

SAVE EVERY MILE®



Save Every Mile POS Loyalty Loading Instructions Verifone Commander -Ruby CI, Ruby II, Topaz, Commander

Please Note:

The instructions for loading loyalty are the same regardless of the Verifone POS type. The screenshots will be different according to the software version your system is on. This version was commander Base 51.43.

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Key Support Contact Information

Verifone

POS Help Desk Support: 1-800-837-4366
Choose Opt.1, Opt.1. Opt. 1

Please have your Locations Verifone Service ID number available.

ASM - Contract Services: 1-800-837-4366, Choose Opt. 2 Opt. 5

Techquidation (2D Scanners)

678-213-4094

PDI (Controlscan/Echosat)

800-371-1118 Ext. 2 for assistance with installing or trouble shooting loyalty equipment.

800-317-1118 Ext. 3 for assistance with loyalty program support.

Clark Crown

Client Services- 877-GO-CLARK (877-462-5275)

Barb Nolan, Director POS & Products

Email: bnolan@clarkbrands.com

Phone Number: 630-940-7003

Loyalty

Mobile App or Point Questions: saveeverymile@velocitylogicgroup.com

Before You Start

Information Needed

- Service ID Number – this is needed if you need Verifone POS Support.
- Clark Crown 4-digit store number
- Verifone Configuration Manager Username and Password

Verifone Software

The recommended software version is the latest one that is available from Verifone but at least version 51.42.

The minimum software version to be able to use loyalty is 43.18 but has know issues that have been corrected in future versions.

Scanner

It is recommended that you have a 2D Scanner to allow for scanning item barcodes and the loyalty ID within the mobile application.

The recommended scanner is the Gryphon GD4590V which can be ordered from Techquidation (678-213-4094).

Datalogic Gryphon

\$347

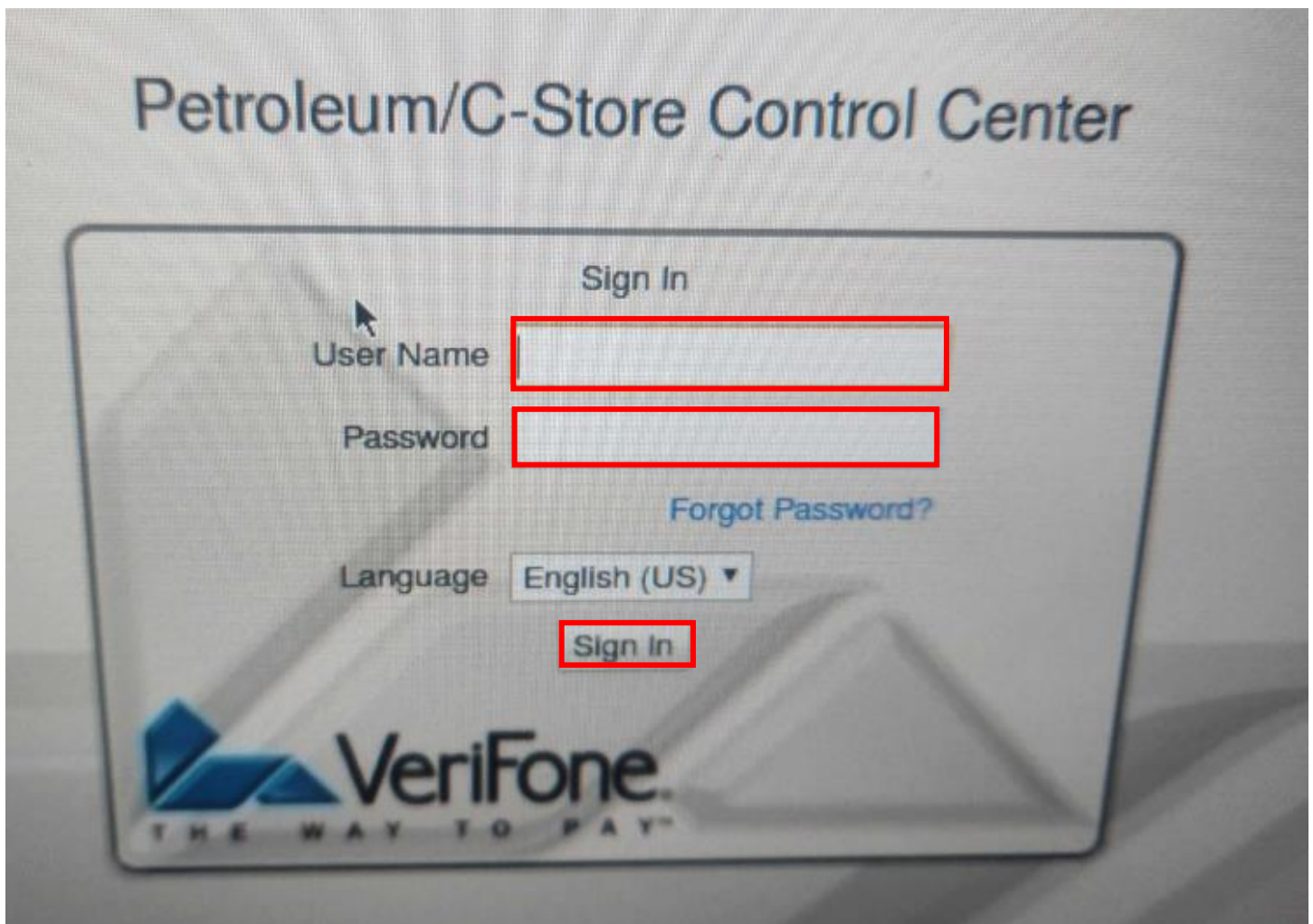
Integrated base: Presentation and
Handheld mode
5 Year manufacturer Warranty



GD4590

Setup Loyalty – Logging on to Configuration Manager

- Step 1: Login to the Cashier Workstation Screen
- Step 2: Go to CSR Function (bottom right corner of screen)
- Step 3: Go to Configuration Manager
- Step 4: Enter the Username and Password and Click Sign In

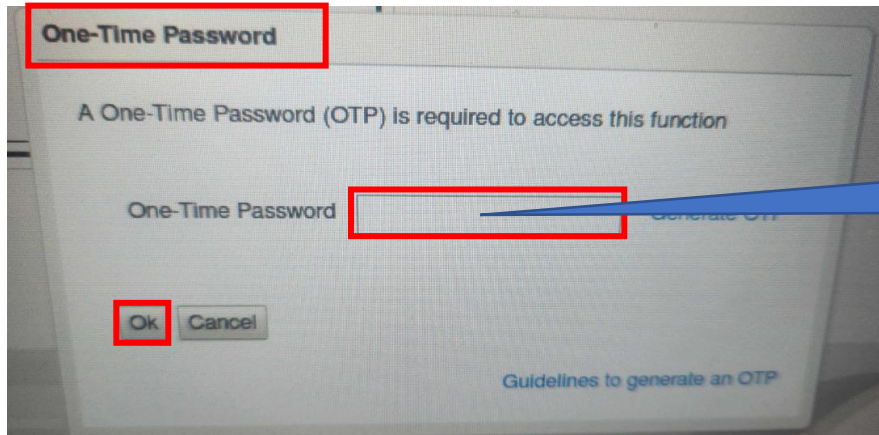


You are now in the Configuration Manager.

Setup Loyalty – One-Time Password (OTP)

To update settings in the Configuration Manager, you may be requested to enter a one-time password (OTP). When this occurs, the below steps should be followed to generate and enter the one-time password.

Step 1: Click Generate OTP.



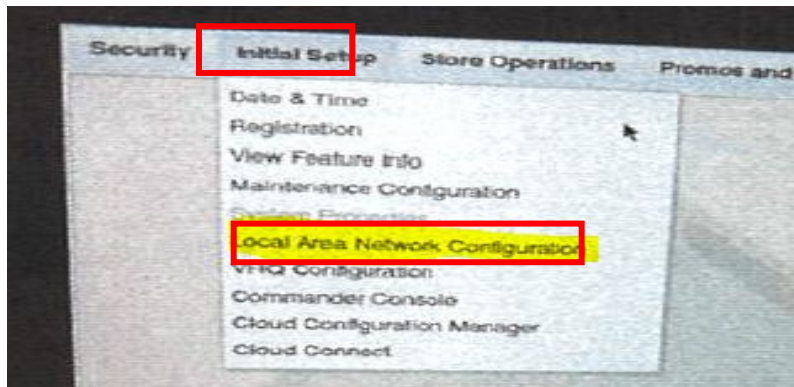
Step 2: This will generate a four-digit one-time password on the RubyCi. This can be found on the right side of the RubyCi. Two numbers will appear at a time in the Status. The first two numbers have a period between them followed by the next two numbers as depicted below.



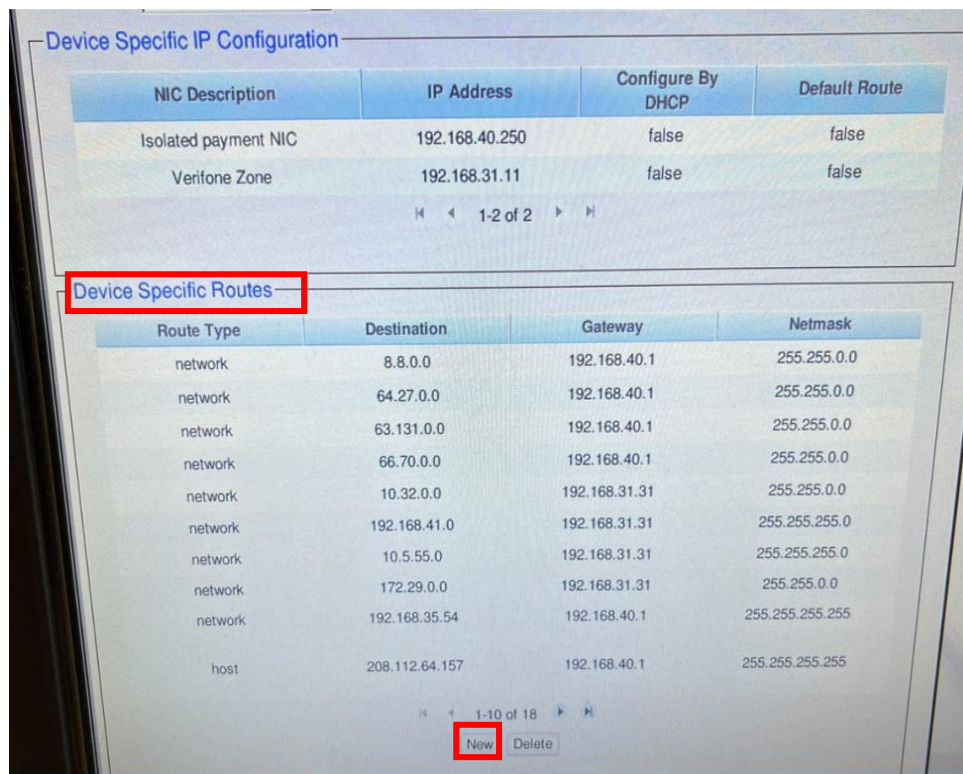
Step 3: Enter the four- digit number in the One-Time Password box and click Ok.

Setup Loyalty – Loyalty Host Address

Step 1: Go to Initial Setup -> Local Area Network Configuration



Step 2: You will be in the Local Area Network Configuration. You will need to click the New button under the Device Specific Routes



Click "NEW" which will take you to entering the New Route Configuration Screen

New Route Config

Route Type:

Destination: . . .

Gateway: . . .

Netmask: . . .

Service:

Step 3: Enter the Loyalty Device Specific Route as outlined below:

Route Type: **host**
Destination: **208.112.64.157**
Gateway: **192.168.40.1**
Netmask: **255.255.255.255**
Service: **SAVE EVERY MILE**

Step 4: "Click" Save" at the lower left corner as well as the top of the screen.

New Route Config

Route Type:

Destination: . . .

Gateway: . . .

Netmask: . . .

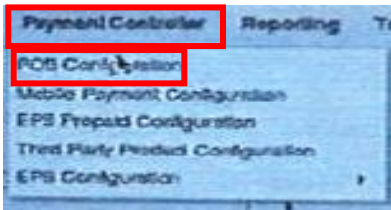
Service:

The New Route configuration should now be complete.

Step 5: "Click" Save at the top of the screen.

Setup Loyalty – Enable Loyalty

Step 1: Go to Payment Controller -> POS Configuration

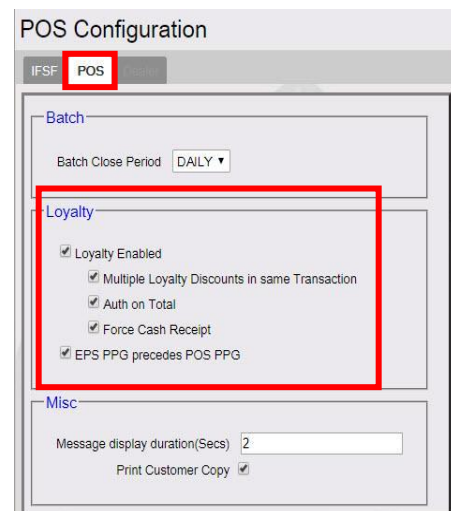


Step 2: Select the POS Tab and click the boxes as indicated below:

Loyalty Enabled:
Multiple Loyalty Discounts in same Transaction:
Auth On Total:
Force Cash Receipt:
EPS PPG precedes POS PPG:

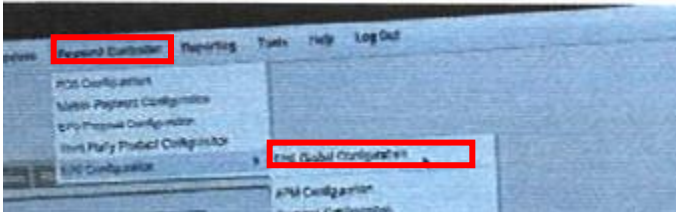
Check
Check
Check
Check
Check

Step 3: Click Save at the top of the screen.

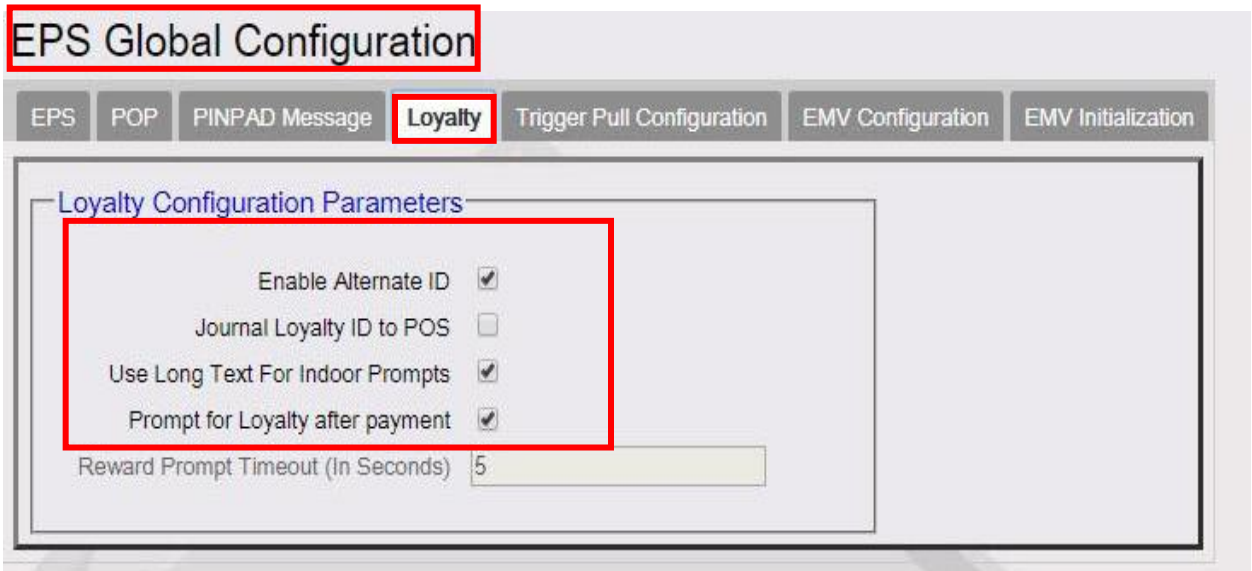


Setup Loyalty – Enable Alternate Loyalty ID

Step 1: Go to Payment Controller -> EPS Global Configuration



Step 2: Select the Loyalty Tab and click the boxes as indicated below:

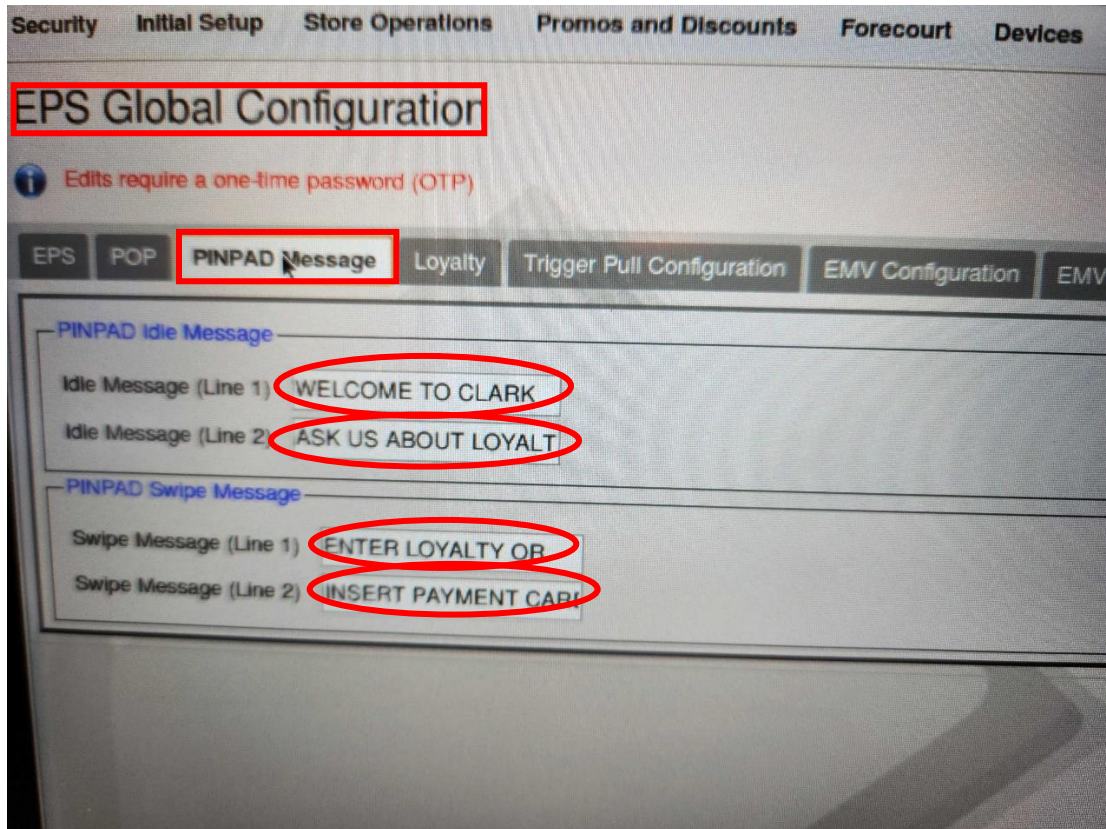


- | | |
|-----------------------------------|--------------|
| Enable Alternate ID: | Check |
| Journal Loyalty ID to POS: | Do NOT Check |
| Use Long Text for Indoor Prompts: | Check |
| Send Reward Prompt to Cashier: | Check |
| Prompt for rewards on fuel only: | Do NOT Check |

Step 3: "Click" Save at the top of the screen.

Setup Loyalty – PIN Pad Idle Message

Step 1: Go to the PINPAD Message Tab of the EPS Global Configuration (Payment Controller -> EPS Global Configuration) and Enter the information below:



Idle Message (Line 1): **WELCOME TO [NAME OF BUSINESS]**

Idle Message (Line 2): **ASK US ABOUT LOYALTY**

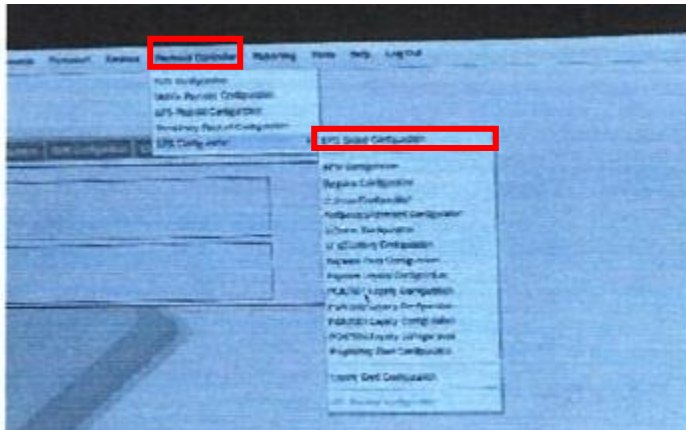
Swipe Message (Line 1): **ENTER LOYALTY ID OR**

Swipe Message (Line 2): **INSERT PAYMENT CARD**

Step 3: Click Save at the top of the screen.

Setup Loyalty – Loyalty Configuration

Step 1: Go to Payment Controller -> EPS Configuration -> PCATS01 Loyalty Configuration (if you have another loyalty program setup in PCATS01, select the next available PCATS number)



Step 2: In the Loyalty Configuration, you will need to setup the loyalty program with the following information below this picture of PCATS01 Loyalty Configuration diagram.

PCATS01 Loyalty Configuration

Network

FEP Enabled

Dealer ID

Program Name

Loyalty Offline Receipt Message

Enable Barcode Scan

Display Loyalty Fep Offline to Hybrid Cards

Communication Options

Mode

IP
 Serial
 Dial

Communication Options

IP Address (IPv4 Format)

Port

Heartbeat Timer

FEP Parameters

Journal Enabled

Reconciliation Period Options

Custom Reconciliation Period Enabled

Custom Reconciliation Period Time

Annotations:

- Store Id (points to Dealer ID field)
- Host IP and Port (points to IP Address and Port fields)

Fill in the information below above in the PCAT01 Loyalty Configuration Above

Network

FEP Enabled:	Checked
Dealer ID:	30-#### (Enter the 4-digit Clark Crown store number such as 30-9997)
Program Name:	Save Every Mile
Loyalty Offline Receipt Message:	Loyalty Offline
Enable Barcode Scan:	Checked
Enable Card Download from Host:	NOT Checked
Display Loyalty FEP Offline to Hybrid Cards:	Checked

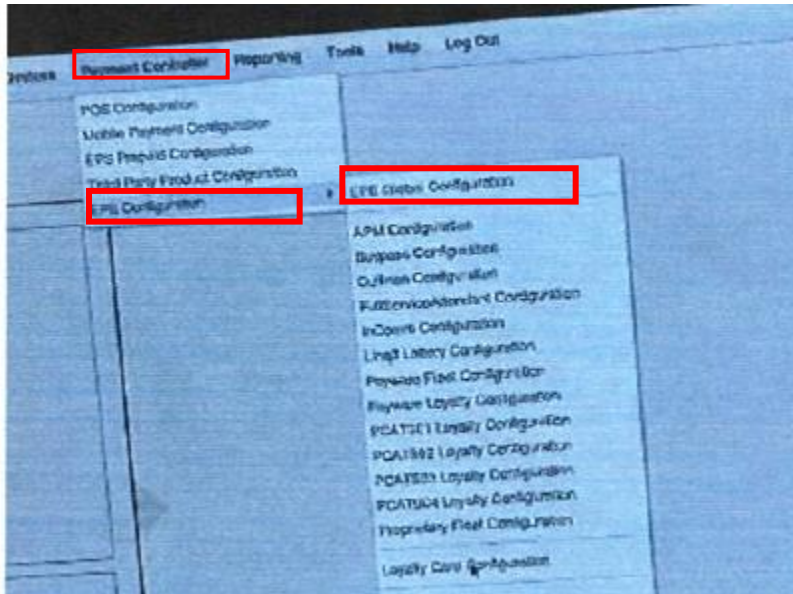
Communication Options

IP/Domain Name:	208.112.64.157-(This is the Velocity Logic Loyalty Host)
Port:	10200
Enable SSL:	NOT Checked
Heartbeat Timer:	300

Step 3: Click Save at the top of the screen.

Setup Loyalty – Loyalty Card Configuration

Step 1: Go to Payment Controller -> EPS Configuration -> Loyalty Card Configuration



Step 2: To Setup the Alternate Loyalty ID. Click the Add button and then enter the ALT card information as depicted below this screen. The information is below the screen

Loyalty Card Configuration | Loyalty Card Type Configuration

Select Card

- DL1
- DL2
- DL3
- ALT**

Add Delete

Card Information

Card Table Index: ALT

Card Abbreviation: DA

Card Name: DL ALT

Lower ISO: 0

Upper ISO: 9

Pan Length: 10

Card Enabled:

Accept Track 1:

Accept Track 2:

Accept Manual/Scanned Entry:

Hybrid Card:

Supported FEPs: PCATS01 **Edit**



ALT ID information to input.



Card Table Index:	ALT
Card Abbreviation:	DA
Card Name:	DLALT
Lower ISO:	0 (zero)
Upper ISO:	9
Pan Length:	10
Card Enabled:	Checked
Accept Track 1:	Checked
Accept Track 2:	Checked
Accept Manual Scanned Entry:	Checked
Hybrid Card:	NOT Checked

Support FEPs

Click the Edit Button, select PCATS01 (unless a different PCATS number was chosen in the previous step.)

Step 3:

To Setup the Loyalty Card Range. Click the Add button and then enter the DL1 card information.

Card Table Index:	DL1
Card Abbreviation:	DL
Card Name:	DL#1
Lower ISO:	6852955
Upper ISO:	6852955
Pan Length:	17
Card Enabled:	Checked
Accept Track 1:	Checked
Accept Track 2:	Checked
Accept Manual Scanned Entry:	Checked
Hybrid Card:	NOT Checked

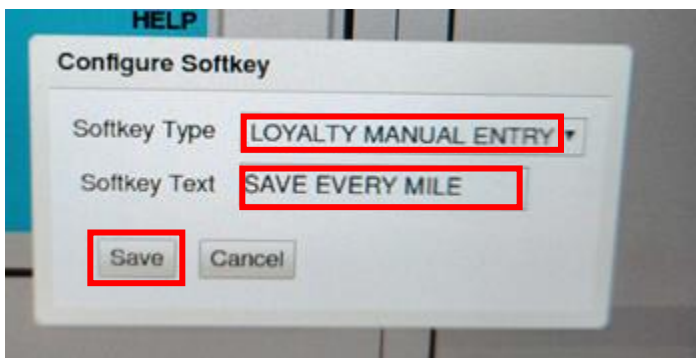
Support FEPs

Click the **Edit** Button, **select PCATS01** (unless a different PCATS number was chosen in the previous step).

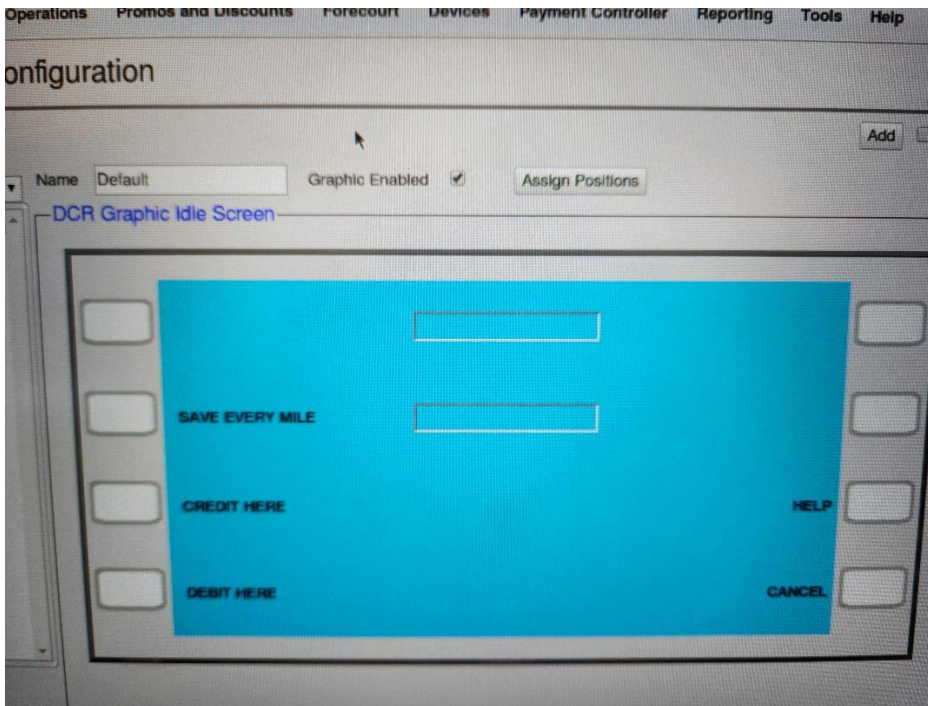
Step 4: Click **Save** at the top of the screen.

Setup Loyalty – Pump Message

- Step 1:** Go to Forecourt -> DCR Idle Screen
- Step 2:** Select the Idle Screen being used.
- Step 3:** Select an available button where you want the customer to select the Save Every Mile loyalty program.
- Step 4:** Select the **LOYALTY MANUAL ENTRY** Softkey Type and enter **"SAVE EVERY MILE"** in the Softkey Text



- Step 5:** Click the **Save** button on the pop-up screen. Your Screen should show the pump message.

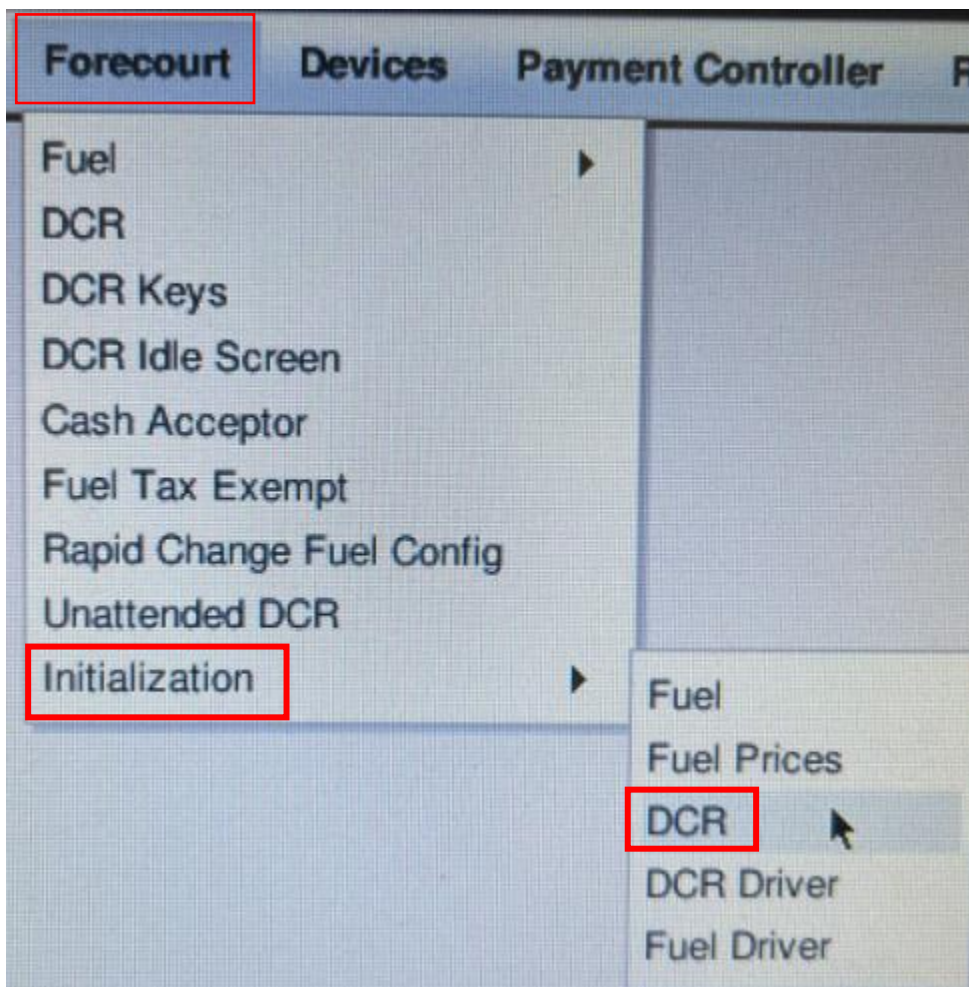


- Step 6:** Click Save at the top of the screen.

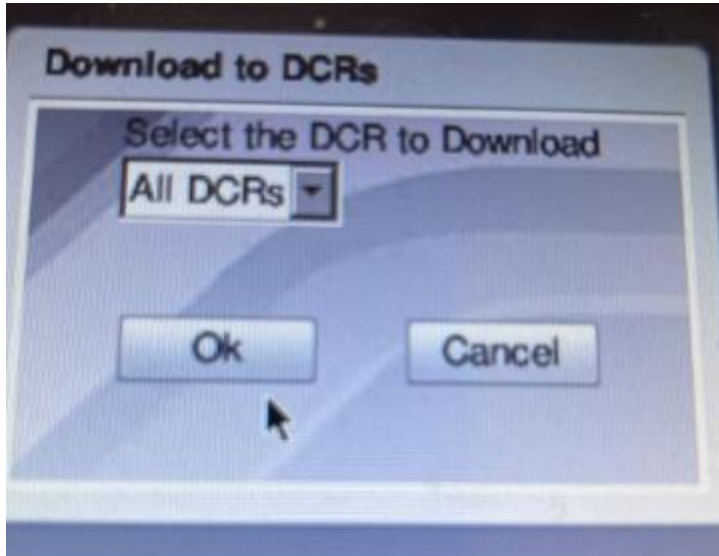
Setup Loyalty – Initialize Pump Message

This step will push the updated DCR idle screen to the pumps. Before proceeding, please make sure that there are no customers at the pump. This step will not allow cards to be taken at the pump for 5 to 10 minutes.

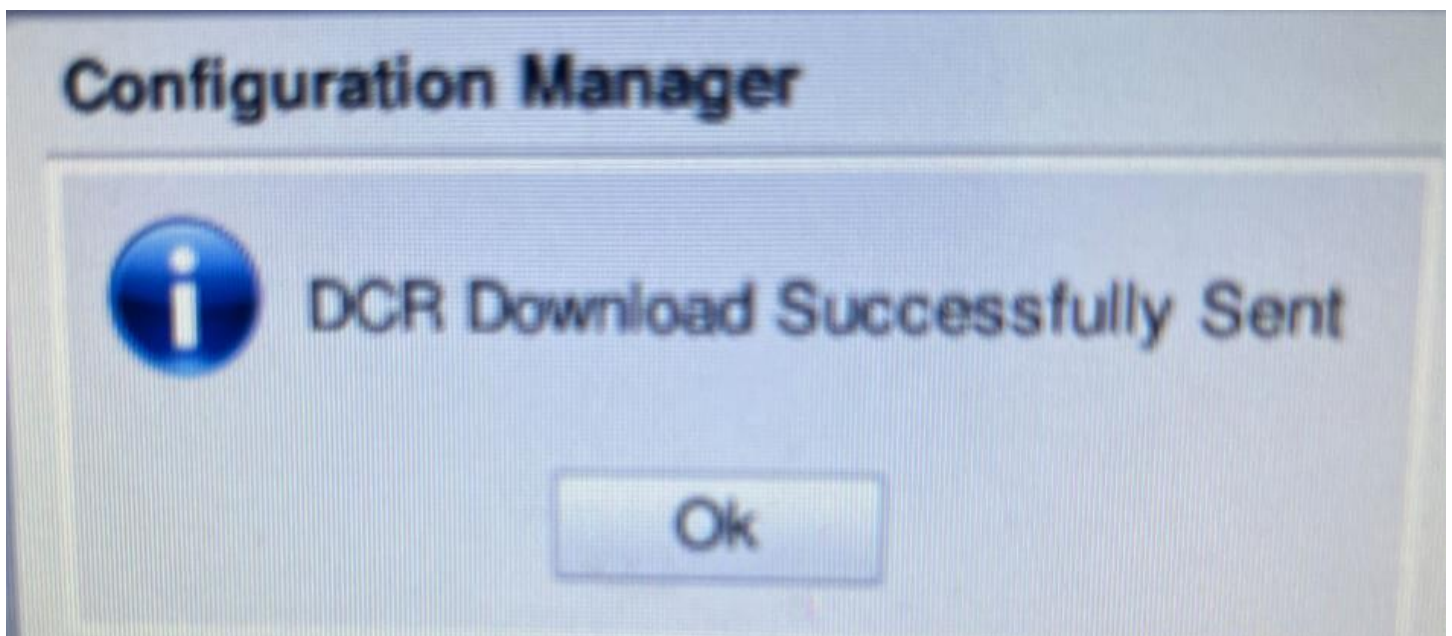
Step 1: Go to Forecourt -> Initialization -> DCR



Step 2: **Select All DCRs hit Ok.**



Successful Configuration.



Step 3: Select Okay

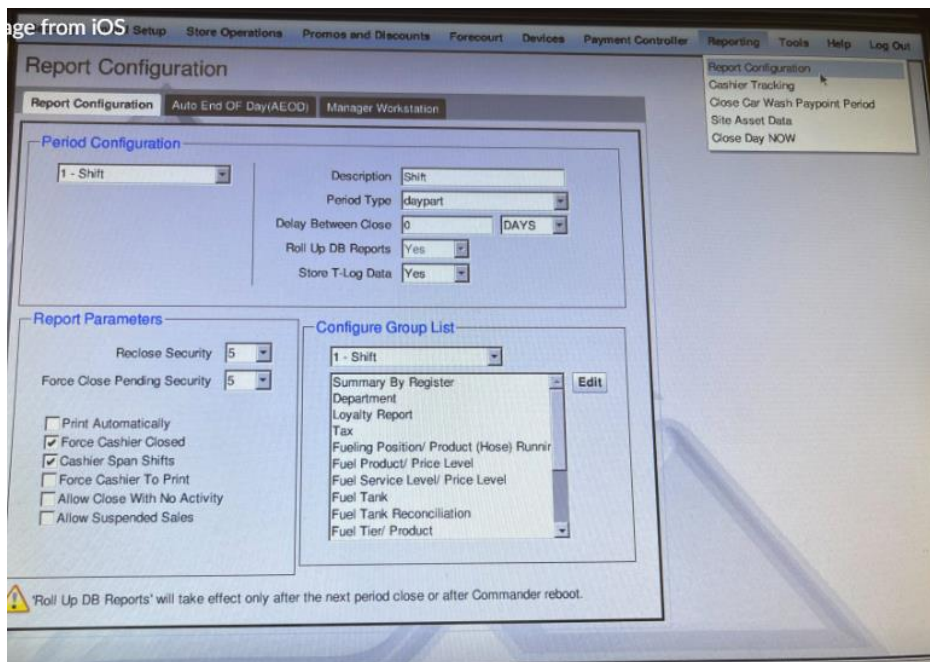
Setup Loyalty – Setting Up Loyalty Reports

Step 1: Go to Reporting -> Report Configuration

Step 2: Select Day Part in the Configure Group List

Step 3: Hit Edit, Check Loyalty Report, Click done button.

Repeat Step 2 & 3 for Day, Month, and Year (if you require the loyalty reports for those periods.)



Step 4: Click **Save** at the top of the screen.

Setup Loyalty – Completed

Congratulations, you have set up the Save Every Mile Loyalty program on RubyCi. You can exit the Configuration Manager by selecting the Log Out menu option.

Setup Verification

- Step 1: Go to the **Network Menu (CSR Function -> Network Menu)**
- Step 2: Select **Diagnostic Check Host Status**. This should **show** that the **Loyalty Host is online**. If the host is not online, this may be an indication of a communication program, please reach out to PDI at 800-393-3246 or Clark Client Services at 877-462-5275.

Loyalty Messaging Verification

Review the PIN pad(s) to ensure that it has the **“Save Every Mile” Message** and the **Loyalty Alt. ID**.

Review all pumps at the forecourt to ensure that they have the “Save Every Mile” option on the Pumps as well as the ability to enter the Loyalty Alt ID

Install the Mobile App for Testing

The **“Save Every Mile” mobile app can be downloaded** from **the app store on your phone**. You can search “Clark Crown” or “Save Every Mile”. You can also go to www.saveeverymile.com for a link to the mobile app.

Once you install the mobile app and register for an account, an email will be sent to verify your email address. Please follow the directions on the email to verify your account. Once your email address is verified, you are set up on the program.

Test a Transaction at the Pump

Perform a test transaction to ensure the **loyalty program** is properly **installed** and **the price rollback is working correctly**.

Select Save Every Mile at the pump and **enter the phone number** used to **register** on the Mobile App as the **Loyalty Alt ID**. **You should see the price rollback**.

Creating PLU/ UPC

To take advantage of the product offers within the mobile app, the product PLU/UPC codes must be set up. The below are the steps to create a new PLU/UPC.

Step 1: **Login** to the **Configuration Manager**

Step 2: Go to **Store Operations -> PLUs**.

Step 3: **Click** the **Add** button.

Step 4: **Enter** the following **required fields**:

PLU: **Enter the PLU or scan the item.**

Description:	Enter a description of the item
Price:	Enter the selling price
Sell Unit:	Enter the unit amount, typically 1.00.
Department:	Select the appropriate Department for the product
Product Code:	Choose the appropriate Product Code
Taxes:	Click Edit and select the appropriate taxes

Step 5: Review the rest of the information and update as necessary for your location and for the product being added.

Step 6: Click **Save** at the top of the screen.

Continue adding PLU Items following the instructions above until all PLU's and product UPC codes are entered. Please remember to click **SAVE** !

Test a "Save Every Mile" promotional item on your phone with your Mobile App.

Test a "Save Every Mile" promotional item using your ALT ID on the PIN PAD.