EverServ® PixelPoint®

OCIUS Pay At Table

PixelPAT Configuration

Powering Better Guest™
Experiences

Publication Details

Revision History

12/09/2015 - Revision 2
Added new configurations for post pay and VAT printing

10/30/2015 - Revision 1
Added content and revised config steps

09/04/2015 - Revision 0
Initial Release

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OCIUS Pay at Table

Overview

Pixel PAT Server supports the operation of OCIUS Terminals with Pixel Point POS.
This four - peer system includes:

1. Pixel Point POS; running in a POS Terminal.
2. Pixel PAT Server; running in the same POS Terminal.
3. Payment Manager Software; running either in the same POS station or in a different station connected to the same network area.
4. An OCIUS Terminal; connected to the network area via wireless.

Those four components must be properly configured. The OCIUS terminal must be registered with OCIUS Implementations, which provide updates to get the terminals bound to a Payment Manager instance.

Configure both the PATAgent and Payment Manger to work in conjunction with each other (i.e. PATAgent will need configuration information, IPs and Port addresses from Payment Manager, and Payment Manager will need configuration information, IP's and Port addresses from PATAgent.

For general OCIUS Terminal and Payment Manager Installation:

1. Connect the Terminal (PED) to the local Wi-Fi
2. Obtain an IP address for the PED
3. Create at least one User on the PED
4. Install and configure Payment Manager a.
Configure the Payment Manager Section b.
Configure the POS section

Please refer to detailed installation and configuration instructions provided by OCIUS on how to perform the above or contact OCIUS for support.

POS Policies

One PixelPoint POS station must be set as the Active Server. In BackOffice, enable the Policy "ActiveServer" under station 1.
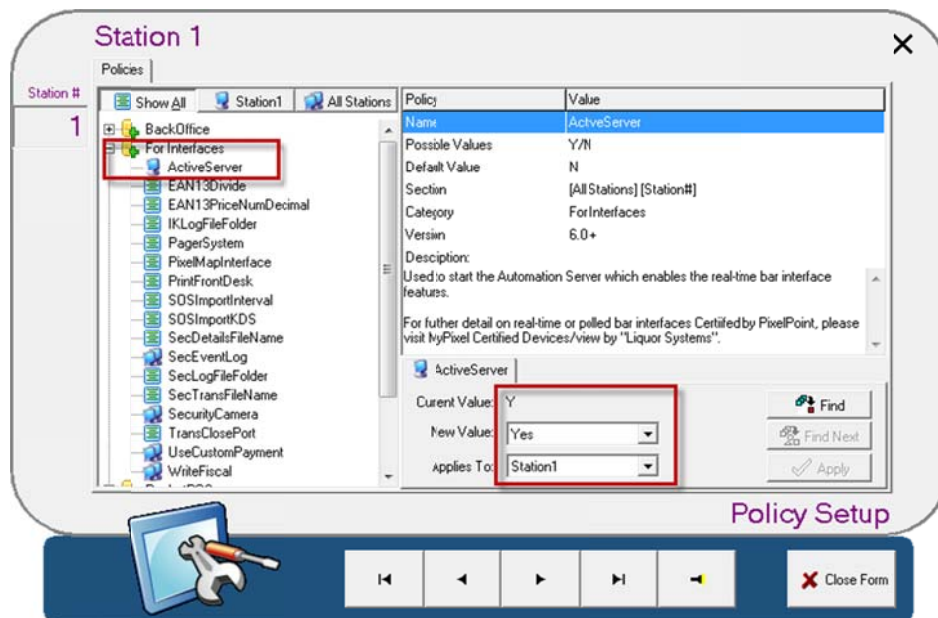
Note: On Windows 7 Operating Systems and higher, and when ACTIVESERVER=Y, the POS must be run as Administrator. Otherwise, the POS will encounter an OLE Registry Error on start-up.

In Order to print after the payment has been closed or to print the VAT receipt the policy "AllowPrintReceiptAfterPayment" must be set to YES.
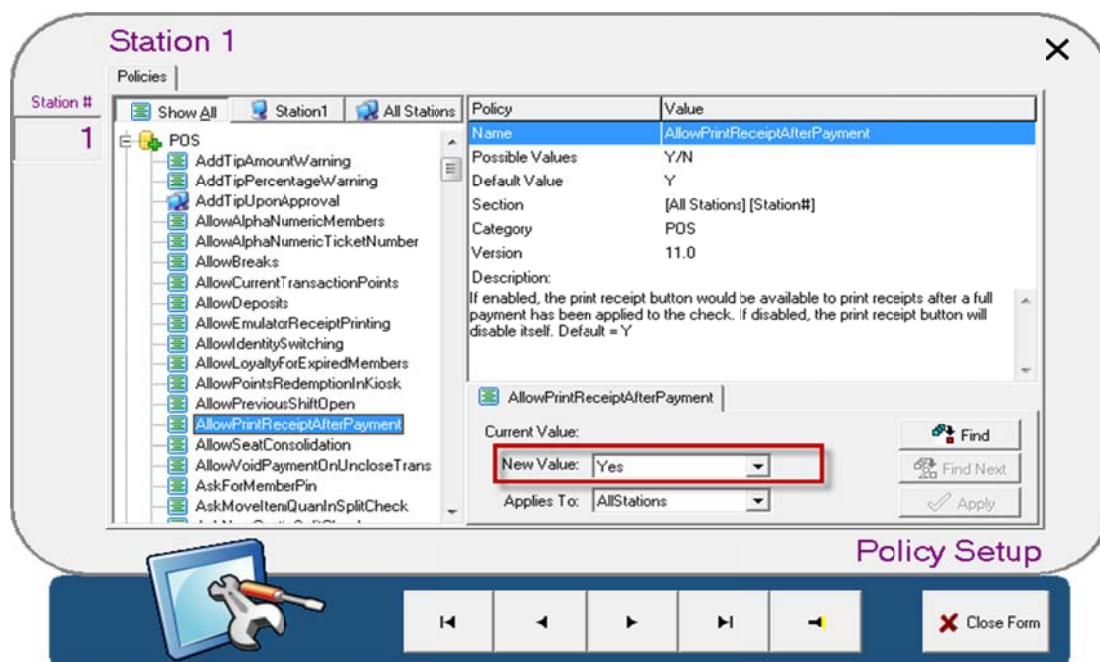
BackOffice Setup

OCIUS Cash Payment Method

1. Create a new No Authorization Payment Method in BackOffice. Assign a name to associate the payment method with OCIUS for easy reference in reporting. Ensure **Is Active?** is enabled.

OCIUS Authorization Payment Method

2. Create a new Payment Method in BackOffice Payment Method Setup and Select External Authorization as Payment Type. Ensure **Is Active?** is enabled.

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PixelPoint PAT Server Configuration

Installation

1. Copy the PATAgent.exe file to the "C:\PixelPOS" folder on the POSSERVER
2. Create a shortcut to the PATAgent.exe file and place it in the Windows Start-up folder
3. Run PATAgent, and then right-click on PATAgent from the System tray and select Show.
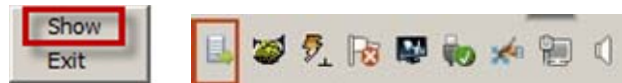
POS Configuration Tab

Important: after configuring each tab you must save your settings by selecting the save button shown below

Pixel PAT Server supports OCIUS Terminal operation with the following configuration:

1. Set Select type of Terminal to OCIUS Vx670/680.
2. In the Methods of payment section, select the **OCIUS Auth** Payment Method for External Authorization payments.
3. Select the **OCIUS Cash** Payment Method for cash payments.
4. Select the IP where the POS is running. The program automatically populates the combo box with the list of IPs assigned to the station depending on the connected network areas.
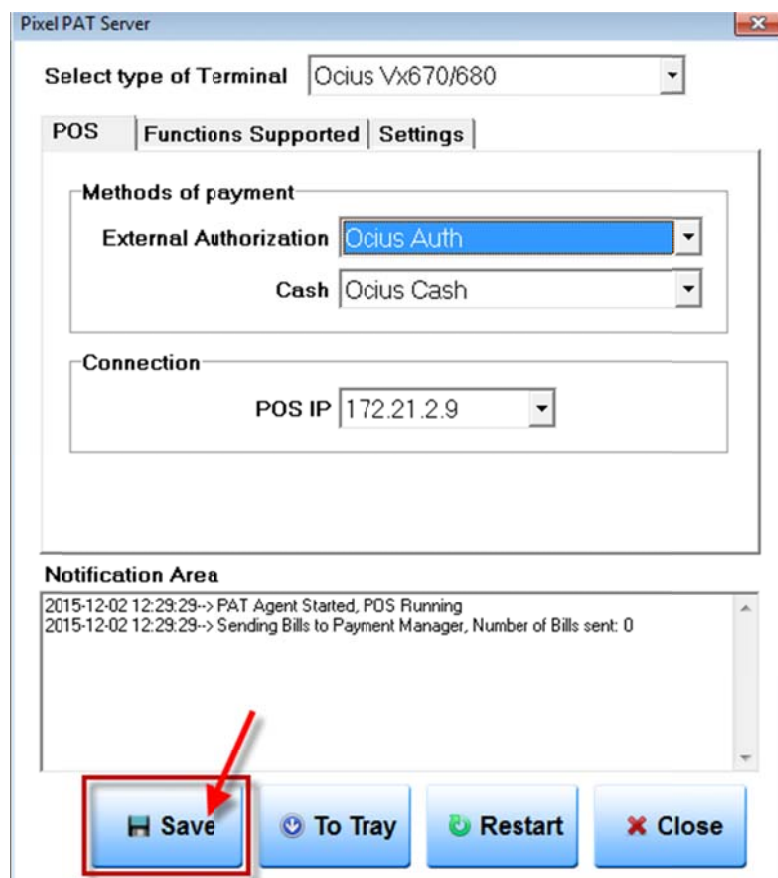
The Settings Tab

The Settings tab splits into two other tabs, **General** and **Connection**. The General tab contains fields to control the behavior of the PAT Server.

4. Configure Settings as desired.

Max Transactions: This is the maximum number of transactions that Pixel PAT Server will lodge with Payment Manager (between 1 and 100).

Filter Transactions by: Filters the transactions lodged with Payment Manager. Has two possible values:
- **None:** Lodges all transaction up to Max Transactions value.
- **POS Employee Swipe:** Lodges only transactions made by the Employee who's swipe matches the value entered in the field to the right.

> **Note:** Employee swipe ID must match the user ID in the OCIUS PinPad.

Apply Payment User: Sets a POS Employee to use when payments are applied to POS:
- **Who starts Transaction:** The payments will be applied to the employee that started the transaction on POS.
- **Terminal User with ID:** All payments will be applied to a POS employee whose swipe matches the value entered in the field to the right.

> **Note:** This ID should match the user ID for the user logged into the PED. See POS manual to see how to assign swipe IDs to a POS employee.

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Print Receipt: Indicates if the POS receipt will be sent to the OCIUS Terminal, and, if yes, when it will be printed. There are three options:

- **Never:** POS receipt is never sent.
- **Before Payment is processed:** Sends the receipt and prints it before the functions Get/ Print Bill and Print Bill are executed.
- **After Payment is approved:** Sends and prints the receipt on any functions if the payment is approved. There is a 3 second delay in printing.
- **Before and After:** Sends and prints the receipt on any functions before functions are executed and if the payment is approved.

PED Options	PrintVAT?	PAT Sever Options			
		Never	**Before Payment is processed**	**After Payment is approved**	**Before and After...**
Get Bill	Yes	No receipt is printed neither before processing the payment nor after closing it	Prints receipt before processing the payment but not after closing it	Prints receipt three seconds after closing the payment but not before processing it	Prints before processing the payment and three seconds after closing it
	No	No receipt is printed neither before processing the payment nor after closing it	Prints receipt before processing the payment but not after closing it	No receipt is printed neither before processing the payment nor after closing it	Prints receipt before processing the payment but not after closing it
Get/Print Bill	Yes	Prints blank slip (*) before processing the payment	Prints receipt twice (**) before processing the payment but not after closing it	Prints blank slip (*) before processing the payment and prints receipt three seconds after closing it	Prints receipt twice (**) before processing the payment and three seconds after closing it
	No	Prints blank slip (*) before processing the payment	Prints receipt twice (**) before processing the payment but not after closing it	Prints blank slip (*) before processing the payment but no receipt after closing it	Prints receipt twice (**) before processing the payment but not after closing it
Print Bill	N/A	Prints blank slip (*) and no payment is processed	Prints receipt and no payment is processed	Prints blank slip (*) and no payment is processed	Prints receipt and no payment is processed

**Send to Pay Manager:** Selects which tables to send to Payment Manager. This has two options:

- **All Tables:** send all tables up to max transactions
- **Tables with Receipts Printed:** send only the tables whose receipts have been printed already.

Use POS Employee Name: If on, device uses the name of the POS Employee to build the bill reference. If off, device uses the Employee number

The Connection Tab

The **Connection** tab allows configuration for single and multi-tier environments.

5. Enter the Payment Manager IP.
6. Enter the Payment Manager Entry point Port (29000 by default).
7. Enter the PED Port (25000 by default).
8. Select the desired Refresh Cycle.
9. Enter the POS VAT port. (29020 by default)

Payment Manager IP: The IP address of the station where Payment Manager is running.

Payment Manager Port: The port number that Payment Manager uses to communicate with the PAT Server (29000 by default).

PED Port: The port number assigned to the Pin Pad (25000 by default).

Refresh Cycle: The number of seconds Pixel PAT Server waits to refresh the list of transactions lodged with Payment Manager (between 1 and 300).

This 'Refresh Cycle" value can greatly affect the responsiveness of this application as there will be a delay based on the value entered. A suggested value is less than 30 seconds.

POS VAT Port: The port used by the PAT server to send receipts. This field is available only is After Payment is Approved or before and after are selected in the Print Receipt field. Prints a VAT receipt. The default value for this port is 29020.

Note: All the entered port numbers on this screen have a corresponding port number in the Payment Manager

Operation

Once all the components are set, this is the flow of operations to process an order created with Pixel Point POS and to be paid with an OCIUS Terminal.

1. Log in the POS, create an order and add the items.
2. Leave the table.

> **Note:** If the table is still Open, the table will be in a locked status, and PATAgent and Payment Manager will not be able to access the transaction.

3. In the next cycle Pixel PAT Server will lodge the order as a payment with Payment Manager.

> **Note:** The Reference is built by combining the POS Table number, POS Transaction number, and POS employee number or name (depending on the PAT Server configuration).

4. Log in the OCIUS Terminal. Select **Bill Options** and either **Get Bill** or **Print Bill**. They both will process the order but the later will also print the receipt.
5. The terminal will show the list of bills lodged with Payment Manager. Pick one, confirm the amount, add the tip (optional), and pay using cash or a Debit/Credit card.

Operational Limitations

1. Pixel PAT Server lodges the bill every certain amount of time configured as Refresh Cycle. Any change made to an existing order on the POS side (like adding items, tips, or moving the table), won't be reflected on the Payment Manager until the next cycle is due.
2. Accordingly, the same situation occurs when Payment Manager returns information back to the POS, such as closing a transaction when payment is made. In such a case, there may be a lag before the transaction is updated on the POS.
3. PAT Server supports partial payments on the OCIUS Terminal as well as tips on them; however, the order should be split on the POS rather than by terminal partial payment.
4. PAT Server also support tips on both sides, POS and OCIUS Terminal. But it is also recommend that the tips will always be applied on the Terminal.

Note: Observing these recommendations should make the operation of every component safer.

Transaction Logs and Troubleshooting

If Payment Manager or PATAgent are misconfigured (e.g. a non-existing POS employee is assigned to a filter), Payment Manager may still process the payment, but the transaction in the POS will remain un-paid and remain open. If this occurs, the transaction should be closed manually to Cash (note the transaction number for auditing and balancing purposes), and the misconfiguration be immediately corrected.

Troubleshooting

For troubleshooting purposes, check the status of any transaction by referring to the logs within the PATAgent and Payment Manager Windows. In the case of the above example, where a non-existing POS employee was incorrectly assigned to the Apply Payment User ID filter in PATAgent, the Payment Manager Log will show that the transaction payment was made successfully, but the PATAgent log will show that there was an error on payment, along with the transaction ID and £ amount.

Notes