



Setting Up Verifone CR for Scan Data

Loyalty Promotions

Configuration Guide

Version 1.1

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CONFIGURING VERIFONE FOR SCAN DATA LOYALTY PROMOTIONS

The procedure for configuring the Verifone cash register for Scan Data Loyalty promotions implies connecting the Verifone cash register to the Petrosoft Loyalty host with the DC-401 installed.

Before you begin configuring the Verifone CR for Scan Data promotions, make sure the following conditions are met:

- The Verifone Ruby2 cash register has Commander Software Base 49 or higher. If your software version is older, please contact Verifone to upgrade your software.
- The cash register and DC-401 are installed properly and physically connected.



Please note that only DC-401 must be installed. DC-101, DC-301, and DC-501 are not compatible with Scan Data Loyalty promotions.



For more information about how to install the cash register and DC-401, refer to the following documentation:

- CR manufacturer's official documentation.
- The [DC-401](#) section in Petrosoft University Portal.

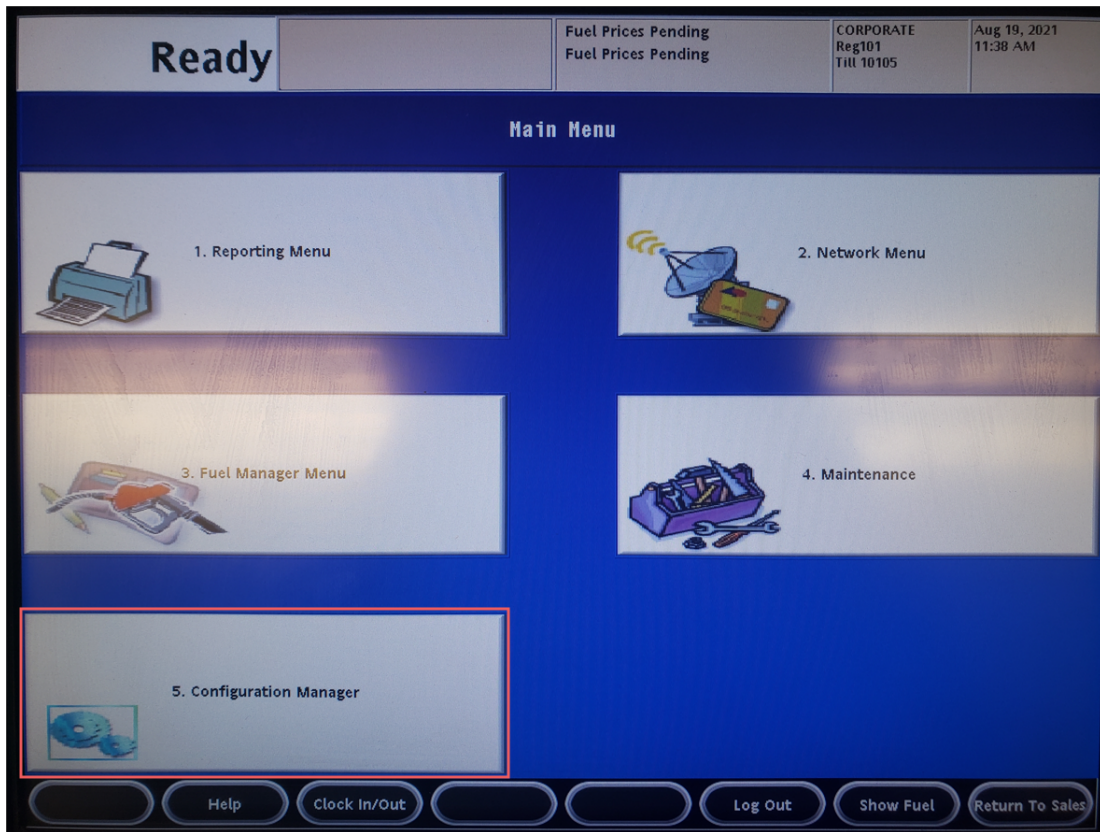
The Verifone Ruby2 cash register is configured via the Verifone Ruby2 console. To log into the Verifone Ruby2 console, you will need to use the manager's credentials. Make sure you have the manager's credentials prepared, before you start configuring the cash register.

To configure the Verifone Ruby2 cash register for the Scan Data Loyalty promotions:

1. At the cash register on the site, open the Verifone Ruby2 console and log into it:
 - a. At the bottom right of the main commander register screen, select **CRS Functions**.

Result: A new screen with several new options opens.

- b. In the new screen, select **5. Configuration Manager**.



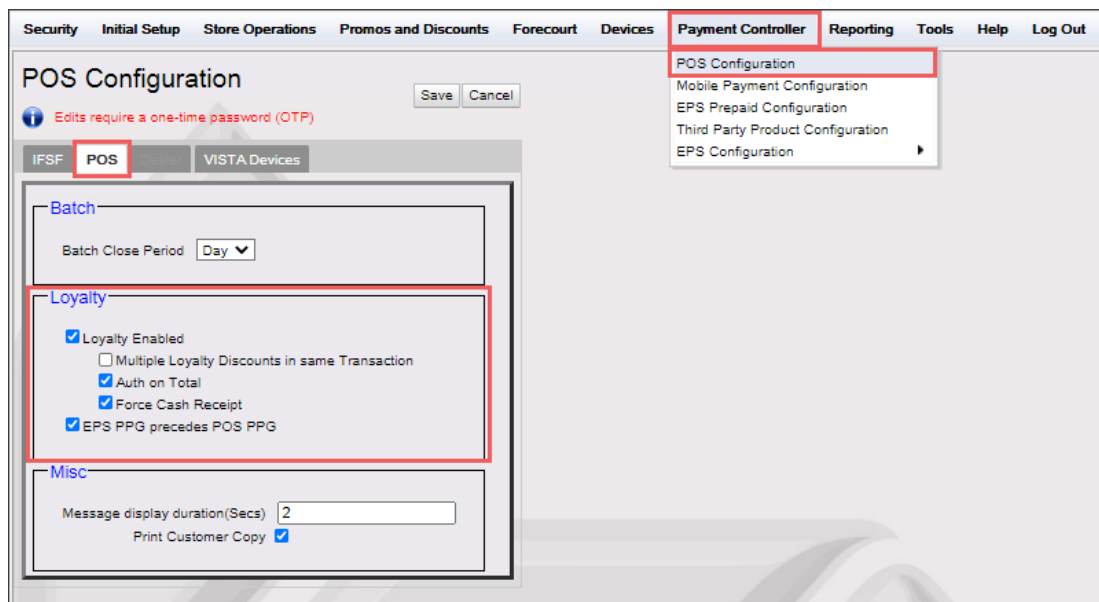
Result: The Sign In screen is displayed.

- c. In the **Sign In** screen, type the user name and password and then tap **Sign In**.



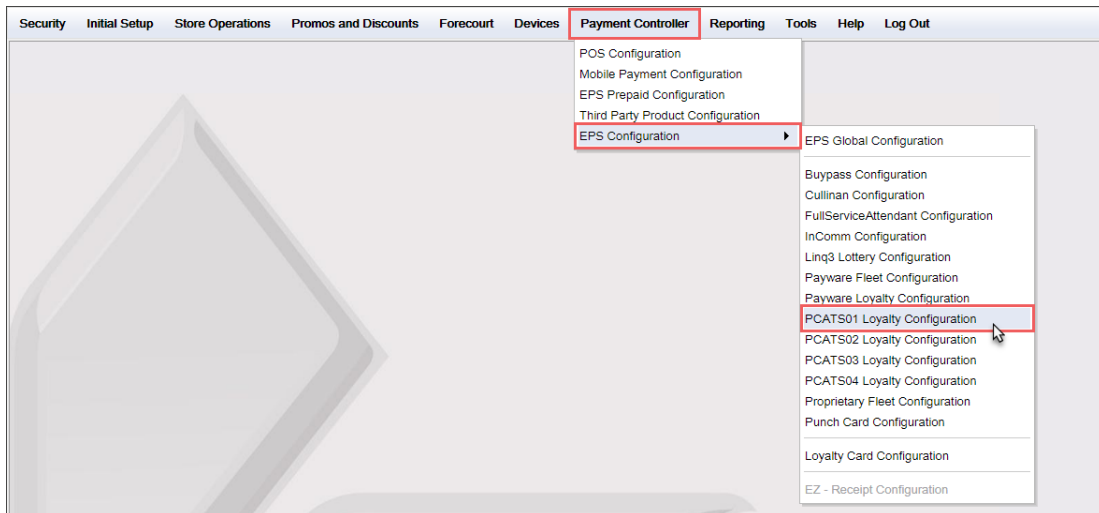
2. Configure POS settings.
 - a. Click **Payment Controller > POS Configuration**.

- b. In the **POS Configuration** form, click the **POS** tab.
- c. In the **Loyalty** section, select the **Loyalty Enabled** option, to activate loyalty on the cash register.
- d. Specify other loyalty parameters, if needed:
 - **Multiple Loyalty Discounts in Same Transaction:** Unselect this option.
 - **Auth on Total:** Select this option. If it is selected, a cashier needs to authorize loyalty promotion each time the **Total** button is pressed. If the **Auth on Total** is unselected, the loyalty promotion is authorized only during the sale completion at the cash register.
 - **EPS PPG Precedes POS PPG:** Select this option, if you need to apply EPS (Electronic Payment System) PPG (Pay per Gallon) settings before POS PPG settings.
- e. At the top right of the **POS Configuration** form, click **Save**.



3. Configure EPS module settings:
 - a. In the main console menu, click **Payment Controller > EPS Configuration**.
 - b. In the **EPS Configuration** sub menu, select a free PCATS Loyalty Configuration, which will be used for configuring loyalty settings, from any of the following available hosts:
 - **PCATS01 Loyalty Configuration**
 - **PCATS02 Loyalty Configuration**
 - **PCATS03 Loyalty Configuration**

• PCATS04 Loyalty Configuration



Result: The PCATS Loyalty Configuration form for the selected loyalty host opens.



Please note that the PCATS Loyalty Configuration you selected must be free and available for setup. Otherwise, you may erase other loyalty settings and accidentally deactivate other loyalty program.

HOW TO MAKE SURE THAT THE PCATS LOYALTY CONFIGURATION IS AVAILABLE FOR SETUP

To check if the PCATS Loyalty Configuration is free and available for setup:

- 1n the main console menu, click **Payment Controller** > **EPS Configuration**.
- 2n the **EPS Configuration** sub menu, select the **PCATS Loyalty Configuration** you need:
 - o The selected PCATS Loyalty Configuration is free and available for setup: If it has no other loyalty settings configured as it is displayed in the image below.

This PCATS Loyalty Configuration without other loyalty settings is free and available for setup.

PCATS03 Loyalty Configuration

Edits require a one-time password (OTP)

Network

FEP Enabled

Dealer ID

Program Name

Loyalty Offline Receipt Message

Enable Barcode Scan

Enable Card Download from Host

Display Loyalty Fep Offline to Hybrid Cards

Communication Options

Mode

IP

Serial

Dial

Communication Options

IP/Domain Name

Port

Enable SSL

Heartbeat Timer

FEP Parameters

Key Index

Reconciliation Period Options

Custom Reconciliation Period Enabled

Custom Reconciliation Period Time

- o The selected PCATS Loyalty Configuration is not free and must not be used for setup: If it already has other loyalty settings configured.

c. In the **PCATS Loyalty Configuration** form > **Network** section, configure the following mandatory settings:

- **FEP Enabled:** Select this option.
- **Dealer ID:** Enter the location (or Business Unit) ID from CStoreOffice®. You can find your location ID in the Locations list.

i For more information on how to open the locations list to find your location ID, see [Setting Up Locations](#).

💡 For example, for the **Cochran** location, its **ID** value is equal to **82** as it is displayed in the image below.

Please note that the **82** ID value in this image is given only as an example and belongs to the **Cochran** location. To configure your cash register, you will need to find the ID value of your location.

☰
CStoreOffice®

DOCS & FILES
DATA ENTRY
INVENTORY
PRICING

Locations

Id	Name
82	Cochran



For Certification purposes, use the following identifiers:

- **21126**: The **Dealer ID** value for USA.
- **24286**: The **Dealer ID** value for Canada.

- **Program Name**: Enter the loyalty program name. For example, *Petrosoft Scan Data*.

d. In the **PCATS Loyalty Configuration** form > **Communication Options** section, configure the following mandatory settings:

- **IP/Domain Name**: In this field, enter the IP address of the DC Box.



In the image below, you can see the example of the IP/Domain Name value for the DC Box installed on the Cochran location. You will need to enter here the IP address of your DC Box installed on your location.



For Certification purposes, use the following IP address for USA and Canada: *192.168.31.16*.

- **Port**: Enter *9000*. You should always use this port value.
- **Enable SSL**: Leave this option unselected.
- **Heartbeat Timer**: Enter the number of seconds, to specify the frequency of sending the requests to loyalty host to check its availability. The recommended value is *300*.

The **Dealer ID** and **IP/Domain Name** values in this image are given only as an example. To configure your cash register, you will need to enter your own values into these fields.

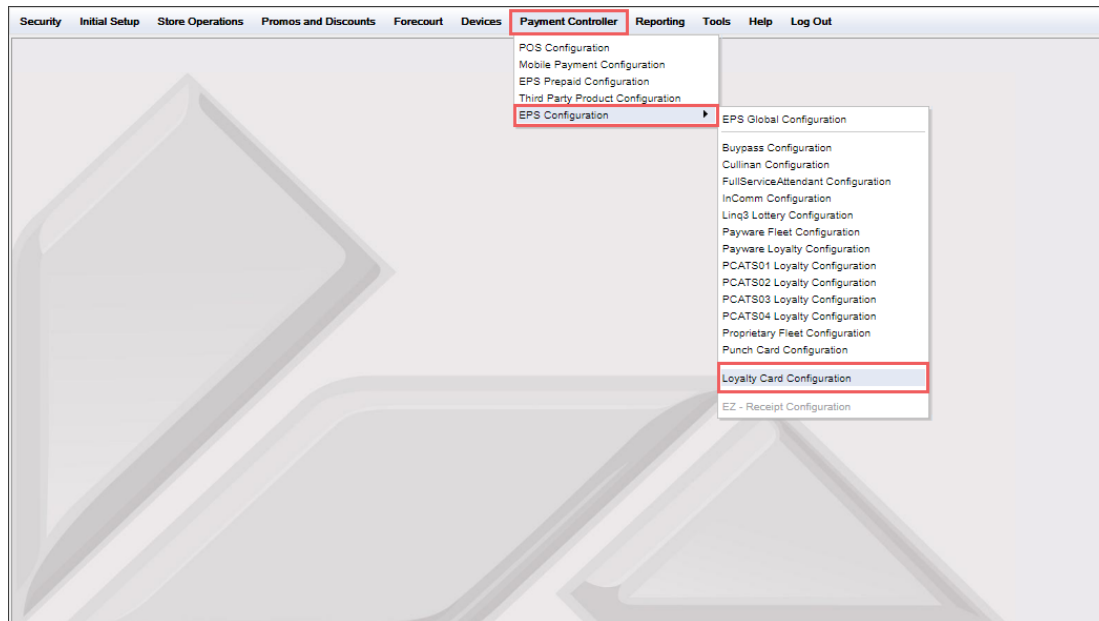
e. At the top right of the **PCATS Loyalty Configuration** form, click **Save**.

4. Add the loyalty card and configure its settings:



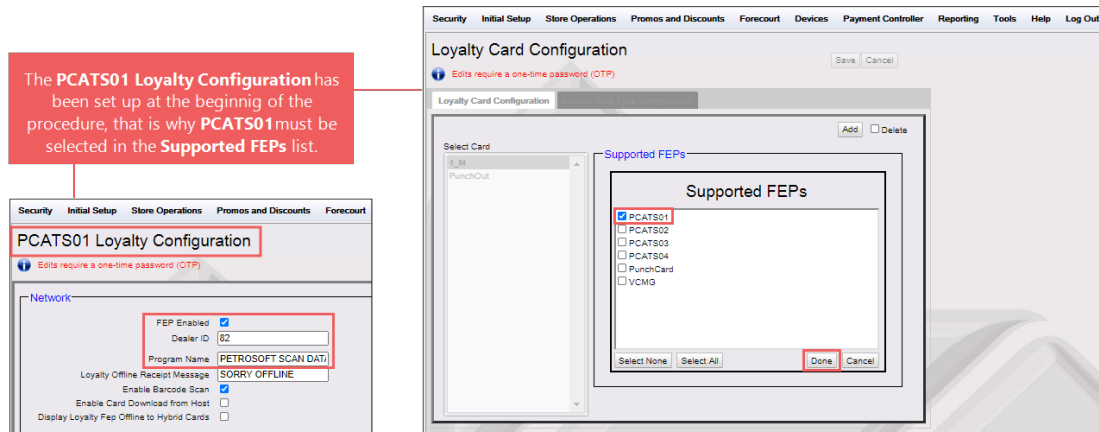
All settings in the step 4 are mandatory.

- a. In the main console menu, click **Payment Controller** > **EPS Configuration** > **Loyalty Card Configuration**.



- b. In the **Loyalty Card Configuration** form > **Loyalty Card Configuration** tab, click the **Add** button.
- c. In the **Card Information** form, configure the following loyalty card settings:
- **Card Table Index**
 - **Card Abbreviation**
 - **Card Name**
 - **Lower ISO:** Enter the beginning point of the card/phone number range.
 - **Upper ISO:** Enter the ending point of the card/phone number range.
 - **Pan Length:** Enter the maximum length value for the customer's card/phone number.
 - Select the **Card Enabled** option.
 - Select the **Accept Manual/Scanned Entry** option.
 - In the **Supported FEPs** option, click **Edit** and in the **Supported FEPs** list, select the same PCATS Loyalty Configuration you have just configured at the beginning of the procedure

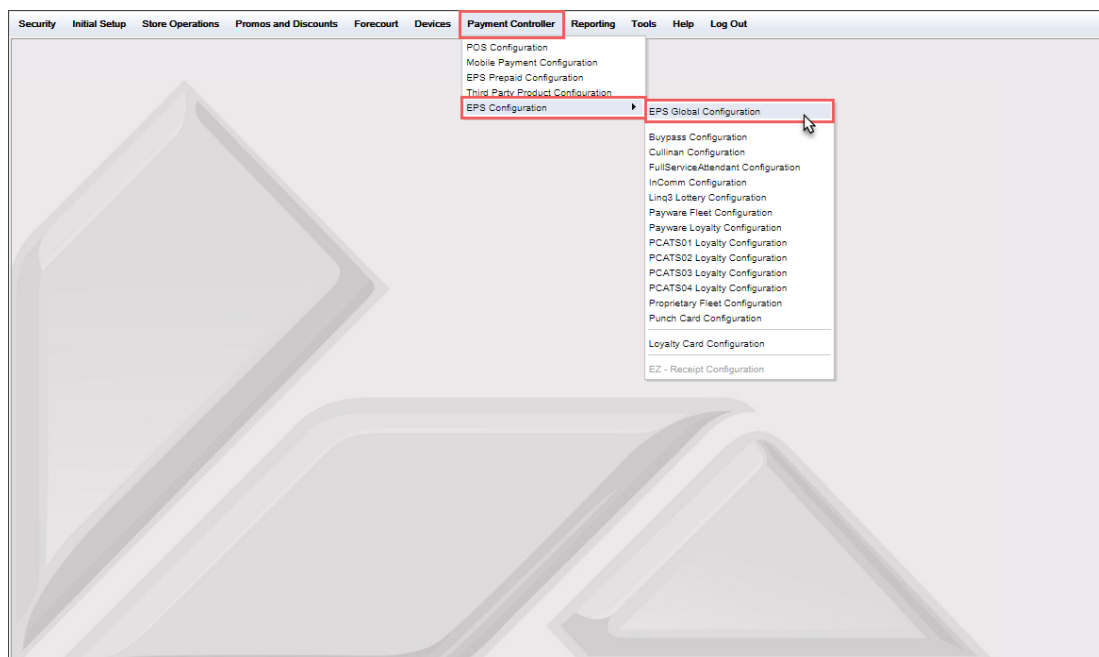
(see the example in the image below). Click **Done**.



d. At the top right of the **Loyalty Card Configuration** form, click **Save**

5. Configure loyalty settings:

a. In the main console menu, click **Payment Controller** > **EPS Configuration** > **EPS Global Configuration**.



Result: The EPS Global Configuration form opens.

b. In the **EPS Global Configuration** form, click the **Loyalty** section.

c. In the **Loyalty** section:

- a. Select the **Enable Alternate ID** option.
- b. Select the **Use Long Texts For Indoor Prompts** option.
- c. Configure additional loyalty settings, if needed.



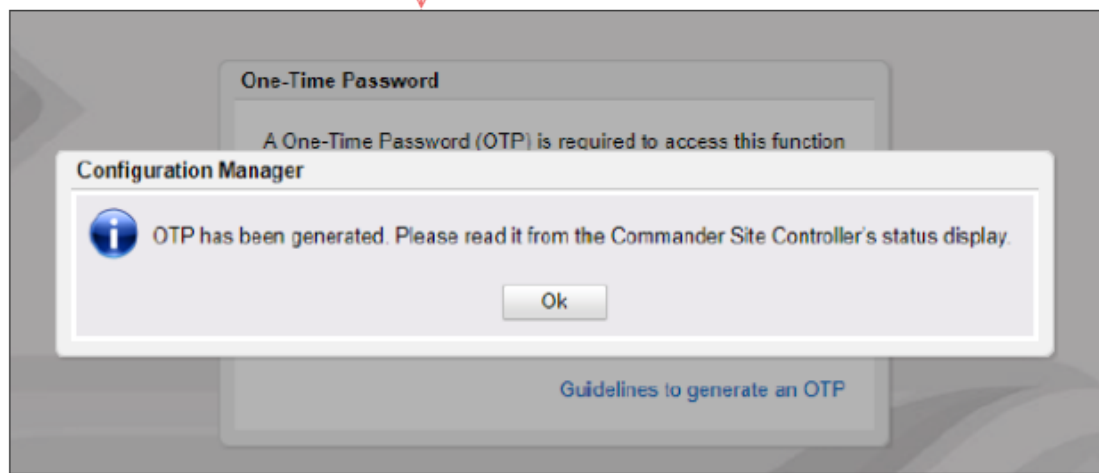
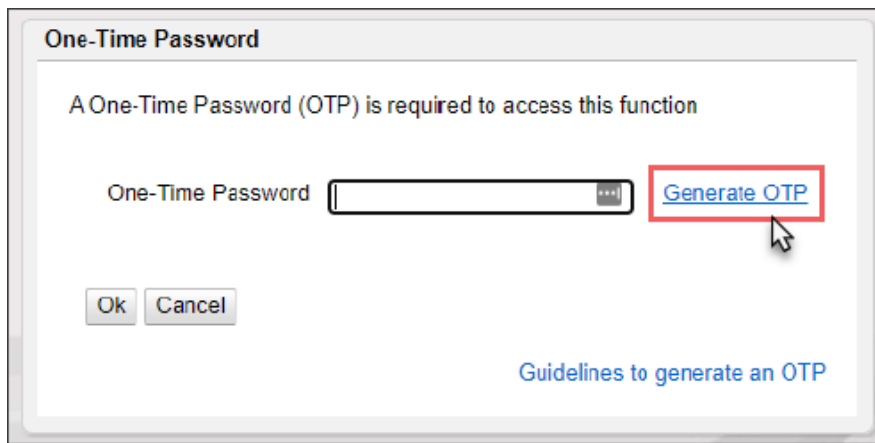
For more information about additional loyalty settings, refer to the manufacturer's official documentation

- d. At the top right of the **EPS Global Configuration** form, click **Save**.

6. Configure the loyalty route:

- a. In the main menu, go to **Initial Setup** > **Local Area Network Configuration**.

- b. In the **One-Time Password** window, generate a One-Time Password (OTP) on your commander and enter it into the field.
- For Full Commander, the code will be displayed on the front LCD panel.
 - For Ruby CI, the code will be displayed on the bottom right LCD panel in two sets of 2. The first set will be separated by a period.



Result: After the One-Time Password is generated and entered in the One-Time Password window, the Local Area Network Configuration form opens.

- c. In the **Local Area Network Configuration** form, go to the bottom and click **New**.

Local Area Network Configuration

Edits require a one-time password (OTP)

Global Routes

Route Type	Destination	Gateway	Netmask	Service
1-1 of 0				
<input type="button" value="New"/> <input type="button" value="Delete"/>				

Select Device Select Register

Device Specific IP Configuration

NIC Description	IP Address	Configure By DHCP	Default Route
Isolated payment NIC	192.168.32.11	false	true
Verifone Zone	192.168.31.11	false	false

Device Specific Routes

Route Type	Destination	Gateway	Netmask	Service
host	52.202.188.81	192.168.31.31	255.255.255.255	Commander Console
host	199.71.107.160	192.168.31.31	255.255.255.255	VHQ
host	199.71.106.30	192.168.31.31	255.255.255.255	VHQ Fail Over
host	192.30.100.116	192.168.31.31	255.255.255.255	VeriCenter(VRSD)
host	192.30.100.109	192.168.31.31	255.255.255.255	Alt IP1 of VeriCenter(VRSD)
host	192.30.100.117	192.168.31.31	255.255.255.255	Alt IP2 of VeriCenter(VRSD)
host	192.30.100.118	192.168.31.31	255.255.255.255	Alt IP3 of VeriCenter(VRSD)
host	192.131.0.184	192.168.31.31	255.255.255.255	Commander Configuration Manager

1-8 of 8

Result: The **New Route Config** window opens.

- d. In the **New Route Config** window, enter the following data:
- In the **Route Type** list, select **Network**.
 - In the **Destination** field, enter **192.168.87.0**.
 - In the **Gateway** field, enter **192.168.31.31**.
 - In the **Netmask** field, enter **255.255.255.0**.

- In the **Service** field, enter **Petrosoft Loyalty**.

New Route Config

Route Type: network

Destination: 192 . 168 . 87 . 0

Gateway: 192 . 168 . 31 . 31

Netmask: 255 . 255 . 255 . 0

Service: Petrosoft Loyalty

Buttons: Save, Cancel

- e. To apply the changes, reboot the site Controller: Commander or RubyCl.

Configuration Manager

Please reboot the Commander Site Controller if you have modified the IP Address

Button: Ok

- f. Check the connection status. From the main menu, go to **Tools > Helpdesk Diagnostics > Payment**.

Payment Controller Reporting **Tools** Help Log Out

- Rule Manager
- Managed Modules
- Refresh Configuration
- Ping Utility
- Image Upload
- Event Manager
- Helpdesk Diagnostics
 - General
 - ForeCourt
 - POS
 - Payment

Result: The Payment Status form opens.

Payment Status

2021-03-10 07:29:54

TEST PROGRAM	Status	Payment	Status
Connection Status	Online	Payment Controller	Online
Last Batch Closed	002		
Current Batch Number	3	Pinpads	
Current Transaction Count	37	POS ID	POP ID Status
IP Address	[REDACTED]	POS not logged In	001 Online
Last Transaction Date	2021-02-19 15:59:23		
Current Net Amount	414.76		
Current Terminal Batch	39		
Store and Forward Count	0		

Saving Sensitive Data in the Verifone Ruby 2 Console

For saving a certain sensitive data in the Verifone Ruby2 console, you will require to enter a one-time password (OTP).

To get instructions on how to generate OTP, in the **One-Time Password** form, click the **Guidelines to generate an OTP** link.

One-Time Password

A One-Time Password (OTP) is required to access this function

One-Time Password

Generate OTP

Ok
Cancel

Guidelines to generate an OTP



The **One-Time Password** form opens each time you click **Save** on the form with the sensitive data.