



Insite360™

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# Instore User Guide

## Computer Programs and Documentation

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## Approvals

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### Underwriters Laboratories (UL):

UL File#	Products listed with UL
MH1941	All Gilbarco pumps and dispensers that bear the UL listing mark.
MH8467	Transac System 1000 and PAM 1000
E105106	Dell DHM Minitower
E165027	G-SITE and Passport Systems

### California Air Resources Board (CARB):

Executive Order #	Product
G-70-52-AM	Balance Vapor Recovery
G-70-150-AE	VaporVac

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Gilbarco pumps and dispensers are evaluated by NCWM under the National Type Evaluation Program (NTEP). NCWM has issued the following CoC:

CoC#	Product	Model #	CoC#	Product	Model #
02-019	Encore	Nxx	02-037	G-SITE Printer (Epson)	PA0307
02-020	Eclipse	Exx		G-SITE Distribution Box	PA0306
02-025	Meter - C Series	PA024NC10		G-SITE Keyboard	PA0304
	Meter - C Series	PA024TC10		G-SITE Mini Tower	PA0301
02-029	CRIND	—		G-SITE Monitor	PA0303
02-030	TS-1000 Console	—		G-SITE Printer (Citizen)	PA0308
	TS-1000 Controller	PA0241	02-038	C+ Meter	T19976
	Distribution Box	PA0242	02-039	Passport	PA0324
	Meter - EC Series	PA024EC10	02-040	Ecometer	T20453
	VaporVac Kits	CV	05-001	Titan	KXXY Series
02-036	Legacy	Jxxx			

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# Introduction

This manual describes how to use Insite360™ for Passport®. Insite360 provides a cloud-based dashboard and portal solution for centralized monitoring and management of core convenience store activities. The Insite360 Instore software application interfaces with registered Passport and/or Passport Edge systems and is compatible with all standard PCs, tablets, and smartphones. Insite360 Instore allows configuration of Users and Roles separate from those configured on any registered Passport systems.

## Feature Overview

Insite360 Instore features include:

- Profile Configuration
- Role and User Maintenance
- Individual Store and Store Groups Maintenance
- Fuel Pricing: Monitor current fuel prices and manage fuel price change downloads by single store or by configured store groups.
- Passport Configuration Data: Manage configuration data downloads for:
  - Speed Key Configuration
  - Indoor Customer Display text
  - Indoor Receipt Header text
  - Indoor Receipt Footer text
  - CRIND® Display text
  - CRIND Receipt Header text
  - CRIND Receipt Footer text
- Reports:
  - Store Close and network reports automatically printed at Store Close
  - Transactions and Receipts
  - Electronic Journal
  - Event Notifications
  - Store Online
  - Store Offline
  - Package Status• Monitor Packages:
  - View Package Download History Log- View Active Packages Log
- Remote Software Updates: Upgrade to the latest software patch, maintenance pack, or full POS software version in just a few clicks for one or multiple sites.

## Insite360 Instore Business Rules

Following are basic business rules and assumptions regarding operation of Insite360 Instore:

- Passport stores that use Insite360 must implement Wide Area Network (WAN) connectivity to the central Insite360 Servers with appropriate security provisions to ensure Payment Application Data Security Standard (PA-DSS) compliance.

- 
- Insite360 does not control the price book on the Passport system. Price book management occurs through a Back Office System (BOS) or manually through the Passport Manager Workstation (MWS).
  - Currently, the Passport system only uploads reports automatically printed at Store Close.

The Passport system does not upload reports viewed or printed on demand.

#### System Requirements

## System Requirements

Insite360 is a cloud-based system hosted by Gilbarco®. Following are requirements for devices used to access Insite360 Instore cloud services:

### Supported Browser and OS Platforms

OS Platform	Google Chrome™		Mozilla Firefox® Internet Explorer® 9+ Opera™		Safari®
Android™	YES	YES	N/A	NO	N/A
IOS®	YES	N/A	N/A	NO	YES
Mac® OS X®	YES	YES	N/A	YES	YES
Windows® 7 +	YES	YES	YES	YES	NO

### Device Types

- Desktop PC and laptop
- Tablet
- Smartphone

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## First Time Sign In

The Insite360 application generates an e-mail to each new user, using the e-mail address provided to Gilbarco. The e-mail contains basic introductory information, such as the new user's temporary password, a link to the Insite360 portal, instructions for logging into the Insite360 portal the first time, and information needed if the user must register sites with Insite360 Instore.

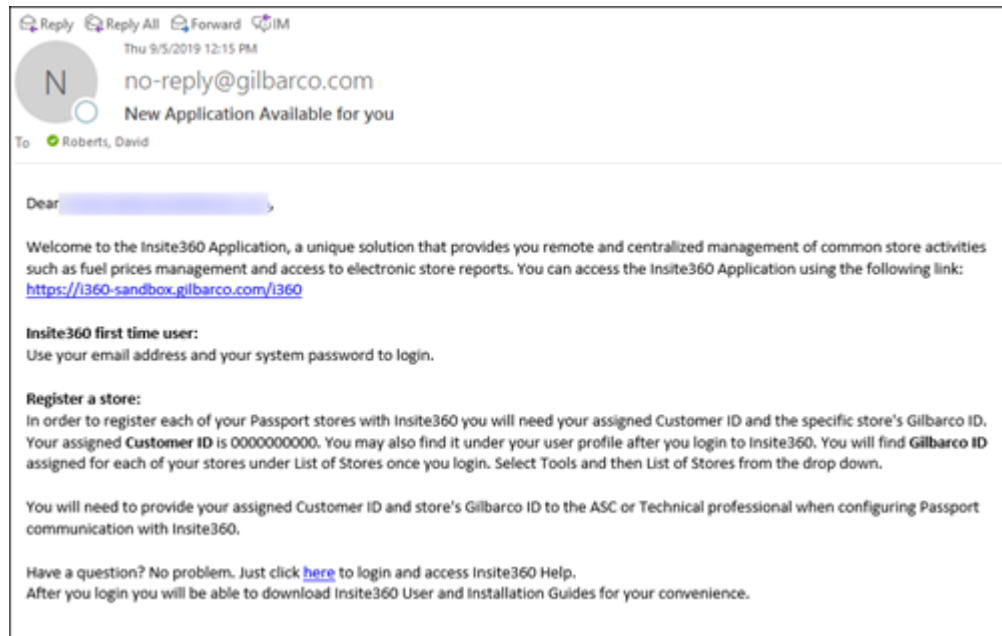


Figure 1: Insite360 New Email

By default, the first user added to Insite360 for a specific merchant or corporation receives administrator level permissions. The corporate administrator can add stores, create and maintain role definitions, add and manage users, and assign a role and stores to each corporate Insite360 user.

The first time a new user signs into Insite360, the user must configure a new password, select security questions, program the security question answers, and update profile information.

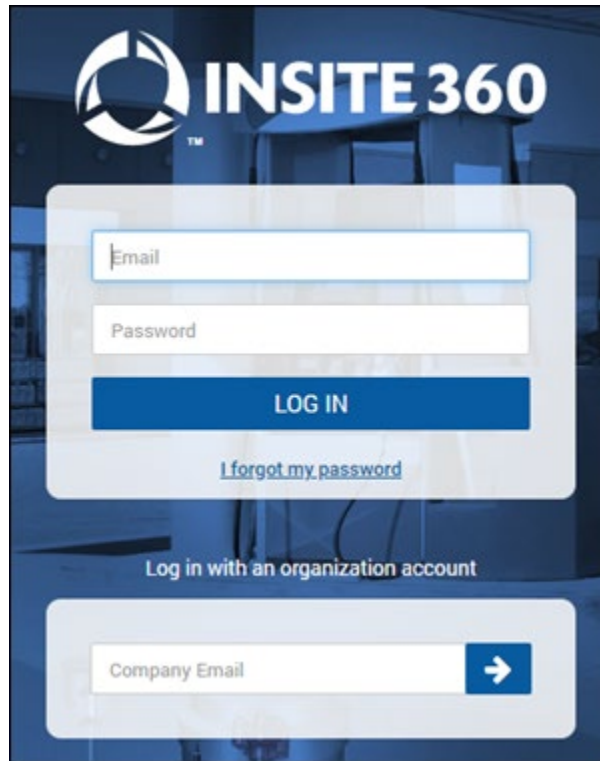
To sign into Insite360, proceed as follows:

1. Double-click the link to the **Insite360 Application** in your e-mail or type it into your browser:  
<http://insite360.gilbarco.com>.

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The **Insite360 Sign In** screen appears.

**Hint:** Add the link to your Internet browser bookmarks or favorites list for easy reference.



*Figure 2: Sign in Screen*

2. In the **Email** field, enter the e-mail address at which you received your Insite360 temporary password.
3. In the **Password** field, enter the temporary password you received in the e-mail. Your password is case sensitive; enter it as it appears in your e-mail. As a security measure, an asterisk (\*) appears for each keystroke as you enter your temporary password.
4. Click **Sign In**. The **First Setup** screen appears.
5. Type the temporary password from the e-mail into the **Current password** field and key a new password into the two **New password** fields. Passwords are case sensitive and must be at least six characters in length.
6. Select a unique security challenge question in each of the **Question #1**, **Question #2**, and **Question #3** fields and type your answer in the associated **Response** field. The **Response** field allows up to thirty characters, including letters, digits, and special characters. You must select a different question for each of the question fields. Insite360 uses the security challenge questions and your answers to identify you if you forget your e-mail address or password.
7. After you complete all the fields, click **Save** to complete the first log in process. The next time you sign into Insite360 you only need to provide your e-mail address and your saved password.

## Signing in After the First Time

To sign in after the first time, go to the Insite360 Sign In page. Enter your e-mail address and new password you configured for yourself. Then click **Sign In**.



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If you forget your password, click **Forgot your password?** to recover your password. Insite360 will ask you to answer the security questions you set up when you signed in the first time to validate your identity. Depending upon the browser and corporate Internet facilities, you may encounter other security measures to validate the Internet Protocol (IP) address with the Insite360 application.


## Special Administrator Responsibilities

When a corporate customer establishes a new Insite360 contract, Gilbarco adds one user to Insite360 for the customer. Gilbarco assigns this user Administrator rights to Insite360. An Administrator maintains Roles, Users, Stores, and Groups of Stores on behalf of the entire corporate customer. A Role is a set of permissions assigned to a certain type of corporate user. For more information, see [“User Maintenance”](#) and [“Role Maintenance”](#).

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## Profile and Log Out

Your name is displayed in the top right corner of the Insite360 screen.

David Roberts 

Click on your name to display the following functions:

- **Profile:** Edit your profile information; editable profile information includes Name, Alternate Email, Language, and Country; you can also change your password and security questions here.
- **Logout:** Sign out from Insite360; log out each time you finish working in Insite360.

## Setting Options

Settings for In-Store can be found in **Settings > Account Management** and **In-Store > Settings**. The Toolbar on the left side of the Insite360 screen provides access to several functions under the **Settings** tab.

### User Maintenance

User Maintenance allows you to set up, edit, and delete users to the system. You can access User Maintenance under **Settings > Account Maintenance > User Maintenance**.

Use the search function at the top of the screen to narrow a search on an existing user by user name, email address, or role.

- **Create New User:** Add a User with an Email address, Name, and selected Role.
- **Edit User:** Change the information for an existing User.
- **Delete User:** Select an existing User to remove from Insite360 access.

Note: This is also where you go to add newly registered stores to your site view. Choose your name from the list of **Users**, select **Edit User**, then under **Store**, click **Add**. You can also add a user to a group by selecting the user name, select **Edit User**, then under **Group**, click **Add**.

### Role Maintenance

Insite360 allows the Administrator to assign available functions to a Role. You can access Role Maintenance under **Settings > Account Maintenance > Role Maintenance**.

Insite360 has three default Roles:

- **Admin: Level 99**, permitted access to all Insite360 functions by default.
- **Owner: Level 90**, permitted access to all Insite360 functions by default.
- **Manager: Level 70**, permitted access to all Insite360 functions by default.

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Configurable functions include:

- Administration:
  - Edit users
  - Edit roles
  - Edit configuration
- Stores:
  - Edit groups
  - Edit stores
- Packages:
  - Edit packages
  - Edit Point of Sale (POS) receipts
  - Edit CRIND receipts
- Prices:
  - View grades
  - Change prices
- More:
  - Edit speedkeys
  - Edit notifications
  - View store close and network reports
  - View transactions and receipts
  - View electronic journals

The Administrator may change the Owner and Manager roles and create additional Roles with functions limited to those required for that Role. For instance, an Auditor role may need to view store reports, but should not be able to change fuel prices. The Administrator may change the Manager role so that users assigned to the Manager role cannot create or edit users or roles, but can view reports and change POS and CRIND receipt headers and footers.

The Administrator must consider carefully the set of functions to allow for various corporate user groups.

## Site View

**Site View** provides a listing of all stores assigned to you. For the Administrator, this is all stores. You can access Site View by going to **In-Store > Monitor / Actions > Site View**. You can also click **Site View** in **Quick Links**.

The listing provides the following information for each store:

- **Store Number:** Usually the corporate store number; this information may not be configured by default, but may be added at any time; this field is editable and is required to search Transactions and Receipts, and Electronic Journal; you cannot do a search on a store that does not have a Store Number configured for it.
- **Store Name:** The name of the store provided to Gilbarco when the store was commissioned; this field is editable.
- **Address:** The store's street address provided to Gilbarco when the store was commissioned; this field is editable.
- **City:** The city in which the store is located; this field is editable.

- **State:** The two-character abbreviation for the state in which the store is located; this field is editable.
- **Postal Code:** The ZIP code in which the store is located; this field is editable.
- **Phone Number:** The store's phone number; this field is editable.
- **Gilbarco ID:** Unique identifier Gilbarco assigned to the store when it was commissioned; this field is not editable.
- **Site Activated:** Indicates the store is currently active.
- **Registered:** Indicates the store has been registered through the Passport system and has exchanged information with Insite360.
- **Site Status:** Indicates if the store is not communicating with Insite360; does not indicate the reason for non-communication.

From **Site View**, you may highlight a store and click on the **Options** button to perform the following functions:

- **View Fuel Prices:** View the fuel grades and current fuel prices at the store.
- **View Fuel Price History:** View the fuel price history at the store.
- **Change Fuel Prices:** Change fuel prices at the store.
- **Change Speedkey:** Edit speedkeys to display on the Passport Cashier Workstation (CWS) at the store.
- **Change POS Receipt:** Change customer display, receipt header, and receipt footer at each Passport CWS.
- **Change CRIND Receipt:** Change promotional display, receipt header and footer, and receipt prompt timeout at the store's CRIND devices.
- **Edit Site Info:** Change the store information that displays on Insite360.

Note: One or more functions may not display for a user, based on the Role assigned to the user.

## Groups of Stores

You can configure a group of stores that have similar characteristics to make changes to the entire group at one time. You can access Group of Stores under **In-Store > Settings > Group of Stores**. Use caution when configuring Group of Stores, as one store may belong to multiple groups.

### WARNING

A user for which a Store is not assigned or has been unassigned may still be able to make changes to that store if the store is included in a Group of Stores assigned to the user.

## Manage Speedkeys

You can create, edit, and delete Speed key configurations and assign stores or store groups to the configuration. You can access Speed keys under **In-Store > Monitor / Actions > Manage Speed Keys**.

## Store Speedkeys

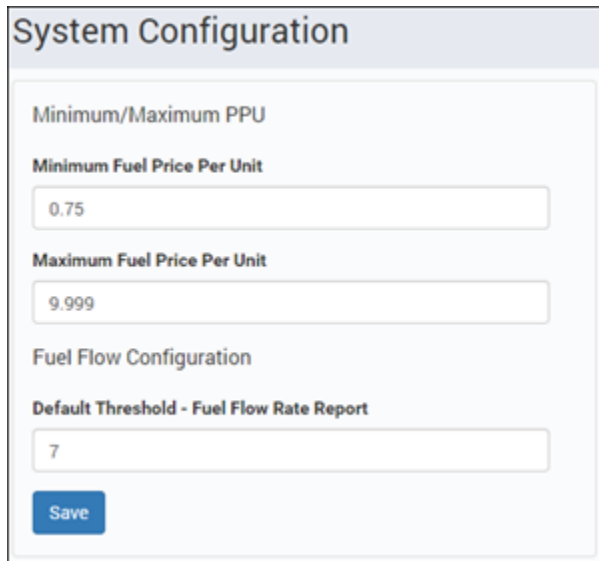
You can modify the current Speed key configuration for a store by clicking the **Options** button for the store and selecting **Edit**. Insite360 displays the current Speed key configuration uploaded from the store.

Figure 3: Speed Key Configuration Details Screen

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## Configuration

Create minimum and maximum Price per Unit (PPU) lockout values for groups of stores and set how often the stores upload Electronic Journal data to Insite360 (values of 1, 5, 10, 15, or 30 minutes). After making changes to the configuration field, click **Save**.



The screenshot shows a web interface titled "System Configuration". Under the heading "Minimum/Maximum PPU", there are two input fields. The first is labeled "Minimum Fuel Price Per Unit" and contains the value "0.75". The second is labeled "Maximum Fuel Price Per Unit" and contains the value "9.999". Below these is a section titled "Fuel Flow Configuration" with a label "Default Threshold - Fuel Flow Rate Report" and an input field containing the value "7". At the bottom left of the form is a blue "Save" button.

Figure 4: System Configuration Screen - PPU Lockout Configuration

## Help

Navigate to **In-Store > User Guides** to access user documentation.

## Notifications

You can create e-mail notifications that Insite360 sends when certain exceptions occur at a store. Navigate to **In-Store > Settings > Notifications** to view, edit, or create new notifications.

You can configure Insite360 to issue e-mail notifications for any of the following exceptions for a Store or Group of Stores:

- Store Offline
- Store Online
- Package Status:
  - Released (for all types of Packages)
  - Accepted (fuel price change)
  - Rejected (fuel price change)

## Reports

Activities under Reports are:

- Store Close and Network Reports
- Transactions and Receipts
- Electronic Journal
- Fuel Flow Rate

### Store Close and Network Reports

Insite360 allows you to view reports the Passport system automatically generates at Store Close, including unsecure network reports. When you click on **Reports > Store Close and Network Reports**, a listing of all reports for all stores assigned to you appear, most recent first.

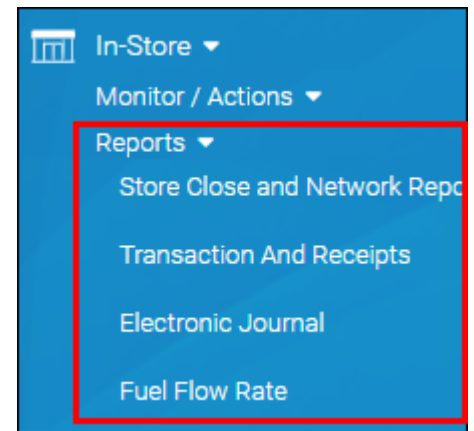


Figure 5: Reports Menu

A screenshot of a web application showing a table of reports. The table has columns for Store Number, Store Name, Type, Extension, and Date. The data is sorted by date in descending order. Above the table are filter fields for Store Number, Group Name, Store Name, Type, Select a file extension, Date From, and Date To. There are also buttons for Search, Clear Filters, View Details, and Email it To Me.

Store Number	Store Name	Type	Extension	Date
4	NACS Passport #4	StoreCloseReports - POS	HTML	07-23-2019 12:49:00
4	NACS Passport #4	StoreCloseReports - POS	HTML	07-23-2019 11:46:05
4	NACS Passport #4	StoreCloseReports - POS	HTML	07-23-2019 11:32:37
4	NACS Passport #4	StoreCloseReports - POS	HTML	07-23-2019 10:38:26
4	NACS Passport #4	StoreCloseReports - POS	HTML	07-22-2019 15:59:43
4	NACS Passport #4	StoreCloseReports - POS	HTML	07-22-2019 12:48:04
5	Fuel Station	StoreCloseReports - POS	HTML	02-20-2019 09:24:52
0044	BGO	Store Close Reports - POS	HTML	01-14-2019 16:20:51
5	Fuel Station	Store Close Reports - POS	HTML	11-16-2018 16:59:22
700WF	Wake Forest Test Site	Store Close Reports - POS	HTML	11-14-2018 15:33:58

Figure 6: Store Close and Network Reports Listing

You may narrow the list of stores and reports that appear by using the filter fields at the top of the screen. Filter fields are:

- Store Number
- Group Name
- Store Name
- Type
- File Extension
  - HyperText Markup Language (HTML): used for Store Close reports
  - PDF: used for network reports
- Date From
- Date To

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Highlight a report for a particular store and click **View Details** to open the report for viewing. The report opens in a new tab. You may save or print the report from here, as well.

Highlight a report for a particular store and click **Email It To Me** and Insite360 will send e-mail with the report attached.

## Transactions and Receipts

The Transactions and Receipts option allows you to:

- Search transaction records
- View the list of search results
- View one or more transaction record
- Print one or more transaction record
- View the receipts that match one or more transaction record
- Print the receipts that match one or more transaction record

The screenshot shows the 'Transactions and Receipts' search interface. It features a top search bar and a grid of filter fields. The filters include Store Number, Start Date (with a calendar icon), End Date (with a calendar icon), Transaction ID, Operator ID, Receipt Text, Details Text, Source Type (a dropdown), Source Number (a dropdown), Keyword, Amount Comparison (a dropdown), and Transaction Amount. Below the filters are 'Search', 'Clear', 'Download', and 'Print' buttons. The bottom section displays a table with columns: Store Number, Transaction Start, Transaction Type, Transaction ID, Operator ID, Source Type, Source Number, Keywords, and Total. A status bar at the bottom indicates 'Displaying 100 Records Found'.

Figure 7: Transactions and Receipts Search Screen

The Transactions and Receipts Search screen consists of a set of filters you can use to refine your search. These filters are:

- **Store Number:** required; key the store number for the specific store you want to search
- (hint: see [Site View](#) for Store Number assigned to each store)
- **Start Date:** required; click on the calendar icon and select the beginning date from which you want to search
- **End Date:** required; click on the calendar icon and select the ending date from which you want to search
- **Transaction ID:** optional; enter the transaction number for the specific transaction you want to search against
- **Operator ID:** optional; enter the operator identification number for the specific transaction you want to search
- **Receipt Text:** optional; free form field used to look for specific word or phrase in the receipt
- **Details Text:** optional; free form field used to look for specific word or phrase in the receipt
- **Source Type:** optional; click on the field to reveal two fields:
  - Source Type: select one from Register, Dispenser, or Kiosk
  - Source Number: select one from the list; options for this field depend on the Source Type you selected:



- Register: options are All, 1, 2, 3, 4, 5, 6, 7, 8, 9 (the CWS register number you want to search against)
- Dispenser or Kiosk: options are All, and 1 through 32 (the forecourt fueling position number you want to search against)
- **Keyword:** optional; available options are:
  - Restricted Item
  - Price Override
  - Network Authorized Tender
  - Voided Item
- **Amount Comparison:** optional; available options are:
  - Greater Than
  - Less Than
  - Equals
- **Transaction Amount:** optional; click on the operator to select Greater Than, Less Than, or Equals and then enter the amount you want to search against
- **Transaction Type:** optional; click on the field and select one or more from the available types; listed types are:
  - Cash Acceptor Chg/Ref Due
  - Drive Off
  - No Sale
  - Paid In
  - Paid Out
  - Pump Test
  - Refund
  - Safe Drop- Safe Loan
  - Sale
  - Till audit
  - Till Closing Balance
  - Till Opening Balance
  - Void Transaction

After completing your filter selections, click the **Search** key to view the results.

Transactions and Receipts

Search

\* Store Number: 5

\* Start Date: 08/24/2018

\* End Date: 09/10/2019

Transaction ID:

Operator ID:

Receipt Text:

Details Text:

Source Type:

Source Number:

Keyword:

Amount Comparison:

Transaction Amount:

Transaction Type:

Search Clear Download Filter

Displaying 100 of 400 Records Found  
Dates are displayed in your time zone.

	Store Number	Transaction Start	Transaction Type	Transaction ID	Operator ID	Source Type	Source Number	Keywords	Total	
1	5	Aug 23, 2019, 11:22:41 AM EDT	Sale	103	91	Register	2	Network Authorized Tender	\$50.00	Receipt Details Match
2	5	Aug 23, 2019, 11:22:33 AM EDT	Sale	102	91	Register	2		\$0.00	Receipt Details Match
3	5	Aug 23, 2019, 11:19:33 AM EDT	Sale	101	91	Register	2		\$20.00	Receipt Details Match
4	5	Aug 23, 2019, 11:19:21 AM EDT	Sale	100	91	Register	2		\$0.00	Receipt Details Match

Figure 8: Transactions and Receipts Search Results

All transactions that meet your filter definitions appear. The scroll bar on the right allows you to scroll through the page of records. To move to the next page of results, select **More** at the bottom of the page.

You may view or print the Transaction Details or Receipt Details of one or more records listed in the search results by selecting the records you want to view or print and then clicking **Transaction Details** or **Receipt Details**.

*Note: If a record is not available for selection (the Receipt and Details buttons greyed out), this means that the details for the record are not yet available. This may occur, especially if you search very recent transaction records. You may wish to try viewing the details a little later.*

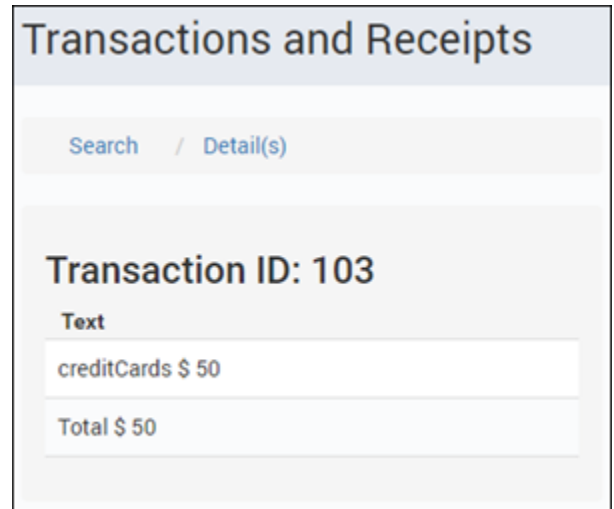


Figure 9: Transactions Details Screen

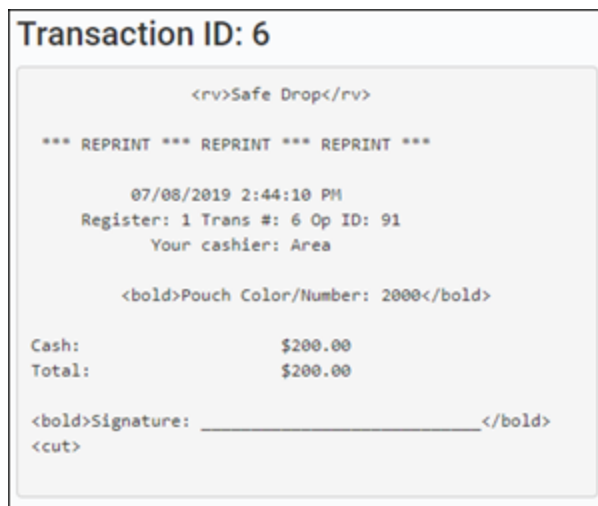


Figure 10: Receipt Details Screen

Click **Print** to print a copy of the transaction or receipt details to a local printer.

### Exceptions

Insite360 displays the error message “No records found” on the bottom right of the screen if your search criteria yields no transaction records.

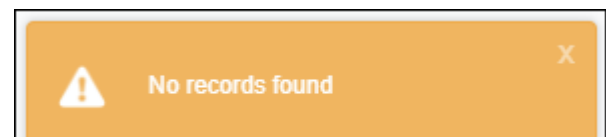


Figure 11: Transactions and Receipts - No Records Found

### Electronic Journal

The Electronic Journal option allows you to:

- Search the Electronic Journal

- View the list of search results
- View a specific Transaction record associated with an Electronic Journal record
- Print a specific Transaction record associated with an Electronic Journal record

The screenshot shows the 'Electronic Journal' search interface. It features a search bar at the top. Below it, there are several filter fields: 'Store Number' (a dropdown menu), 'Start Date' (a date picker showing 09/10/2019), 'End Date' (a date picker showing 09/10/2019), 'Transaction ID' (a text input), 'Operator ID' (a text input), 'Source Type' (a dropdown menu), 'Source Number' (a dropdown menu), and 'Text' (a text input). There are four buttons: 'Search', 'Clear', 'Download', and 'Files'. At the bottom, it indicates 'Displaying 8 of 8 Records Found' and shows a table header with columns: 'Date Time', 'Transaction ID', 'Operator ID', 'Source Type', 'Source Number', and 'Text'.

Figure 12: Electronic Journal Search

The Electronic Journal Search screen consists of a set of filters you can use to refine your search. These filters are:

- **Store Number:** required; enter the store number for the specific store you want to search
- (hint: see the [Site View](#) for Store Number assigned to each store)
- **Date From:** required; click the calendar icon and select the beginning date from which you want to search
- **Date To:** required; click the calendar icon and select the ending date through which you want to search
- **Source:** optional; click the field to reveal two fields:
  - Source Type: select one from Register, Dispenser, or Kiosk
  - Source Number: select one from the list; options for this field depend on the Source Type you selected:
    - Register: options are All, 1, 2, 3, 4, 5, 6, 7, 8, 9 (the CWS register number you want to search against)
    - Dispenser or Kiosk: options are All, and 1 through 32 (the forecourt fueling position number you want to search against)
- **Transaction ID:** optional; enter the transaction number for the specific electronic journal record you want to search against
- **Operator ID:** optional; the Operator ID that you want to search against
- **Search Text:** optional; free form text you want to search against

After completing your filter selections, click the **Search** key to view the results.

Date Time	Transaction ID	Operator ID	Source Type	Source Number	Text
Aug 21, 2019, 12:59:20 PM EDT	13	91	Register	1	Tender Count - Transaction started
Jul 26, 2019, 9:56:20 AM EDT	6	91	Register	2	Tender Count - New Count started. Count Type is Final Count. Employee ID: 91. TEND: 0000000000175
Jul 26, 2019, 9:56:20 AM EDT	6	91	Register	2	Tender Count - New Count Detail Added: Tender Type: Cash, Tender Amount: \$0.00, Tender Count: 0, Tender Denomination: 0
Jul 26, 2019, 9:56:20 AM EDT	6	91	Register	2	Tender Count - Transaction started

Figure 13: Electronic Journal Search Results

All transactions that meet your filter definitions appear. The scroll bar on the right allows you to scroll through the page of records. To move to the next page of results, select the **More** button.

Use the Download button to export the Journal Details to Excel.

*Note: If a record is not available for selection, this means the details for the record are not yet available. This may occur, especially if you are searching very recent journal records. You may wish to try viewing the details a little later.*

## Exceptions

Insite360 displays the error message “No records found” on the bottom right of the screen if your search criteria yields no transaction records.

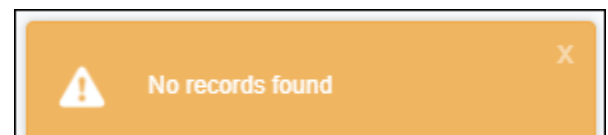


Figure 14: Electronic Journal Search - No Records Found

## Fuel Flow Rate

The Fuel Flow Rate is used to identify fueling positions that are showing a reduced fuel flow rate. This could be a result from a clogged filter that requires a change, or other issues. This is based on a 7-day average of the peak flow rate and is by grade and pump position.

Figure 15: Fuel Flow Rate page

Fuel Flow Rate allows you enter the following data:

- Store Number: Store ID number
- Date: Sets the calculation for one week ending on the date specified
- Threshold: Sets the minimum fuel flow rate before. Fuel flow rate equal to or less than the value set will be highlighted in **red** below.

- **Show All Stores:** Sets the system to show all stores rather than a specific store. **Store Number** is disabled when checking this box
- **Hide Above Threshold:** Sets the system to display only grades and positions with a fuel flow rate at or below the value set.

You can export the fuel flow rate report to either an Excel or CSV file. Click the **Exported Files** button to see a list of exported files for the day. This list is deleted on a daily basis.

## Monitor / Actions

Clicking on **Monitor / Actions** allows you to perform the following functions:

- Site View
- View Package Download History
- View Active Packages Log
- Manage Speed Keys
- Manage Site Fuel Price
- Manage Group Fuel Price
- Manage Customer Fuel Price
- Manage Site POS Receipt
- Manage Group POS Receipt
- Manage Site CRIND Receipt
- Manage Group CRIND Receipt
- Manage Scheduled Tasks
- Manage Site Employees
- Tax Management

## Site View

Clicking the **Site View** button allows you to view information on the stores available to you.

Store Number

Select Store

Search

Clear

Store Name

	Store Number ▲	Store Name	Address	City	State	Postal Code	Phone Number	Gilbarco ID	Site Activated	Registered	Site Status	
Options +	0044	BOO	7300 W FRIENDLY AVE	GREENSBORO	NC	27410	0000000000	181128				Configuration
Options +	2	Passport #2	707 SHAYNA LANE	GREENSBORO	NC	27410	3365479756	826001				Configuration
Options +	4	NACS Passport #4	23447 MAIN STREET	GREENSBORO	NC	27453	3365470001	829999				Configuration
Options +	5	Fuel Station	91 GREEN STREET	SYLVIA	NC	28583	3365478899	826010				Configuration
Options +	643857	GVR CAFETERIA	7300 W FRIENDLY AVE	GREENSBORO	NC	27420	3365475302	256831				Configuration
Options +	7	WESTERN GAS TEST SITE	2716 BATTLE ROAD	GREENSBORO	NC	27412	3365478596	826012				Configuration
Options +	700WF	Wake Forest Test Site	7300 W Friendly	Greensboro	NC	27408	1234567890	293895				Configuration
Options +	8	FMS TEST	1003 E ROOSEVELT RD	GREENSBORO	IL	27284	3365475001	100454				Configuration
Options +	9	FUEL TO GO TEST SITE	25 KDI DRIVE	GREENSBORO	NC	27396	3365478412	826011				Configuration
Options +	999	Josh Test	7300 W Friendly Ave	Greensboro	HI	26211	9999999999	833653				Configuration
Options +	Russ1	TAC Gasboy	7300 W Friendly Ave	Greensboro	NC	27410	8007437501	296456				Configuration

Figure 16: Site View Screen

The information that displays includes:

- Store Number
- Store Name
- Store Street Address
- Phone Number

- Gilbarco ID
- Site Activation Status
- Registered Status
- Site Status
  - **Green** indicates the site has a heartbeat (is communicating properly)
  - **Red** indicates the site does not have a heartbeat (there is a problem communicating)
- Configuration Information

Click **Options** to view additional options for a site that include:

- View Fuel Prices
- View Fuel Price History
- Change Fuel Prices
- Change Speed Key
- Change POS Receipt
- Change CRIND Receipt
- Edit Site Info

## View Package Download History

Clicking on Package Download History displays a listing of the packages downloaded to stores, most recent first.

Store Number	Store Name	Last Status	Type	Last Update	User Name	Source
999	Josh Test	Rejected	Speed Key	Sep 09, 2019, 4:54:07 PM EDT	Joe Paxton	Insite360
4	NACS Passport #4	Accepted	Price Change	Aug 26, 2019, 10:54:02 AM EDT	Joe Paxton	Insite360
4	NACS Passport #4	Accepted	Price Change	Aug 26, 2019, 10:47:02 AM EDT	Joe Paxton	Insite360
4	NACS Passport #4	Accepted	Price Change	Aug 26, 2019, 10:42:20 AM EDT	Joe Paxton	Insite360

Figure 17: Package Download History Screen

Each listing consists of:

- Store Number
- Store Name
- Last Status
- Type of package
- Date of the last update
- User Name of the person who created the package
- Source, or where the package came from
- Show History button to display package history
- View Details button to display with the reason Passport rejected the package.

You can filter the list using the filter fields at the top of the screen. Filters include:

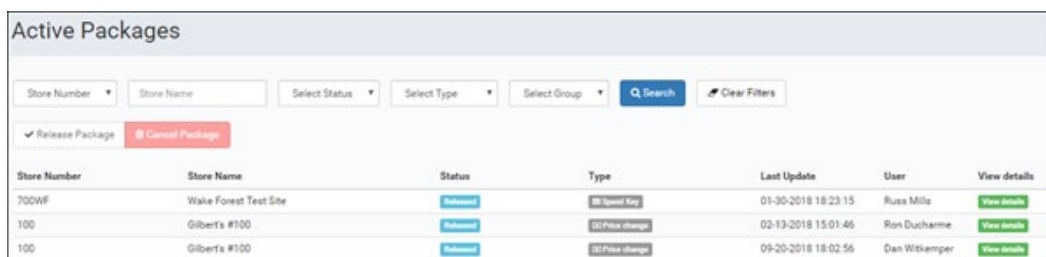
- Store Number
- Store Name
- Type:

- Price change: Fuel price change.
  - Speedkeys: CWS speedkey configuration.
  - Receipt POS: Changes to customer display content, receipt header, and receipt footer.
  - Receipt CRIND: Changes to promotional display content, receipt header, receipt footer, and receipt prompt timeout.
- Status:
    - **Pending:** The user created the package, but it is not yet released.
    - **Cancelled:** The user created the package but cancelled its release.
    - **Downloaded:** Package was downloaded to the Passport system but not yet processed.
    - **Released:** The user released the package for download.
    - **Accepted:** Passport accepted the downloaded package and processed it without errors or warnings.
    - **Rejected:** Passport rejected the downloaded package.
    - **Warning:** Passport received the package and only partially processed it; the warning contains a description of the issues Passport found.
    - **Error:** If you see this status, advise your corporate administrator to contact the Gilbarco Help Desk for assistance.
  - User Name: Person who created the package.
  - Start Date
  - End Date
  - Group: Group the package is associated with.

For any package with a status of Rejected, the **View Details** link causes a message to display with the reason Passport rejected the package.

## View Active Packages Log

Clicking on **View Active Packages Log** causes a listing of packages that have not yet been downloaded to display, with the most recent at the top of the list.



Store Number	Store Name	Status	Type	Last Update	User	View details
700WF	Wake Forest Test Site	Released	02 Speed Key	01-30-2018 18:23:15	Russ Mills	<a href="#">View details</a>
100	Gibber's #100	Released	02 Price change	02-13-2018 15:01:46	Ron Ducharme	<a href="#">View details</a>
100	Gibber's #100	Released	02 Price change	09-20-2018 18:02:56	Dan Wittemper	<a href="#">View details</a>

Figure 18: Active Packages Screen

Each listing consists of:

- Store Number
- Store Name
- Status
- Type
- Last Update
- User
- View Details

You can filter the list using the filter fields at the top of the screen. Filters include:

- Store Number
- Store Name
- Type:
  - **Price change:** Fuel price change.
  - **Speedkeys:** CWS speedkey configuration.
  - **Receipt POS:** Changes to customer display content, receipt header, and receipt footer.
  - **Receipt CRIND:** Changes to promotional display content, receipt header, receipt footer, and receipt prompt timeout.
- Status:
  - **Pending:** Package was created but not yet released.
  - **Released:** Package was released for download.
  - **Downloaded:** Package was downloaded to the Passport system but not yet processed.
  - **Pending POS:** Package was created but not yet released pending POS.
  - **Scheduled:** Package was scheduled but not yet released.
- **Group:** If you have configured Groups of Stores, this drop-down menu displays all available Groups of Stores by name.

## Manage Site and Group Fuel Price

Go to **In-Store > Monitor / Actions > Manage Site Fuel Price** or **Manage Group Fuel Price** to adjust the fuel pricing of single sites or multiple sites.

Fuel Price Management

Single SiteMultiple SitesFuel Prices

Store Name

SearchClear

Store Number ▲	Store Name	Address	City	State	
0044	BGO	7300 W FRIENDLY AVE	GREENSBORO	NC	Select
2	Passport #2	707 SHAYNA LANE	GREENSBORO	NC	Select
4	NACS Passport #4	23447 MAIN STREET	GREENSBORO	NC	Select
5	Fuel Station	91 GREEN STREET	SYLVA	NC	Select
643857	GVR CAFETERIA	7300 W FRIENDLY AVE	GREENSBORO	NC	Select
7	WESTERN GAS TEST SITE	2716 BATTLE ROAD	GREENSBORO	NC	Select
700WF	Wake Forest Test Site	7300 W Friendly	Greensboro	NC	Select
8	FMS TEST	1003 E ROOSEVELT RD	GREENSBORO	IL	Select
9	FUEL TO GO TEST SITE	25 KOI DRIVE	GREENSBORO	NC	Select

Figure 19: Fuel Price Management page

Following information displays for each fuel grade as configured at the site:

- Fuel Grade Name
- National Association of Convenience Stores (NACS) product code for the fuel grade
- Pricing Mode, such as Day or Night



- Service Level, such as Self
- Pricing Level, such as Cash
- Current Price
- New Price, which defaults to the Current Price

Following information displays for each fuel grade as configured at a group of sites:

- Group Name
- Number of Stores (in the group)

Use the search feature to search for a site or a group name. Use the **Select** button to select a site.

Group Name	Number of Stores	
testing	2	Select
Name	1	Select

Figure 20: Edit Group Fuel Prices Screen

Insite360 provides several methods for configuring the fuel prices on the **Edit Site Fuel Prices** or **Edit Group Fuel Prices** screen. You may highlight a single fuel grade at a time and key the new price in the **New Price** field or adjust the **New Price** field by clicking the button until the desired price appears in the **New Price** field. If more than one fuel price is changing by the same amount, you may select a group of fuel grades using the selection boxes and use the buttons under “Increment/Decrement by cents the selected rows” until the desired prices appear in the New Price fields.

Grade	NACS Code	Mode	Service Level	Price Level	Current Price	Source	New Price
REGULAR	001	DAY	SELF	CASH	1.0	Insite360	-1 1.000 +1

Figure 21: Edit Site Fuel Prices Screen

After completing all the price changes, select **Save**. Insite360 displays the confirmation below indicating the fuel prices are saved and pending release.

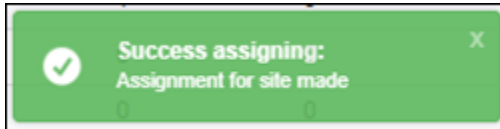


Figure 22: Successful Price Change Message

To download the package to the store or group of stores, go to **In-Store > Monitor / Actions > View Active Packages Log**. The **Active Packages** screen appears. You may highlight the package and click the **Release Package** button to download the package to the store or group of stores.

To cancel a listed package, highlight it and then click the **Cancel Package** button.

## Rules for Editing Fuel Grade Prices

Following are some rules to remember when changing fuel prices in Insite360:

- If the store or group of stores receiving the fuel price changes operate with Cash/Credit pricing, and you configure the Credit price lower than the Cash price, Insite360 displays the error message “Cash price must be lower than Credit price”. You must correct the prices before you can save.
- If the New Price is less than the **Minimum PPU for Groups** configuration in Insite360 (**Low PPU Lockout** field value found in **MWS > Fuel > Site Options > Pricing Levels** tab on the Passport system) or greater than the Maximum PPU for Groups configuration in Insite360 (**High PPU Lockout** field value found in **MWS > Fuel > Site Options > Pricing Levels** tab on the Passport system), Insite360 displays the error message “Prices exceed limits set by Site Options. Please correct errors”. You must correct the prices before you can save.
- The Passport systems upload to Insite360 all locally configured fuel discounts, including Fuel Discount Name, Grade, and PPU Amount Off. If the New Price less any fuel discounts programmed on the Passport system would cause the fuel price to be less than the Low PPU Lockout field value found in **MWS > Fuel > Site Options > Pricing Levels** tab, Insite360 displays an error message that includes the fuel discount and associated fuel grade. You must correct the prices before you can save.
- If the store has an electronic price sign connected to the Passport system, when Insite360 downloads a fuel price change, Passport initiates the price change immediately.
- If there is no electronic price sign connected to the Passport system, Passport displays a message indicating a fuel price change is ready.

Figure 27: Fuel Price Change Received Message



After the cashier acknowledges the message by pressing **OK**, the CWS prompts the cashier for printing the pending price change report.

Figure 28: Print Pending Price Change Report Message



If the cashier presses **Yes**, the **Pending Fuel Price Change Report** prints showing the information from the Fuel Price Change download package; otherwise, no report prints.

The cashier may initiate the fuel price change at:

**CWS > More > More > Dispenser Menu > Fuel Price Change.** The manager may initiate the fuel price change at **MWS > Pricing > Fuel Price Change.**

- After changing fuel prices, Passport notifies Insite360 details of the change, including whether the Manager had overridden any of the downloaded prices. Passport also notifies Insite360 of fuel prices changed manually on the Passport system or electronically through a third-party interface, such as Back Office.

## Customer Fuel Prices

Go to **In-Store > Monitor / Actions > Manage Customer Fuel Prices** to adjust the fuel pricing of customer sites.

Customer Fuel Prices									
Excel CSV									
Store Number ▲	Grade	NACS Code	Mode	Service Level	Price Level	Price	Source		
0044	REGULAR	001	DAY	SELF	CASH	\$1.000	Insite360	History	Change
100	PREMIUM	003	DAY	SELF	CASH	\$1.000	Insite360	History	Change
100	PLUS	002	DAY	SELF	CASH	\$1.000	Insite360	History	Change

Figure 23: Customer Fuel Prices Screen

Following information displays for each fuel grade as configured at the site:

- Store Number
- Grade
- National Association of Convenience Stores (NACS) product code for the fuel grade
- Pricing Mode, such as Day or Night
- Service Level, such as Self
- Pricing Level, such as Cash
- Current Price
- Source

You can review a site's price change history by clicking the **History** button.

The screenshot shows the 'Price History - BGO' interface. At the top, there are search filters for Grade, Status, Date From, and Date To. Below these are 'Search' and 'Clear' buttons. The main part of the screen is a table with the following columns: Grade, NACS Code, Mode, Service Level, Price Level, Old Price, New Price, Operator ID, Applied Date, Received Date, Source, and Status. A single row of data is visible, showing a price change for 'REGULAR' fuel from \$1.970 to \$2.000, applied on June 18, 2019, with a status of 'accepted'.

Grade	NACS Code	Mode	Service Level	Price Level	Old Price	New Price	Operator ID	Applied Date ▼	Received Date	Source	Status
REGULAR	001	DAY	SELF	CASH	\$1.970	\$2.000	91	Jun 18, 2019, 11:27:01 AM EDT	Jun 18, 2019, 11:37:41 AM EDT	Insite360	accepted

Figure 24: Customer Price History Screen

Narrow a search for a price change on a site by using the following fields:

- Grade
- Status
- Date From:
- Date To:

Following information displays for each fuel grade as configured at the site on the history page:

- Grade
- National Association of Convenience Stores (NACS) product code for the fuel grade
- Pricing Mode, such as Day or Night
- Service Level, such as Self
- Pricing Level, such as Cash
- Old Price
- New Price
- Operator ID
- Applied Date
- Received Date
- Source
- Status

To change a customer's fuel prices, select **Change**. This opens the [Edit Site Fuel Prices](#) page.

## Employee Management

Go to **In-Store > Monitor / Actions > Manage Site Employees** to add or edit site employee information. This data can be changed from within Instore or through the POS system at the site.

Changes made from the POS to Instore can take up to 15 minutes to appear in Instore. Changes made from Instore occur in real time.

Employees

Store Number <sup>i</sup> Name Operator Id Security Group Source

Search Clear Create New Employee

Export To Excel Export To CSV

Displaying 20 of 48 Records Found

Last Name ▲	First Name	Operator Id	Security Group	Phone #	Source	# Stores		
1000454	Test	79431	Supervisor		Passport	1	Edit Details	De-activate
1000454	Test	79431	Supervisor		Passport	1	Edit Details	De-activate
Billson	Eddy	2222	Cashier		Passport	1	Edit Details	Process Duplicates
Billson	Eddy	2222	Cashier		Passport	1	Edit Details	Process Duplicates
Employee-6veeaw	Automated-6veeaw	80673	Owner	(919) 555-5555	Passport	1	Edit Details	De-activate
Employee-8nr0fg	Automated-8nr0fg	77124	Manager	(919) 555-5555	Passport	1	Edit Details	De-activate

Figure 25: Manage Site Employees Screen

The following information appears for each employee in the system:

- Last Name
- First Name
- Operator ID
- Security Group
- Phone #
- Source
- # Stores

Narrow a search for an employee at a site by using the following fields:

- Store Number (search for a single or multiple store numbers)
- Name
- Operator ID
- Security Group
- Source

Instore automatically identifies duplicate employee names and highlights duplicate names in yellow. This could be two different employees, or an employee shared across multiple sites. To resolve duplicate entries (remove yellow shading), click **Process Duplicates**.

Possible duplicate employees named Eddy Billson

Keep Employee	Store Number	Operator Id	Phone #	Address	City
<input checked="" type="checkbox"/>	100454	2222			
<input checked="" type="checkbox"/>	826011	2222			

Process Cancel

Figure 26: Process Duplicate Screen

- If the duplicate names are different people, leave the boxes checked and click **Process**. This removes the duplicate warning on the Manage Site Employee screen.
- If the duplicate names are the same person, deselect all boxes but one and click **Process**. This will assign all store numbers to a single record.

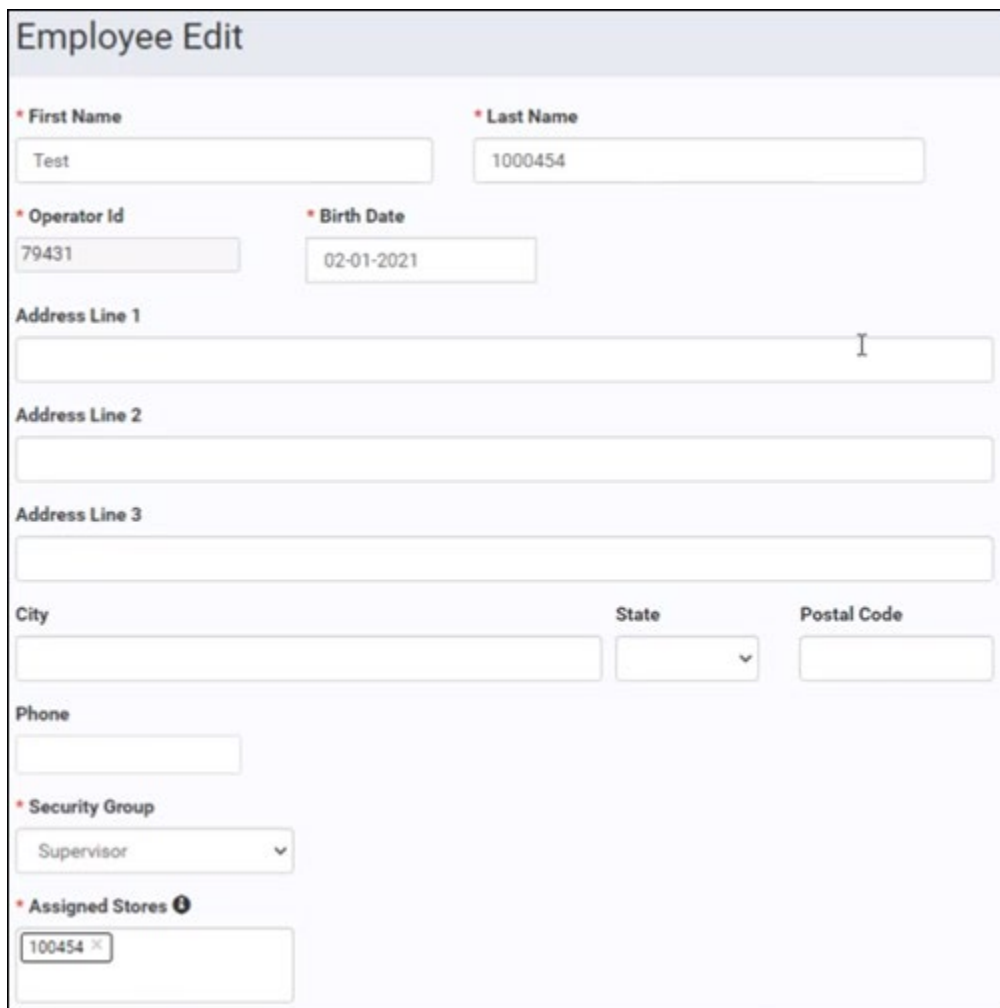
*Note: You can only select all duplicates or a single duplicate when using the **Process Duplicate** function.*

Each account comes with a default Area Manager employee with an Operator ID of 91.

To create a new employee, click the **Create New Employee** button.

To edit an existing employee, click the **Edit Details** button next to the employee you wish to edit.

You can add the new employee's name, operator ID, birth date, address, security group, and the assigned stores from Instore. Employee Preferences can be viewed modified by Instore.



The screenshot shows the 'Employee Edit' form with the following fields and values:

- \* First Name:** Test
- \* Last Name:** 1000454
- \* Operator Id:** 79431
- \* Birth Date:** 02-01-2021
- Address Line 1:** (empty)
- Address Line 2:** (empty)
- Address Line 3:** (empty)
- City:** (empty)
- State:** (dropdown menu with a downward arrow)
- Postal Code:** (empty)
- Phone:** (empty)
- \* Security Group:** Supervisor (dropdown menu with a downward arrow)
- \* Assigned Stores:** 100454 (with a close button 'x')

Figure 27: Employee Edit Screen

To terminate an employee within Instore, click the **De-activate** button. The employee record still exists in the list but is greyed out and is not assigned to a store.

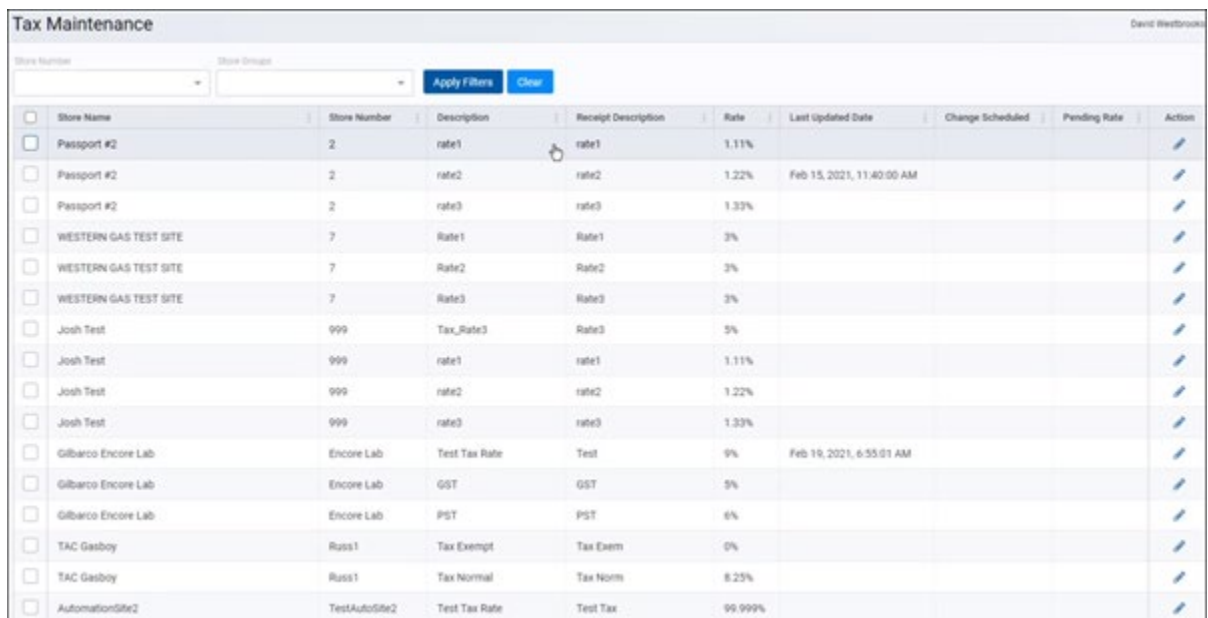
To re-hire an employee within Instore, click the **Re-activate** button.

## Tax Management

Go to **In-Store > Monitor / Actions > Tax Management** to update multiple tax rates at a time. You can schedule tax changes immediately (within 5 minutes) or for a specific future date and time. Tax rates can only be modified in Instore, not created or deleted.

To create a tax rate for multiple sites, set up [store groups](#) prior to setting a tax rate.

Tax Management checks to ensure a site is online. The system will not allow a rate change if the site is not online. Tax Management deselects all sites not online.



<input type="checkbox"/>	Store Name	Store Number	Description	Receipt Description	Rate	Last Updated Date	Change Scheduled	Pending Rate	Action
<input type="checkbox"/>	Passport #2	2	rate1	rate1	1.11%				
<input type="checkbox"/>	Passport #2	2	rate2	rate2	1.22%	Feb 15, 2021, 11:40:00 AM			
<input type="checkbox"/>	Passport #2	2	rate3	rate3	1.33%				
<input type="checkbox"/>	WESTERN GAS TEST SITE	7	Rate1	Rate1	3%				
<input type="checkbox"/>	WESTERN GAS TEST SITE	7	Rate2	Rate2	3%				
<input type="checkbox"/>	WESTERN GAS TEST SITE	7	Rate3	Rate3	3%				
<input type="checkbox"/>	Josh Test	999	Tax_Rate3	Rate3	5%				
<input type="checkbox"/>	Josh Test	999	rate1	rate1	1.11%				
<input type="checkbox"/>	Josh Test	999	rate2	rate2	1.22%				
<input type="checkbox"/>	Josh Test	999	rate3	rate3	1.33%				
<input type="checkbox"/>	Gilbarco Encore Lab	Encore Lab	Test Tax Rate	Test	9%	Feb 18, 2021, 6:55:01 AM			
<input type="checkbox"/>	Gilbarco Encore Lab	Encore Lab	GST	GST	5%				
<input type="checkbox"/>	Gilbarco Encore Lab	Encore Lab	PST	PST	6%				
<input type="checkbox"/>	TAC Gasboy	Russ1	Tax Exempt	Tax Exem	0%				
<input type="checkbox"/>	TAC Gasboy	Russ1	Tax Normal	Tax Norm	8.25%				
<input type="checkbox"/>	AutomationSite2	TestAutoSite2	Test Tax Rate	Test Tax	99.999%				

Figure 28: Tax Maintenance Screen

The following information appears for each tax rate in the system:

- Store Name
- Store Number
- Description
- Receipt Description
- Rate
- Last Updated Date
- Change Scheduled
- Pending Rate

Narrow a search for a tax rate by using the following fields:

- Store Number
- Store Groups

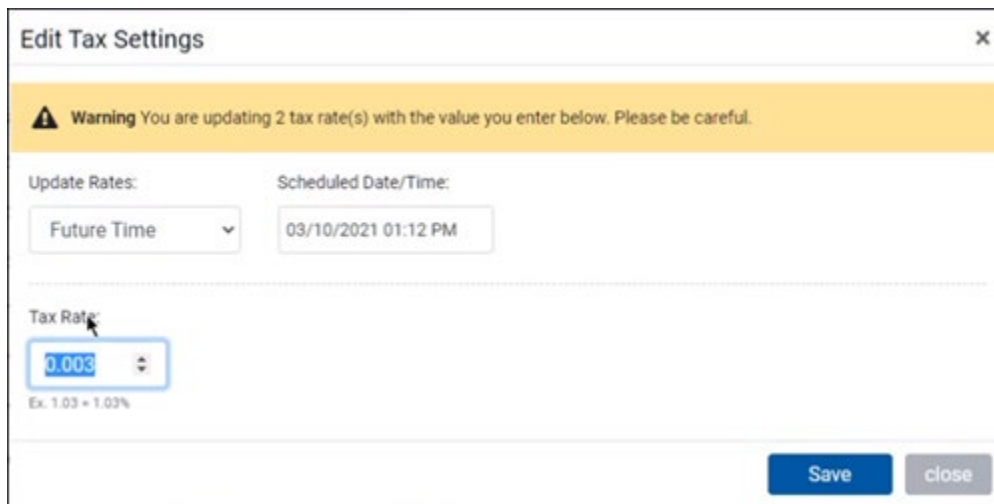



Figure 29: Edit Tax Settings Screen

To change a rate, click the edit icon under the **Actions** column.

1. Select the update rate, **Now** or **Later**. Now sets the new tax value within 5 minutes of the change. **Later** allows you to set a date and time the change is made.
2. Enter a new **Tax Rate**. You can change the tax rate from 0-100.000%.
3. Click **Save** and **OK** to confirm.

To cancel a rate change, click the cancel rate icon .



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## Quick Links

The Insite360 Quick Links screen appears when you sign into Insite360. **Quick Links** contains all the applications and functions available to you through Insite360. The following is an example of the Insite360 **Quick Links** screen.

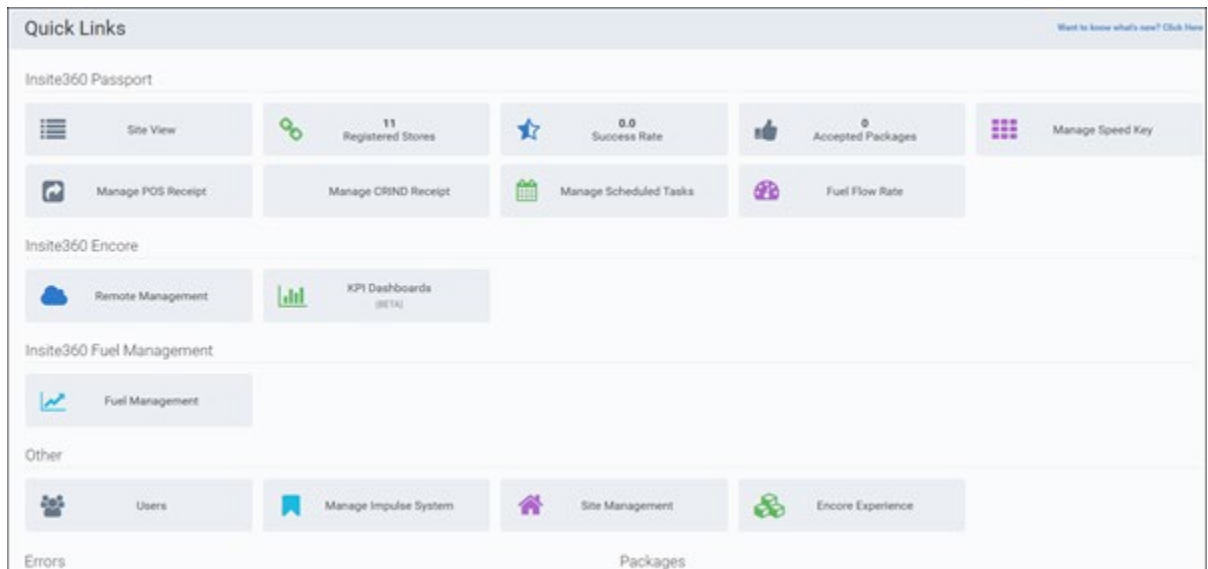


Figure 30: Quick Links Screen

## Quick Link Buttons

Selecting one of the buttons displayed within the **Quick Link** section allows access to specific functions. The **Quick Link** buttons include:

- Site View
- Registered Stores
- Success Rate
- Accepted Packages
- Manage Speed Key
- Manage POS Receipt
- Manage CRIND Receipt
- Manage Scheduled Tasks
- Fuel Flow Rate

### Site View

See the [Site View](#) section for more information.

### Registered Stores

This button displays the number of your assigned stores that have registered their POS. To view the stores, go to the [Site View](#) page.

### Success Rate

The **Success Rate** button displays the overall percentage of packages successfully downloaded and accepted in the past seven days. Clicking the **Success Rate** button causes the **Package Download History** screen to display. For more information on this screen, see [Package Download History](#).

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## Users

The **Users** button shows the total number of corporate users who have access to Insite360. Clicking the **Users** button causes the User Maintenance screen to display. For more information on this screen, see [User Maintenance](#).

## Accepted Packages

The **Accepted Packages** button displays the total number of packages successfully downloaded and accepted by stores or groups of stores. Clicking the **Accepted Packages** button causes the Package Download History Log screen to display. For more information on this screen, see [Package Download History](#).

## Manage Speed Key

Clicking on **Manage Speed Key** button takes you to the **Speed Key Configurations List** page. If no data appears on the **Speed Key Configurations List** screen, click **New Configuration** to create a [speed key configuration](#).

Speed Key Configurations List						
<div><div>Name</div><div>Source</div><div>Edited By</div><div>Last Update Start</div><div>Last Update End</div><div><input type="text"/></div><div><input type="text"/></div><div><input type="text"/></div><div><input type="text"/></div><div><input type="text"/></div><div><input type="button" value="Search"/></div><div><input type="button" value="Clear"/></div><div><input type="button" value="+ New Configuration"/></div></div>						
	Name ▲	Source	Edited By	Last Update	Stores	Groups
<input type="button" value="Options -"/>	700S: 01-09-2019 20:30:53	Site	293895	01-09-2019 20:30:54	1	0
<input type="button" value="Options -"/>	700S: 01-09-2019 20:37:41	Site	293895	01-09-2019 20:37:42	1	0
<input type="button" value="Options -"/>	700S: 01-09-2019 20:47:31	Site	293895	01-09-2019 20:47:32	1	0

Figure 31: Speed Key Configurations List

Clicking **Options** allows you to perform the following functions for a site:

- Edit
- Copy
- Assign to Store
- Assign to Store Group
- Delete

---

## Manage Site and Group POS Receipts

Go to **In-Store > Monitor / Actions > Manage Site POS Receipt** or **Manage Group POS Receipt** to manage POS receipts of single a site or multiple sites.

Selecting **Manage Site POS Receipt** takes you to the **Site Selection – POS Receipt** screen. From this screen you can search your list of stores by **Store Name**.

Stores are listed on the screen with the following information:

- Store Number
- Store Name
- Address
- City
- State

Click **Select** to proceed to the POS Receipt for the site.

Site Selection - POS Receipt					
<div>Store Name</div> <div><input type="text"/></div> <div><div>Search</div><div>Clear</div></div>					
Store Number ▲	Store Name	Address	City	State	
0044	BGO	7300 W FRIENDLY AVE	GREENSBORO	NC	<div>Select</div>
2	Passport #2	707 SHAYNA LANE	GREENSBORO	NC	<div>Select</div>
4	NACS Passport #4	23447 MAIN STREET	GREENSBORO	NC	<div>Select</div>
5	Fuel Station	91 GREEN STREET	SYLVA	NC	<div>Select</div>
643857	GVR CAFETERIA	7300 W FRIENDLY AVE	GREENSBORO	NC	<div>Select</div>
7	WESTERN GAS TEST SITE	2716 BATTLE ROAD	GREENSBORO	NC	<div>Select</div>
700WF	Wake Forest Test Site	7300 W Friendly	Greensboro	NC	<div>Select</div>
8	FMS TEST	1003 E ROOSEVELT RD	GREENSBORO	IL	<div>Select</div>
9	FUEL TO GO TEST SITE	25 KOI DRIVE	GREENSBORO	NC	<div>Select</div>
999	Josh Test	7300 W Friendly Ave	Greensboro	HI	<div>Select</div>
Russ1	TAC Gasboy	7300 W Friendly Ave	Greensboro	NC	<div>Select</div>

*Figure 32: Site Selection - POS Receipt Screen*

Selecting **Manage Group POS Receipt** takes you to the **Group Selection – POS Receipt** screen. From this screen you can search your list of stores by **Group Name**.

Stores are listed on the screen with the following information:

- Group Name
- Number of Stores

---

Click **Select** to proceed to the POS Receipt for the group.

### Group Selection - POS Receipt

Group Name

Search

Clear

Group Name	Number of Stores	
Sonias test group	1	<div>Select</div>
East	0	<div>Select</div>
testing	2	<div>Select</div>

*Figure 33: Group Selection - POS Receipt Screen*

Once you've clicked **Select**, the receipt for either a site or a group appears.

Figure 34: POS Receipt Screen

Following fields appear in the Manage Site POS Receipt screen:

- **Customer Display:** Text that displays inside on each Passport customer display while the CWS is idle.
- **Scroll:** Check this field if you want the Customer Display text to scroll.
- **POS Receipt Header:** Text that prints at the top of inside receipts.
- **Left and Center:** Radio buttons for selecting whether to print the receipt header centered or left justified.
- **POS Receipt Footer:** Text that prints at the bottom of inside receipts.
- **Left and Center:** Radio buttons for selecting whether to print the receipt footer centered or left justified.

After you complete the fields you wish to download to the store or group of stores, click the **Save** button at the bottom of the screen (you may need to scroll down to view the button). To cancel out of the configuration, click the **Cancel** button.

After completing all the price changes, select **Save**. Insite360 displays the confirmation below indicating the fuel prices are saved and pending release.

To download the package, go to **In-Store > Monitor / Actions > View Active Packages Log**. The **Active Packages** screen appears. You may highlight the package and click the **Release Package** button to download the package to the store or group of stores.

To cancel a listed package, highlight it and then click the **Cancel Package** button.

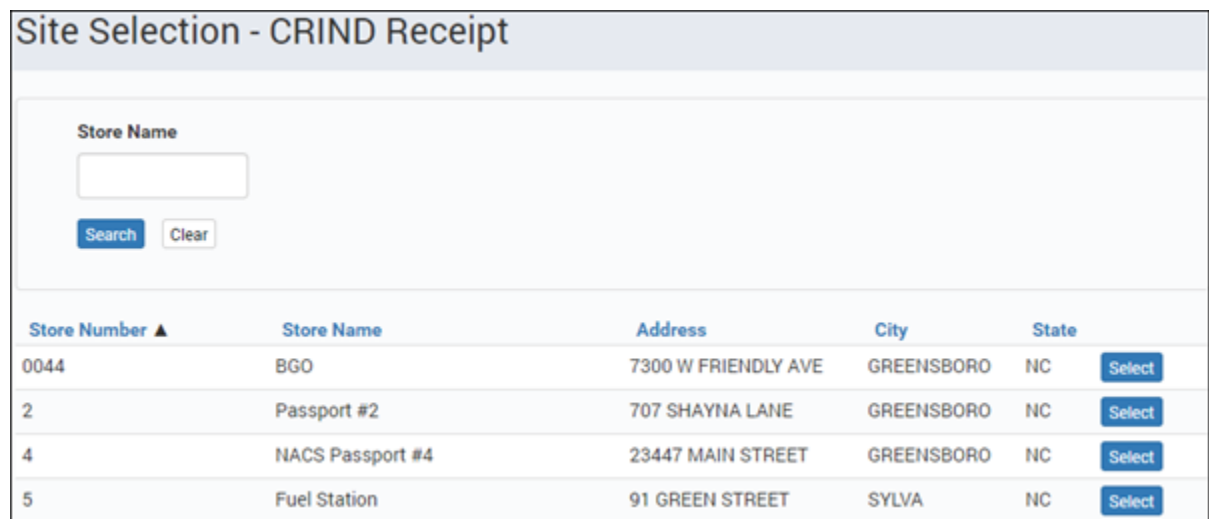
## Manage Site and Group CRIND Receipt

Go to **In-Store > Monitor / Actions > Manage Site CRIND Receipt** or **Manage Group CRIND Receipt** to manage CRIND receipts of single a site or multiple sites.

Selecting **Manage Site CRIND Receipt** takes you to the **Site Selection – CRIND Receipt** screen. From this screen you can search your list of stores by **Store Name**.

Stores are listed on the screen with the following information:

- Store Number
- Store Name
- Address
- City
- State



Store Number ▲	Store Name	Address	City	State	
0044	BGO	7300 W FRIENDLY AVE	GREENSBORO	NC	Select
2	Passport #2	707 SHAYNA LANE	GREENSBORO	NC	Select
4	NACS Passport #4	23447 MAIN STREET	GREENSBORO	NC	Select
5	Fuel Station	91 GREEN STREET	SYLVA	NC	Select

Figure 35: Site Selection - CRIND Receipt Screen

Selecting **Manage Group CRIND Receipt** takes you to the **Group Selection – CRIND Receipt** screen. From this screen you can search your list of stores by **Group Name**.

Stores are listed on the screen with the following information:

- Group Name
- Number of Stores

## Group Selection - CRIND Receipt

Group Name

Search

Clear

Group Name	Number of Stores	
Sonias test group	1	<div>Select</div>
East	0	<div>Select</div>
testing	2	<div>Select</div>

Figure 36: Group Selection - CRIND Receipt

Click **Select** to proceed to the CRIND Receipt for the group or site.

Once you've clicked **Select**, the receipt for either a site or a group appears.

Figure 37: CRIND Receipt Screen

Following fields appear:

- **Promotional Display:** Text that displays on the CRIND while it is idle.
- **Receipt Header:** Text that prints at the top of outside CRIND receipts.
- **Left and Center:** Radio buttons for selecting whether to print the receipt header centered or left justified.
- **Receipt Footer:** Text that prints at the bottom of outside CRIND receipts.
- **Left and Center:** Radio buttons for selecting whether to print the receipt footer centered or left justified.



- 
- **Receipt Timeout:** Number of seconds the print receipt prompt displays at the CRIND; values are 5 through 30 seconds.

After you complete the fields you wish to download to the store or group of stores, click the **Save** button at the bottom of the screen (you may need to scroll down to view the button). To cancel out of the configuration, click the **Cancel** button.

After completing all the price changes, select **Save**. Insite360 displays the confirmation below indicating the fuel prices are saved and pending release.

To download the package, go to **In-Store > Monitor / Actions > View Active Packages Log**. The **Active Packages** screen appears. You may highlight the package and click the **Release Package** button to download the package to the store or group of stores.

To cancel a listed package, highlight it and then click the **Cancel Package** button.

# Remote Software Update

The **Remote Software Update** function allows you to manage and update your Passport Point of Sale software remotely.

Following Passport requirements are necessary to use Remote Software Update:

- Version 12.02 (or higher) installed
- High Speed Routing Solution
  - Secure Zone Router or Management Network Service Provider

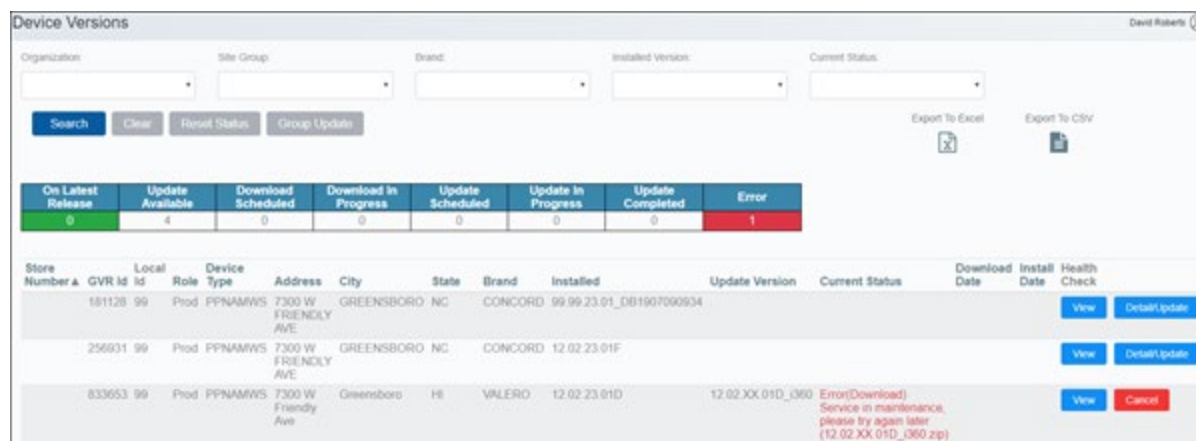
## Device Version Assignment

Navigate to **Remote Software Update > Device Version Assignment** to view and manage software versions on your Passport devices.

Selecting **Device Version Assignment** takes you to the **Device Versions** screen where you can view a listing of sites, status, and access to the Health Check Report. This is also where you select the site to be updated.

You can narrow your sites/device list by using the search function with the following parameters:

- Organization
- Site Group
- Brand
- Device Type
- Current Status



The screenshot shows the 'Device Versions' interface. At the top, there are search filters for Organization, Site Group, Brand, Installed Version, and Current Status, along with buttons for Search, Clear, Reset Status, and Group Update. To the right are buttons for Export To Excel and Export To CSV. Below the filters is a summary table with columns: On Latest Release (0), Update Available (4), Download Scheduled (0), Download In Progress (0), Update Scheduled (0), Update In Progress (0), Update Completed (0), and Error (1). The main table lists three devices with columns: Store Number, GVR Id, Local Id, Role, Device Type, Address, City, State, Brand, Installed, Update Version, Current Status, Download Date, Install Date, and Health Check. The third device has a red error message: 'Error(Download) Service in maintenance, please try again later (12.02.XX.01D\_0360.zip)'.

Store Number	GVR Id	Local Id	Role	Device Type	Address	City	State	Brand	Installed	Update Version	Current Status	Download Date	Install Date	Health Check
181128	99	Prod	PPNAMWS	7300 W FRIENDLY AVE	GREENSBORO	NC	CONCORD	99.99.23.01_0B1907000934						<a href="#">View</a> <a href="#">Detail/Update</a>
256931	99	Prod	PPNAMWS	7300 W FRIENDLY AVE	GREENSBORO	NC	CONCORD	12.02.23.01F						<a href="#">View</a> <a href="#">Detail/Update</a>
833653	99	Prod	PPNAMWS	7300 W Friendly Ave	Greensboro	HI	VALERO	12.02.23.01D	12.02.XX.01D_0360	Error(Download) Service in maintenance, please try again later (12.02.XX.01D_0360.zip)				<a href="#">View</a> <a href="#">Cancel</a>

Figure 38: Device Version Screen

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## Managing Updates using the Device Version Detail screen

Click the **Details/Update** button to manage the software update for a device.

The screenshot shows the 'Device Version Detail' screen with three main sections: 'Device Configuration Data', 'Store Data', and 'Software Update'.

**Device Configuration Data**

- Device Id: 3137069
- Device Type: PPNAMWS
- Last Updated: 09/10/2019 01:29 PM GMT-4
- PassportVersion: 12.02.23.01D
- PassportMaintenanceVersion:
- PassportBrand: VALERO
- Versions: EDHVersion: 09.23 (09.23.02.01D )
- OSHotFixVersion: 69.9.03
- PassportModel: PA0324
- PassportSerial: SB102000
- Site Role:
  - ☒ Production
  - ☐ Field Trial
  - ☐ Lab

**Store Data**

- Store Number: 103
- Address: 7300 W. Friendly Ave
- City: GREENSBORO
- State: North Carolina
- Time Zone: America/New York

**Software Update**

- ☒ No Update
- ☐ Latest Overall Version: 12.02.XX.01D\_i360
- ☐ Latest revision for the current version: 12.02.XX.01D\_i360
- ☐ Immediate Send
- Times are local at the site
- Download Date:
  - Input field
  - HH : MM AM
- Install Date:
  - Input field
  - HH : MM AM

Buttons: Save, Cancel

Figure 39: Device Version Detail Screen

The **Device Version Detail** screen displays general information pertaining to the Passport Point of Sale device and the other key store parameters pertinent to the software update process.

The 'Site Role' will be set by Insite360 and will likely not change once initially configured. This setting is based on the type of site that Insite360 is connected to. The three options are:

- **Production:** Capable of receiving production released versions of software)

- **Field Trial:** Capable of receiving field trial and production released versions of software)
- **Lab:** Capable of receiving lab, field trial, and production released versions of software)

Select from the choices listed below in the Software Update Section:

- **No Update** is the default state and as the name states will not update the Passport POS software at the site
- **Latest Overall Version** will take a site from the currently installed software version to the most current version (including Major and Service Pack)
- **Latest Revision** for the current version will take a site from the currently installed software version to the most recent Service Pack available)
- **Immediate Send** will send the software update package to the site once the 'Save' button is pressed
  - Software is sent to the site and upon completion of the download:
  - Software is moved to a staging area to be applied after the store has closed per the following rules
  - NOTE: From this point forward, the Passport system follows the same steps as if CD Media had been used to load the software.
  - If the Passport system detects a software upgrade is available after the manager selects **Period Close > Store Close > Start**, then the following message is presented:

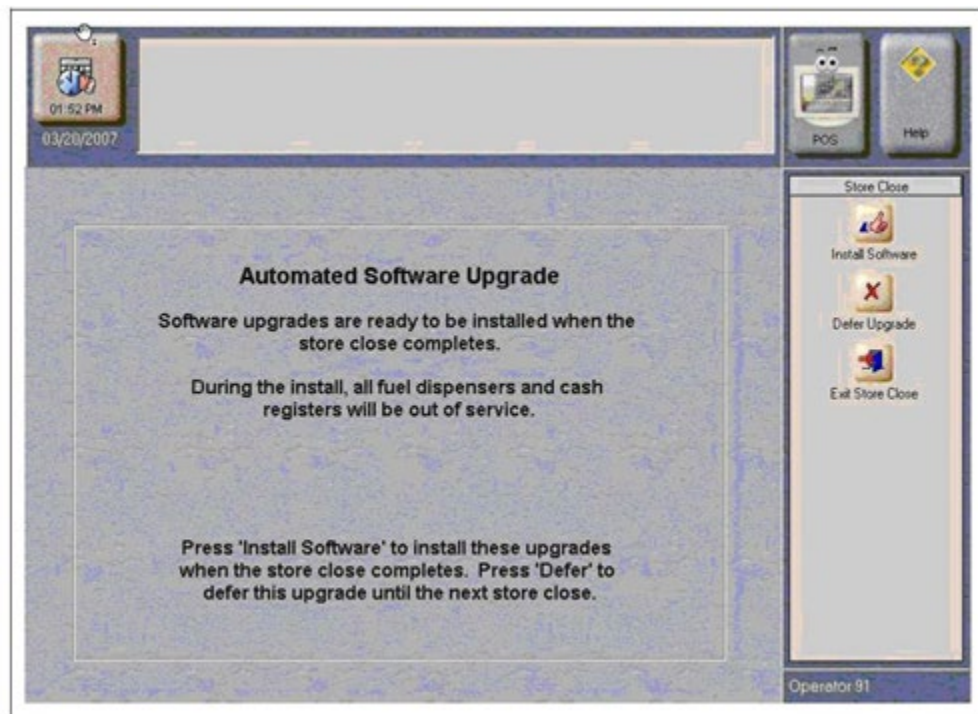


Figure 40: POS Upgrade Message

- The manager has three options and must select one to continue:
  - If Exit Store Close is selected, the Store Close process is terminated and the user is redirected to the Period Close menu.
  - If Install Software is selected, the Store Close process will continue and the upgrade will be installed after the close process has completed.
  - If Defer Upgrade is selected, the upgrade will not be installed but may be installed at the next Store Close and the close process will continue. When the

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store detects that there are no software deferrals remaining, this screen will display with only two options (Install Software and Defer Upgrade will not be present)


- **Download Date** will send the software update package to the site once the date and time parameters have been satisfied
- **Install Date** will set the flag for the Passport POS to move the software to the staging area as noted in the 'Immediate Send' section above (bullet 2) and will continue as noted in the subsequent bullets
  - **Important Distinction!** setting the Install Date to 7/10/2019 at 1:15PM will not initiate a software update at 1:15 PM. This will instead trigger the flag to be set to prompt for a software update to be installed at the next store close.
  - Software will be sent to the site and upon completion of the download the software will be moved to a staging area to be applied after the store has closed

The user has the option to cancel the installation if the software has not moved into the staging area on the Passport POS system.

## Viewing POS Health Status

From the **Device Version** screen, you can click **View** to review the latest Passport POS Health Check Report.

Gilbarco System Health Check



**General Info**

Description	Data_Value
Store Name	Store Name
Store Number	299
Address Line 1	
Address Line 2	
Address Line 3	
City, State, Postal Code	..
Report Generation Time	7/25/2019 3:00:31 AM
Machine	POSSERVER01
Hardware	Touch Dynamic Inc.BRQ67
Image Version	40.9.26
Passport Version	12.02.23.01F
OS Hotfix Version	69.9.03
Maintenance Pack	
Brand Installed	CONCORD
Processor Speed (MHz)	3300
Physical Memory (MB)	4096.00
Operating System	Microsoft Windows 7 Professional
Service Pack	Service Pack 1

**Server Alerts**

Time	Alert Message
7/9/2019 4:22:30PM	"This is a message from The Automated Passport Daily Database Maintenance Job.  Your hourly transaction log backup did not succeed.
7/23/2019 10:00:11AM	"This is a message from The Automated Transaction Log Backup.  A backup mismatch condition was detected.

Figure 41: Passport POS Health Check Report

# Glossary

Term	Description
Download	Transmit a file to a Passport Store or Group of Stores
Insite360	Cloud-based application to assist petroleum industry merchants manage their stores remotely
Package	Configuration file a user creates for downloading to a Store or Group of Stores
PA-DSS	Payment Application Data Security Standard; all current versions of Passport software are PA-DSS certified
Receipt Timeout	Number of seconds the CRIND displays a prompt to the customer for printing the customer receipt; at expiration of the Receipt Timeout, the CRIND removes the customer prompt and completes the transaction

## Abbreviations and Acronyms

Term	Description
BOS	Back Office System
CRIND	Card Reader in Dispenser
CWS	Cashier Workstation
HTML	HyperText Markup Language
IP	Internet Protocol
MWS	Manager Workstation
NACS	National Association of Convenience Stores
OS	Operating System
PA-DSS	Payment Application Data Security Standard
PLU	Price Look Up
POS	Point of Sale
PPU	Price per Unit
UPC	Universal Product Code
WAN	Wide Area Network

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