

PixelPoint[®]

Payback Integration

Publication Details

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Patents

The following patents apply to some areas of functionality within the PixelPoint software suite: Pat. 6,384,850; 6,871,325; 6,982,733; 8,146,077; 8,287,340

Revision History

4/22/2016 – Revision 0

Initial Release

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Overview

This integration allows for EPOS Payback Loyalty to be utilized within the PixelPoint POS.

Supported Functions

- Sale
- Refund
- Reload
- Balance Inquiry
- Redeem Loyalty
- Redeem Offers
- Receipts

Requirements

- POS.exe v. 12.3.6 or higher
- .NET Framework v. 4.0
- PBLWrapDLL.dll (copy into folder C:/PixelPOS)
 - Provided by Payback
- NLog.dll (copy into folder C:/PixelPOS)
 - Provided by Payback
- Payback.dll (copy into folder C:/PixelPOS/DLLS)
 - Provided by PixelPoint

Important: Before beginning with setup and configuration, ensure that the files *PBLWrapDLL.dll*, *NLog.dll* and *Payback.dll* have all been copied into their respective folders.

Policies

Enable the following policy in BackOffice:

- SecureBarMode
- UseCustomPayment

Note: The POS must be restarted for newly enabled policies to take effect.

Setup and Configuration

1. In BackOffice>General Setup>Coupon Setup, create a new coupon.
2. In the *Description* field, name the coupon.
3. In the *Type of Coupon* field, check **Manual by Amount**.
4. In the *Coupon* field, check **Applies to all categories**.
5. Check the box **Allow other category coupons**.

PayBack Offer ☒ Is Active? ✕

Coupon | Advanced

Description:

Security Level:

Revenue Center:

Max Coupon Amount:

Category:

☒ Manually Entered Description

Type of Coupon:

☐ Percent Off

☐ Amount Off

☒ Fixed Price

☐ Manual by Percentage

Minimum:

☐ Quantity

☐ Price

Coupon:

☐ Applies to certain categories

☒ Applies to all categories

☐ Applies to a product

☐ Applies to selected product

☐ Applies to certain products

☐ X for Y Coupon

☐ Apply to lowest priced Items first

X Value: Y Value:

☐ One per check maximum

☒ Allow other category coupons

☐ Allow other product coupons

☐ Apply only once if multiple products found

☐ Auto Calculate

☐ Auto Apply

☐ Auto Remove

☐ Apply to members only

Coupon:

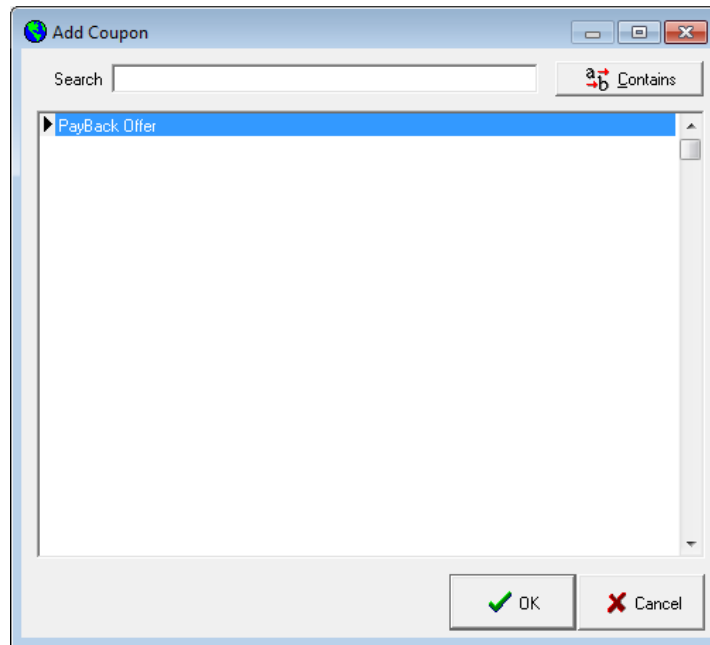
☐ Auto Order Item

☐ Client Points Coupon

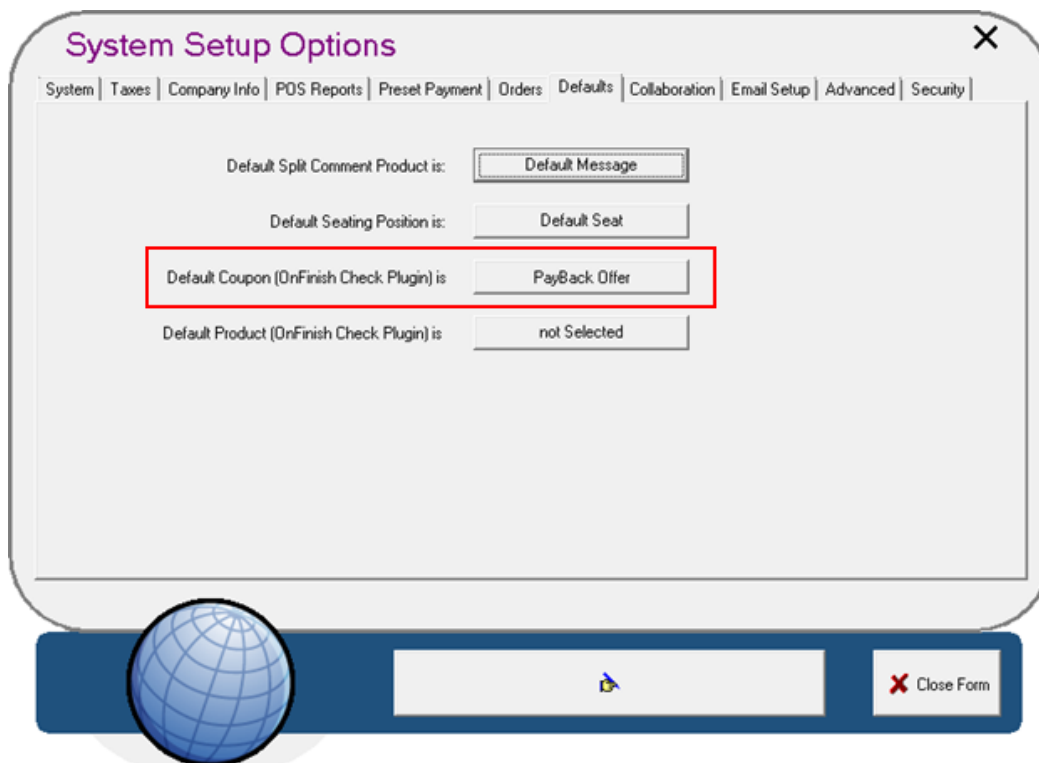
Coupon Setup

⏪ ⏩ ⏴ ⏵ ⏴ ⏵ + ✕ Close Form

6. Save the coupon and close the form.
7. In BackOffice>Administrator>System Setup, select the Defaults tab.
8. Click the button **Default Coupon**.



9. Select the newly created coupon from the resulting window.
10. Click **OK**.
11. The **Default Coupon** button should now show the name of the selected coupon.



12. Click the **Advanced** tab.

System Setup Options

System | Taxes | Company Info | POS Reports | Preset Payment | Orders | Defaults | Collaboration | Email Setup | Advanced | Security

OnFinish Check Plugin
PayBack.dll

Default Internet Employee
Not Set

Third Party Reservation Plugin

Setup button is enabled when Third Party Reservation Plugin is declared.
Configuration will vary depending on the Plugin.

13. Beside the *OnFinish Check Plugin* field, click the **Browse** button.
14. Load the file *Payback.dll* from the folder *C:/PixelPOS/DLLS*.
15. Close the form.
16. In BackOffice>Administrator>Payment Method Setup, create a new method of payment.

PayBack ☒ Is Active?

Method of Payment | Advanced | Payment Denominations

Report Category: Default

Description: PayBack ☐ Is Currency? Min. Security Required:

Exchange Rate: 1 # of Decimals: 2 % Emp Tip Surcharge (3=3%):

Select:

- ☐ No Authorization
- ☐ Member/VIP Auth.
- ☐ Credit Card Auth.
- ☐ Front Desk Auth.
- ☐ Debit Card
- ☒ Custom
- ☐ Gift Card (third party)
- ☐ External Authorization

Payment Options:

- ☒ Sale Auth (No PreAuth)
- ☐ Disable Cash Drawer Opening
- ☐ Allow Retip
- ☐ Force Tender Settlement
- ☒ Show Calculated Tendered Amt.
- ☐ Is Bank Deposit Item (non-EFT)
- ☐ Ask For Cashback

Card Prefixes:

Methods of Payment Setup

17. Name the new payment type 'Payback'.
18. Set the Payment Type to **Custom**.
19. Check the box **Sale Auth (No PreAuth)**.
20. Click the **Advanced** tab.
21. Check the box **Do not ask for swipe**.

PayBack Is Active?

Method of Payment | **Advanced** | Payment Denominations

Accounting Code

Tip Accounting Code

Custom DLL

Cash Change Processing

☐ Print Customer Authorization Slip with Transaction Receipt
☐ ...and also when receipt is reprinted

Min Value ... Max Value ...

Printed Card Number Format

☐ Always Print on Receipt
☒ **Do not ask for swipe**
☐ Do not ask for Expiry Date
☐ Ask for CVV on manual entry
☐ Applies to internal member gift cards only
☐ Do not show in POS payment list
☐ Prompt for Payment Note
☐ **Allow Voids**

Methods of Payment Setup

22. Uncheck **Allow Voids**.
23. Beside the *Custom DLL* field, click **Browse**.
24. From the file *C:/PixelPOS/DLLS* load the file *Payback.dll*.
25. Click the **Setup** button.
26. In the Payback section of the Configuration window, enter the Payback-provided *Account ID*.
27. Check *Log Request and Response XML* if you want to store the XML generated by Payback during request-response calls.
28. In the PixelPoint section of the Configuration window, Check *Print Receipt in a separate slip* if you want Payback information to print on a separate receipt. If unchecked, the Payback receipt information will be included in the footer of the PixelPoint receipt.
29. Check *Log Request and Response XML* if you want to store the XML generated by PixelPoint during request-response calls.
30. Click **Apply** to save your settings and close the Payment Method Setup form.

Configuration

PayBack

Account ID

☐ Log Request and Response XML

PixelPoint

☒ Print Receipt in a separate slip
☐ Log Request and Response XML

Product Setup

1. In BackOffice>Products>Product Setup, create a new product.
2. Complete the boxes *Description* and *Printed Description*.
3. In the field *Price A*, enter a price for the item. Multiple pricings is supported, if desired.
4. Beside the *Report Cat* field, select a Report Category from the drop down menu.

5. Select the **Advanced** tab.

6. In the *Ref Code/UPC* field, enter the barcode provided by Payback for the product.
7. Repeat steps 1-6 for each product you wish to set up.

Using Payback

To begin using Payback in the POS, three new function buttons are required.

Return Entire Transaction

In order to return Payback transactions, an additional button is required on the Order Form. To add this button:

1. Go to BackOffice>Administrator>Form Designer and open the Order Form.
2. Create a new function button.

Tip: To easily match the style to the buttons already on the form, copy and paste an existing button.

3. Set the *Caption* field to **Return Entire Transaction**.
4. Set the *FunctionType* field to **ftOrder**.
5. Set the *FunctionName* field to **Return Entire Transaction**.
6. Save your changes and exit the form.

FunctionName	Return Entire Transaction
FunctionType	ftOrder

Payback Offers & Balance

In order to obtain card balances and Payback offers, two additional buttons are required on the Finish Form. To add these buttons:

1. In BackOffice>Administrator>Form Designer, open the Finish Form.
2. Create a new function button.
3. Set the *Caption* field to **Payback Balance**.
4. Set the *FunctionType* field to **ftOrder**.
5. Set the *FunctionName* field to **Balance Inquiry**.
6. Create a new function button.
7. Set the *Caption* field to **Payback Offers**.
8. Set the *FunctionType* field to **ftOrder**.
9. Set the *FunctionName* field to **Third Party Inquiry**.
10. Save your changes and exit the form.

FunctionName	Balance Inquiry
FunctionType	ftOrder

FunctionName	Third Party Inquiry
FunctionType	ftOrder

Note: The *Caption* field in the Button Editor sets the text that will appear on a button in the POS. Buttons can be named to the preference of the user. The *Caption* field entries shown above are suggestions.

Sale

To pay for a check using Payback:

1. Create an order.
2. Proceed to the Finish Form.

The screenshot shows a POS system interface with the following elements:

- Order Summary (Top Left):**

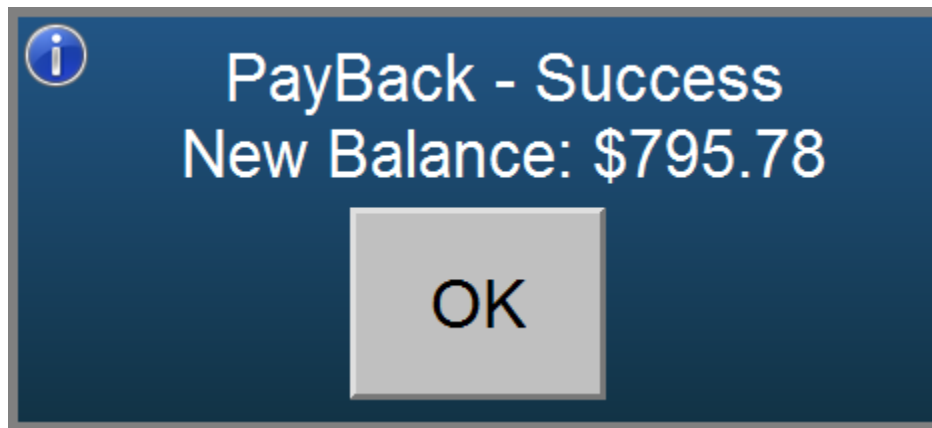
1	SALMON SMOKED	\$2.30
1	MC CAIN M/WAVE	\$1.00
1	Hot Dinner	\$2.00
1	Standard Offer 1	\$2.00
1	Standard Offer 2	\$1.25
1	DR OETKER MOZZA PIZZA 1	\$3.59
1	DR OETKER MOZZA PIZZA 2	\$3.59
1	Percent Discount Offer	\$5.50
- Payment Options (Top Right):** CASH, VISA, MasterCard, Amex, Discover Card, On Account, Debit, and a large **PayBack** button.
- Amount Due (Center):** \$21.23
- Net Total:** \$21.23
Final Total: \$21.23
- Buttons:** Payments..., Divide By, PayBack Balance, Get PayBack Offers, Dine-IN, No Tax, Next \$, and Apply PayBack.
- Bottom Bar:** # of Cust: 1, Time Seat: 3:17:41 PM, Server: Supervisor, Logout, Q#1, Help, Print Receipt, Coupons, Gift Card, and Leave.

3. Select **Payback** as the method of payment.
4. Apply the payment.
5. Swipe the Payback card when prompted by the system.

The screenshot shows a "PayBack" payment screen with the following elements:

- Title:** PayBack
- Instruction:** Swipe or scan your Card
- Image:** A logo with the letters "PB" inside a circular graphic.
- Buttons:** A red "Cancel" button.
- Footer:** Gift Card - Sale

6. If successful, the POS will display a confirmation message as well as the remaining balance on the card.



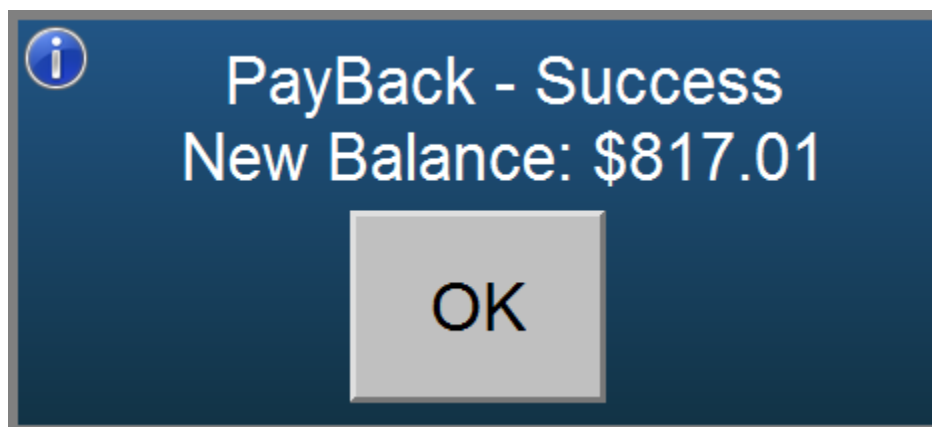
Refund

To refund a transaction that was paid for using a Payback card:

1. On the Order Form, select the newly added button **Return Entire Transaction**.
2. Enter the transaction number to be refunded. The transaction will appear on the Finish Form.
3. Select **Payback** as the method of payment.
4. Apply the payment.

The screenshot displays the POS system interface during a refund transaction. On the left, a list of items is shown with their respective prices: -1 SALMON SMOKED (\$2.30), -1 MC CAIN M/WAVE (\$1.00), -1 Hot Dinner (\$2.00), -1 Standard Offer 1 (\$2.00), -1 Standard Offer 2 (\$1.25), -1 DR OETKER MOZZA PIZZA (\$3.59), -1 DR OETKER MOZZA PIZZA (\$3.59), and -1 Percent Discount Offer (\$5.50). Below this list, the 'Net Total' is (\$21.23) and the 'Final Total' is (\$21.23). The interface includes buttons for 'Void Item', 'Dine-IN', 'No Tax', 'Next \$', 'Payments...', 'Divide By', 'PayBack Balance', 'Get PayBack Offers', and 'Apply PayBack'. A central numeric keypad is visible. On the right, a vertical list of payment methods is shown: CASH, VISA, MasterCard, Amex, Discover Card, On Account, Debit, and PayBack. The 'PayBack' option is highlighted. At the bottom, the status bar shows '# of Cust: 1', 'Time Seat: 3:25:09 PM', and 'Server: Supervisor'. Navigation icons for Logout, Q#1, Help, Print Receipt, Coupons, Gift Card, and Leave are also present.

5. Swipe the Payback card when prompted by the POS.
6. If successful, a confirmation message will appear and the new balance of the card will be displayed.



Issue & Reload

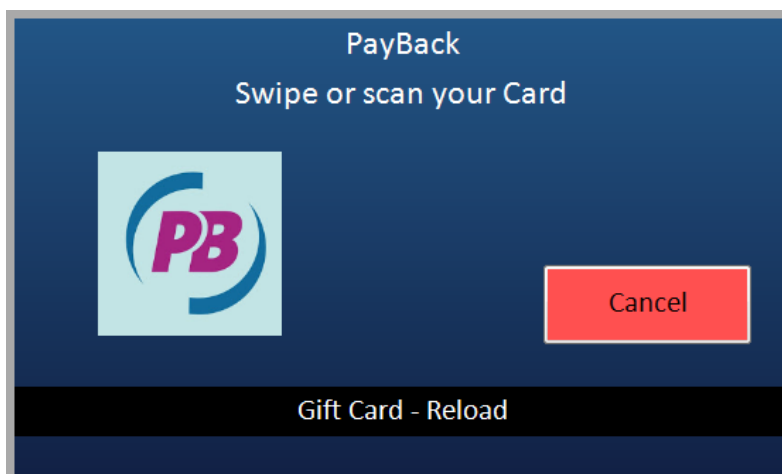
To add funds to your Payback Card:

1. On the Finish Form screen, select the **Gift Card** button.
2. Enter the amount of funds to be loaded onto the card.
 - Choose from a pre-set amount by selecting one of the available buttons, or select **Enter Amount** to manually enter an amount.
3. Select **Reload** or **Issue**. Both buttons will perform the same function.
 - Disregard the Manual Enter box. This function is not supported with Payback.
4. Click **Add New** to save the selection, and confirm in the *Summary* field on the right-hand side.

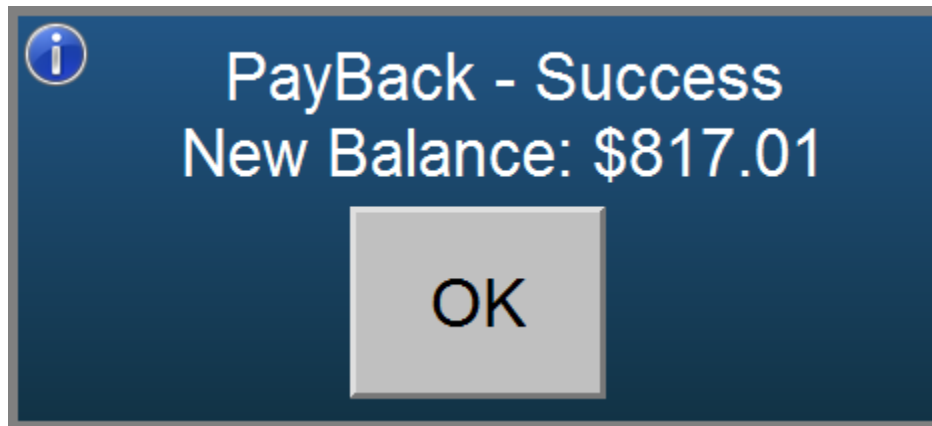


Summary	
Value	Quantity
\$10.00	1

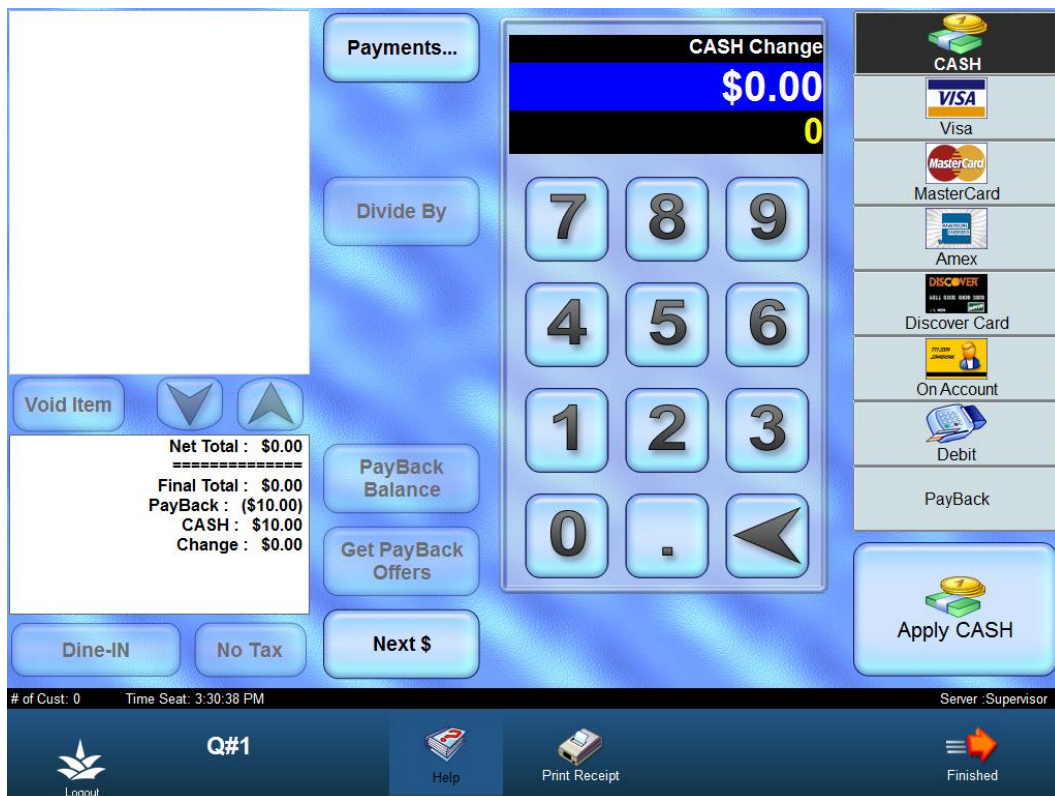
5. Select the **Finish** button and follow the prompt to swipe the card.



6. If successful, a confirmation message will appear and the new balance of the card will be displayed.



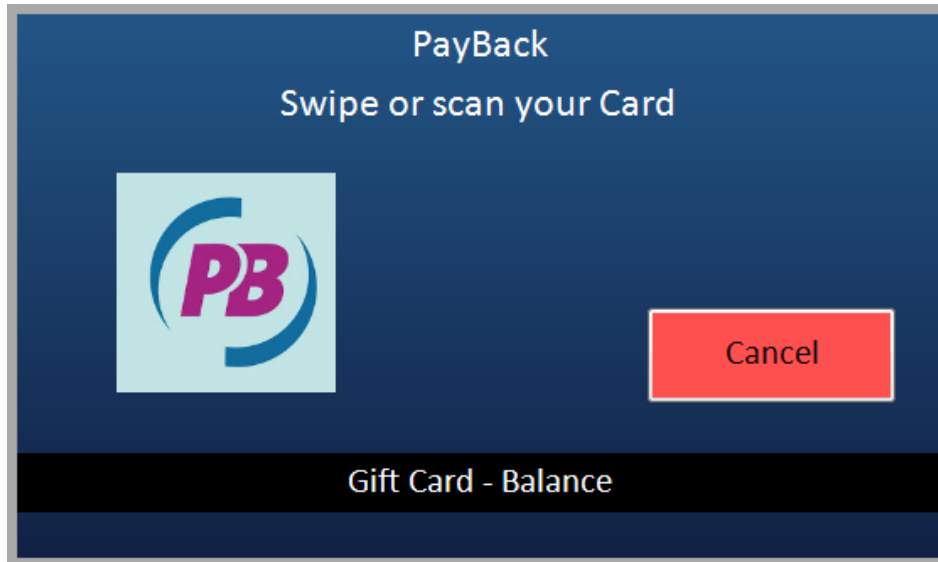
7. Press **OK** to proceed to the Finish Form and collect payment for the transaction.



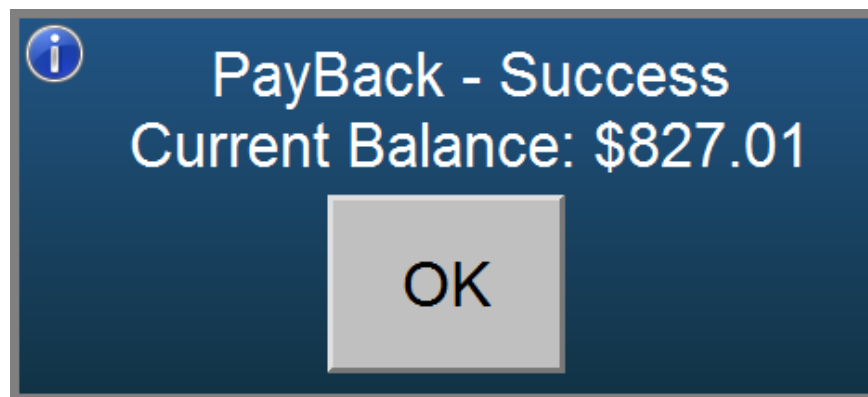
Balance Inquiry

To check the balance of a Payback card:

1. On the Finish Form, select the button **Payback Balance**.
2. Follow the prompt to swipe the card.



3. A window will appear confirming the balance of the card.



Redeem Loyalty

To redeem Loyalty:

1. On the Order Form, order any items that count towards Loyalty redemption.
2. Proceed to the Finish Form and press the button **Get Payback Offers**.
3. Follow the prompt to swipe the card.
4. Ordered items eligible for Loyalty discounts are displayed in red on the Finish Form. Discounts are displayed in green, and the amount of discount applied is shown in parentheses ().
5. Finish the transaction by selecting a payment method and collecting payment.

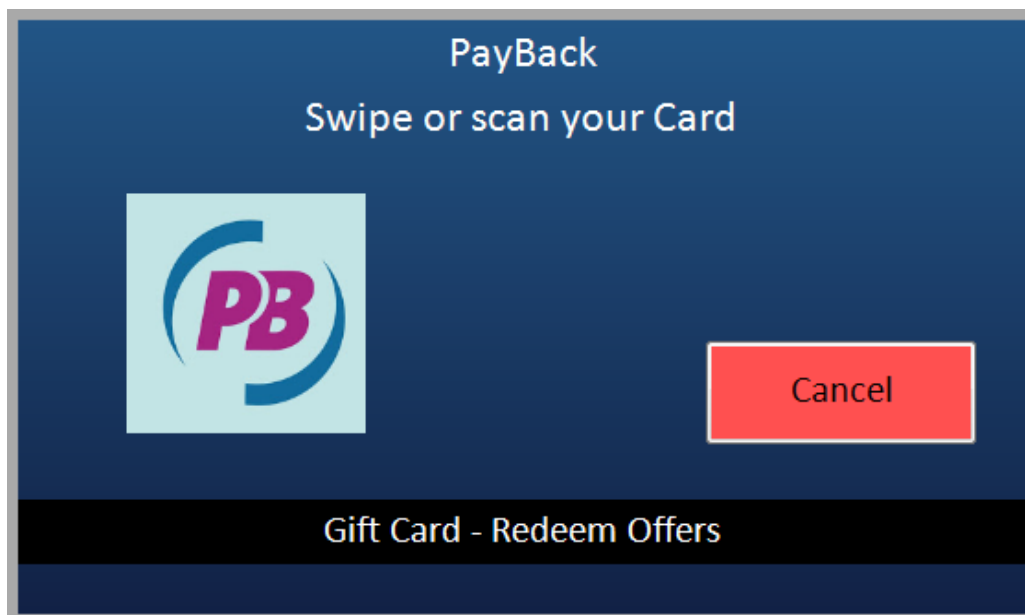


3	DR OETKER MOZZA PIZZA	\$10.77
1	DR OETKER MOZZA PIZZA	(\$1.50)

Redeem Offers

To redeem Offers:

1. On the Order Form, order any items that count towards Loyalty redemption.
2. Proceed to the Finish Form and press the button **Get Payback Offers**.
3. Follow the prompt to swipe the card.



4. A window will appear showing available Offers based on the items ordered.

Select the offers you want to redeem		
1	Free Product for Points MC CAIN M/WAVE, Discount: \$0.50, Max Units: 946	<input checked="" type="checkbox"/>
3	Discount for Points Hot Dinner, Discount: \$0.20, Max Units: 879	<input checked="" type="checkbox"/>
1	Free Item Standard Offer 1, Discount: \$0.00, Max Units: 7	<input type="checkbox"/>
1	Treat Item Standard Offer 2, Discount: \$0.00, Max Units: 7	<input checked="" type="checkbox"/>

Select All Cancel Apply

5. Check the boxes on the right hand side for any Offers you wish to redeem.
6. Choose the quantity of each item by selecting the numbered boxes to the left of each Offer.
- *Max Units* in each product description shows the maximum number of units allowed for each offer. The chosen quantity may not exceed this number.

Quantity (Max = 3)

3

7 8 9 Cancel

4 5 6 Clear

1 2 3 OK

7. Click **OK**.
8. When finished selecting Offers, click **Apply**.

9. On the Finish Form, all discounted items are shown in green and the amount of each discount is shown in parentheses ().

2 DR OETKER MOZZA PIZZA 1 \$7.18
1 MC CAIN M/WAVE \$1.00
3 Hot Dinner \$6.00
1 Standard Offer 1 \$2.00
1 Standard Offer 2 \$1.25
1 DR OETKER MOZZA PIZZA (\$1.00)
1 MC CAIN M/WAVE-Free Prc (\$0.50)
1 Hot Dinner-Discount for Pc (\$0.60)
1 Standard Offer 2-Treat Item (\$1.25)

Payments...

Divide By

PayBack Balance

Get PayBack Offers

Next \$

Dine-IN No Tax

Amount Due
\$14.08
0

CASH
VISA
Visa
MasterCard
Amex
Discover Card
On Account
Debit
PayBack

Apply CASH

Void Item

Net Total : \$14.08
Final Total : \$14.08

of Cust: 1 Time Seat: 9:04:41 AM Server: Supervisor

Logout Q#1 Help Print Receipt Coupons Gift Card Leave

10. Finish the transaction by selecting a payment method and collecting payment.

Receipts

In addition to the regular receipt information generated by PixelPoint, receipts involving Payback transactions will include the following:

On All Transactions:

- Cardholder name
- Points earned on current transaction
- Points balance
- Points value
- Spend balance

Additional on Reload Transactions

- Load amount

Additional on Sale Transactions

- Amount redeemed

Additional on Refund Transactions

- Refund amount

Additional on Loyalty and Offer Redemption Transactions

- Offer description
- Offer value