

Altus Premier Portal

Merchant Training Guide

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Overview

The Altus Premier Portal is an administrative tool for Altus Premier. This tool was designed for merchants to review transaction information, check card balances, and manage records of registered customers.

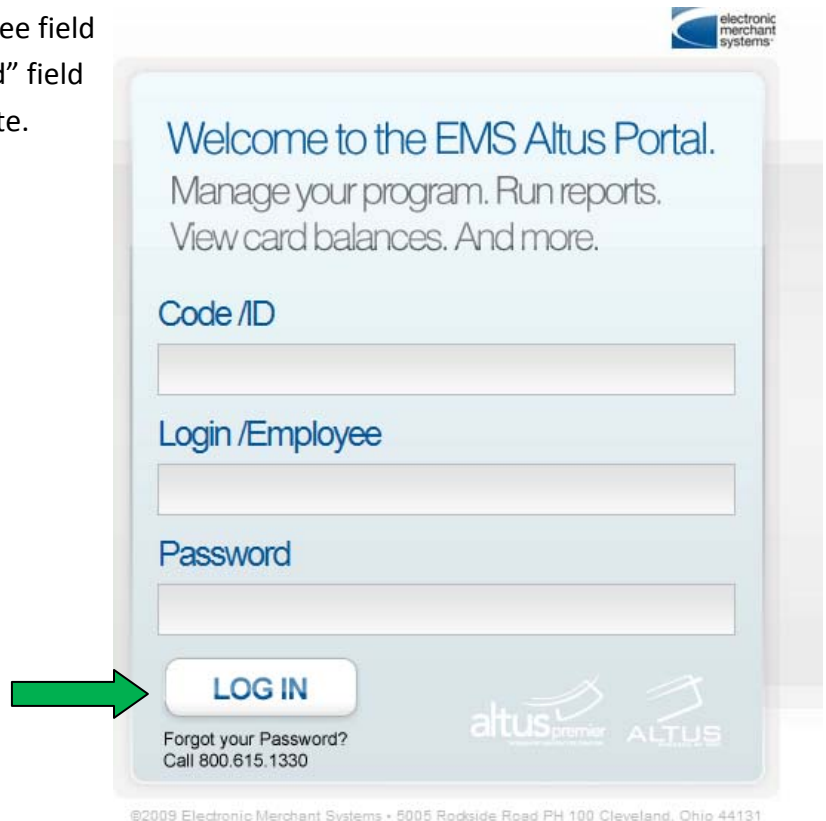
Navigation

Login Screen

To login to the Altus Premier Portal at an administrator view type in the URL,
<http://www.altusportal.com/>

You will need the following information which can be found from the letter and test cards sent to you from EMS.

- Type in your Altus Premier ID in the “Code/ID” Field.
- Type in your Login in the Login /Employee field
- Type in your password in the “Password” field
- Click the “Log In” Button to enter the site.



Welcome to the EMS Altus Portal.
Manage your program. Run reports.
View card balances. And more.

Code /ID

Login /Employee

Password

LOG IN

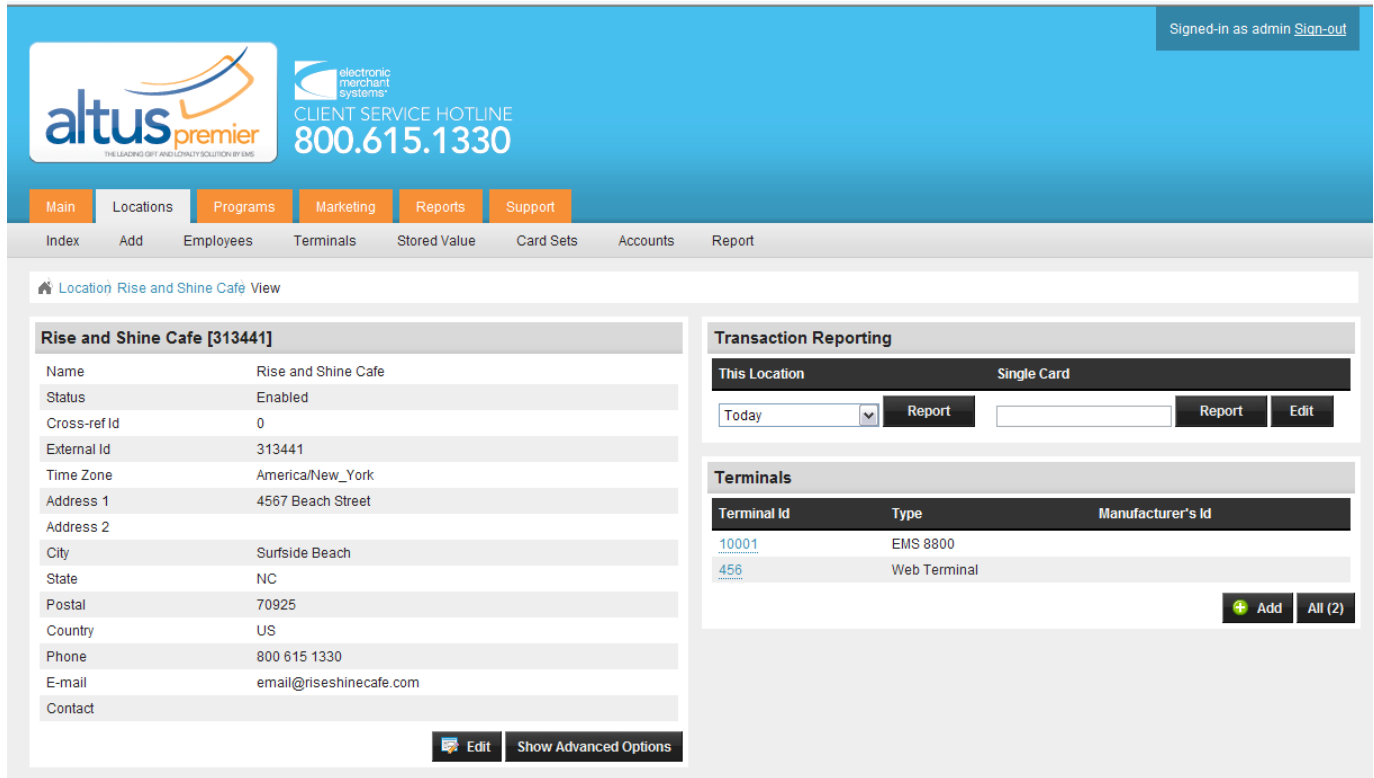
Forgot your Password?
Call 800.615.1330

altus premier ALTUS

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Dashboard

This is the main page, or “Dashboard”. It shows a snapshot of general information about your loyalty and gift program.



Signed-in as admin [Sign-out](#)

altus premier
THE LEADING LOYALTY SOLUTION BY EMS

electronic merchant systems
CLIENT SERVICE HOTLINE
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Main | Locations | **Programs** | Marketing | Reports | Support

Index | Add | Employees | Terminals | Stored Value | Card Sets | Accounts | Report

Location: Rise and Shine Cafe View

Rise and Shine Cafe [313441]

Name	Rise and Shine Cafe
Status	Enabled
Cross-ref Id	0
External Id	313441
Time Zone	America/New_York
Address 1	4567 Beach Street
Address 2	
City	Surfside Beach
State	NC
Postal	70925
Country	US
Phone	800 615 1330
E-mail	email@riseshinecafe.com
Contact	

[Edit](#) [Show Advanced Options](#)

Transaction Reporting

This Location: **Single Card**

Today Report Report

Terminals

Terminal Id	Type	Manufacturer's Id
10001	EMS 8800	
456	Web Terminal	

[+ Add](#) [All \(2\)](#)

There are seven main tabs at the top of every screen. Each of these broad categories contains many smaller details you can view, control and edit.

Below the main tabs there are a set of sub tabs. Every Page has different sub tabs to help you navigate the program and narrow down your desired activity.



Main | Locations | **Programs** | Marketing | Reports | Support

Index | Add | Employees | Terminals | Stored Value | Card Sets | Accounts | Report

As you navigate through the program, a set of breadcrumbs develop under the sub tabs. These help you track forward and backward through the pages you have been to.

[Home](#) [Location](#) [Rise and Shine Cafe](#) [Employee](#) [admin](#) View

Links are shown as text in blue font. If a name, number, or word is blue, clicking it will bring you to a new page or show you a report associated with it.

Rise and Shine Cafe [313441] Employees

« Previous Page 1 of 1 Go Next »

Id Search

Res	Id	Name	Status	Admin
1	altus70925	admin	Enabled	<input checked="" type="checkbox"/>
2	2000	web terminal	Enabled	<input checked="" type="checkbox"/>

« Previous Page 1 of 1 Go Next »

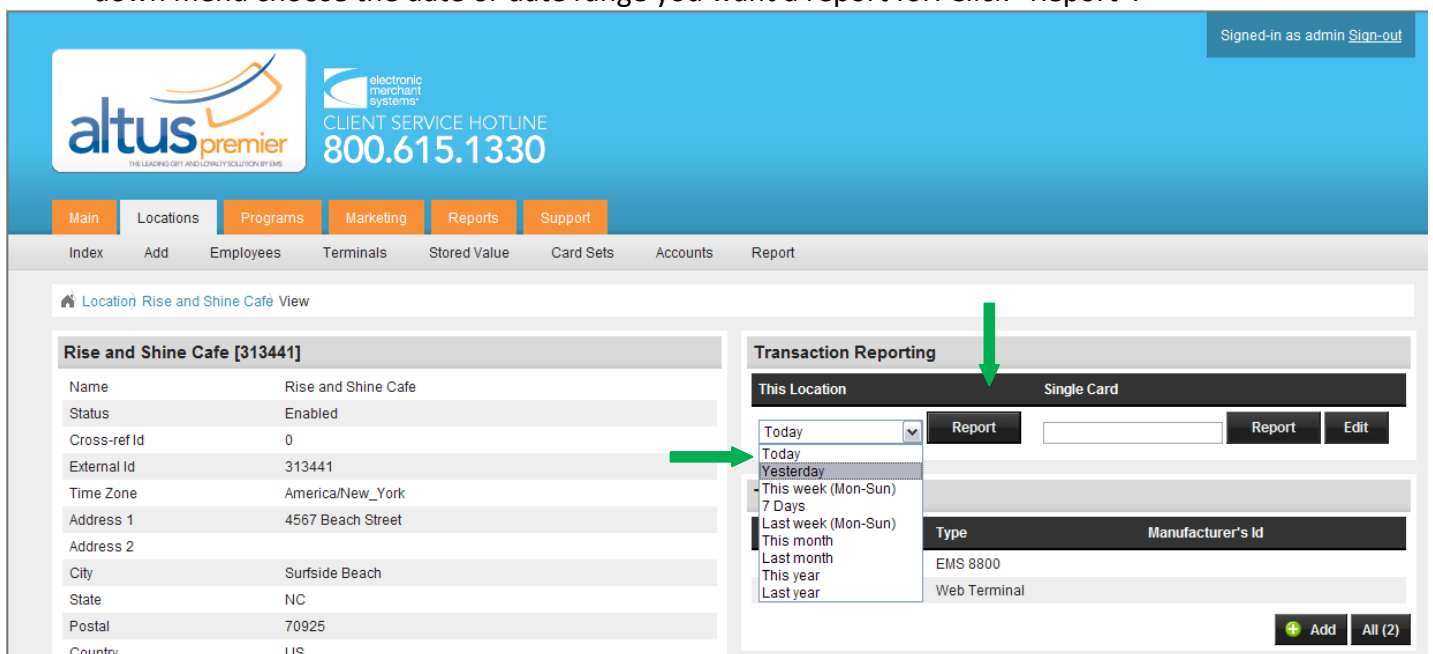
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Reports

You have many options for running reports in your web portal. You can run reports for transactions, customer data, liability, employees and terminals.

Transaction Report

The report that you are likely to use most often is the transaction report. You have several options for how to run this report. The simplest way is to use the Quick Report option on your Location home page. It is located on the right side of the screen, under the Transaction Reporting header. In the drop down menu choose the date or date range you want a report for. Click "Report".



The screenshot shows the Altus Premier web portal interface. At the top, there are logos for 'altus premier' and 'electronic merchant systems' along with the 'CLIENT SERVICE HOTLINE 800.615.1330'. A navigation bar includes 'Main', 'Locations', 'Programs', 'Marketing', 'Reports', and 'Support'. Below this, a breadcrumb trail shows 'Index > Add > Employees > Terminals > Stored Value > Card Sets > Accounts > Report'. The main content area is titled 'Location: Rise and Shine Cafe View'. On the left, a table lists details for 'Rise and Shine Cafe [313441]', including Name, Status, Cross-refId, External Id, Time Zone, Address, City, State, Postal, and Country. On the right, the 'Transaction Reporting' section is active. It features a dropdown menu for selecting a date range, currently showing 'Today' selected. A green arrow points to the 'Report' button next to the dropdown. Another green arrow points to the 'Report' button in the 'Transaction Reporting' header. Below the dropdown, there are sections for 'Type' (EMS 8800) and 'Manufacturer's Id' (Web Terminal). At the bottom right of the reporting section, there are '+ Add' and 'All (2)' buttons.

After running the report you will notice a grey box that shows the date range you chose to report on, as well as several checkboxes to the right. The check boxes control what information you view in your report.

Each check box represents a column in the report. You can edit what information you view by checking and unchecking the appropriate boxes, and then clicking “Go”, this will regenerate the report.

Location Rise and Shine Cafe [313441] Transaction Report

2010-05-06 to 2010-05-06

Trans Id Card Id Term Id Location
 Emp Id Batch Ref Approval Code Promo
 Type Amt Ent Bal Diff Tip
 Processed Comm Related Name
 E-Mail Adjust Reason

Go Download as CSV View Location Edit Location

Transaction Totals Summary

Operation	Transactions	Curr USD [1222]	Pts [1223]
Loyalty Issuance	5	20.00	-25.83
Totals	5	20.00	-25.83

Transactions between 2010-05-06 and 2010-05-06

Card Id	Trans Id	Approval Code	Term Id	Location Id	Batch Ref.	Emp Id	Type	Amt Ent	Processed Time	Void
921122145794153	239889	392640	456	Rise and Shine Cafe [313441]	1	2000	Loyalty Issuance	12.52	2010-05-06 09:12:09.183-04	
921122118536166	239892	323820	456	Rise and Shine Cafe [313441]	2	2000	Loyalty Issuance	9.85	2010-05-06 09:12:55.122-04	
921122114623531	239893	511302	456	Rise and Shine Cafe [313441]	3	2000	Loyalty Issuance	26.75	2010-05-06 09:13:36.71-04	
921122114783396	239896	956912	456	Rise and Shine Cafe [313441]	4	2000	Loyalty Issuance	62.55	2010-05-06 09:18:51.924-04	
921122177910152	239899	814719	456	Rise and Shine Cafe [313441]	5	2000	Loyalty Issuance	62.50	2010-05-06 09:23:01.179-04	

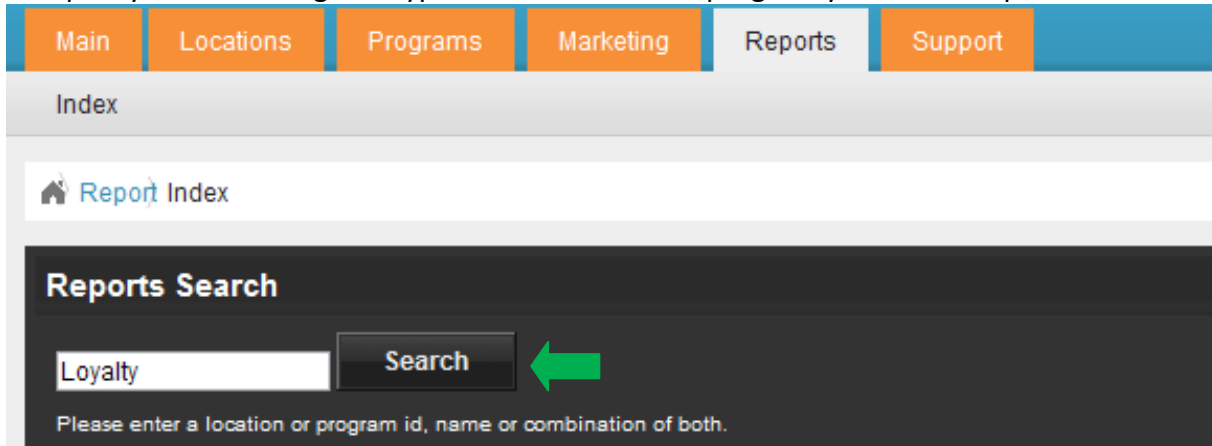
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You will also notice a Transaction Totals Summary which gives you a snapshot of what types of transactions were run, how many of each, and the total values.

In the report, if a transaction is highlighted pink it means that the transaction was voided.

Reports Search

Another way to access the reports you can run is by clicking Reports Tab. This allows you to search for the report you are looking for. Type in the name of the program you want a report for and click Search.



Reports Search Results		
Name	Type	View
RiseShine Loyalty	Program	Decentralized Report Centralized Report Transaction Report Account Data Report Totals By Program Liability

There is a header labeled “View” on the right side of the screen. Under this heading are several reporting options. Anything in blue font is a link, clicking on any report name here will take you to the report. Below is a description of each report:

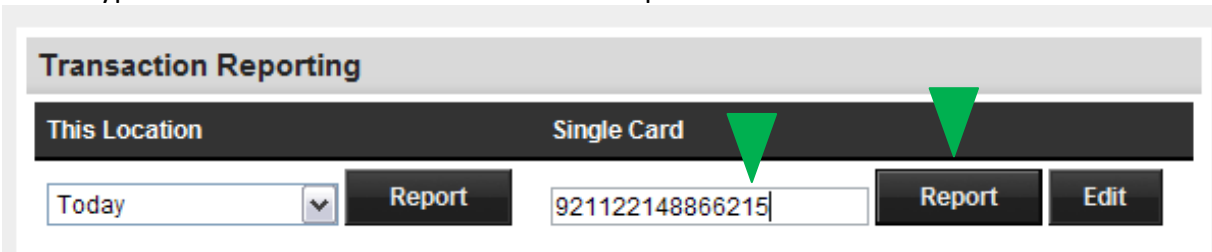
- **Transaction:** Detailed of all transactions that were run in a given time period. This can be done for a specific program or for a location as a whole.
- **Centralized:** This report is for merchants that have more than one location and have an accounting system that uses one main account that funds are deposited into and then dispersed from.
- **Decentralized:** This report is for merchants with more than one location and has an accounting system in which the locations all pay each other rather than depositing into a main account.
- **Account Data:** This report allows you to see the customer data that has been added to card numbers.
- **Totals by Program:** Summary of the number and types of transactions run in each program.
- **Liability:** Card status summary, showing how many cards are active, expired and in inventory as well as the value totals on those cards.

Balance Inquiry

Many times a merchant will get questioned about the balance of an individual card. They may want to see information about an individual card to track its usage. Whatever the reason the Altus Portal makes it possible.

Start at the Location home page. Located on the right side of the screen, under the “Transaction Reporting” header is the field for “Card Number”.

- Type in the card number and then click “Report”



From this screen you can set reporting options similar to the transaction reporting. This view shows transactions performed on this individual card.

Location: Rise and Shine Café Program: Rise & Shine Combo Card

Card 921122148866215

1970-01-01 2010-05-06

Trans Id Card Id Term Id Location
 Emp Id Batch Ref Approval Code Promo
 Type Amt Ent Bal Diff Tip
 Processed Comm Related Name
 E-Mail Adjust Reason

Go Download as CSV View Card Edit Card

Transaction Totals Summary

Operation	Transactions	Curr USD (Grp 91*) [872]	Pts [1220]	Cust Coffee (Grp 91*) [874]	Cust Visit (Grp 91*) [873]
Account History	3	0.00	0.00	0.00	0.00
Gift Issuance	2	60.00	0.00	0.00	0.00
Gift Redemption	1	-5.00	0.00	0.00	0.00
Loyalty Issuance	1	0.00	52.00	0.00	0.00
Promo Issuance	15	0.00	0.00	6.00	4.00
Promo Redemption	1	0.00	0.00	-1.00	0.00
Totals	23	55.00	52.00	5.00	4.00

Transactions between 1970-01-01 and 2010-05-06

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Card Id	Trans Id	Approval Code	Term Id	Location Id	Batch Ref.	Emp Id	Type	Amt Ent	Processed Time	Void
921122148866215	152750	225156	10001	Rise and Shine Cafe [313441]	16	1	Gift Issuance	10.00	2010-03-03 15:22:28.43-05	
921122148866215	152753	853401	10001	Rise and Shine Cafe [313441]	17	1	Gift Redemption	5.00	2010-03-03 15:23:28.032-05	
921122148866215	152766	380744	10001	Rise and Shine Cafe [313441]	18	1	Account History		2010-03-03 15:26:16.097-05	
921122148866215	152779	762546	10001	Rise and Shine Cafe [313441]	19	2000	Account History		2010-03-03 15:47:10.471-05	
921122148866215	152788	312667	10001	Rise and Shine Cafe [313441]	20	1000	Promo Issuance	1.00	2010-03-03 15:51:39.39-05	
921122148866215	152789	293484	10001	Rise and Shine Cafe [313441]	21	1000	Promo Issuance	1.00	2010-03-03 15:52:12.608-05	
921122148866215	152790	801746	10001	Rise and Shine Cafe [313441]	22	1000	Promo Issuance	5.00	2010-03-03 15:52:51.635-05	

To obtain a balance of the card and to view card details click the “View” button.



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- Main
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- Marketing
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Index Schedules

Location: Rise and Shine Café Program: Rise & Shine Combo Card Set: Initial Test_2.26.10 Card: 921122148866215 View

Card

Card Id: 921122148866215
 Cross Reference Id:
 PIN: 991539
 Card Set: [Initial Test_2.26.10 \[847\]](#)
 Initial Card Set: [Initial Test_2.26.10 \[847\]](#)
 Status: Activated
 Activation: 2010-03-03 15:22:28.43-05
 Expiration:
 Demo:

[Edit](#) [Report](#)

Balances

Currency (Grp. 91)	55.00 USD
Points	52.00
Coffee (Grp. 91)	5.00
Visit (Grp. 91)	4.00

Accounts (Present and Past)

Account	Program	Pri Customer	Activation	Status
33293	Rise & Shine Combo	Jeoff Harbmen [3157]	2010-03-03 15:22:28.43-05	Activated

[+ Add Customer](#)

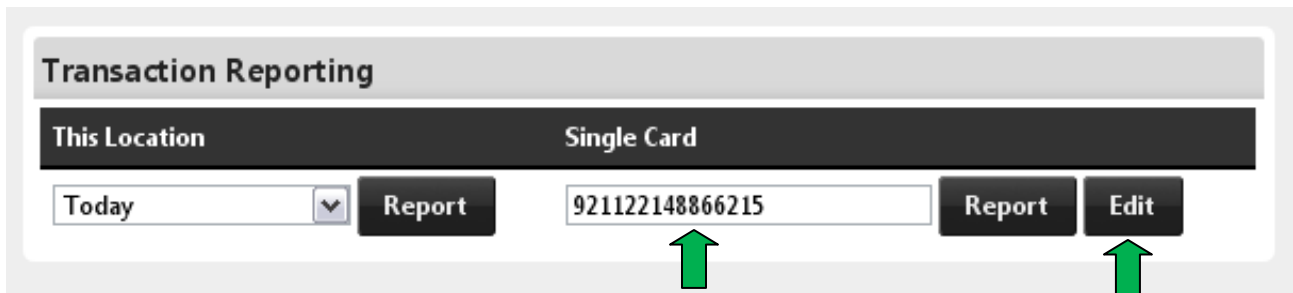
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Card Edit

Another feature that will be used often is the Card Edit capabilities. You can get to the card edit page from your location home page.

Type in the card number you are looking for in the “Single Card” box.

- *(If you are simply looking for card information such as balance details and customer data already entered you can click “Report” which will bring you to the card summary page.)*
- *(However, if you need to edit the card **[add customer information, change a card status or change the balance]** you will click “Edit”.)*



The screenshot shows a web interface for Transaction Reporting. At the top, there is a header "Transaction Reporting". Below it, there are two tabs: "This Location" and "Single Card". Under the "Single Card" tab, there is a dropdown menu with "Today" selected, a "Report" button, a text input field containing the card number "921122148866215", another "Report" button, and an "Edit" button. Two green arrows point upwards to the card number input field and the "Edit" button.

You will notice several different headers on the Edit page.

At the top left is the basic card information, including the card number, pin, and activation date. The right side of the screen shows the Balance information and the option to change the expiration date.

To change the balance of a card, enter in the difference amount in the Difference box under the Balance header. Select the Type of value you are adding or subtracting and click Adjust.

Please Note
 Status, expiration, and balance changes will produce a transaction.

Card 921122148866215 Edit		Balances	
Cross-ref Id:		Currency (Grp. 91)	65.00 USD
PIN	991539	Points	52.00
Card Set	Initial Test_2.26.10 [847]	Coffee (Grp. 91)	5.00
Initial Card Set	Initial Test_2.26.10 [847]	Visit (Grp. 91)	4.00
Initial Set Sequence	2	Difference (+/-)	<input type="text"/>
Status	Activated <input type="button" value="v"/>	Type	[None] <input type="button" value="v"/>
Activation:	2010-03-03 15:22:28.43-05	Adjustment Reason	<input type="text"/>
Demo	<input type="checkbox"/>	<input type="button" value="Adjust"/>	
Adjustment Reason	<input type="text"/>		
Required when editing status and/or expiration			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			
<input type="button" value="View"/> <input type="button" value="Report"/>			
		Expiration	
		Expiration Date	<input type="text"/> <input type="button" value="G"/>
		To expire a card please enter a date in the past	
		Adjustment Reason	<input type="text"/>
		<input type="button" value="Update Expiration"/>	

IMPORTANT INFORMATION REGARDING NEW LAW GOVERNING EXPIRATION DATES!

In accordance with the federal Credit Card Accountability, Responsibility, and Disclosure Act, as of August 22, 2010, new restrictions on dormancy fees or services fees are as followed.

Such fees will only be permitted where: (1) there has been no activity with respect to the certificate or card in the 12-month period ending on the date on which the fee is imposed; (2) the certificate or card clearly and conspicuously states—(i) that such a fee may be imposed; (ii) the amount of such fee; (iii) how often such fee may be imposed; and (iv) that such fee may be imposed for inactivity. Also, not more than one fee may be charged to the consumer during any one-month period. Issuers or vendors of gift certificates or cards must inform consumers of any fees before the consumer purchases the card.

Additionally, you are prohibited from selling gift certificates or cards that have an expiration date which is less than five years after the date it was issued, or the date that funds were last loaded on a store gift card or general-use prepaid card. A certificate or card carrying an expiration date must clearly and conspicuously disclose the expiration date.



If you scroll down you will see the Custom Fields on the left and the customer information on the right. To edit this information you will need to fill in the appropriate fields, and then click “Save Customer” at the bottom of the page.


If you are adding mobile numbers or email addresses for marketing purposes be sure to check the corresponding “Opt-In” box in order to ensure that the SMS and Email broadcasts are sent to the customer.


Customer Custom Fields

No custom fields for associated program.

Customer

First Name	<input type="text" value="Jeoff"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="Harbmen"/>
Prefix	<input type="text"/>
Suffix	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="[None]"/>
Postal Code	<input type="text"/>
Country	<input type="text" value="[None]"/>
Mail Opt In	<input type="checkbox"/>
Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
Alt Phone	<input type="text"/>
Phone Opt In	<input type="checkbox"/>
E-mail	<input type="text" value="jeoff@sparkbase.com"/>
Alt E-mail	<input type="text"/>
E-mail Opt In	<input type="checkbox"/>
Birthday	<input type="text"/> 
Anniversary	<input type="text"/> 
Gender	<input type="text" value="[N/A]"/>
User-name	<input type="text"/>
Password	<input type="text"/>

 Save Customer
Cancel

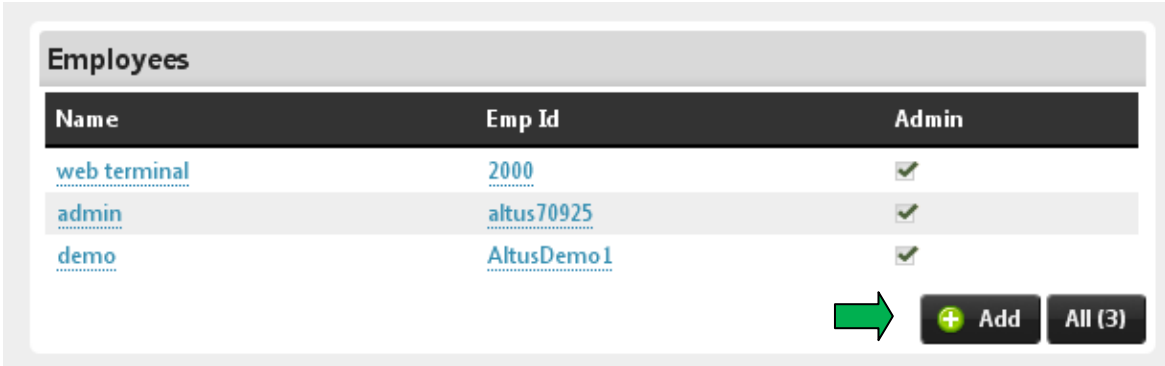
View  Add

Merchant Administration


Employee Add/Edit

If you have decided to require an employee id and/or password at the terminal level, you will need to add the employees into your portal. Or, if you have additional employees that you should have access to the online portal, you will need to add them as well. To do this, from your location home page, scroll down to the Employee header.

Click Add.



Name	Emp Id	Admin
web terminal	2000	<input checked="" type="checkbox"/>
admin	altus70925	<input checked="" type="checkbox"/>
demo	AltusDemo1	<input checked="" type="checkbox"/>


+ Add
All (3)

This will bring you to the Employee Add page, which will allow you to add a new employee.

Below is a description of each field on this page:

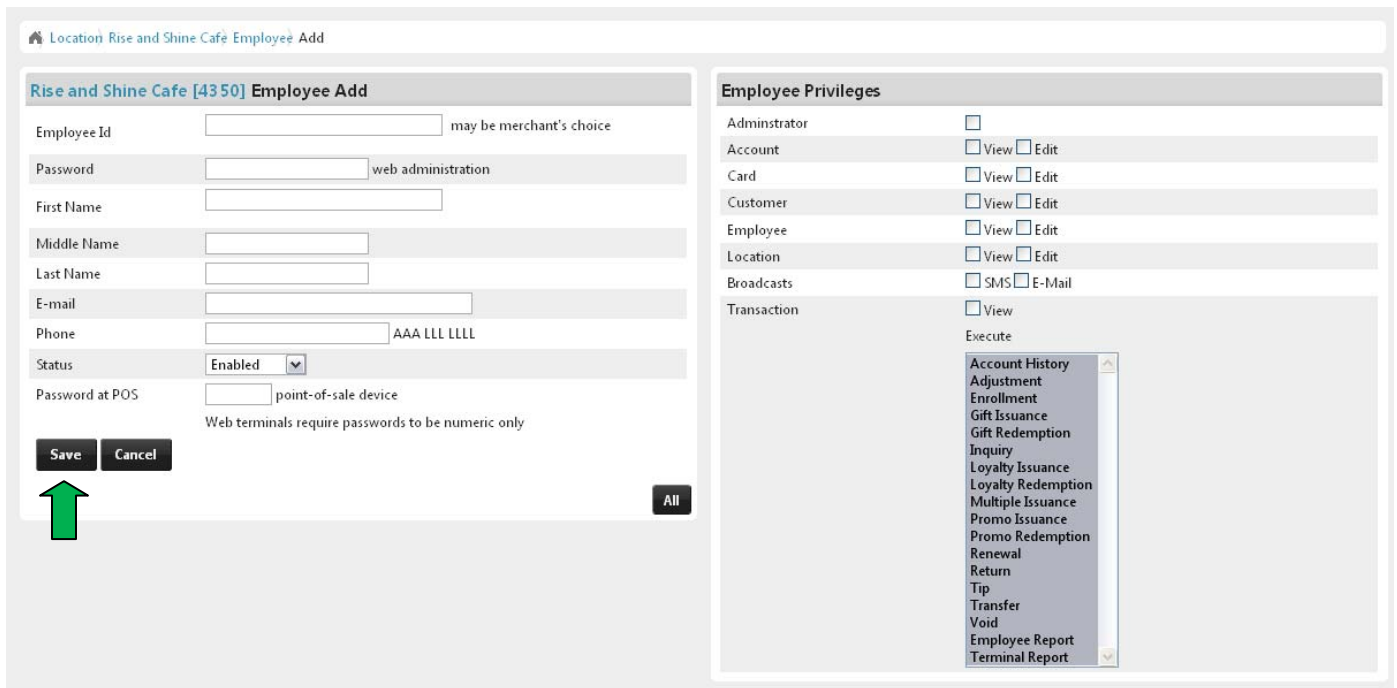
- **Employee Id:** This is your choice for how you want to identify your employees. Typically it is a numeric 1-4 digit numbers.
- **Password:** This first password is for web administration access. If you are adding an employee that is going to be allowed access to the online portal, you must assign a web password. It must be at least 6 digits long. If the employee does not have access to the online portal you can leave this blank.
- **First/Middle/Last Names:** This is the name of the employee you are adding.
- **E-mail:** This is an optional field to store the email address of your employee.
- **Phone:** Another optional field to store additional employee information.
- **Status:** Any employee you add that will be running transactions or logging in to the portal needs to be at Enabled status. However, if you need to suspend their access at any time, you can change the status to Quit, Suspended, or Terminated. If an employee is set at any of those statuses they will not be allowed to log in or run transactions.
- **Password at POS:** This is for any employee that will be entering a password into the terminal. It should be numeric only, typically 4 digits in length. On the right side of the page is where you can set the privileges for each employee.

Below are descriptions of each privilege.

- **Administrator:** If this employee should have access to the online portal, this box must be checked. If it is not checked, they will not be allowed to sign in.
- **Account:** Every card number has a corresponding account number, which contains customer, card, and balance information.
- **Card:** If you want the employee to be able to view or edit card information (such as balances or expirations), check the appropriate boxes.

- **Customer:** You can choose whether or not the employee can view or edit customer information such as name, phone number, and address.
- **Employee:** This allows the employee to view and edit other employee information.
- **Location:** This allows the employee to view and edit the merchant location information.
- **Broadcasts:** You can allow your employees to send SMS and/or Email broadcasts.
- **Transaction:** You can choose which transactions you want each employee to perform in this case the employee can only do Gift Issuances and Redemptions, Loyalty Issuance and Redemption as well as Inquiries and Tips. However, the transaction would fail if the employee tried to void a transaction.

Once you have finished choosing the employee privileges, click Save.



Location Rise and Shine Cafe Employee Add

Rise and Shine Cafe [4350] Employee Add

Employee Id may be merchant's choice

Password web administration

First Name

Middle Name

Last Name

E-mail

Phone AAA LLL LLLL

Status ▾

Password at POS point-of-sale device

Web terminals require passwords to be numeric only

Employee Privileges

Administrator

Account View Edit

Card View Edit

Customer View Edit

Employee View Edit

Location View Edit

Broadcasts SMS E-Mail

Transaction View

Execute

- Account History
- Adjustment
- Enrollment
- Gift Issuance
- Gift Redemption
- Inquiry
- Loyalty Issuance
- Loyalty Redemption
- Multiple Issuance
- Promo Issuance
- Promo Redemption
- Renewal
- Return
- Tip
- Transfer
- Void
- Employee Report
- Terminal Report

A blue confirmation box will show up.

Info:

Employee successfully added.