

RELEASE NOTES PAYTRONIX 9.0

PLANNED RELEASE DATE: April 28, 2009

Paytronix Version 9.0 (9.0) offers new POS, PXC, and PXS features. The POS and PXC features will require software upgrades in order to use these new features. To upgrade to the v9.0 PXC, you will need to upgrade the Java JVM to v.1.6. No upgrade will be required to use the PXS features; they will be implemented automatically at the time of the release.

Note: For additional information regarding installation of v9.0 please contact your customer service representative at 617-649-3300, press 1 for customer service.

If you need assistance using the Merchant Interface, you can click on the “Help” link in the upper right hand corner of all pages to access Paytronix online help.

OVERVIEW

Paytronix is pleased to be releasing version 9.0. Virtually all merchants have requested that we make the links on the left navigation bar dynamic so that no users get the 403/404 http error page and that merchant users be able to reset their own password. This have resulted in some substantial changes to the merchant portal.

Upon the release of v9.0, the first time a merchant user logs in, they be required to enter their email address and a security question and response. This is necessary to enable merchant users to re-set their own password.

We will be offering Webex training sessions for corporate users on Tuesday, Wednesday and Thursday of next week at 10am and 4pm Eastern Time each day. Please contact Amanda to get into a training session – 617-649-3300 x234.

MERCHANT USERS REQUIRED TO PROVIDE EMAIL AND PASSWORD HINT RESPONSES

Upon the release of v9.0, all merchant users will be prompted to provide both an email address for the username and a security question response. This is necessary to support the release of a new feature that enables merchant users to be able to re-set their own passwords going forward. The first time a merchant user logs in they will be asked to provide the information the username is missing. In the example below, the username used has neither an email address or security question configured.

Update Account Information

Please enter an email address for your account before proceeding.

Email Address:

Confirm Email:

Please define a security question before proceeding.

Security Question:

Answer:

MERCHANT USERS ABLE TO RESET THEIR OWN PASSWORD

When a merchant user attempts to log in and cannot remember their password, they will be able to click on the “If you are having problems logging in, click here” portion of the log in screen.

Step 1 – Click forgot password link

Log in to your account

Username:

Password:

Forgot Your Password?

If you are having problems logging in, [click here](#)

Please do not save a link (bookmark, favorite) to this page. This is just the login page. If you would like to bookmark a page on this site, wait until after you have successfully logged in.

Step 2 – Enter username and hit submit

Password Request

Use this page to request that a **new password** be emailed to you. If you know your username, enter it below.

Username:

If you are a cardholder and cannot remember your username, you may enter your card number below.

Card Number¹:

¹ Please locate the account number on your card. Enter just the digits in the card number. Do not include any spaces.

Step 3 – Respond to challenge question

Password Request

Mother's maiden name?

Submit

A correct response to the above question will allow us to securely send a new password to your email address.

Having Problems?

If you have visited this page before and requested a new password, but have not received the email, check to see if you are running a spam blocker or other email filter. If so, look for an email entitled "Your Password Reminder", which should contain your new password.

If you are having trouble receiving a new password via email, click on

[Report an Issue](#)

When reporting the issue, please be sure to include the email address you want used for this account. Once the issue has been reviewed, the account will be updated and a new password will be sent to your updated email address.

MERCHANT HOME PAGE AND NAVIGATION CHANGES

DYNAMIC LINKS ON THE LEFT NAVIGATION

Based on popular request, the left navigation links are dynamically generated based on the permissions of each logged in user. Links the user does not have permission to access are suppressed. This should make all presented links safe and prevent users from getting the 403/404 http error page. There are other areas in which we have protected links within the body of the presented page. For example, on the CSR pages after an account has been looked up, the user will only see links that they have permissions to utilize. This was a significant re-write of the merchant portal which we hope greatly improves user experience.

FEWER LINKS IN BODY OF HOME PAGE

A tradeoff in making all links safe is that many of the titles on the "Home" page are no longer links. The "Store Manager Home Page" and "Franchisee Home Page" remain as links and will only be presented to users who have these permissions. All other titles on the "Home" page are no longer links. All links for navigation are through the left nav. In v9.0 we are not changing what links are shown in the body of the home page, we are working on something else for this in a coming release. Keep your eyes out for a revamped "Home" page with more functionality within the page coming soon!

GUEST ANALYSIS NO LONGER PRESENT ON LEFT NAV

Guest Analysis is no longer going to be a link on the left nav for any user. Users are able to access the Guest Analysis report through the Report Center.

STYLE AND BRANDING ON LOGOUT PAGE

Prior to v9.0, when a user logs out of the merchant interface they see a plain white page without a left NAV or branding. In V9.0, the logout page will show their left NAV and merchant branding.

POP-UP CALENDARS ON REPORTS

In v9.0, Paytronix has made some additional enhancements to the report center. In the input boxes, where there are date entries available, there is a pop-up calendar available. These calendars should assist merchant report runners in identifying the dates needed to run reports for.

General Card Activity Detail Report



The screenshot shows a web form titled "General Card Activity Detail Report". It contains several input fields and a "Submit" button. The "Date Range:" section includes a "Quick Date:" dropdown menu set to "Select one...", and "Manual Date Entry:" fields for "From" and "To" dates. A pop-up calendar is visible, showing the month of April 2009. The "Card Number:" section includes a "Card Number:" input field and an "All:" checkbox. A "Submit" button is located at the bottom of the form.

MERCHANT DEFINED USER PERMISSION GROUPS

In v9.0 merchants will be able to define their own custom user permission groups. Prior to v9.0, merchants have been able to apply permissions based on default groups of permissions defined by Paytronix.

Below the User Administration Heading, merchant users with appropriate privileges will see a link in the left NAV labeled Permission Groups. Using this link, you are able to create a new group which you can then select custom permissions. The advantage is that in the future, if you want to add a permission to a set of users, you can simply edit the permission group once and it will update all of the users associated with this group to have the new permission.

The edit permission group will not be a standard permission granted to users. If you want to use this feature contact Paytronix customer service.

GUEST ANALYSIS CHANGES

We have discovered some conditions that were not functioning completely as expected. In v9.0, we have addressed these issues.

CHANGE TO CUMMULATIVE WALLET ACTIVITY FILTER

The cumulative wallet activity filter had two check boxes for “wallet adjustment” is in for transaction type. In v9.0 we removed the duplicate box. There is now only one box labeled “wallet adjustment.”

CORRECTION TO “IS REVERSED ENROLLED” CONDITION

In v8.2, it was discovered that a code change broke the “Reversed Enrolled” condition, such that merchants were not able to query cards based on whether or not they were reverse enrolled. This has been fixed in v9.0.

CAMPAIGN TOOL -- “NEXT TO LAST CAMPAIGN OCCURENCE”

In the Campaign Tool, merchants are able to query based on the last and next to last occurrence of a specific campaign. The “next to last occurrence” setting did have a bug in the filtering. In v9.0 this has been corrected.

SUSPENDED MEMBERS PREVENTED FROM REDEEMING REWARDS

In v9.0, we have made some changes to what users whose accounts/cards are suspended can do. Suspended cards have always been prevented from earning points and redeeming rewards at the POS, but in an open points program, where the guest redeems the points through the website, suspended cards were able to be redeemed. Once v9.0 has been released, guests with suspended cards will be prevented from redeeming points for items in open points programs (through reward yourself).

CLOSED STORE

Merchant Store Administrators will now be able to close stores in the Paytronix system. To close the store in the system, navigate to the Manage Stores link under the Store Administration heading. Select the store, and then visit the “close store” link. On this page, the merchant administrator can then close the store “now” or on a future date. Once the date of the closure is reached:

- All security agents (PXC's and/or terminals) are removed from the Connectivity Status page.
- All transactions from this store will be denied.
- The store is removed from CSR pull down lists.
- Store which are closed are not longer going to need to be re-names “z-closed_XXXXX”. If this is desired for reporting it must be done manually.
- Further, should a campaign be run, when the runner selects an adjustment based on the enrolled store -- even if the enrolled store is closed -- the transactions for the campaign will go through with transactions attributed to the closed store.

Close Store - Example Store

Now
 On this
day: / /
(mm/dd/yyyy)

SELL LOYALTY CARD OVER THE WEB

Several Paytronix merchants sell their loyalty cards to guests for a fee, and have asked for Paytronix to develop the capability to be able to sell loyalty cards over the web. In v9.0, this feature has been developed. Through this feature, merchants will be able to sell their loyalty cards through a web portal for a price they determine. Customers will also be charged a shipping and handling fee (at the merchant's discretion) for the order.

After the order is complete, the user will be sent an email with the details of the transaction and AUTH for the charge to their credit card. This email will also have a link for the customer to register their new loyalty card. After the order is complete, the customer is also redirected to a web page so that they can immediately complete the registration of this card.

There are two options for fulfillment: emailed virtual card or mailed physical card. With the emailed virtual card, the guest would bring the email into a restaurant and using the Media Exchange button their information would be transferred over to a physical card. With a mailed card, Paytronix would send a nightly file to a fulfillment house. The fulfiller will then send the cards off to the ship to address in the order. When the cards arrive, they will be active and ready for use.

To use this feature, merchants will need to have a configured Verisign Pay Flow Pro account number, to accept payment over the web. If a merchant has one of these set up for their web gift card sales, recharge, or auto-recharge with Paytronix, the same account can be used.

EMAIL TEMPLATE NEW FIELD - @COUNTRY@ ENABLED

There is a new email template parameter enabled in v9.0, @country@. This parameter can be included in both simple email templates and campaign email templates.

GUEST WEBSITE NAVIGATION OPTIONS

In v9.0, merchants are able to change the pages that the guest sees into a single page for entry to the page. Coupled with this is that there are additional navigation links on the left nav. To enable this type of "new" guest home page, this will need to be configured on the Paytronix database, and a new link will need to be posted on the guest web site.

Please note that in the image below "Template Merchant" will be replaced with the actual name of the merchant.



Welcome to the loyalty web portal for Template Merchant

Thank you for joining the Template Merchant Guest Rewards program! Our loyalty program offers many great rewards and benefits


1. **Register My Card** - If you are a new member please start by registering your card using the **Register My Card** button below.
2. **Account Log In** - Use the **Account Log In** feature to edit your personal information, sign up for email notification of promotions and seasonal rewards, and review transactional activity.
3. **Check My Balance** - Click the **Check My Balance** button to review your current account balances (no need to register your card first).

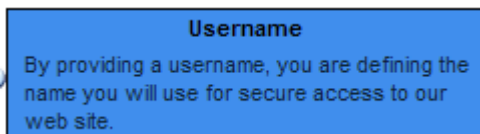


REQUIRED FIELDS ASTERISKED

In v9.0, all fields noted as required fields for any form entries, will automatically have these fields asterisked on the form to indicate that they are “required” fields.

GUEST REGISTRATION “Why do we need this?” links


In v9.0, the guest registration page will not have the “Why do we need this?” links that opened a separate browser page. Instead of a separate page, the guest will be able to find all of the same information on the registration page. To the right of every field the guest will see an  icon. If they mouse over this icon, they will see the explanatory text for this field in a popup box on the page (see example below).



VERIFONE PHONE LOOK-UP

In release v9.0 we are enabling a new feature on the Verifone terminal. This feature is particularly helpful for merchants operating a loyalty program using a Verifone terminal. Phone lookup is a useful feature to use when a guest has forgotten, misplaced, or lost their card. Rather than swiping their card, you can use **Phone Lookup** to access the guest's rewards account. Phone Lookup is available with Balance Inquiry, Add Points, Redeem Rewards, and Media Exchange. This feature will not work for stored value transactions.

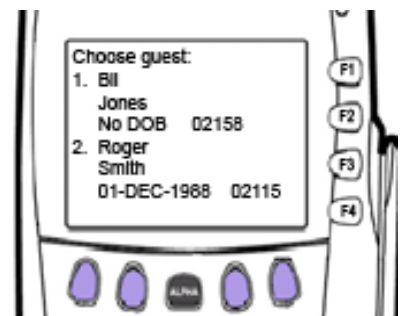
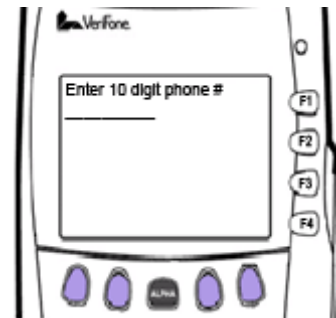
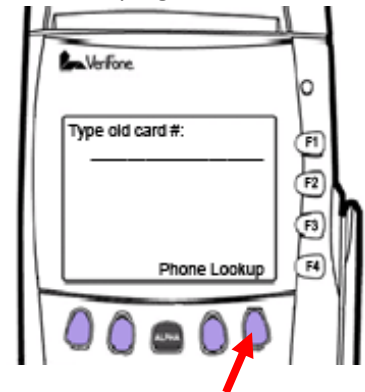
Please note, a guest must have first registered their card online and entered their phone number information in order for the system to find the guest. If the guest has not registered their rewards account online, the phone lookup feature will not work for them.

1. Press the purple button farthest to the right under the words Phone Lookup.
2. You will be asked for the guest's phone number. Type in the 10-digit phone number without dashes or spaces. Then press enter ().
3. The terminal will return a list of guests that have a matching phone number. The following guest personal information will be displayed on the screen:

First Name	
Last Name	
Date-of-Birth	Zip

This information is helpful to properly identify the guest. Usually there will be just 1 individual identified with the phone number. But sometimes there might be multiple individuals registered under the same phone number. Using the numeric keypad, press the number listed next to the appropriate guest to select that guest's account. The screen can display two guests at a time. If more than 2 guests are identified, you can scroll down using the purple button under the arrow.

4. When you're using this to perform one of the terminal functions, you will be returned to that function's work flow, right where you left off, as if you had entered the guest's card number.



VERIFONE TERMINAL MENU GROUPS

In v9.0, merchants will be able to configure the main screen of the Verifone terminals based on the supported Paytronix programs. Prior to v9.0, all terminals showed all available prompts i.e. both gift and loyalty items even if the restaurant did not use all of these features. Terminals running v9.0 software can be configured to display three different main menus; the configuration options are: All, Gift or Loyalty. If Gift is chosen only gift card menu options are available on the main screen; and similarly, if loyalty is chosen only the loyalty prompts. Contact the customer service team if you think this new software benefit your users.

VERIFONE PING INTERVAL CHANGES

In v9.0, Paytronix has changed the way the Verifone terminals perform dial status pings. Previous to v9.0, terminals were often showing up red in the connectivity status page even if the terminal had to performed transactions on that day. This was due to the status ping being blocked by some other event like a credit card transaction or fax coming in on the same phone line.

Here are some of the changes made to improve performance of the **dial status ping** without unnecessarily tying up the phone line:

1. The terminal will attempt to a status ping every 24 hours. If an attempt fails, the terminal will retry 4 times at intervals (1, 2, 4, 8) minutes apart. This spreads the attempts over 15 minutes.
2. If the terminal misses a ping because the phone line was in use during the above time period it will retry again in 24 hours. However, if the terminal performs a successful transaction the terminal will follow the transaction with a status ping (~ 1 minute later).
3. The status ping process will not start until there is a successful configuration of the system.
4. If the credential for a terminal is turned off an error message will be displayed and the status ping process will be terminated.
5. Allow status pings while the terminal is left on the re-print screen which shows after a transaction. Prior to v9.0, leaving the terminal on this screen could have caused a lost status ping.

OTHER ACKNOWLEDGEMENTS

1. Third-Party Library Software

- Apache Software Foundation: This product (Paytronix) includes software developed by the Apache Software Foundation (<http://www.apache.org/>), including: Apache Commons, Apache httpClient, Xerces, log4j, Jakarta Commons, Apache Jakarta-Oro, APR snprintf library, Apache FOP, and Apache Batik.
- Exolab Project: This product (Paytronix) includes software developed by the Exolab Project (<http://www.exolab.org/>), including: Castor.
- Sun Microsystems, Inc.: This product (Paytronix) includes software developed by Sun Microsystems, Inc. (<http://www.sun.com>), including: Java Cryptography Extension (JCE), Java Communications API, and Secure Sockets Extension (JSSE) – which also includes code licensed from RSA Data Security.
- SourceForge.net: This product (Paytronix) includes software developed by SourceForge.net and distributed under the Common Public License, including WTL and distributed through a ZLib License for tinyxml.
- Thai Open Source Software Center Ltd, Clark Cooper, and Expat maintainers: This product (Paytronix) includes software developed by Thai Open Source Software Center Ltd, Clark Cooper, and Expat maintainers including Expat XML Parser Library.

- Jean-loup Gailly and Mark Adler: This product (Paytronix) includes software developed by Jean-loup Gailly and Mark Adler including ZLib Compression Library.
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- Eclipse SWT. This product (Paytronix) contains products developed by Eclipse SWT.

KNOWN ISSUE(S)

1. Stored Value Liability Aging Report has a business day off set problem. The report runs correctly in terms of the end of the business day accommodating the business day off set. However, it was discovered that the start date is not using the business day off set properly in its computation. Any merchant with a BDO greater than zero minutes is affected by this. The net result is the report could be reporting values slightly higher than anticipated in the more recent month. For example, say a merchant has a BDO off set of 6 hours. Cards sold on August 1 from 12:00am – 5:50am will be attributed to the August monthly bucket – but should be attributed to July, since these six hours are part of the business day of July 31. This has been logged for correction in a future release.