



VERIFONE TERMINAL TRAINING

**Processing Transactions on the
Omni 3750 / Vx510 / Vx570 Terminal**



**terminal
training**

Root Menu Screen



Training Tips

- The root menu will display all applications that have been loaded on your terminal.
- Preferred Loyalty Solutions and your credit card program (if installed) Preferred Loyalty Solutions are completely separate applications running on different processing networks.
- The CommServer application is software that controls Ethernet communication between your router and the terminal. This application is required to run transactions over the Internet.
- You can process transactions either over the Internet (recommended for fastest processing) or over dial up telephone lines (slower processing). If processing transactions over a phone line, the terminal dials a toll free number incurring no extra local or long distance charges.
- Press the **STAR (*) key** to toggle back and forth between applications such as your credit card program and Preferred Loyalty Solutions.



Basic Ethernet (IP) Troubleshooting



- Verify Ethernet cable is properly connected from your router to your terminal's **10BaseT** port located either at the back of the terminal (for Omni 3750s and Vx570s) or underneath the terminal (for Omni 3730s, Vx510s). The port illuminates when connected indicating an Internet signal is present.
- Press the **STAR (*)** key to access the root menu and verify the CommServer application is installed. Access CommServer and press the 3rd purple button from the left to access the Diagnostics menu. Select the **Troubleshoot** function and verify OK responses are returned.
- If failures are returned try **rebooting the terminal and/or the router** (in some cases) by unplugging the power cord and waiting 15 seconds. After turning the power back on the terminal, please wait at least 60 seconds **AFTER** the main menu appears for CommServer to initialize. Repeat above step and re-run Troubleshoot.
- If all OK responses are returned from Troubleshoot, press the **STAR (*)** key to access the root menu and select Preferred Loyalty Solutions. Process a test transaction. If the transaction fails to process, contact us for assistance at 1-888-541-1138.



Switching From Internet to Dial-Up Processing



Training Tips

- If your hi-speed Internet connection goes down for any reason, or you do not have Ethernet connectivity available in a certain location, you can switch the terminal to Dial-Up mode and process transactions using a phone line.
- Press the down arrow at the main menu and select Options (F2). Select **Connectivity (F2)** and press **F1** to toggle between **Internet Enabled** and **Phone Enabled**. Verify Phone Enabled is set in the F1 position.
- Exit the Preferred Loyalty Solutions application completely by pressing the **Red X Cancel** button followed by the **Star (*) key** to return back to the root menu each time you change these settings before re-accessing Preferred Loyalty Solutions.



PLS Main Menu Screen



Training Tips

- The main menu features the three main terminal functions, Record Sale, Balance Inquiry, and Load Value.
- Record Sale is the most commonly used function to enter the sale amount of customer transactions which drives the calculation of earned rewards.
- Press the down arrow button to access configuration options and report options from the main menu.
- Press the **Red X Cancel** button to return back to the main menu at any time.
- Clerks can swipe cards at the main menu screen to initiate a Record Sale transaction by default instead of pressing **F1 Record Sale**. Go ahead and press F1 or swipe a card to initiate a Record Sale transaction.



Swipe Card Screen



Training Tips

- If hand-keying, you do not need to enter the first 4 zeroes.
- If registered customer does not have their card available, you can enter their mobile number in this space by entering their number as follows: 856#456#8652 for 856-456-8652 and press ENTER to advance.
- Your batch of sequential card ID#s must be activated in the Preferred Loyalty Solutions system or card transactions will not process and return an error.
- All “standard” (non-fundraising) cards for regular customer distribution are automatically activated prior to shipment. However, all fundraising cards for non-profit distribution are NOT activated upon delivery and will not process upon receipt.
- Fundraising cards are activated one batch at a time after receipt of a properly submitted fundraising request form submitted online from your Preferred Loyalty Solutions account.



Record Sale Amount Screen



Training Tips

- On this screen the clerk simply enters the sales ticket amount for the current transaction. Rewards are issued based on this sales amount value.
- Always enter the full amount of the ticket in this screen. No discounting. No redemptions. This value should match the POS system ticket.
- It's up to management whether or not to include tax but worst case with inputting tax is the customer receives a few extra in rewards that triggers more spending.
- The Sale Amount Screen must be greater than \$0.00 or an error message will be returned with one exception. The Sale Amount screen can only be left at \$0.00 if performing a Unit redemption transaction (if enabled).



Category Screen (Optional)



Training Tips

- If enabled, general spending categories track the type of purchase made by the customer. Categories can be customized for each individual proprietor.
- Proprietors can load up to 8 categories (4 categories to a screen). Select the down arrow to access the next screen of available categories.
- Each category can have its own reward ratio. For example, Breakfast may yield 10% rewards while Lunch yields 20% rewards and Dinner yields 15% rewards.
- Reward ratios can be changed anytime through the Category Maintenance module. Please refer to our **Webinar: Using Category Maintenance to Configure Reward Ratios** available online from the Training Center for comprehensive instructions.
- Unlike the Internet Terminal, Verifone category label changes require a new file build and new download. Contact us for assistance at 1-888-541-1138.



Redemption Type Screen



Training Tips

- The Preferred Loyalty Solutions program enables clerks to record the sale transaction (for issuing rewards) and process a redemption (removing value from the card) in one consolidated transaction.
- Select **F2 Gift/Rwds** for either gift value or rewards redemption. The system automatically withdraws value from Gift Balance first (if available) followed by Rewards Balance.
- If enabled on your terminal, select **F3 Units** to perform a redemption of units (e.g., dining entrees, car washes, haircuts) that were pre-loaded on the customer's card. This Frequency application is optional and enabled only at client request.
- Selecting **F4 No Redemption** assumes only the cardholder's sale will be recorded for the purposes of issuing rewards back to the consumer.



Gift / Rewards Redemption Amount Screen



Training Tips

- Enter either the **exact** value to be redeemed by the customer toward the current ticket OR press **F3 Redeem All** if available balances are unknown.
- **Redeem All** overrides common Insufficient Funds errors to enable fast processing but requires clerks to collect the balance owed (Remittance Amount) from the customers to cover money owed.
- Cards **MUST** be activated to redeem rewards earned or preloaded on the customer's card. Activation occurs when the customer's email address has been authenticated through a Double OPT-IN process during registration.
- The Redeem All setting can be disabled from clerk use. Contact us at 1-888-541-1138 for instructions.



Unit Redemption Amount Screen (Optional)



Training Tips

- Enter either the **exact** number of units to redeem toward the current ticket. **DO NOT** press Redeem All unless the balance is clearly known by the clerk.
- Units (optional) and Gift Value can be redeemed regardless of whether the card has been activated.
- It is optional for clerks to enter a Sale Amount when performing a units redemption. The sale amount screen can either be left at \$0.00 or entered by the clerk. If sales amount is entered by the clerk, the cardholder will receive rewards based on this value.
- The **Redeem All** setting can be disabled from clerk use. Contact us at 1-888-541-1138 for instructions.



Final Confirmation Screen



Training Tips

- The final confirmation screen provides clerks with the opportunity to check the accuracy of the transaction details before processing and printing a receipt.
- Clerks can either press **Confirm F3** OR press the green **ENTER** button to confirm the current transaction and generate a receipt.
- Pressing the **Red X Cancel** button or **Cancel F4** will return clerk back to the main menu to redo the transaction.
- The merchant copy of the receipt automatically prints after a successful transaction. The clerk is prompted with the option to print a patron copy of the receipt or can cancel and return back to the main menu.



Inquiry Type Screen



Now let's take a look at the Balance Inquiry (F2) function located on the Preferred Loyalty Solutions Main Menu Screen.

Training Tips

- The Bal. Inquiry function allows clerks to check available cardholder balances, activation status, and recent transaction history without actually processing a transaction.
- Press **F2 Display Only** to show cardholder's balances and activation status on screen only.
- Press **F3 Print & Display** to generate a paper receipt with the cardholder's current balances and most recent transaction details.



Inquiry Display Screen



Training Tips

- After the communicating phase, the cardholder's available balances and activation status will appear on screen for clerk review.
- Press the down arrow to access the cardholder's most recent transaction details.
- Press the up and down arrows to scroll through the cardholder's most recent transactions for review.
- More detailed transaction history and display / sorting options can be viewed on the Reconciliation Report, available from your online account.
- All transaction details from the Reconciliation Report can be exported to CSV format (Excel spreadsheet compatible) for review and analysis.



Select Credit Type Screen



Now let's take a look at the Load Value (F3) function located on the Preferred Loyalty Solutions Main Menu Screen. We will walk through a Load Gift transaction only since Load Units and Load Reward transactions follow the exact same process.

Training Tips

- There are up to three separate currencies that appear on every printed receipt: **Gift, Units (Optional) and Rewards**. All three currencies can be manually loaded to execute a variety of prepaid strategies to drive visitation and frequency.
- When loading value, Gift Value and Units can be redeemed by customers regardless of whether or not the card has been activated. Rewards value, whether earned through sales activity, or preloaded in advance as an activation bonus, can only be redeemed by customers if the card has been activated.
- Please visit the Training area of your online account for ideas and strategies for increasing sales and ROI through prepaid gift and unit loads.



Load Gift Value Screen



Training Tips

- Enter the exact amount of value being purchased by the customer or manually loaded to run a prepaid marketing strategy. In this example, we are loading \$20.00 to the Gift Balance side of the card.
- After a successful transaction, the details appear immediately on your Reconciliation Report in real-time.
- The Auditing Configurations tool available online can be adjusted to flag any Load Gift transaction equal to or exceeding a predetermined threshold. Flagged transactions appear on your Fraud Monitoring Report for management review.



Load Gift Category Screen



Training Tips

- Select a category for the load. Press **F1 Prepay Load Bonus** to trigger a reward back to the customer on the Rewards side of a card.
- For example, if Prepay Load Bonus is set to 20%, a cardholder would receive \$4.00 in rewards as an incentive for loading \$20.00 on their card.
- Reward ratios can be changed anytime through the Category Maintenance module.
- Press the **F2 Prepay No Bonus** or **F3 Adjustment** category to record a Load Gift transaction without an associated reward bonus.
- Use the Adjustment category for correcting transaction mistakes or compensating cardholders for goodwill customer service subject to management authorization.



Final Load Gift Confirmation Screen



Training Tips

- The final confirmation screen provides clerks with the opportunity to check the accuracy of the transaction details before processing and printing a receipt.
- Clerks can either press **Confirm F3** OR press the green **ENTER** button to confirm the current transaction and generate a receipt.
- Pressing the **Red X Cancel** button or **Cancel F4** will return clerk back to the main menu to redo the transaction.
- The merchant copy of the receipt automatically prints after a successful transaction. The clerk is prompted with the option to print a patron copy of the receipt or can cancel and return back to the main menu.



Terminal Reports



Training Tips

- There is no settlement or batching function in the Preferred Loyalty Solutions application. All transaction reporting is available in real-time.
- Managers can access their reconciliation reports directly from the Verifone Terminal by pressing the down arrow at the Preferred Loyalty Solutions Main Menu screen and selecting **Reports F2**.
- There are two types of reports available for printing. Select **Detail Report F2** to access ALL individual transaction details for the day selected. Select **Summary Report F3** to access only summary level details by transaction type (Sales, Earned Rewards, Gift Redemptions etc.) for the day selected.
- For more detailed reporting and transaction details, including reporting by shift and clerk ID, please sign into your Preferred Loyalty Solutions account online and select **Reconciliation Report** for more advanced display options and filtering.



THANK YOU FOR YOUR ATTENTION



www.PLSRewards.com

For More Information: Call 1-888-541-1138 • Email: support@plsrewards.com