NCR Mobile Pay Dashboard Administrator Guide

Last Updated: August 3, 2020

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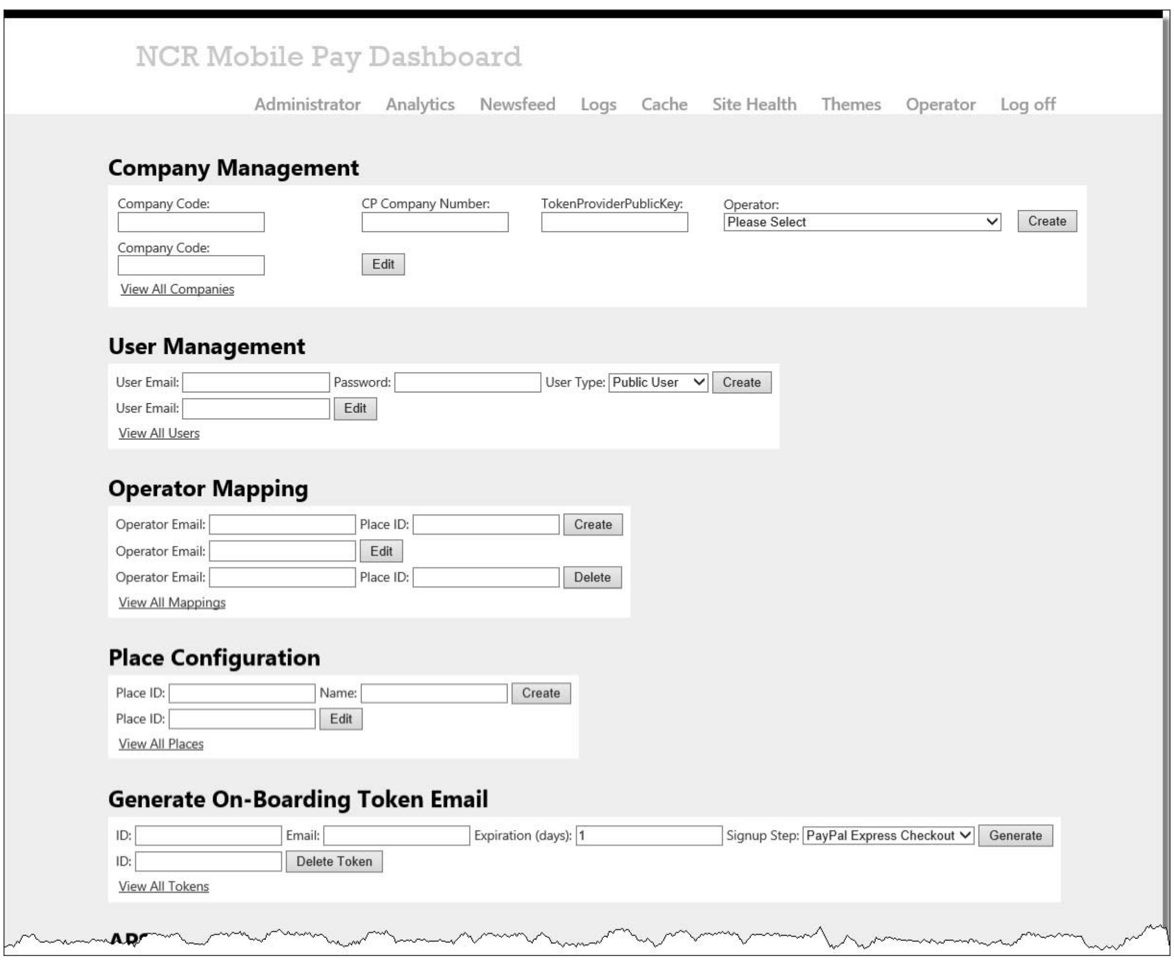
About NCR Mobile Pay Dashboard

NCR internal employees use the NCR Mobile Pay Dashboard to integrate NCR Mobile Pay clients with the NCR payment gateway. The functions in this guide allow you to map the sites within a company using Mobile Pay to the same company in the NCR payment gateway so that Mobile Pay transactions process to the correct locations. You can also use this tool to customize Mobile Pay sites to more closely align with company branding, such as displaying the company logo, adding special messages, and more. Use this guide to understand the different areas of the tool and what you can do in each area.

- Mobile Pay integration with the NCR payment gateway in host to host. This means you are not sending any payment detail down to the site. Payment detail goes directly from the NCR payment gateway host to the Mobile Pay host.
- The in-store configuration for credit card processing is irrelevant. In-store processing could be EDC, P2PE, NCR payment gateway, or a different CP environment. You create generic Mobile Pay tenders in Aloha Configuration Center for use when applying payment to the check. Refer to the NCR Mobile Pay Implementation Guide for instructions.

To access NCR Mobile Pay Dashboard, visit https://NCRPay.com/Dash/Account/Login and log in with the credentials provided to you in an email by an NCR Mobile Pay administrator. If you need to request credentials, contact Support@AlohaEnterprise.com.



Administrator Tab

The tabs across the top of the screen provide access to other functions that allow you to view analytics, logs, the cache, the site health, and more, but most of the work you perform is done here on the Administrator tab.

Company Management

Use Company Management to create the Mobile Pay company code that links the Mobile Pay environment to the NCR payment gateway company ID. Company Management is only available to users designated as a Super User (see “User Management” on page 5). Once you create the company in NCR Mobile Pay Dashboard, a user with appropriate access can edit and view the company.

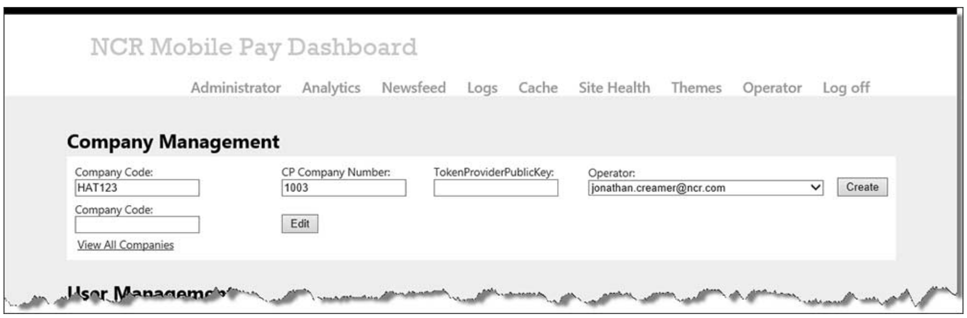


Figure 1 Company Management

How to obtain the public key

Whether or not a client is already using Aloha Online Ordering for online payments impacts the steps required to create a new company here in Mobile Pay Dashboard. The NCR payment gateway only allows for the entry of one public and private key, required for the two applications to communicate with each other. These keys must match exactly, for successful communication.

If the client is using Aloha Online Ordering, a public and private key has already been generated for them and you must use those keys when establishing the link between Mobile Pay and the NCR payment gateway. Access WebAdmin in Aloha Online Ordering and select Configuration > Payment Providers. The area circled in red below is the public key.

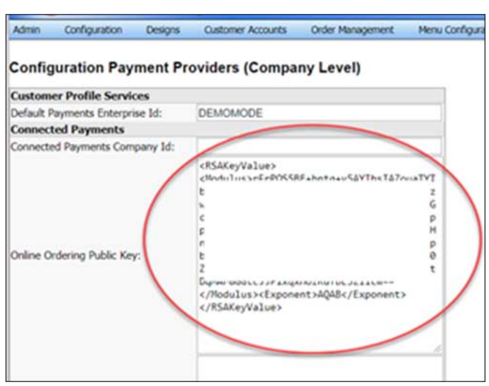


Figure 2 WebAdmin Public Key

Ask the Enterprise support team to copy the private key from the Aloha Online Ordering server to the Mobile Pay server. The private key must be configured on the Mobile Pay servers and be synced to the Mobile Pay company. If payments are already being processed through Aloha Online Ordering and the NCR payment gateway, the public key has already been assigned to the corresponding company in the NCR payment gateway.

If the client is not using Aloha Online Ordering, send a request to the NCR Mobile Pay team to generate the public and private key. It typically takes about a day to receive the newly generated public key from them. Ask that they copy the private key for the newly created company to the Mobile Pay server. Provide them with the Company Code you assigned to the store and the NCR payment gateway company code. Also send an email to ConnectedPayments.support@ncr.com to assign the public and private key to the corresponding company in the NCR payment gateway (Connected Payments - ServerEPS).

Prerequisite: The company must already exist in the NCR payment gateway (ServerEPS) before using Company Management to create the Mobile Pay company in NCR Mobile Pay Dashboard.

How to create a new company

1. In the Company Management area of the screen, enter a **unique random seven-digit alphanumeric number** you create in ‘Company Code.’ Use a naming convention that makes sense to you. A Company Code is required to generate the public and private key.
2. Enter the **number** assigned to this same company in NCR payment gateway (Connected Payments - ServerEPS) in ‘CP Company Number.’ This number is required before you can create a new company in NCR Mobile Pay Dashboard.
3. Bypass the **entry** of the ‘TokenProvidedPublicKey,’ as this is not required to create the company; however, you must use the **Edit** function to enter it before NCR Mobile Pay can communicate with the NCR payment gateway.
4. Select the **user** who will manage the new company from the ‘Operator’ drop-down list.
5. Click **Create**.

How to edit a company, add the public and private key, and map the tenders created for the NCR payment gateway with Mobile Pay

1. Type the **unique number** assigned to the company to edit in the second ‘Company Code’ option (see Figure 1) and click **Edit** to the right.

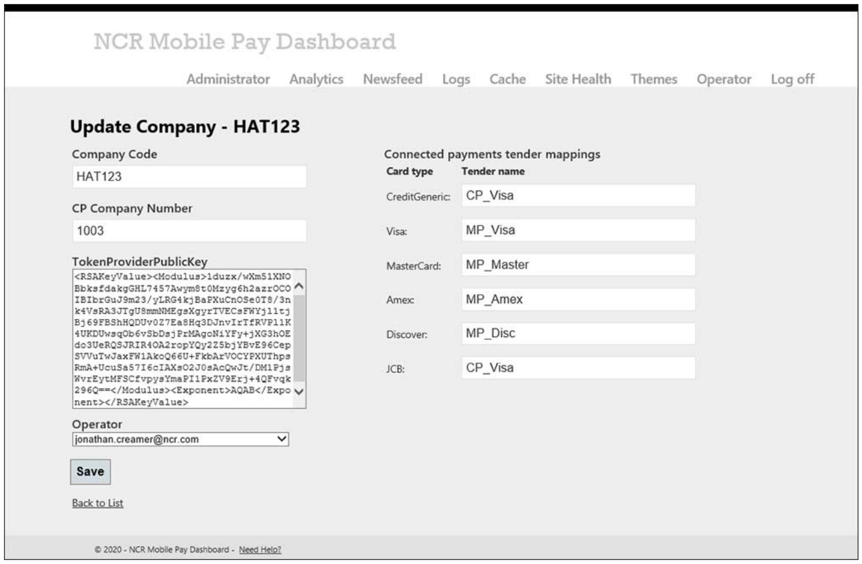


Figure 3 Update Company Screen

2. Copy the **public key** into 'TokenProviderPublicKey.'

   If the client is already using Aloha Online Ordering:

   a. Access **WebAdmin** in Aloha Online Ordering.
   b. Select **Configuration > Payment Provider**s.
   c. Locate and copy the **key** (see Figure 2).
   d. Return to **Company Management** and paste the **public key** here in 'TokenProviderPublicKey.'

   \- OR -

   If the client is not using Aloha Online Ordering:

   a. Open the **email** received from the Mobile Pay team in response to your request for a public and private key.
   b. Copy the **public key** included in the response.
   c. Return to **Company Management** and paste the **public key** here in 'TokenProviderPublicKey.

3. Under the 'Connected Payments tender mapping' group bar, type the **exact name** of each "Generic" tender created in Aloha Configuration Center (CFC) for use when using Mobile Pay to accept a card of that type. Do this for each card brand appearing on the screen. For example, if you created a tender in CFC named MP_Amex, type MP_Amex in the text box to the right of Amex. It is important these names match exactly.

Generic tenders are not required for EDC sites that use the in-store credit card tenders.

4. Click **Save**.
5. Click **Back to List** to exit and return to the Company Management screen.

User Management

User Management allows the creation and editing of the different types of users, providing them access to the NCR Mobile Pay Dashboard based on their specific needs. You also use this function to unlock users being denied access due to Mobile Pay safety mechanisms in place.

User Types

Public User — Not supported.

Operator — Allows access to the Operator and Theme tabs in the Mobile Pay Dashboard only. This user type is reserved for restaurant owners and managers.

Administrator — Allows access to and configuration of all areas and tabs in Mobile Pay Dashboard except Company Management, which is reserved for Super Users. Administrators create other Administrators and Operators, but cannot create Super Users. This user type is reserved for NCR internal employees.

Super User — Allows access to all areas and tabs, same as the Administrator user, but is the only user type with access to Company Management. Super Users can create other administrators and super users. Super User is only available as a selector on the Update User screen shown in Figure 5. First create an Administrator user and then edit the user to elevate them to a Super User.

Figure 4 User Management

How to reate a new user

1. Enter a **user email** and **passwor**d to assign to the user.
2. Select a **User Type**. Refer to User Types.
3. Click **Create** to create the new user. **Note:** You must first create, and then edit a user, to elevate them to a Super User.

How to edit an existing user

Once you create a user, you can edit the record to change the user type, disable the user, change their password, and more.

1. Type the **email address** of the user to edit in the second 'User Email' option (see Figure 4), and click Edit to the right of the email address.

Figure 5 Edit User

2. Select a **different user type** to assign to the user, to change the existing privileges for the selected user. For example, to elevate an Administrator to a Super User, select Super User from the User Type drop-down list.
3. To disable a user, clear **Active**.
4. Select or clear **Subscribed to Emails** to designate whether the user should receive the stats emails. Administrators receive them daily and Operators receive them weekly.
5. Type a **new password**, if you want to change the existing password for the user; otherwise, leave it **blank** to retain the current password.
6. Click **Save** to save any changes.

How to unlock a user who is unable to log in due to Mobile Pay safety mechanisms

There are two ways an account becomes locked: 1) If the user enters their password incorrectly six times in a row, and 2) when the user does not log in for 30 days.

1. Type the **email address** of the user to unlock in the second 'User Email' option (see Figure 4), and click Edit to the right of the email address.
2. Locate and click the **Unlock Account** button on the bottom of the screen. A message letting you know the account is unlocked appears on the screen.
3. Click **OK**.
4. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

How to view all existing users

1. Click **View All Users** in the bottom left corner of the User Management area of the screen (See Figure 4)

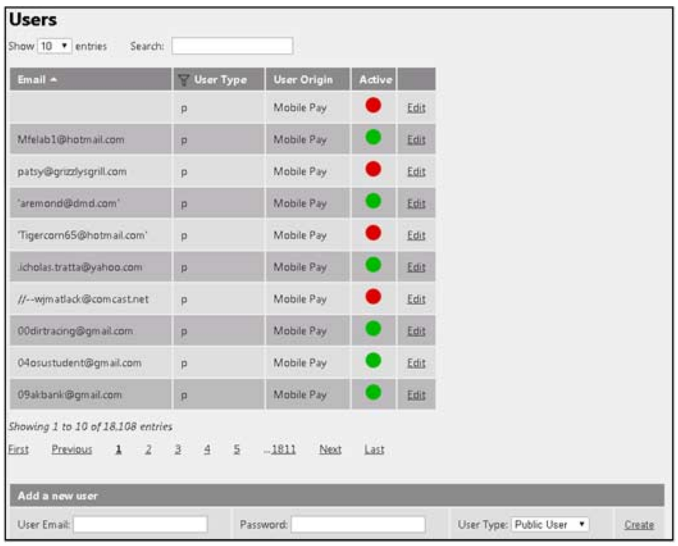


Figure 6 View All Users

2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the 'Show' drop-down list.
3. Type a **partial email address** to search for an existing user.
4. Click the **Filter** icon to the left of 'User Type' to select a specific type of user to view.
5. Use the **First**, **Previous**, **page number**, **Next**, and **Last** options to more easily navigate the list.
6. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

Operator Mapping

Use Operator Mapping to determine the sites to which an Operator has access. An Operator only has access to the sites given to them on this screen.

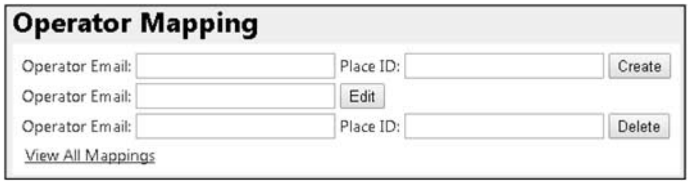


Figure 7 Operator Mapping

How to define the sites to which an Operator has access

1. Enter the **email address** of the Operator in the first 'Operator Email' option on the screen.
2. Type the **HASP key number** assigned to the key in place at a site you are adding to the Operator in 'Place ID.'
3. Click **Create**.

How to add or remove the sites to which an Operator has access

1. Enter the **email** of the Operator to edit in the second 'Operator Email' option (see Figure 7) and click **Edit** to open the Operator Map screen.

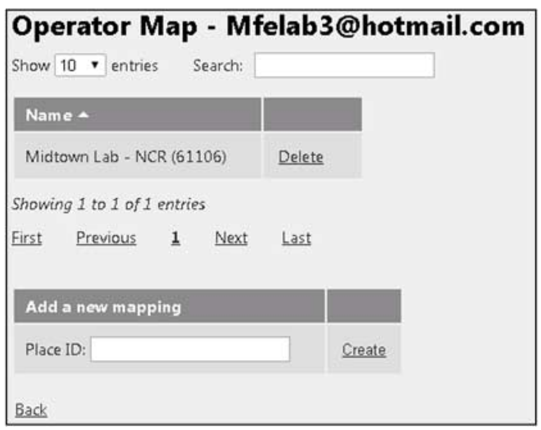


Figure 8 Edit Operator Mapping

This screen shows the full list of sites assigned to the Operator; however, you can add or delete more sites on this screen.

2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the 'Show' drop-down list.
3. Type a **partial site name** to search for an existing site already assigned to the Operator.
4. Use the **First**, **Previous**, **page number**, **Next**, and **Last** options to more easily navigate the list.
5. To remove a site, locate and select the **site** in the list and click **Delete** to the right of the site name.
6. To add a new site, under the 'Add a new mapping' group bar, enter the **HASP key number** assigned to the HASP key in place at the site and click **Create**.
7. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

Place Configuration

Use Place Configuration to create and edit new store sites to assign to Mobile Pay companies.

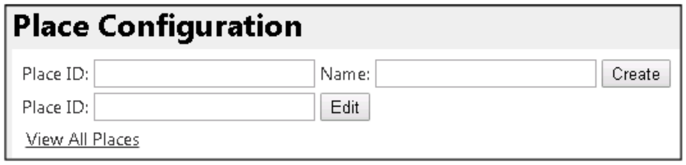


Figure 9 Place Configuration

How to create a new site

1. Enter the **HASP key number** assigned to the site you are adding into the first 'Place ID' option on the screen.
2. Type the **name** to appear for the restaurant on receipts and in reports.
3. Click **Create**.

How to make a new site appear in analytic reports

1. Enter the **HASP key number** assigned to the site into the second 'Place ID' (see Figure 9) and click **Edit** to the right to access the Update Place screen.

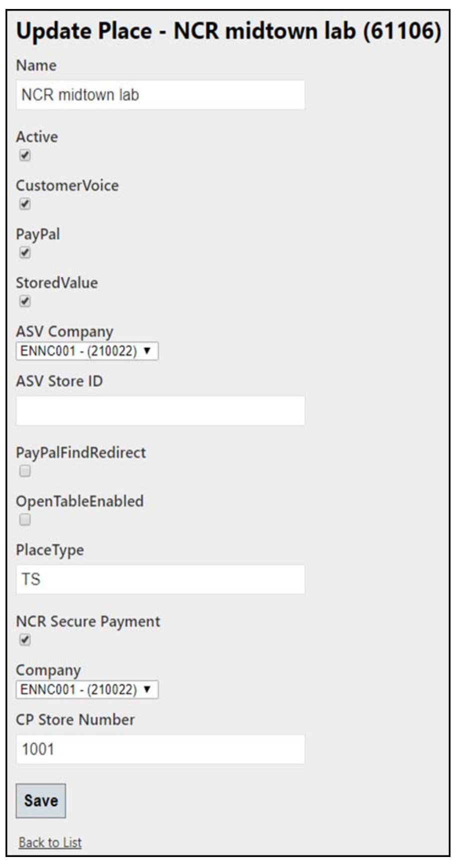


Figure 10 Update Place Configuration

2. Type a **new name** to change the name of the site in Mobile Pay, if desired.

3. Select **Active** to designate the site is to appear in the appear in the analytic reports that are emailed daily/weekly. Clearing Active does not prevent Mobile Pay working at the site.
4. Select **CustomerVoice** to collect feedback from guests about their dining experience. (*Out of scope for this release*).
5. Select **PayPal** to receive payments through the guest's PayPal account directly. (*Out of scope for this release*).
6. Select **StoredValue** to enable receipt of payments using a stored value card (gift card).
7. From the ASV Company drop-down list, select the **company code** that issued the gift card.
8. In the ASV Store ID field, enter the **ASV store id** that issued the gift card.
9. The **PayPalFindRedirect** check box is mainly unused and not to be altered.
10. Select **OpenTableEnabled** to track flags for stats.
11. Type **TS** in 'PlaceType' to indicate the site uses Table Service; type **QS** to indicate the site uses Quick Service. This is mainly unused.
12. Leave the **NCR Secure Payment** check box cleared (cleared by default) to process payments using EDC.

    Select **NCR Secure Payment** to process payments using the NCR Payment Gateway (Connected Payments). Select the **company** and specify the **CP Store Number**.

13. Select the **company ID** under which the store operates from the 'Company' drop-down list.
14. Enter the **connected payments store number** in 'CP Store Number.'
15. Click **Save**.
16. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

How to view all Places

1. Click **View All Places** in the bottom left corner of the Place Management area of the screen (See Figure 9).

    Green indicates the selection is active; Red indicates it is not.

    MP = Mobile Pay

    PP = PayPal (not used at this time)

    SV = Stored Value (Gift Card)

    CV = Customer Voice

    OT = Open Table

2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the 'Show' drop-down list.
3. Type a **partial site name** to search for an existing place.
4. Use the **First**, **Previous**, **page number**, **Next**, and **Last** options to more easily navigate the list.
5. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

Generate On-Boarding Token Email

Use Generate On-Boarding Token Email to generate and send out the email to start the PayPal ono-boarding process. This is not used at this time.

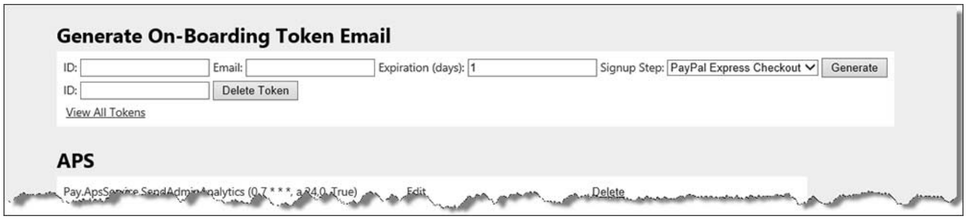


Figure 11 Generate On-Boarding Token Email

How to delete all tokens for a site

1. Type the **HASP key number** for the site for which to delete the tokens in the second 'ID' option on the screen.
2. Click **Delete Token**. This deletes all tokens for the site ID that is entered. This basically marks any links for the site as inactive.

How to view all tokens

1. Click **View All Tokens** in the bottom left corner of the Generate On-Boarding Token Email area of the screen (see Figure 11).
2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the 'Show' drop-down list.
3. Type a **partial HASP key number** to search for an existing site.
4. Click **Toggle Delete** to mark the token as inactive.
5. Click **Resend** to resend the email to the Recipient.
6. Click **View Link** to display the link in a popup on the screen.
7. Use the **First**, **Previous**, **page number**, **Next**, and **Last** options to more easily navigate the list.
8. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

APS

Do not change this section.

This area controls mail jobs that are sent out daily or weekly. The options at the bottom of the section are for creating new jobs. This section is mainly for explanation purposes and should not be changed.

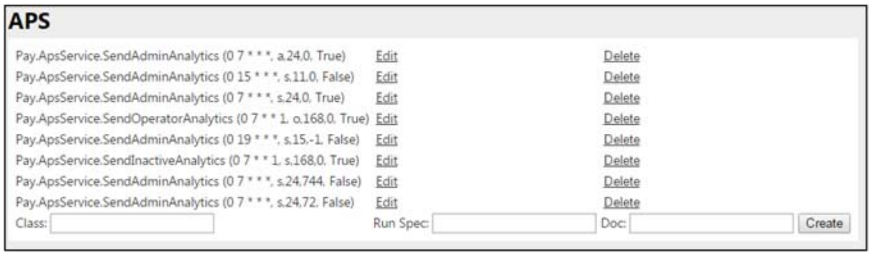


Figure 12 APS

How to create new jobs

1. Enter the **type of job** to run in 'Class.' Currently there are three kinds of jobs:

   Pay.ApsService.SendAdminAnalytics sends out the email report for "NCR Mobile Pay Admin Analytics." This contains stats for all sites marked as active.

   Pay.ApsService.SendOperatorAnalytics sends out the Operator email that is composed of the sites currently mapped to that user.

   Pay.ApsService.SendInactiveAnalytics sends an email that contains the list and stats of sites set as inactive but have check view or payments.

2. Enter the **correct values** (0 7 * * *, a,24,0, True) in 'Run Spec' for the parameters described below.

   Minute of Hour (Green) indicates the minute of the hour to send the email. For example, to send an email at 7:10, set this to 10.

   Hour of the Day (Turquoise) indicates the hour of the day to send the email. The email is sent out based on the 24-hour day value.

   Day of the Month (Pink) indicates the day of the month. So first of each month would be a 1.

   Month of the Year (Red) indicates the month of the year.

   Day of the Week (Dark Yellow) indicates the day of the week with Sunday starting as 0.

   An asterisk for a parameter indicates a filter is not applied. So, 0 7 * * * means send the email every day at 7:00.

3. Enter the **correct values** (0 7 * * *, a,24,0, True) in 'Doc' for the parameters described below.

   User Type (Green) designates the User Type to which to send the email. In this case, it is sent out to only administrators.

   Hour range for Data (Turquoise) designates the number of hours back to collect the data. For example, collect the last 24 hours of data. To collect the data for the last week change the number to 168.

   Hour offset (Pink) designates the number of hours to shift time window from the "Hour range for Data". Positive number shifts the window back in time. Example. (0 7 * * *, a,24,-6, True) collects the last 24 hours of data starting at 1:00 am.

4. Click **Save**.

How to edit an existing job

1. Click **Edit** next to the job to change.

Figure 13 Update APS

2. Select **Enable** to allow the sending of the job form.
3. Click **Delete** to remove the job completely.
4. Click **Save** to save your changes.
5. Click **Back to List** to exit and return to the list of jobs.

Place Address

This section is no longer used but works as expected for an address table.

Figure 14 Place Address

Client Versions

This section is no longer used. This was a table used for managing supported versions of native mobile apps on multiple platforms.

Figure 15 Client Versions

Subscriptions

Subscriptions are email alerts a user receives based on actions performed in Mobile Pay Dashboard. Use the Subscription area to manage the subscriptions of Administrators.

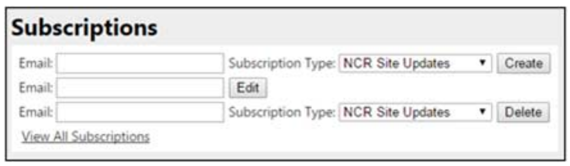


Figure 16 Subscriptions

How to create a subscription

1. Type the **email address** of the Administrator user to begin receiving the subscription updates.
2. Select the type of subscription to create from the 'Subscription Type' drop-down list. Your choices are:

   NCR Site Updates sends an email update any time you create or change settings for a site.

   Theme Updates sends an email update any time a theme is create/updated.

   Note: PayPal options are not supported at this time.

3. Click **Create**.

How to edit or add a subscription

1. Enter the **email** address of the user for which to edit or add a subscription in the second ‘Email’ option (see Figure 16) and click **Edit** to the right to open the Subscription Map screen.

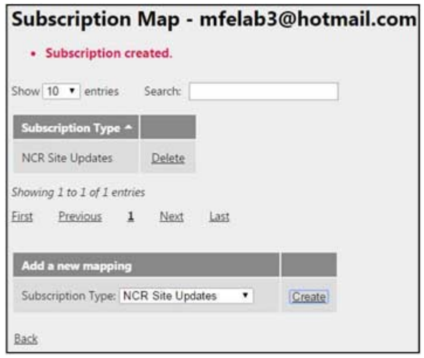


Figure 17 Edit Subscriptions

2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the ‘Show’ drop-down list.
3. Type a **partial subscription type name** to search for a subscription already assigned to the user.
4. Use the **First**, **Previous**, **page number**, **Next**, and **Last** options to more easily navigate the list.
5. To remove a subscription, locate and select the **subscription** under the ‘Subscription Type’ group bar and click **Delete** to the right.
6. To add a new subscription, under the ‘Add a new mapping’ group bar, select **another type of update** from the ‘Subscription Type’ drop-down list and click **Create**.
7. Click **Back** to exit and return to the list of subscriptions.

How to view all subscriptions

1. Click **View All Subscriptions** in the bottom left corner of the Subscriptions area of the screen (see Figure 16).
2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the ‘Show’ drop-down list.
3. Type a **partial email address for the user** to search for an existing subscription.
4. Use the **First**, **Previous**, **page number**, **Next**, and **Last** options to more easily navigate the list.
5. Select a **user** in the list and click **View User Subscriptions** to see all subscriptions currently assigned to the user.
6. Select a **specific subscription type** for a user and click **Delete** to remove the subscription from the user.
7. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

Themes

There is a document on Seismic that explains how to brand your Mobile Pay site. Please ask your NCR representative for the latest version of the “MobilePay Branded UI - How To” document.

Themes allow companies/owners to brand Mobile Pay with their colors and logos so that it looks similar to their company branding; however, it is still tied to Mobile Pay so that NCR can send updates.

Figure 18 Themes

How to create a theme

1. Type the **subdomain portion of the URL** in 'Subdomain.' For example, in ac.ncrpay.com, ac is the subdomain, so you would type ac in 'Subdomain.
2. Type a **name** to identify the subdomain in 'Name.' For example, for ac.ncrpay.com, you would type the name Aloha Cafe.
3. Click **Create**.

Theme Mapping

Use Theme Mapping to allow an Operator to access and make changes to the themes assigned to them.

Figure 19 Themes Mapping

How to create a theme mapping

1. Type the **email address** of the Operator.
2. Type the **subdomain** to which the Operator requires access. For example, type ac for an Operator who needs access to the previously created subdomain for Aloha Cafe (ac.ncrpay.com)
3. Click **Create**.

How to view all theme mapping

1. Click **View All Theme Mapping** in the bottom left corner of the Theme Mapping (see Figure 19).
2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the 'Show' drop-down list.
3. Type a **text string** to use for searching for an existing theme mapping.
4. Use the **First**, **Previous**, **page number**, **Next**, and **Last** options to more easily navigate the list.
5. Select a **user** in the list and click **Delete** to delete the theme mapping for the user.
6. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

Swarm

Swarm is the Theme Pool manager. On a normal basis this does not need to be touched. When functioning correctly, this works automatically. Themes are hosted on the web server so that they are serviced quickly; however, this becomes an issue when the servers are load balanced. A user can update a theme on one server and the theme appear correctly for that server, but the other servers do not have the update yet. This is where Swarm comes in. Once you save the changes to a Theme, that web server triggers a mechanism that tells all servers to update their themes. This ensure all web servers use the updated files for serving to the users.

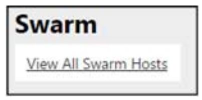


Figure 20 Swarm

How to view all Swarm Hosts

This is a screen for managing the active hosts (web servers) and for triggering a manual swarm update. This list view is similar to the others.

Unregister — Removes a server from the swarm. The server re-registers the next time IIS restarts.

Broadcast Theme Update — Triggers the mechanism that tells all servers to update their themes.

Check Messages

Use Check Messages as an aid for troubleshooting support cases. This section accepts a code and displays the message info appearing in the various parts of Mobile Pay.

Messages in Cache: This section is what messages are kept in the Couchbase Cache. Couchbase is the Mobile Pay quick data access repository this is a fast roundtrip then the SQL servers. This section shows the different bits of information stored in the cache.

Messages in Database: This is the long term storage for Mobile Pay. This shows the messages that are recorded for the check. It contains a little more detail about the message and the check.

Error Codes

Use Error Codes to edit the error code name or message returned by Mobile Pay site agent during the pay process.

Figure 21 Error Codes

How to edit an error code

1. Type the **error code** to edit in the second 'Error Code' option (see Figure 21) and click **Edit** to the right.

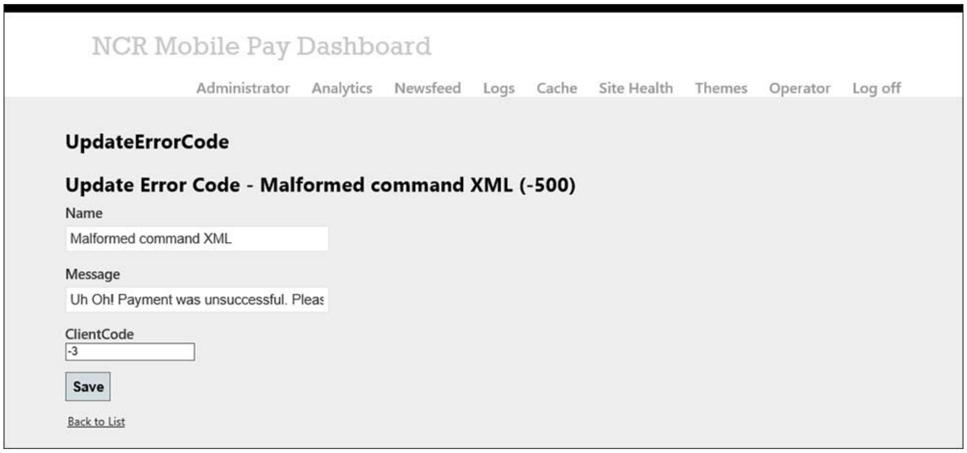


Figure 22 Edit Error Codes

2. Change the **name** and/or **message** to appear to the user.
3. Make note of the **value** appearing in 'ClientCode' that determines where in the pay flow to send the user when the error occurs.

   -1 — Sends the user back to the Tax and Total screen.

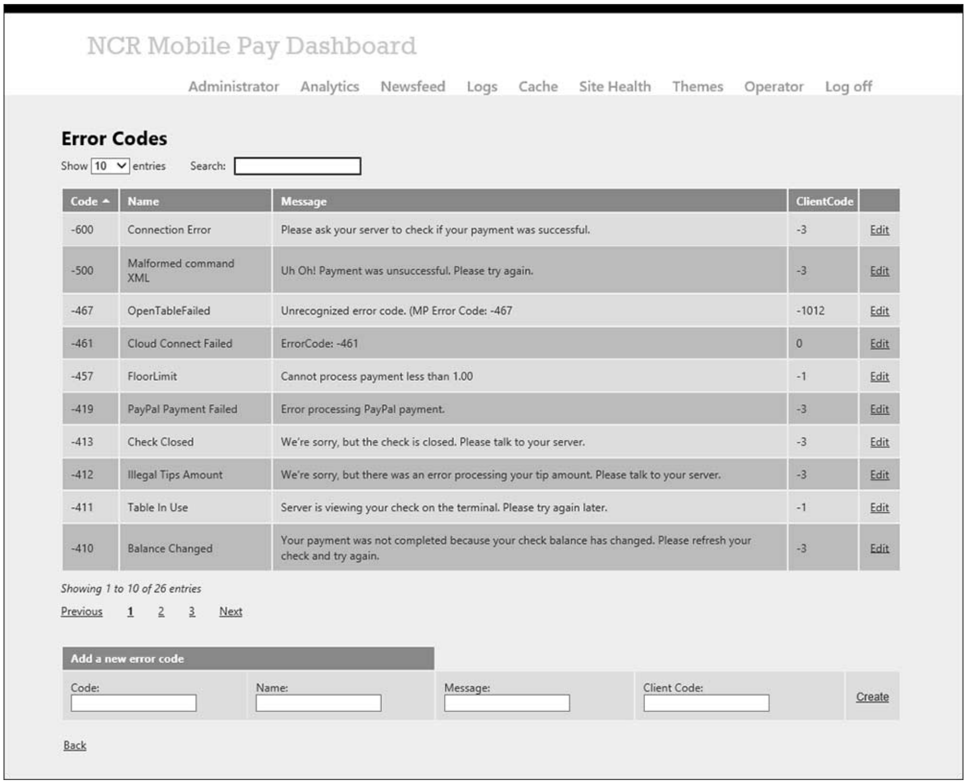
   -2 — Sends the user back to the Card entry screen.

   -3 — Sends the user back to the Check view screen.

4. Click **Save**.
5. Click **Back to List**.

How to view all error codes

1. Click **View All Error Codes** in the bottom left corner of the Error Codes area (see Figure 21).



Code	Name	Message	ClientCode	
-600	Connection Error	Please ask your server to check if your payment was successful.	-3	Edit
-500	Malformed command XML	Uh Oh! Payment was unsuccessful. Please try again.	-3	Edit
-467	OpenTableFailed	Unrecognized error code. (MP Error Code: -467	-1012	Edit
-461	Cloud Connect Failed	ErrorCode: -461	0	Edit
-457	FloorLimit	Cannot process payment less than 1.00	-1	Edit
-419	PayPal Payment Failed	Error processing PayPal payment.	-3	Edit
-413	Check Closed	We're sorry, but the check is closed. Please talk to your server.	-3	Edit
-412	Illegal Tips Amount	We're sorry, but there was an error processing your tip amount. Please talk to your server.	-3	Edit
-411	Table In Use	Server is viewing your check on the terminal. Please try again later.	-1	Edit
-410	Balance Changed	Your payment was not completed because your check balance has changed. Please refresh your check and try again.	-3	Edit

Figure 23 Error Codes

2. Select the **number of entries** (25, 50, 75, or 100) to appear on the screen from the 'Show' drop-down list.
3. Type a **text string** to use for searching for an existing error code.
4. Use the **First**, **Previous**, **page number**, and **Next** options to more easily navigate the list.
5. Click **Edit** to the right of an error code to make changes, such as change the message text, then refer to how to edit an error code.
6. Click **Back** to exit and return to the Mobile Pay Dashboard home screen.

CPS Profile

This section is not used.

Figure 24 CPS Profile