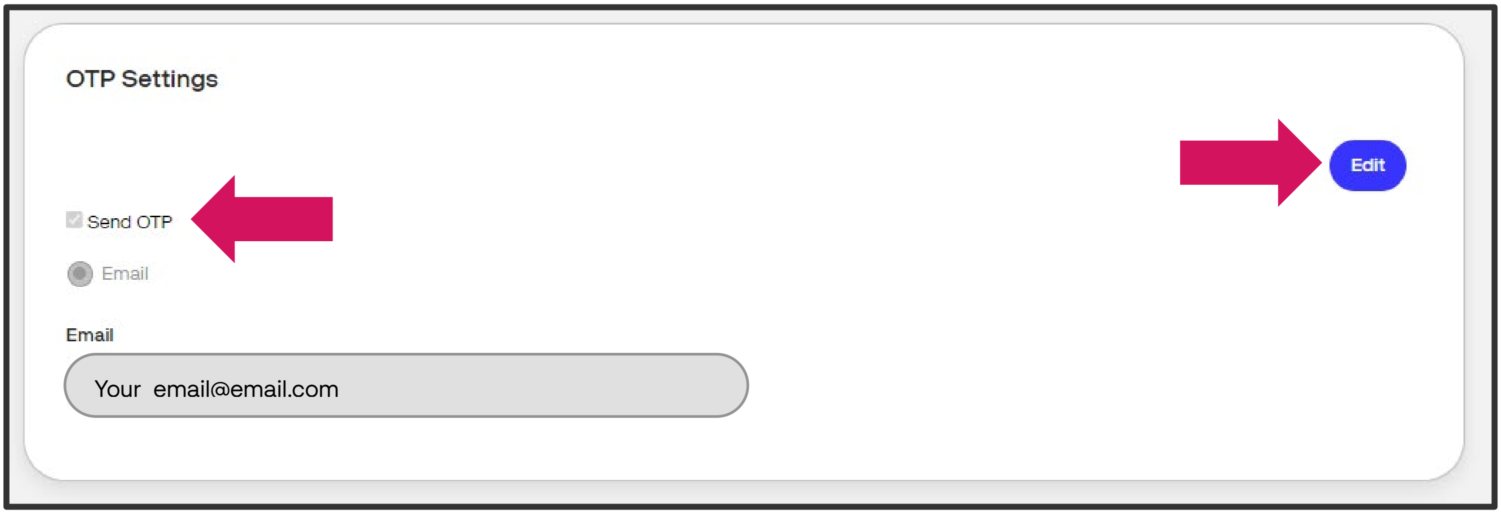
- A valid account with Verifone C-Site Management
- An active site, onboarded with Verifone C-Site Management
- Verifone Software Release 53.35+
- An active email associate with Verifone C-Site Management
- Manager access to Verifone Configuration Client.

Configuring OTP Emails

1. Log in to the Verifone C-Site Management application. In the top right corner of the application, select your account initials icon and select **OTP Settings**.



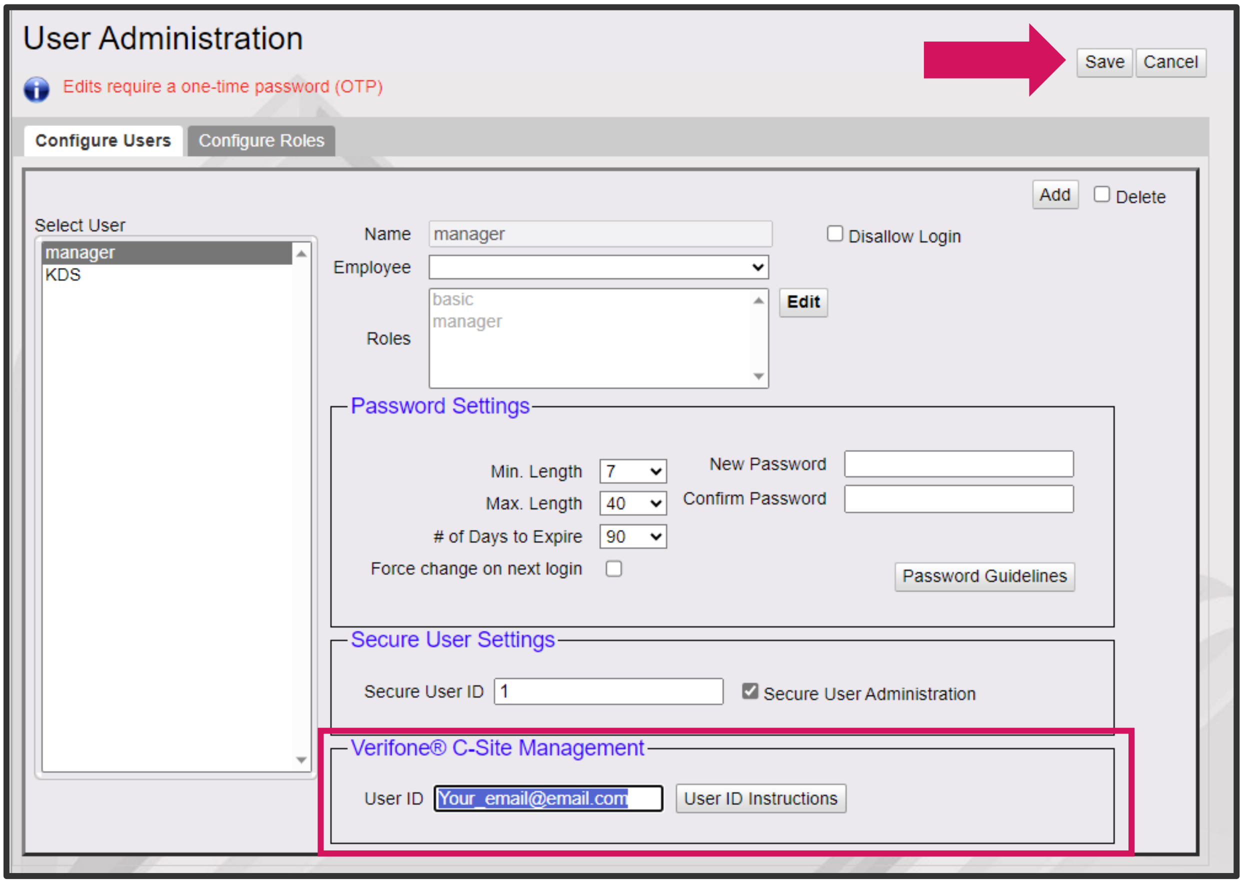
2. If the **Send OTP check box** is not selected, click on **Edit** to enable the parameter. Save the changes if they have been made.



NOTE The email address cannot be changed as it is the User ID.

3. Login to Verifone Configuration Client and go to **Security > Manage Users**. Enter in the OTP when prompted.

4. Enter in the **Verifone C-Site Management email address** (the same one as used in the OTP settings) in the User ID Field. Select **Save** on the User administration form.

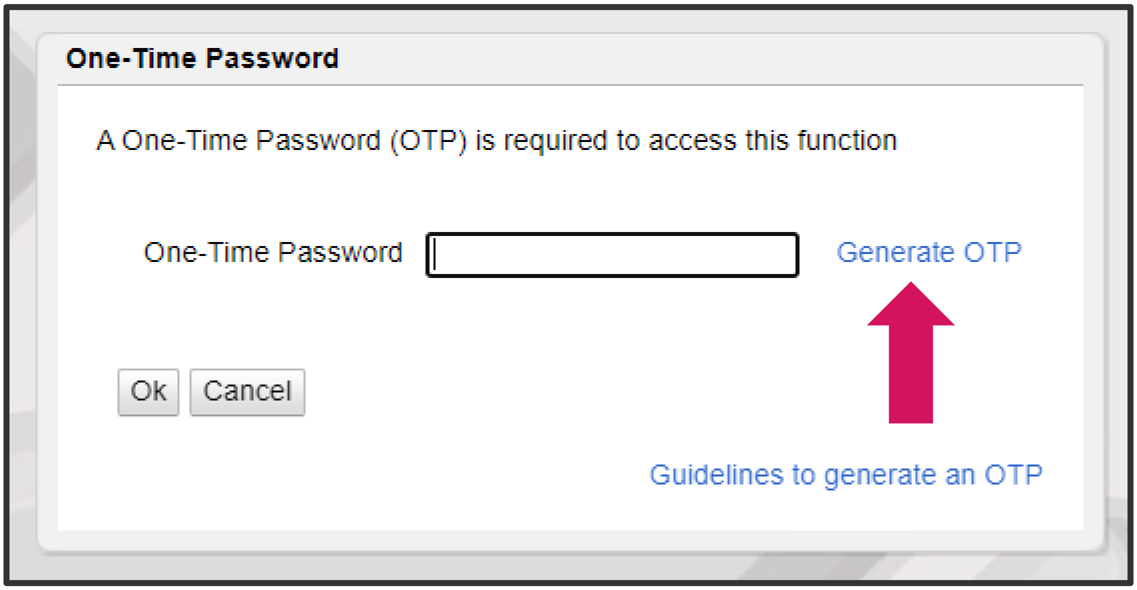


NOTE

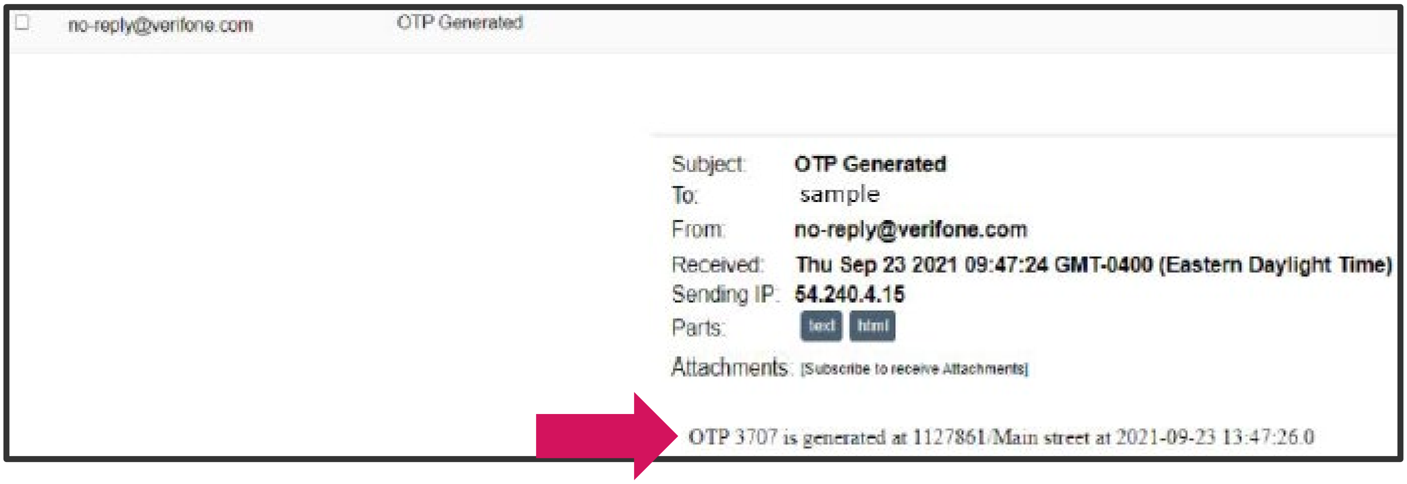
As mentioned above in the Requirements section, Verifone Configuration Client users must have a Verifone C-Site Management user ID to receive OTPs by email.

Using the OTP to Email Feature

1. Any areas of Configuration Client that require an OTP will prompt for a One Time Password (as shown below). Select **Generate OTP** to the right of the entry field. The OTP will be sent to the email configured.



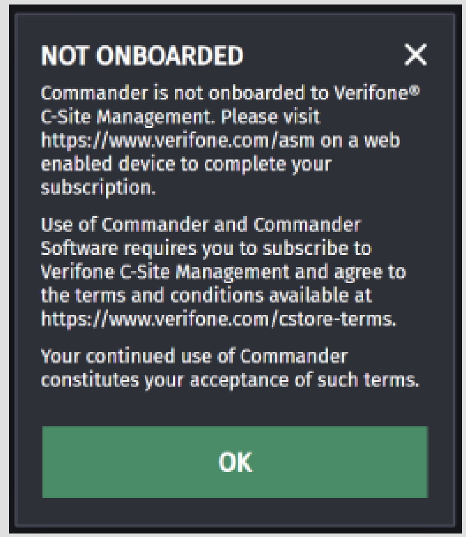
2. Check the email to retrieve the OTP and enter the prompt on Configuration Client.

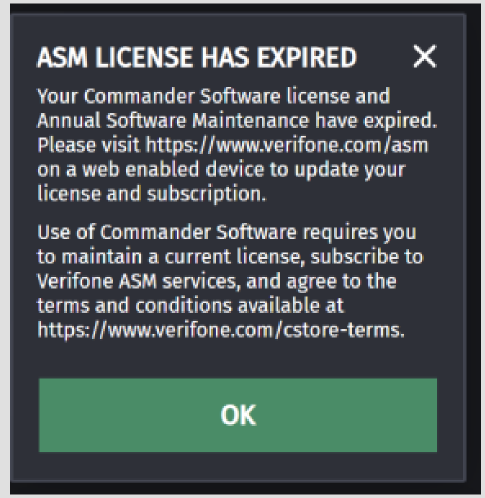
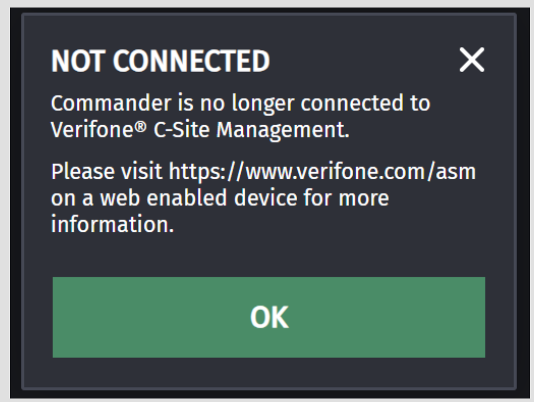


Appendix I

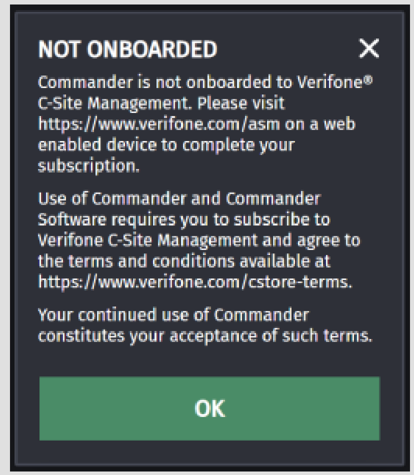
Note: Self-checkout end users will not see prompting messages. Messages will only appear when accessing cashier screens.

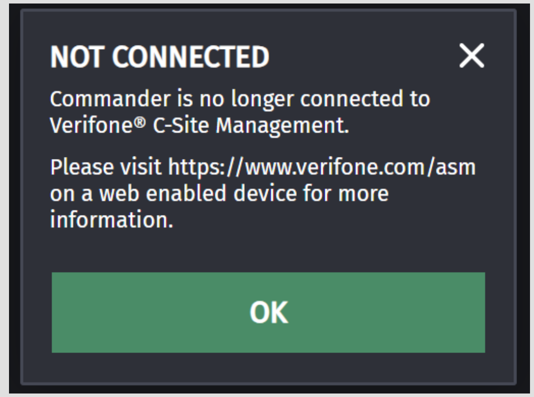
Commander Release 53.41

Topic	When will this appear	Frequency	Feature Disablement	Messages	Resolution
Commander not onboarded	120 days post installation of the Commander Software	Appears at login	N/A		Onboard the Commander

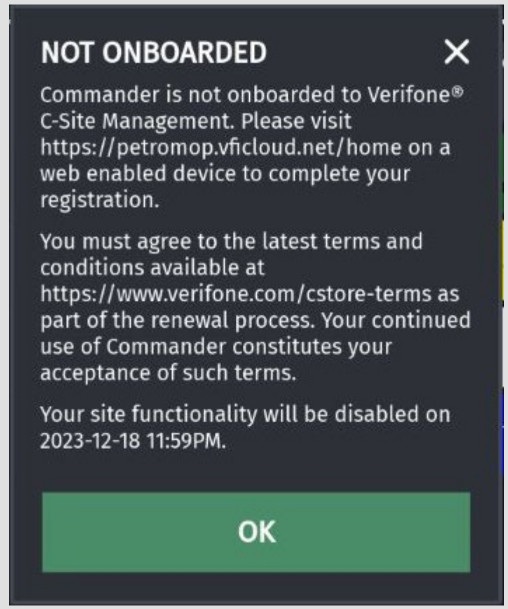
Commander Onboarded, but ASM Expired	120 days post installation of the Commander Software	Every Transaction	N/A		Renew ASM License
Not Connected	Any time after Onboarding	When connectivity is lost to C-site. Appears at POS Login.	N/A		1. Work with your MNSP to confirm connectivity to Verifone C-Site is maintained. 2. Contact the helpdesk for assistance.

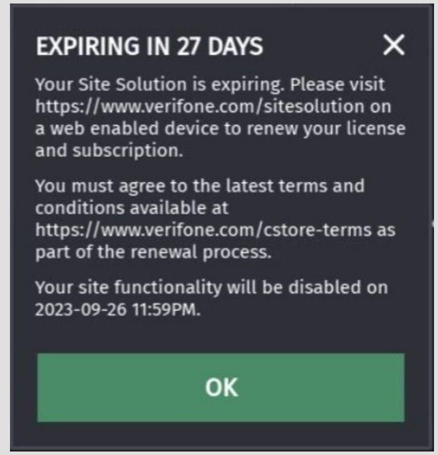
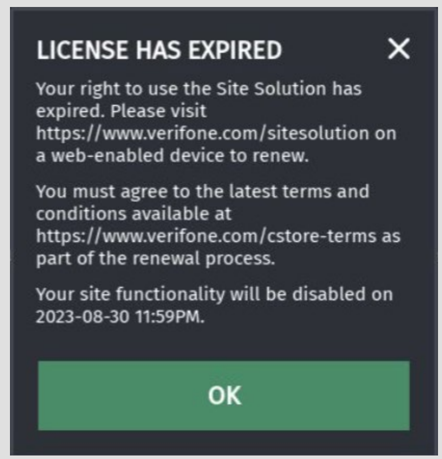
Commander Release 54.00 and 54.01

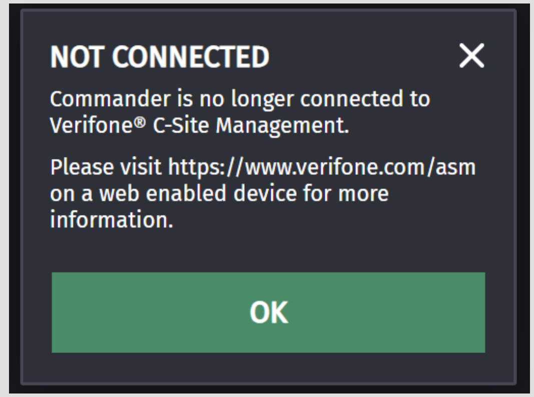
Topic	When will this appear	Frequency	Feature Disablement	Messages	Resolution
Commander not onboarded	60 days post installation of the Commander Software	Every transaction	Forecourt and POS functionality Disablement occurs at 90 days for Forecourt and 91 days for the POS. **Occurs at midnight when the system is idle.**		Onboard the Commander
Commander Onboarded, but ASM Expired	60 days post installation of the Commander Software	Every Transaction	Forecourt and POS functionality Disablement occurs at 90 days for Forecourt and 91 days for the POS. **Occurs at midnight when the system is idle.**		Renew ASM License

Not Connected	Anytime after Onboarding		N/A		N/A	1. Work with your MNSP to confirm connectivity to Verifone C-Site is maintained. 2. Contact the helpdesk for assistance.

Commander Release 54.02

Topic	When will this appear	Frequency	Feature Disablement	Messages	Resolution
Commander not onboarded	60 days post installation of the Commander Software	Every transaction	Forecourt and POS functionality Disablement occurs at 90 days for Payment (inside), Self-Checkout, and Forecourt. POS is disabled at 91 days. **Occurs at midnight when the system is idle.**		Onboard the Commander

Commander Onboarded, but ASM Expired	60 days post installation of the Commander Software	Every Transaction	Forecourt and POS functionality Disablement occurs at 90 days for Payment (inside), Self-Checkout, and Forecourt. POS is disabled at 91 days. **Occurs at midnight when the system is idle.**	 	Renew ASM License

Not Connected	Anytime after Onboarding		N/A		1. Work with your MNSP to confirm connectivity to Verifone C-Site is maintained. 2. Contact the helpdesk for assistance.

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