



Siteminder Users Guide

Web version for use with Model - M4000

Automated Fueling Terminals

Version 1.4b

Date: November 26, 2018



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Revision History

Revision Number	Changes Made	By	Date
1.0e	Initial Release	SPP	07/18/2017
1.1b	Added Inventory Tab, screenshots	SPP	08/04/2017
1.2a – 1.3a	Added instructions on taxes / tables	SPP	10/10/2017
1.4a – 1.4b	Added instructions for new features	SPP	11/26/2018

A Note on Revisions

As features and improvements are made to the Siteminder application, this document is revised to cover the changes. The sections that are being revised will always have the latest example screenshots. However, some of the non-related screenshot images may be slightly off as graphical elements are added or relocated during the revision process.



Customer Service & Technical Support

General Information

Mailing and Shipping Address:

QT Petroleum on Demand, LLC.
4909 Nautilus Ct. N., Suite 109
Boulder, CO 80301

Office Phone Number: (303) 444-3590

Fax Number: (303) 444-8736

Email: techsupport@qtpod.com

Office Hours: 7:30 AM to 5:30 PM (Mountain) MON - FRI

To assist you better and to make the customer service call as efficient and effective as possible, please have the following information ready:

Troubleshooting Background

Try to provide a detailed description of the problem(s). Including:

- 1) Can the problem or issue be repeated?
- 2) When did the problem or issue occur (and for how long)?
- 3) Has any related equipment been re-configured or changed recently (especially since the initial installation of QTpod hardware)?
- 4) What was the recent weather activity in the area (possibility of power spikes, brownouts or related weather phenomena affecting your equipment)?

Expertise Available on Site

If necessary, have a computer or maintenance support person available.

- 1) Sufficient time to follow our support staff from problem to resolution (make appointments if necessary).
- 2) Depending on your warranty/service contract selections, the individual responsible for dealing with problems or issues related to QTpod software or hardware.



Replacement Parts Policy

If the problems or issues you are experiencing with your QTpod M4000 Automated Fuel Terminal require a permanent replacement of parts, the guidelines are as follows:

- 1) QTpod and the customer have discussed the issues and have mutually decided that a replacement module (or board) is required to keep the fuel terminal functioning while the original troubled module is returned, tested and then either repaired or scrapped at the QTpod facility.
- 2) The replacement modules will be shipped to your location as permanent replacements. These replacement modules are subject to having an invoice for the cost of the module shipped with them, and if the original is not returned within one week, you will be charged for the cost of the replacement module.
- 3) After the original module is fixed, QTpod will return it to our remanufactured parts pool.

Recommended Procedures

Routinely review your transactions online to ensure that everything is operating normally and no suspect entries (several \$0.00 sales?) are visible.

Never leave your terminal shut off (esp. line power on the terminal block, located in the pedestal of the fuel terminal) if, for any reason not related to repair or maintenance, it will not be used. Leaving the terminal power off will shut off the heaters and in inclement weather the terminal will not ward off condensation and / or possible corrosion.

Consider your QTpod Automated Fuel Terminal as a personal computer; do not open the head or pedestal doors during inclement weather. Any parts replacement or maintenance outside the normal scope of operation (if needed) should be performed by qualified field technicians or under direct supervision by QTpod Service Technicians (this includes telephone technical support). If you are unsure about any operation of the terminal, call a QTpod Service Technician.



Siteminder Overview

Siteminder is a complete fuel-management system used with the QTpod Model M4000 Automated Fuel Terminal.

Because it is now designed for the Web, Siteminder can be utilized from any computer with a color display resolution of at least 1024 x 768 pixels and utilizing a compatible browser (*NOTE: JavaScript must be enabled in the browser*).

Browsers initially supported:

Chrome, Firefox, Internet Explorer, Safari, Microsoft Edge

Siteminder automatically performs time-consuming accounting tasks — from collecting data to producing analytical reports — to make your fuel operation more efficient, and more profitable.

Siteminder captures sales data from remote terminal sites via their Internet connection on the Web.

Siteminder provides confidential communication between sites and convenient access to the daily information needed to make sound business decisions.

Siteminder processes and analyzes data stored in a database. Siteminder provides immediate customer, sales, and inventory reports. Siteminder performs many fuel-management tasks, including sales and inventory statistics using US and international volume and currency units. Siteminder features allow flexibility when handling unique circumstances. Siteminder has undergone many product enhancements over the years, and this latest version incorporates the most popular features, all the while enabling secure connectivity with a user's browser anywhere across the Internet. While these are explained in greater detail within this manual, following is a brief list of some of the features:

- Tax Tables which allow exact taxes to be computed and displayed on receipts. Taxes can be computed AS PART OF or IN ADDITION TO retail price.
- Discount Tables which allow discounts to increase as more fuel is purchased. The discounts and break-points are completely configurable.
- Discount Classes which allow you to set a price for some of your customers and they will get that price no matter how the price fluctuates. You can use this option for those customers who want to buy a quantity of fuel at a certain price.
- Role-Based Level Protection which restricts access to different portions of the program or limits the ability to edit certain field data.
- Access Schedules which allow the operator to restrict access to the fuel terminal to only certain customers or groups of customers (e.g., private card or credit card), after hours or anytime the operator chooses.



Introduction to Siteminder

This section contains basic instructions on navigating the menu structure to accomplish common tasks for which that you will use Siteminder. Siteminder is used by QTpod customer support staff to initially configure the M4000 terminals and by the customer to manage pricing, generate reports, etc. This dual usage means that some of the commands described within this document may be greyed-out or non-functional, as they are reserved for QTpod support personnel.

Logging onto Siteminder

Enter the following link into your browser's address field:

<https://portal.qtpod.com/portal>

Your browser should now show you the login page as shown below:

QTpod petroleum on demand

QT POD Siteminder

Login

Please login with your user name and password.

User Name

Password

Remember me?

Log in

Enter your User Name and Password that you were assigned by either QTpod support or by your company's account administrator. The checkbox option to "Remember Me" will function only if your browser settings allow saving data.

The following Welcome screen will then be displayed. The tab row allows you to:
View Transactions by Terminal, View or Edit configurations, Change your password, or Logoff.

QTpod petroleum on demand

QT POD Siteminder

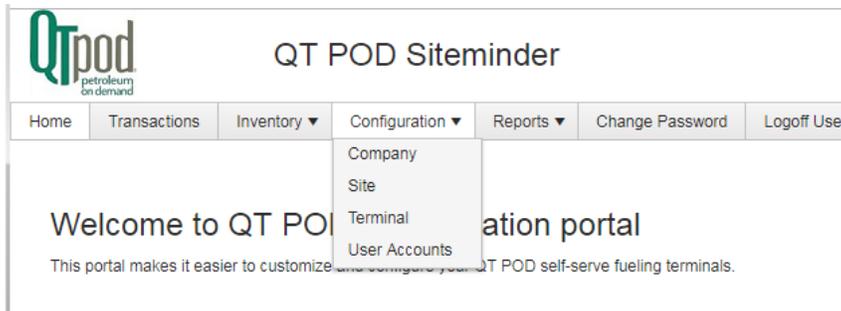
Home Transactions Inventory Configuration Reports Change Password Logoff User

Welcome to QT POD Configuration portal

This portal makes it easier to customize and configure your QT POD self-serve fueling terminals.

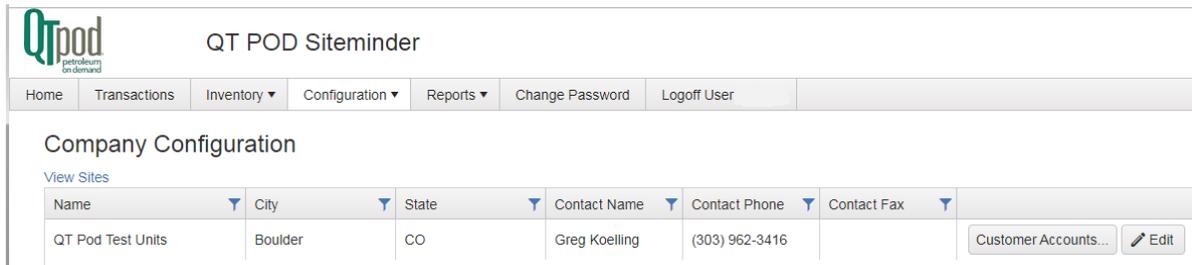
Navigating Siteminder Tabbed menus

Now that you are logged in, we will cover some examples of typical tasks that Siteminder is used for. The Configuration tab will expand to a sub-menu of options when the mouse cursor is clicked on it. You can then select an item by clicking on it. NOTE: *All buttons with the small grey triangle function in this manner.*



Viewing, Sorting, Filtering Data Items

The Siteminder displays data items organized in columns, with sorting and filtering options by clicking on a column's header or clicking on the funnel icon.



At the top is a blue link that allows jumping to another screen (typically returning to a previous screen). To the far right of each item are action buttons that jumps to a new screen or opens a dialog box for detailed viewing and/or editing the data fields for that item.

Common Company Administrator Tasks

The tasks that will be covered in this section are:

- Viewing Transactions
- Changing Fuel Prices
- Inventory Management
- Maintaining Company's Customer Accounts
- Maintaining Company Contact Information

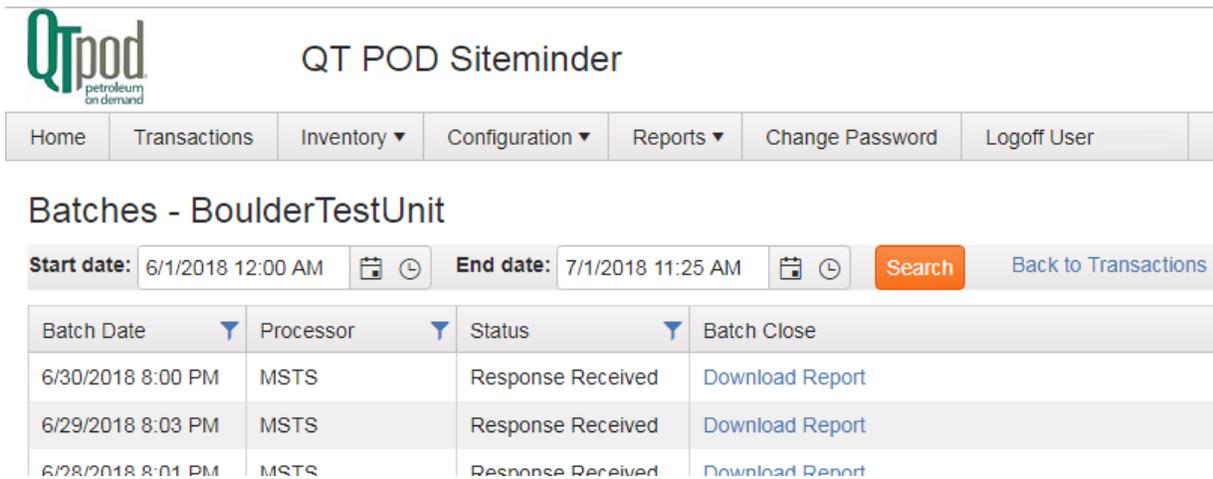
Instructions for other tasks are covered further down in this manual, use the Table of Contents to locate. If you cannot find the information you need, please contact QTpod customer service. Contact information is shown at the start of this guide.

Viewing and Exporting Transactions, Reprinting a Receipt

Transactions are accessed by reference to the Terminal they occurred on, so use the drop-down menu to select the Terminal for viewing. The screen defaults to filtering the transactions for the current day. Use the Start date / End date fields to cover the time-period you desire, then click the orange “Search” button.

The data can be exported as a CSV file for import into other programs (like spreadsheets) for building reports and graphs. The file will be automatically downloaded via your browser as “Transactions.csv”. Use your browser’s settings to predesignate what folder the file downloads to. There is an adjacent option for export in the TLG text file format for use with compatible applications.

Next to the “Search” button is the “View Batches” button. Some credit-card processors accumulate transactions for processing in batches. When finished they can provide information on the status of the transactions processed. Clicking the “View Batches” button opens a list of that information filtered by the Start and End date values. Reports for can be downloaded by clicking on the Download Report link.



QT POD Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Batches - BoulderTestUnit

Start date: 6/1/2018 12:00 AM End date: 7/1/2018 11:25 AM Search Back to Transactions

Batch Date	Processor	Status	Batch Close
6/30/2018 8:00 PM	MSTS	Response Received	Download Report
6/29/2018 8:03 PM	MSTS	Response Received	Download Report
6/28/2018 8:01 PM	MSTS	Response Received	Download Report

Clicking on the column headers will sort the on-screen data based on that column’s data. There is an additional ability to filter on a column’s data values by clicking on the grey ‘funnel-icon’.

In the lower left corner, you can select the number of items shown per page, and which page is currently displayed.



QTpod petroleum on demand

QT POD Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Transactions

Terminal: Dallas - 4000105 Refresh Start date: 7/1/2018 12:00 AM End date: 8/31/2018 3:23 PM Search View Batches Export To CSV Export To TLG

Date	Account #	Customer N...	Card #	Holder N...	...	Card	Fuel	Pump Na...	Units	Amount	Tail #	
7/31/2018 3:24 PM			7019532015	TRUCK 23	Clos...	Proprie...	Jet A	Pump #1 - Jet A	5.00000	12.50		Detail...
7/31/2018 10:58 AM			7019532015	TRUCK 23	Clos...	Proprie...	Jet A	Pump #1 - Jet A	5.00000	12.50		Detail...
7/31/2018 10:54 AM			7019532015	TRUCK 23	Clos...	Proprie...	Jet A	Pump #1 - Jet A	5.00000	12.50		Detail...
7/31/2018 10:52 AM			7019532015	TRUCK 23	Clos...	Proprie...	Jet A	Pump #1 - Jet A	5.00000	12.50		Detail...
7/31/2018 10:41 AM			7019532015	TRUCK 23	Clos...	Proprie...	Jet A	Pump #1 - Jet A	0.98000	2.45		Detail...
7/31/2018 10:37 AM			7019532015	TRUCK 23	Clos...	Proprie...	Jet A	Pump #1 - Jet A	0.00000	0.00		Detail...
7/30/2018 4:55 PM			7019532015	TRUCK 23	Clos...	Proprie...	Jet A	Pump #1 - Jet A	0.00000	0.00		Detail...

1 - 10 of 18 Items

Totals for date range selected: Jet A: \$164.32 (66.410 units) Jet B: \$0.00 (0.000 units) Total: \$164.32 (66.410 units)

Clicking on a transaction item's "Details" button located on the far-right will display a screen with all the parameters regarding that transaction. Next to the "Update" and "Cancel" buttons on the sheet bottom is a blue link to allow reprint a receipt of the transaction. It will come as a "Receipt.pdf" file into the user's "/Downloads" folder. Some browsers will auto-open a new tab to view the receipt and allow saving the file elsewhere and printing (see inset of receipt below).

QTpod petroleum on demand

QT POD Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User sperrin

Transaction Detail

Terminal: Dallas - 4000105 Date: 7/31/2018 3:24 PM Pump: Pump #1 - Jet A Product: Jet A

Authorized Amount: 12.50 Card Type: Proprietary Cardholder Name: TRUCK 23

Account Number: 7019532015 Response Text: Approved

Batch Number: 99 Invoice Number: 100099

Start Time (UTC): 2018-07-31 20:24:10.000 Start Totalizer: 82229915.000

End Time(UTC): 2018-07-31 20:24:37.000 Avg Price Per Unit: 2.50000 Total Tax: 0

Total Price: 12.50

Custom Ticket Message: Auth Response Message: APPROVAL

Status: Closed Capture Response Message:

Network: Proprietary Processor: Proprietary

Update Cancel Print Receipt

QT Petroleum on Demand
1801 Royal Lane, Suite200
Dallas, TX 75229
(972) 406-5900
7/31/2018 3:24:37 PM

FUEL: Jet A
PUMP: Pump #1 - Jet A
Units: 5.000 US Gallons
Unit Price: \$2.500
Sub Total: \$12.50

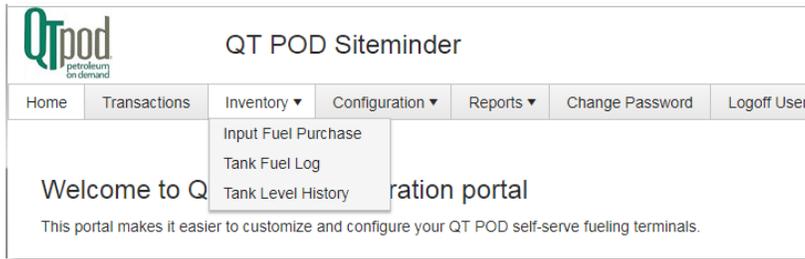
Invoice #: 100099
SALE TOTAL: \$12.50

PAYMENT AMOUNT: \$12.50
Proprietary
CARD: **** * 2015
EXP: 2020-12
NAME: TRUCK 23
Approval Code: NHK672

FOOT1
HAVE A SAFE FLIGHT!

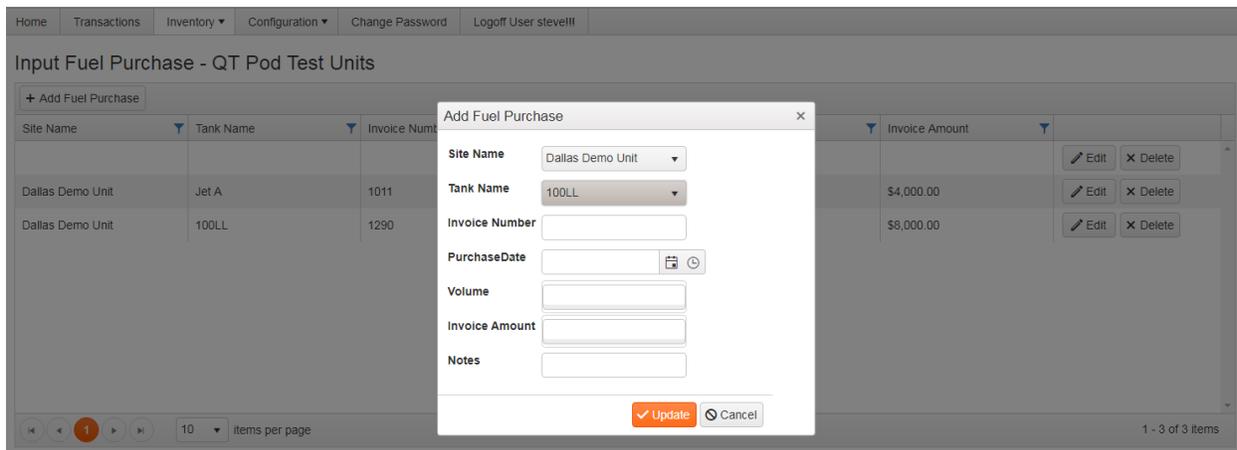
Inventory Management

Click on the top-level menu bar's "Inventory" tab to open a list of sub menu options.



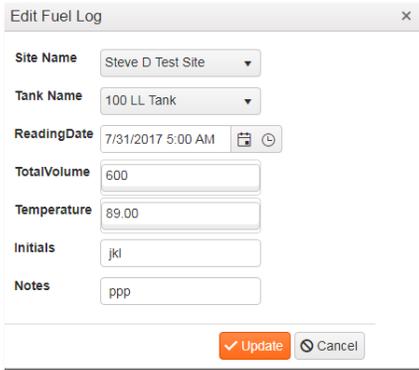
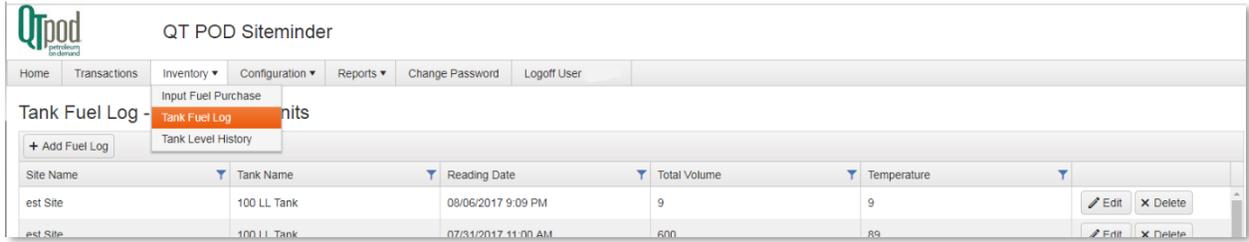
Adding a Fuel Purchase

Clicking on "Input Fuel Purchase" shows a table of recent purchases. At the top left is a "+ Add Fuel Purchase" button. Clicking there will allow a record entry for a new purchase. The record contains Site and Tank names, Invoice number, Purchase Date, Volume, Invoice Amount and a field for additional Notes. On the far right are Edit and Delete buttons for making corrections.



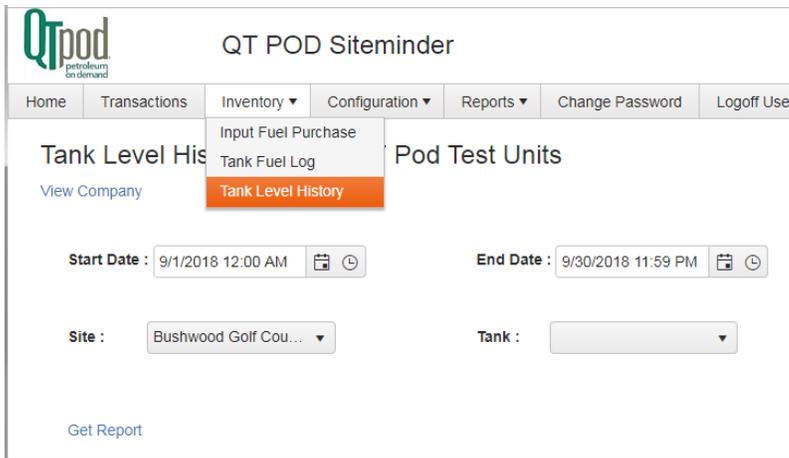
Tank Fuel Log

The selection of the "Tank Fuel Log" submenu allows registering time & date stamped tank measurements.



Tank Level History

The last submenu item on the inventory tab is “Tank Level History”. Use the drop-down buttons for “Site” and “Tank” selection. You then select time & date filtering to target a period to review. The lower left link “Get Report” can then be clicked to open a new tab on your browser with a .pdf of the requested history. The .pdf can then be saved or printed from there.



Note that the “Volume Level” column is calculated from “Transactions” data, while “Gain” and “Loss” column data is derived from comparisons made with actual tank levels in the “Measurements” column.

Tank Level History Report

For Site: **Dallas Demo Unit** Tank: **100LL** From: **7/1/2017 12:00:00 AM** To: **7/31/2017 11:59:00 PM**

Activity Date	Measurements	Fuel Purchases	Transactions	Volume Level	Gain	Loss
7/25/2017 1:49:12 PM			1.990	3638.675		
7/25/2017 9:21:14 AM			15.000	3640.665		
7/21/2017 3:43:15 PM			8.000	3655.665		
7/21/2017 2:20:33 PM			15.010	3663.665		
7/21/2017 12:47:43 PM			10.010	3678.675		
7/21/2017 10:52:03 AM			0.000	3688.685		

Changing Fuel Prices

Use the Configuration drop down and select Terminal. Click on the Terminal item you wish to edit. On smaller displays, you will need to use the right-side scroll bar to move the viewing window to show the Terminal you wish to select. Click the “Dispensers” button.

Terminal Configuration

[View Sites](#) [View Receipt Options](#)

[+ Add Terminal](#)

Name	Site	Device	Update ...	Last Up...	
Test Terminal	Dallas Demo Unit	test M4000 (12345678)	Yes	Standard Time)	Settings Cards... Dispensers... Messages... Push Configuration x Delete
Boulder - 4000107	Dallas Demo Unit	M4000-4000107 (M4000-4000107)	Yes	Thu Apr 20 2017 17:11:24 GMT-0500 (Central Daylight Time)	Settings Cards... Dispensers... Messages... Push Configuration x Delete
test	Crowley - Merrill Field	BoulderTestUnit (BoulderTestU...			Settings Cards... Dispensers... Messages... Push Configuration x Delete
Dallas - 4000105	Dallas Demo Unit	M4000-4000105 (M4000-4000105)		Mon Jul 10 2017 13:30:10 GMT-0500 (Central Daylight Time)	Settings Cards... Dispensers... Messages... Push Configuration x Delete
Dev Terminal	Dallas Demo Unit	M4000-T1 (4T00-100-1001)		Fri May 19 2017 11:41:48 GMT-0500 (Central Daylight Time)	Settings Cards... Dispensers... Messages... Push Configuration x Delete

10 items per page

Click the “Settings” button for the dispenser you would like to change the fuel price on. The variety of parameters for that dispenser are divided into categories that are selectable by clicking on the tabs.

Dispenser Settings - Pump #1 - 100LL (Dallas - 4000105)

[View Dispensers](#)

General | **Prices** | Discount Classes | Taxes | Pulses | Timeouts

Dispenser Name: Pump #1 - 100LL

Product Name: 100LL

Dispenser ID (1-32): 1

HV Display Number: 0

Current Totalizer Reading: 82229915

Dispenser Type: DPI

Pulser Type: Default

Max Totalizer Digits: 9

Volume Unit: US Gallons

Click on the Prices tab and then change the Price per Unit field to the new value.



QT POD Siteminder

Home | Transactions | Inventory ▼ | Configuration ▼ | Reports ▼ | Change Password | Logoff User

Dispenser Settings - 100LL (BoulderTestUnit)

[View Dispensers](#)

General | **Prices** | Discount Classes | Taxes | Pulses | Timeouts

Product Name: 100LL

Volume Unit: US Gallons

Price per Unit: 3.00000

Discount Table: None

Click the “Update” button at the bottom of the page, then click on blue View Dispensers link at the top of the page.

Repeat this process for each dispenser you wish the change the price on. When done, click on the blue View Terminals at the top of the page.

Scroll the window as necessary to view and select the Terminal with the newly modified pricing. Click on

the “Push Configuration” button to send the price change to the terminal. The update process occurs in the background and should complete within a few minutes.

test	Field	(BoulderTestU...		Settings	Cards...	Dispensers...	Messages...	Push Configuration	X Delete
Dallas - 4000105	Dallas Demo Unit	M4000-4000105 (M4000-4000105)	Mon Jul 10 2017 13:30:10 GMT-0500 (Central Daylight Time)	Settings	Cards...	Dispensers...	Messages...	Push Configuration	X Delete
	Dallas Demo	M4000-T1	Fri May 19 2017 11:41:48 GMT-						

At the terminal you can verify the dispenser is charging the updated price by using a test or credit card. Apply for a \$1.00 sale and note the updated price on the screen, then press the Cancel keypad to terminate the sale. For a paper record, use keypad to Confirm the sale then turn pump handle-clear on and then off, then check the printed receipt.

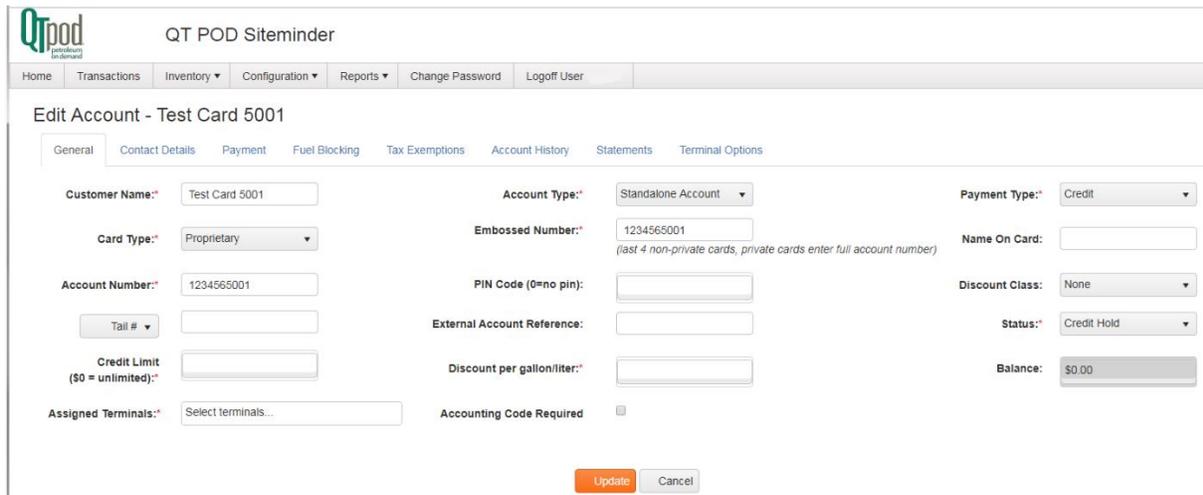
NOTE: Any changes made to dispenser settings that affect pricing and/or delivered quantities are recorded at the Terminal for later auditing by Weights and Measures.

Maintaining Customer Accounts

Click the Configuration’s drop-down menu button for “Company”. Typically, this will show a single item, with Company name and contact information. Click on the “Customer Accounts” button near the right edge. In Siteminder, a customer account is tracked by the card that is used for transactions.

Editing an Existing Account

To edit an account’s data, locate the item with the proper account number, then click on the “Details” button near the right edge of screen. The following type of screen should now be shown.



The screenshot displays the 'Edit Account - Test Card 5001' interface. At the top, there is a navigation bar with tabs: Home, Transactions, Inventory, Configuration, Reports, Change Password, and Logoff User. Below this, the main content area has several sub-tabs: General (selected), Contact Details, Payment, Fuel Blocking, Tax Exemptions, Account History, Statements, and Terminal Options. The 'General' tab contains the following fields:

- Customer Name: Test Card 5001
- Account Type: Standalone Account
- Payment Type: Credit
- Card Type: Proprietary
- Embossed Number: 1234565001 (with a note: last 4 non-private cards, private cards enter full account number)
- Name On Card: (empty field)
- Account Number: 1234565001
- PIN Code (0=no pin): (empty field)
- Discount Class: None
- Tail #: (empty field)
- External Account Reference: (empty field)
- Status: Credit Hold
- Credit Limit (\$0 = unlimited): (empty field)
- Discount per gallon/liter: (empty field)
- Balance: \$0.00
- Assigned Terminals: Select terminals...
- Accounting Code Required: (checkbox, unchecked)

At the bottom right, there are two buttons: 'Update' (orange) and 'Cancel' (grey).

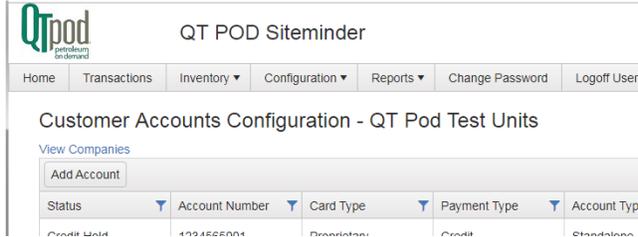
Use the top located tabs to navigate to the various parameters for the account that need to be modified. There is a global “Update” button on the bottom of every tabbed screen that will apply all accumulated changes and return to the Customer Accounts Configuration screen. Press it once after all the parameters have been edited as required.

NOTE: *Not all fields will be editable based on usage rules for the level of the user logged in.*

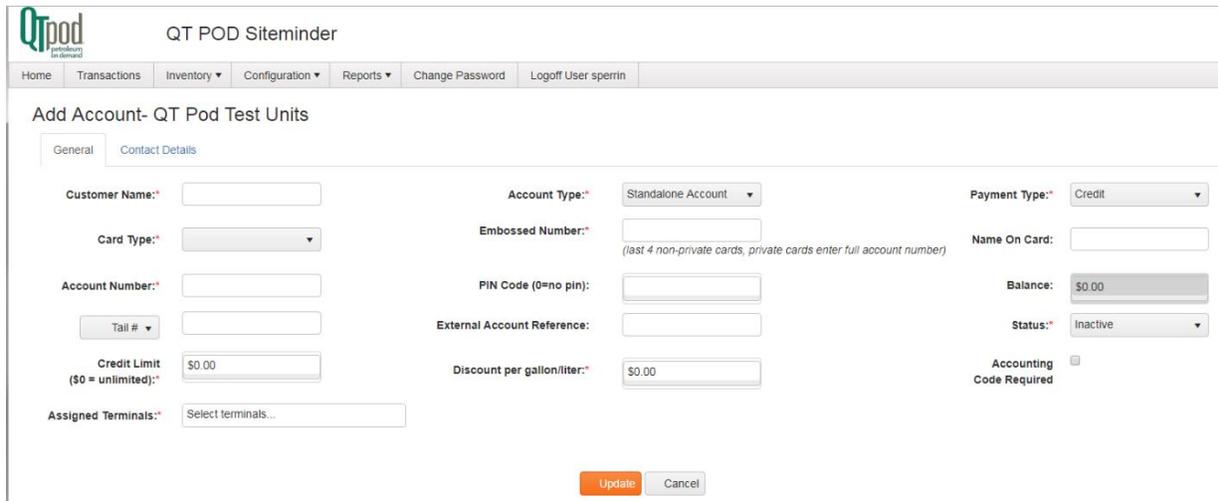
There is a Statements tab that allows you select a time-range filter and then click “Get Statement” which generates, downloads and displays a viewable “Statement.pdf” document.

Adding a New Account

To add a new account, from the Customer Accounts Configuration screen, click the “Add Account” button.



The following screen should be shown:



Under the General tab the following fields are available for data entry:

- Customer Name (just for record keeping)
- Select Account Type
 - Standalone Accounts can be used for Credit or Private
 - Master and Sub Accounts can only be used with Private Cards
 - Card Type Discount
- Payment Type can select Prepay or Credit accounts
- Card type selects the type of card for this account from drop-down list
- Embossed number (**required**)
 - The last four digits only, on credit cards
 - All digits from private cards
- Name on Card –must match mag-stripe track data, typically Last Name/First Name
- Account Number (just for record keeping)
- PIN Code – Pin customer can setup to limit access using their card (blank or zero = no PIN)
- Discount Class – Negotiated price per gallon
- Tail Number / Vehicle ID (used only for record keeping)

- External Account Reference
- Status
 - Active – (required) for current customers
 - Inactive – For customers not currently using terminal
 - Credit Hold – For customers who owe too much money
- Credit Limit (required)
 - Set to zero for prepay customers or customers with unlimited credit
- Discount per gallon/liter – The dollar amount subtracted from cost per gallon/liter
- Balance – the current balance on account (Negative numbers indicate remaining credit)
- Accounting Code Required, checkbox
- Assigned terminal (required) – lists the terminals where Payment can be made using this account (based on allowed amounts from the Prepaid Balance/Credit limit).

Under the Contact Details tab the following fields are available for data:

- Contact Name – Customer’s Contact Name for billing purposes
- Address 1 – Customer’s address for billing purposes
- Address 2 – Customer’s address for billing purposes
- City – Customer’s City for billing purposes
- State – Customer’s State for billing purposes
- Postal Code – Customer’s Postal Code for billing purposes
- Phone – Customer’s Phone for billing purposes
- FAX – Customers’ FAX for billing purposes
- Email – Email address of customer contact

Account Field Dependencies

When adding, or editing accounts, be mindful of the following rules on the population of the Embossed Number and Name on Card fields.

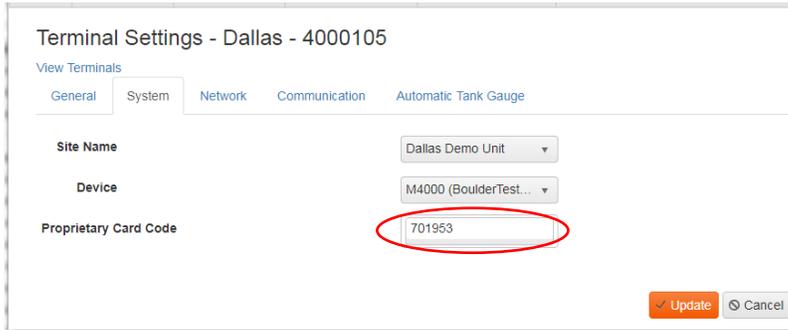
For non-private card accounts:

- The Embossed Number is only the last four-digits on the card, and it is recommended that the Name on Card field must contain a portion of the name as stored on the magnetic stripe track data. It could be left blank but be aware that multiple accounts could share the same last four digits.

For private card accounts:

- The Name on Card field is left blank and the Embossed Number is the four-digit card number concatenated onto the end of the Terminal’s Proprietary Card Code*.

* Proprietary Card Code: This code can be found under Terminal Settings System tab (see below).



Terminal Settings - Dallas - 4000105

View Terminals

General System Network Communication Automatic Tank Gauge

Site Name: Dallas Demo Unit

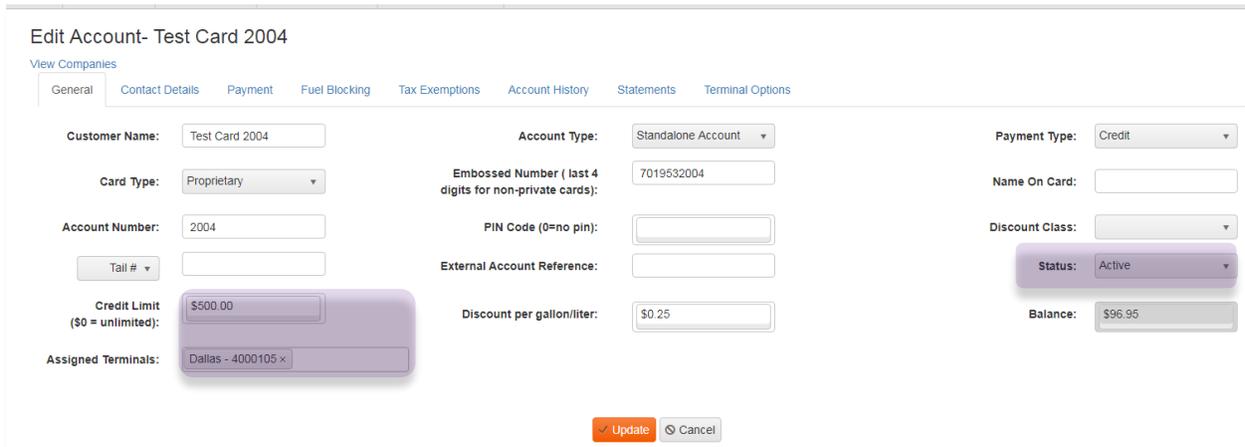
Device: M4000 (BoulderTest...)

Proprietary Card Code: 701953

Update Cancel

Account Field Requirements

Below is an example of an account that is setup to give a \$0.25 price Discount when the Proprietary card #2004 is used on the Terminal Dallas – 4000105, which has a propriety code value of 701953.



Edit Account- Test Card 2004

View Companies

General Contact Details Payment Fuel Blocking Tax Exemptions Account History Statements Terminal Options

Customer Name: Test Card 2004

Card Type: Proprietary

Account Number: 2004

Tail #: []

Credit Limit (\$0 = unlimited): \$500.00

Assigned Terminals: Dallas - 4000105 x

Account Type: Standalone Account

Embossed Number (last 4 digits for non-private cards): 7019532004

PIN Code (0=no pin): []

External Account Reference: []

Discount per gallon/liter: \$0.25

Payment Type: Credit

Name On Card: []

Discount Class: []

Status: Active

Balance: \$96.95

Update Cancel

Notice that the Embossed Number and Name on Card fields are formatted properly as described in the previous section on dependencies.

The color highlighted fields above indicate the required fields that should not be left blank. Also, the Status field should be set to “Active” to enable the account on the Assigned Terminals.

Assigned Terminals are selected by clicking within the blank area of the field and then selecting a terminal from the exposed list. Terminals can be removed by clicking on the ‘x’ next to the Terminal name.

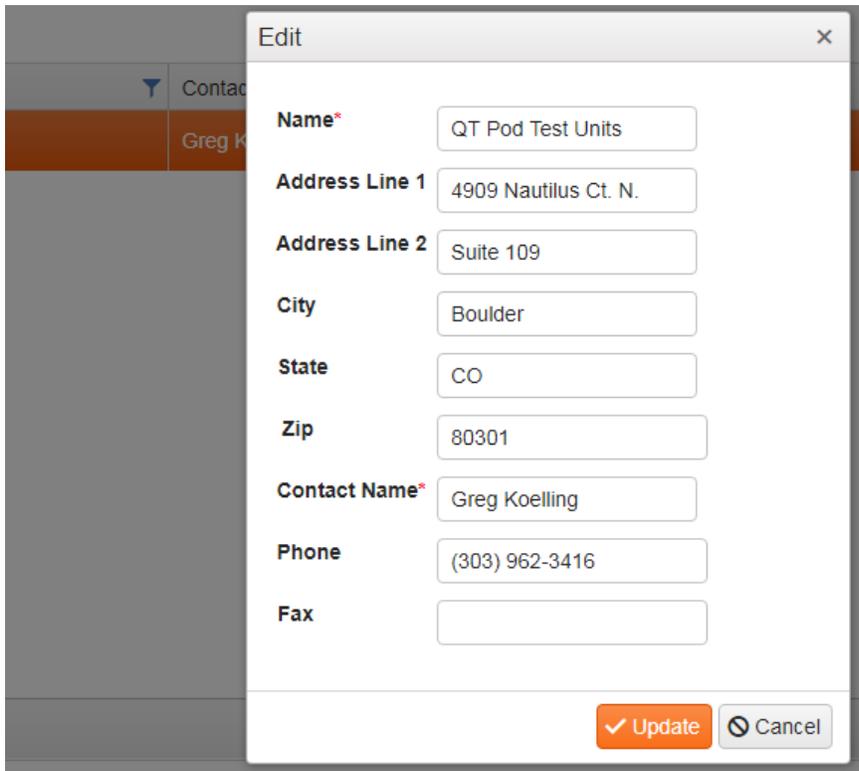
Finally,

Click on the “Update” button when finished editing, to save the changes for the account.

Maintaining Company Contact Information

On the Company Configuration screen, press the “Edit” button on the far-right edge. It enables a pop-up dialog-box that allows the entry or changing of the company’s contact information. Note that the Name and Contact Name fields are mandatory (indicated by the red asterisks).

Press “Update” or “Cancel” buttons to close the dialog-box as needed.



The image shows a screenshot of a web application interface. A pop-up dialog box titled "Edit" is open, allowing for the modification of contact information. The dialog box contains several text input fields, each with a label and a red asterisk indicating it is mandatory. The fields are: Name (containing "QT Pod Test Units"), Address Line 1 (containing "4909 Nautilus Ct. N."), Address Line 2 (containing "Suite 109"), City (containing "Boulder"), State (containing "CO"), Zip (containing "80301"), Contact Name (containing "Greg Koelling"), Phone (containing "(303) 962-3416"), and Fax (empty). At the bottom right of the dialog box, there are two buttons: "Update" (with a checkmark icon) and "Cancel" (with a close icon). The background of the application shows a table with a header "Contact" and a row containing "Greg K".

Contact
Greg K

Name*

Address Line 1

Address Line 2

City

State

Zip

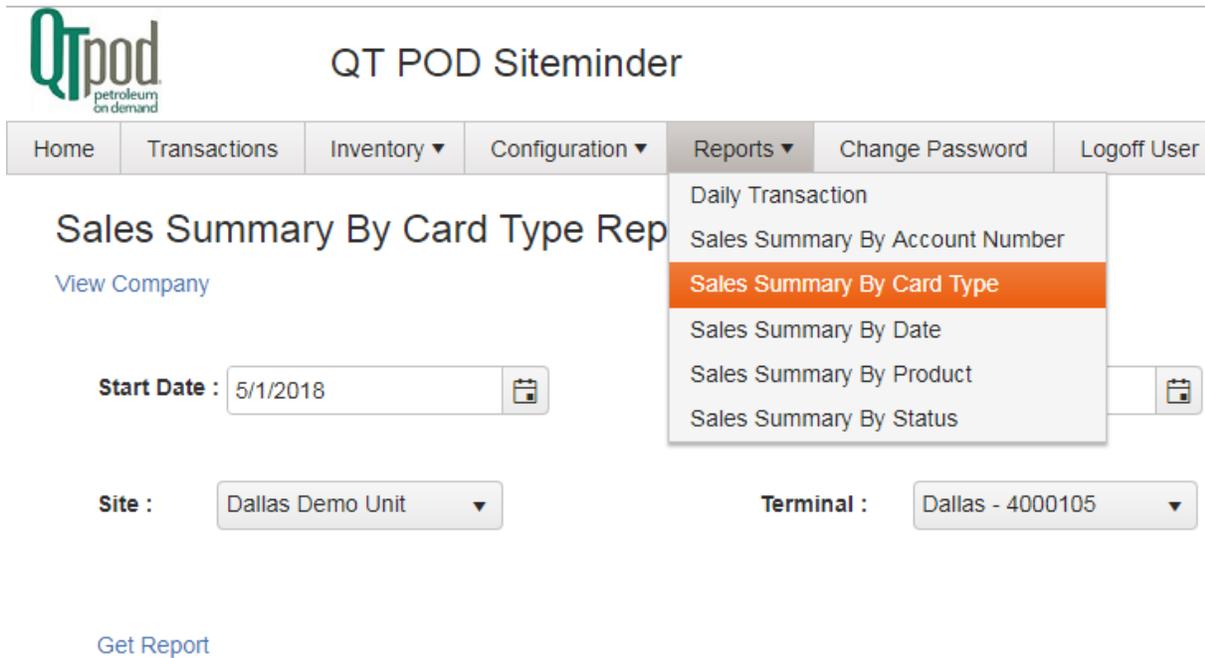
Contact Name*

Phone

Fax

Reports

Click on the top-level menu bar's "Reports" tab to open a list of sub menu options. Use the drop-down selections for Site and Terminal to target the data for the report. Use the Start and End Date filters to narrow the time interval that the data is included in the report. There are calendar hot-buttons to make date selection easier.



The screenshot shows the QT POD Siteminder interface. At the top left is the QTpod logo. The main title is "QT POD Siteminder". Below the title is a navigation menu with tabs: Home, Transactions, Inventory, Configuration, Reports, Change Password, and Logoff User. The "Reports" tab is selected, and a dropdown menu is open, listing several report options: Daily Transaction, Sales Summary By Account Number, Sales Summary By Card Type (highlighted in orange), Sales Summary By Date, Sales Summary By Product, and Sales Summary By Status. Below the menu, the page title is "Sales Summary By Card Type Rep" with a "View Company" link. There are input fields for "Start Date" (5/1/2018) and "Terminal" (Dallas - 4000105). A "Site" dropdown is set to "Dallas Demo Unit". At the bottom left, there is a "Get Report" link.

Use the "Get Report" link on the lower left of the screen to generate a pdf file into your "/Users/.../Downloads" folder. It will also open a tab on your browser with the requested information displayed. From that tab you can download the pdf file to another destination or print (method dependent to which browser you are using).

Company Site Configuration Tasks

This section will cover some of the more advanced operations that a Company Administrator can accomplish with Siteminder. Most of these operations will have already been done during configuration and pretesting by the factory, but all are included here for completeness.

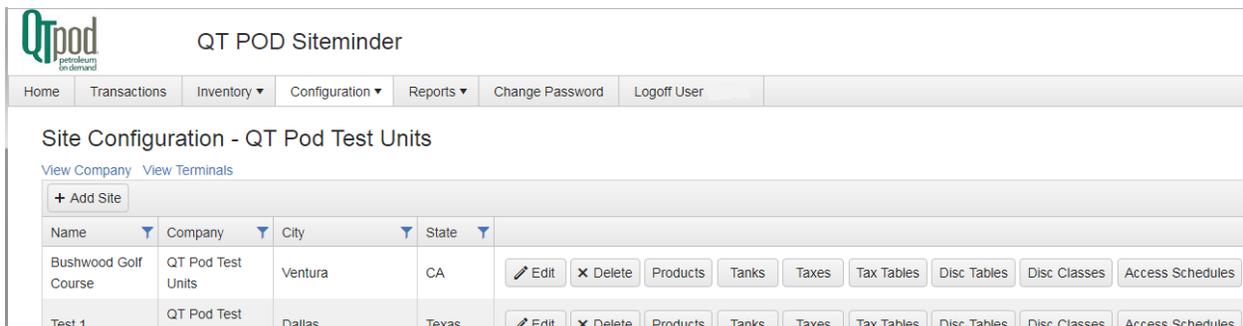
A company can have one or more sites that can have one or more terminals that can each control one or more dispensers that deliver product from one or more tanks. This hierarchy of dependencies must be complete (no gaps) for the Terminal & Siteminder to properly function.

Topics Covered in this Site Configuration section:

- Adding and Deleting Sites
- Editing General Site Information
- Available Product and Configuration at a Site
- Tank Configuration
- Site specific Taxes, Tax Tables
- Site specific Discount Tables and Discount Classes
- Site Access Schedules

Adding and Deleting Sites

From top menu bar Configuration tab, click on “Site” to show a table of all the sites the company has been configured with.



Name	Company	City	State									
Bushwood Golf Course	QT Pod Test Units	Ventura	CA	Edit	Delete	Products	Tanks	Taxes	Tax Tables	Disc Tables	Disc Classes	Access Schedules
Test 1	QT Pod Test	Dallas	Texas	Edit	Delete	Products	Tanks	Taxes	Tax Tables	Disc Tables	Disc Classes	Access Schedules

At the top-left is a button to “+ Add Site” and for each site there is also a “x Delete” action button to remove the site and its data.

Editing General Site Information

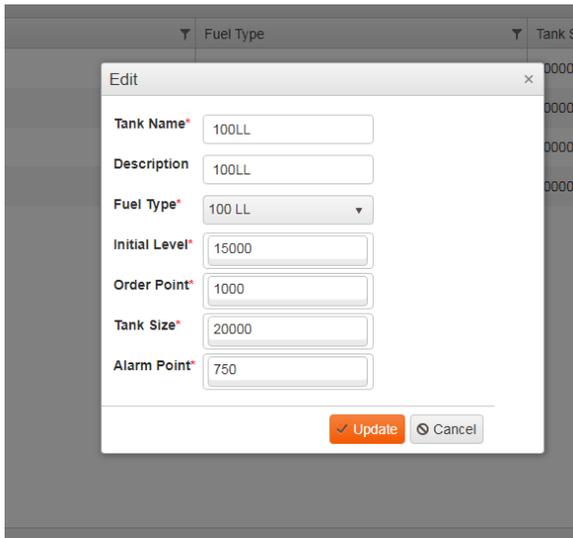
There is an “Edit” button next to the “Delete” that opens a pop-up dialog box for editing location, address, and contact information for the site. Click on “Update” to save changes or “Cancel” to close the dialog box.

Product Availability and Configuration

Clicking the “Product” button displays a list of products available at the site. Use the “+ Add Product” or “x Delete” to manage the list of products. Next to the “Delete” button is an “Edit” button. It lets you enter an alias name for a product that is selected from the drop-down list of Fuel Types.

Tank Configuration

Clicking on the “Tank” button shows all the tanks currently available at the site. Use the “+ Add” and “Delete” buttons to manage the tank list. Clicking on the “Edit” button for a tank pops open a dialog box with information regarding the fuel and levels.



The **red asterisks** indicate that these marked fields are not to be left blank. Use the “Update” button to save and close the dialog box (see above).

Access Schedules

Clicking the Site configuration’s “Access Schedules” button opens a list view of available schedules for that site.



Name	Access Start	Access End	
Normal	7:00 AM	1:00 PM	Edit Delete

Adding a schedule allows assigning a label name to it and entering start and end time-of-day periods that access is to be allowed. All times entered are local to that site.

QT POD Siteminder - QT Pod

Home Transactions Inventory Configuration Reports Change Password Logoff User

Access Schedules Configuration - QT Test1 Site

View Sites

+ Add Schedule

Name	Access Start	Access End	
Night	2:00 AM	7:30 AM	Edit X Delete
Day	6:00 AM	6:00 PM	Edit X Delete
Unrestricted	12:00 AM	11:59 PM	Edit X Delete

10 items per page 1 - 3 of 3 items

Once the schedules have been defined, one of them can be assigned as the default to a terminal (a blank default is the same as unrestricted access)

QT POD Siteminder - QT Pod

Home Transactions Inventory Configuration Reports Change Password Logoff User

Terminal Settings - Dev Terminal

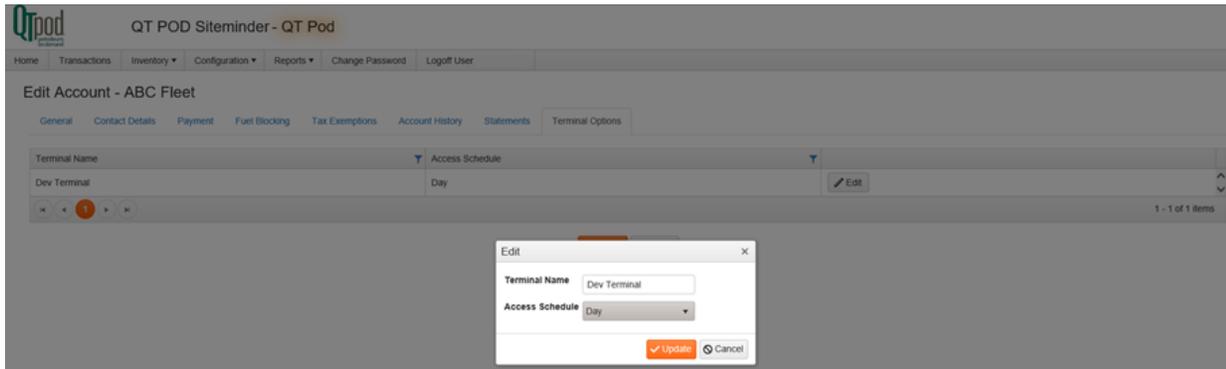
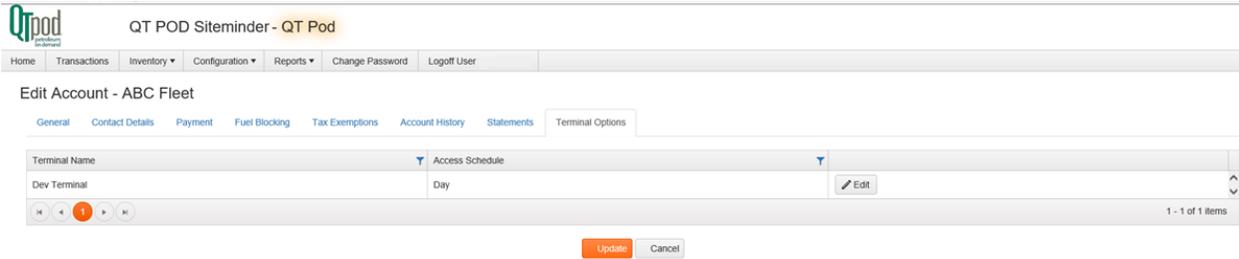
View Terminals

General System Network Communication Automatic Tank Gauge

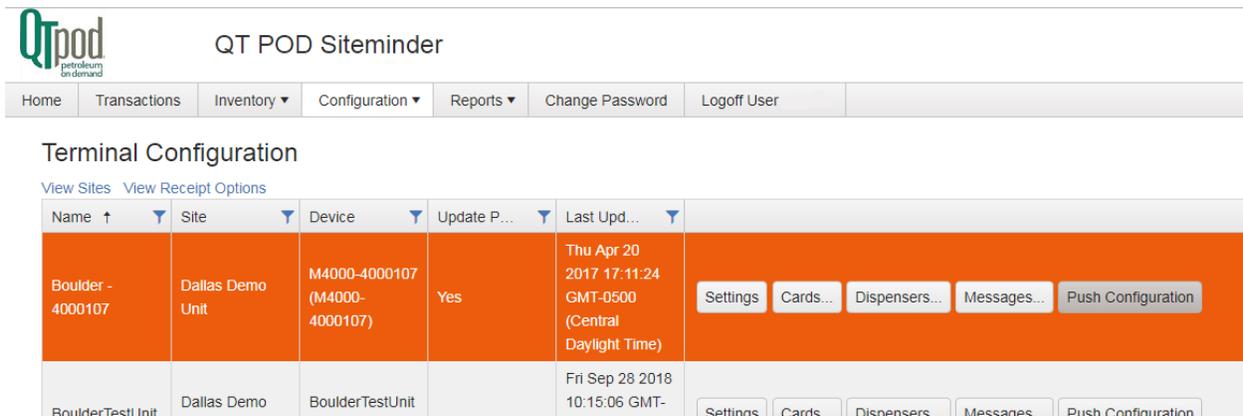
Terminal Name: Dev Terminal	Tax Table: Marine
Maximum Sale Amount: \$2,500.00	Amount of Fillup Key: \$100.00
Batch Close Time: 10:00 AM	Receipt Prompt: No Prompt
Force Registry #: <input checked="" type="checkbox"/>	Labeled as: Tail Number
Min Registry # Length: 3	Max Registry # Length: 9
Reject Unregistered Non-Private Card Users: <input type="checkbox"/>	Reject Unregistered Private Card Users: <input type="checkbox"/>
Print Private Account Balance on Receipt: <input type="checkbox"/>	Access Schedule: Unrestricted
Blacklist Update Time 1(not used for commercial): 12:30 AM	Blacklist Update Time 2(not used for commercial): 2:00 PM
Blacklist Update Time 3(not used for commercial): 2:30 PM	

[Update](#) [Cancel](#)

Then any overriding schedules can be applied to the dispensers and then to individual accounts on that terminal.



Once the schedule changes have been updated for a terminal, you must “Push Configuration” for the changes to be applied to the terminal.



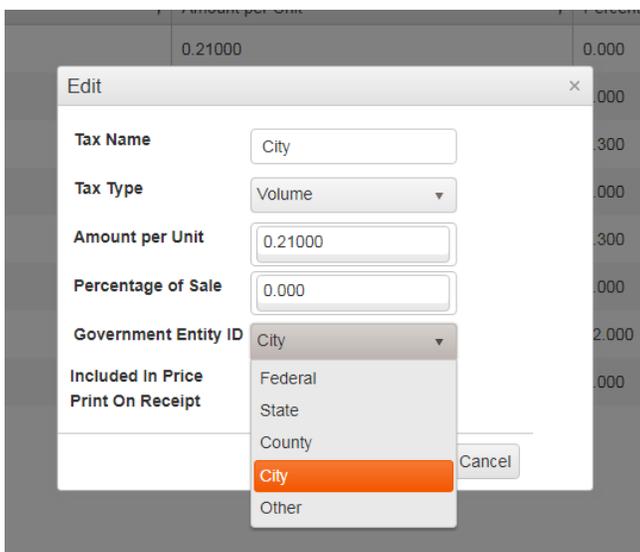
Taxes - An Overview

The application of taxes to fuel sales requires entry at three different levels within Siteminder. Proper configuration at all three levels: Site, Terminal and Dispenser is required for taxes to be properly applied to sales.

1. Site Configuration: Using the buttons “Taxes” and “Tax Tables” on the right side, you can enable the addition of taxes to sales, either by volume or as a percentage of sale. Taxes and their designation type are stored within a tax table for later selection during the Terminal configuration process.
2. Terminal Configuration: Use the “Settings” button, and under the General tab the “Tax Table” button allows choosing which tax table to apply for each Terminal at that site.
3. Dispenser Configuration: Each pump has a Taxes tab that allows the selection and enabling of taxes.

Tax Configuration – Site Level

The “Tax” button opens an itemized list of taxes that can be applied at the site. Taxes can be applied to the volume amount or to a percentage of the sale. There is a dropdown list (see inset) for assigning the Government Entity that is collecting the taxes. There are check boxes for 1) indicating if the tax is already present in the price, 2) whether to print the tax on the receipt.



Click on the “Update” or “Cancel” buttons to close the dialog box when finished.

Site Tax Table Configuration

The “Tax Tables” button is located next to “Taxes” and allows the creation and deletion of tables that organize which specific taxes (generated in the previous configuration step) and in which order they are to be applied.

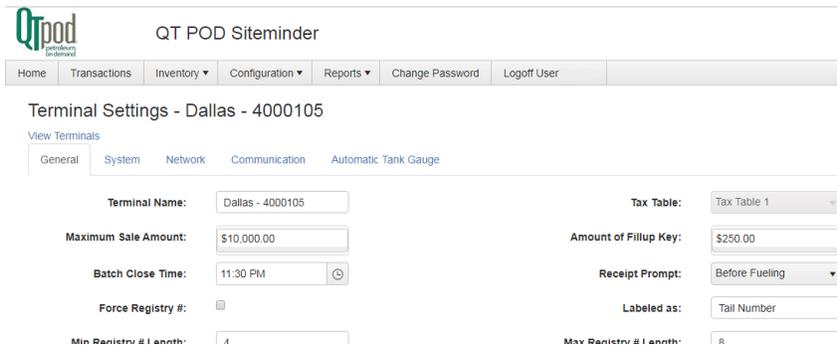
The “Edit” button allows you to change the name of the tax table. The creation of the table, the assignment of taxes and the order they are applied is done by QTpod customer support personnel.

(The following text is included for reference as to what steps QTpod performs for the customer.)

The “Taxes Used” button open a list-view of the taxes contained within that table. The “+ Use Tax” button and the “x Delete” buttons can be used to manage the tax list. The list order can be changed by using the “Move Up” and “Move Down” action buttons. The tax application order normally doesn’t matter unless there is a need to allow taxes to be applied to an already taxed value. The use of the “Stacking” button allows this type of taxation to be applied. Use the “Edit” button on the right edge of the Stacking list to toggle the checkbox(s) as to which upper level taxed values a ‘stacking’ operation is to be applied. When modified, the action button changes to an “Update” button to apply the change.

Terminal Settings – Tax Table selection

Selecting Configuration Terminal from the top menu, then selecting a terminal and pressing the “Settings” button on the right side brings you to the General tab. The upper right corner shows the tax table applied (by QTpod customer configuration) for this terminal.



QTpod Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Terminal Settings - Dallas - 4000105

View Terminals

General System Network Communication Automatic Tank Gauge

Terminal Name: Dallas - 4000105 Tax Table: Tax Table 1

Maximum Sale Amount: \$10,000.00 Amount of Fillup Key: \$250.00

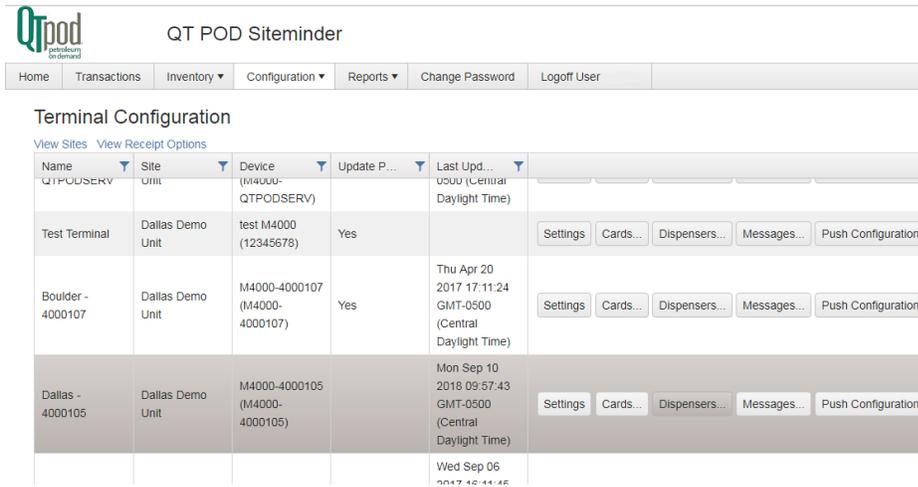
Batch Close Time: 11:30 PM Receipt Prompt: Before Fueling

Force Registry #: Labeled as: Tail Number

Min Receipt # Length: 4 Max Receipt # Length: 8

Dispenser Taxes Configuration

The “Dispenser” button is located on the right side of the Terminal Configuration screen.



QTpod Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Terminal Configuration

View Sites View Receipt Options

Name	Site	Device	Update P...	Last Upd...	
QTPODSERV	Unit	(M4000-QTPODSERV)		0500 (Central Daylight Time)	
Test Terminal	Dallas Demo Unit	test M4000 (12345678)	Yes		Settings Cards... Dispensers... Messages... Push Configuration
Boulder - 4000107	Dallas Demo Unit	M4000-4000107 (M4000-4000107)	Yes	Thu Apr 20 2017 17:11:24 GMT-0500 (Central Daylight Time)	Settings Cards... Dispensers... Messages... Push Configuration
Dallas - 4000105	Dallas Demo Unit	M4000-4000105 (M4000-4000105)		Mon Sep 10 2018 09:57:43 GMT-0500 (Central Daylight Time)	Settings Cards... Dispensers... Messages... Push Configuration
				Wed Sep 06 2017 16:11:15	

When pressed, the dispenser configuration screen is shown. On the right side for each dispenser there is



a “Settings” button.

Dispenser Configuration - Dallas - 4000105

View Terminals

Name	Terminal	Dispenser ID	Type	
Pump #2 - Jet B	Dallas - 4000105	2	DPI	Settings Tank Connections
Pump #1 - Jet A	Dallas - 4000105	1	DPI	Settings Tank Connections

Pressing that button moves to the Dispenser Settings screen. Some of the values are fixed by QTpod customer support during Terminal configuration. Taxes are one of those items, but there is a Taxes tab to view what taxes are being applied to that dispenser.

Dispenser Settings - Pump #1 - Jet A (Dallas - 4000105)

View Dispensers

General Prices Discount Classes **Taxes** Pulses Timeouts

Name	Used
State Tax	false
FET Jet	true
FET Avgas	false

Update Cancel

Note that the “Update” button applies all accumulative changes across all the tabs for a dispenser. So even on a tab screen that you haven’t (or couldn’t) change, the “Update” will save (or “Cancel” abort) for all the tabs that have had changes with one single click.

Discounts

Siteminder supports two primary types of discounts; by Card and by Volume.

Card Type Discounts

To apply a discount to all cards of a single issuer, a card type discount can be set up. This section outlines how to apply a blanket discount to all cards of a specific card type in Siteminder.

Under main menu’s Configuration tab, select Company and then click on “Customer Accounts” button.

QTpod petroleum on demand

QT POD Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Company Configuration

View Sites

Name	City	State	Contact Name	Contact Phone	Contact Fax	
QT Pod Test Units	Boulder	CO	Greg Koelling	(303) 962-3416		Customer Accounts... Edit

On the upper left, click the “Add Account” button.

QTpod petroleum on demand

QT POD Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Customer Accounts Configuration - QT Pod Test Units

View Companies

Add Account

Status	Account Number	Card Type	Payment Type	Account Name
Credit Hold	1234567890	Discover	Credit	

All fields marked with red asterisk must be filled in:

- In the Account Type field, select “Card Type Discount”
- in the Card Type dropdown, Select the type of card you would like to apply the discount to
- Put a descriptive label in the Customer Name field (to identify this in the account list). The Account Number field is required but can be anything (choosing a low number will cause it to appear at the top of your accounts)
- Set the account to Active in the Status dropdown
- Set your discount, assign to your terminal(s) and click Update.

Add Account- Trade Show QTPod1

General Contact Details

Customer Name:* Visa Discount

Account Type:* Card Type Discount

Payment Type:* Credit

Card Type:* VISA

Embossed Number:*

(last 4 non-private cards, private cards enter full account number)

Name On Card:

Account Number:* 1

PIN Code (0=no pin):

Balance: \$0.00

Tail #

External Account Reference:

Status:* Active

Credit Limit (\$0 = unlimited): \$0.00

Discount per gallon/liter:* \$0.50

Accounting Code Required

Assigned Terminals: M4000-4000146 X

Update Cancel

Volume Discount Tables

Like taxes, discounts are entered in multiple operations. First at the Site level and then at the Dispenser level. Unlike taxes though, the customer has full access rights to generating and applying discounts.

QT POD Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Site Configuration - QT Pod Test Units

View Company View Terminals

+ Add Site

Name	Company	City	State	
Bushwood Golf Course	QT Pod Test Units	Ventura	CA	[Edit] [Delete] [Products] [Tanks] [Taxes] [Tax Tables] [Disc Tables] [Disc Classes] [Access Schedules]
Crowley - Merrill Field	QT Pod Test Units	Dallas	Texas	[Edit] [Delete] [Products] [Tanks] [Taxes] [Tax Tables] [Disc Tables] [Disc Classes] [Access Schedules]
Dallas Demo Unit	QT Pod Test Units	Dallas	TX	[Edit] [Delete] [Products] [Tanks] [Taxes] [Tax Tables] [Disc Tables] [Disc Classes] [Access Schedules]
Test Site	QT Pod Test	Boulder	CO	[Edit] [Delete] [Products] [Tanks] [Taxes] [Tax Tables] [Disc Tables] [Disc Classes] [Access Schedules]

The “Disc Tables” button for a site opens a view list of volume-discount tables. Tables can be created and deleted with the “+ Add” and “x Delete” buttons. When you add, or edit a table, a pop-up dialog box appears. The Table Name is on top field and up to seven volume thresholds can be entered. The \$/volume discount to be applied is entered to the right of each threshold entry.

Discount Tables Configuration - Dallas Demo Unit

View Sites

+ Add Table

Discount Table Name

Dev Disc Table1

Table Name: Dev Disc Table1

Apply Discount if:	Discount
volume over 100	0.1
volume over 0	0

[Update] [Cancel]

Discount Classes

For each site one or more discount (prepaid) fixed price classes can be created. When the “Disc Classes” button is pressed, you can create or delete a discount class for the site.

Site Configuration - QT Pod Test Units

View Company View Terminals

+ Add Site

Name ↑	Company	City	State	
Bushwood Golf Course	QT Pod Test Units	Ventura	CA	Edit Delete Products Tanks Taxes Tax Tables Disc Tables Disc Classes Access Schedules
Crowley - Merrill Field	QT Pod Test Units	Dallas	Texas	Edit Delete Products Tanks Taxes Tax Tables Disc Tables Disc Classes Access Schedules
Dallas Demo Unit	QT Pod Test Units	Dallas	TX	Edit Delete Products Tanks Taxes Tax Tables Disc Tables Disc Classes Access Schedules

Each discount class entry should be named and commented to easily identify the customer that will be receiving a prepaid price.

Discount Classes Configuration - Dallas Demo Unit

View Sites

+ Add Discount Class

Discount Class Name	Comment	
No Discount	\$0.00/g	Edit Delete

Edit

Class Name:

Comment:

[Update](#) [Cancel](#)

The adjusted price for that class is entered and maintained in the Dispenser Settings section (see below).

QT POD Siteminder

Home Transactions Inventory Configuration Reports Change Password Logoff User

Dispenser Settings - Pump #1 - Jet A (Dallas - 4000105)

View Dispensers

General Prices **Discount Classes** Taxes Pulses Timeouts

Product Name: Jet A

Volume Unit: US Gallons

Price per Unit:

Discount Table:

[Update](#) [Cancel](#)

Immediately on the right of the Prices tab is the Discount Classes tab for selecting the class available at the dispenser.

Dispenser Settings - Pump #1 - Jet A (Dallas - 4000105)

[View Dispensers](#)[General](#) [Prices](#) [Discount Classes](#) [Taxes](#) [Pulses](#) [Timeouts](#)

Name	Comment	Price
No Discount	\$0.00/g	2.50

The price can be edited and updated with this screen. Typically, the added classes are given names like "Platinum", "Gold", etc. and provides a means to give special customers fixed pricing; independent of normal day-to-day adjusted pricing.



Company Terminal Configuration Tasks

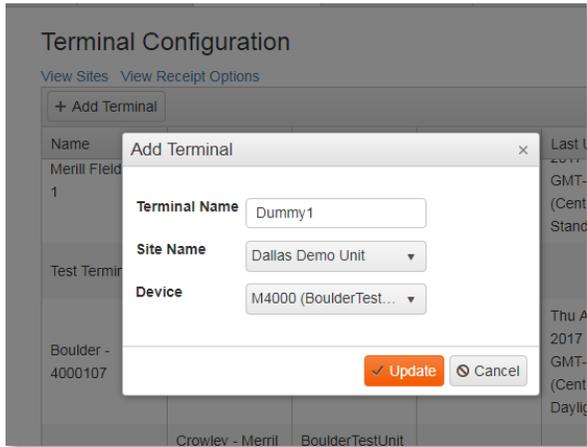
IMPORTANT NOTE: *Most of the changes made to a terminal's configuration can only be done by QTpod personnel or with their direct assistance. Access control rules are in place to prevent errant changes or deletions by a company's administrator that could render a terminal inoperable.*

Covered in this Terminal Configuration section:

- Adding / Deleting Terminals
- Terminal Settings Tabs:
 - General
 - System
 - Network
 - Communication
 - Automatic Tank Gauge
- Payment Card Configuration
 - Assigning a Card
 - Editing / Deleting a Card
- Dispenser Configuration
 - Adding / Deleting Dispensers
 - Dispenser Settings Tabs
 - General
 - Prices
 - Discount Classes
 - Taxes
 - Pulses
 - Timeouts
 - Dispenser's Tank Connections
- Viewing & Editing Receipt Options
- Editing Terminal Messages
- Pushing Configuration to the Terminal

Adding and Deleting Terminals

To add a Terminal, use the main “Configuration” button to select menu “Terminal”. The upper right button “+ Add Terminal” will then pop-up a dialog box to enter and select the new Terminals information (see inset image).



Note that the drop-down selection fields Site Name and Device both require that valid information on a company’s site(s) and devices (available for those sites) have been already configured with Siteminder. If the drop-downs don’t show a selection option you require, “Cancel” and then perform the steps required to add the sites and devices as necessary for the company.

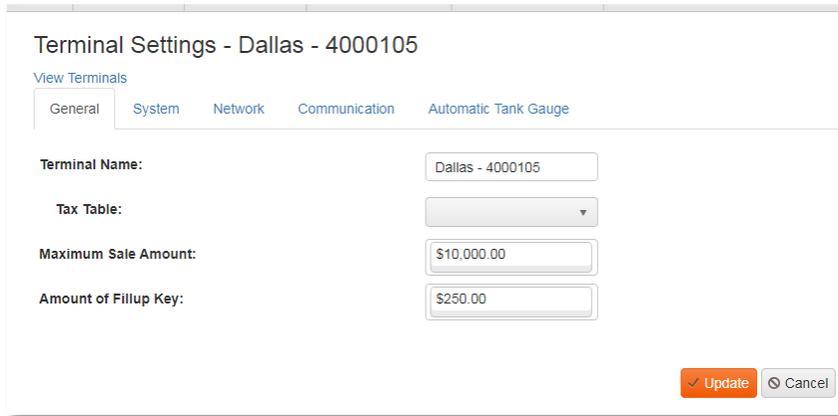
Removal of Terminals is accomplished by using the “x Delete” button on the far-right for each terminal to be removed. You will receive a confirmation pop-up for each deletion request.

Terminal Settings Tabs

Pressing the “Settings” button on a Terminal item opens a new tabbed screen for changing attributes and settings for that terminal. Many of the fields and tabs contain information that should only be modified by QTpod support personnel, as it could render the Terminal inoperable if a mistake is made.

Some of the Terminal Settings operations have been detailed in previous steps but here we will cover all the tabs and fields. Note if tabs shown in this section are missing, or fields shaded as non-editable, then access-level restrictions are probably in operation.

General



From the General tab for a terminal you can assign a tax table from a drop-down list of tables previously configured at the site level.

System

The system tab allows you to associate this terminal to a specific site selected from a drop-down Site Name list of a company's sites. Likewise, a Device drop-down list allows association with a Terminal Name. The last field is Proprietary Card Code that is assigned by the QTpod factory that is used to properly generate unique private card account values.

Network

The network tab contains critical information for establishing Internet connectivity for QTpod and credit card processing. These values are set up by QTpod at the time of manufacturing test.

Communication

The Terminal's CPU communicates via serial interfaces to many of its peripherals. There are two primary ports (0 & 1) that are typically configured to connect with the pedestal hardware. For mechanical dispensers, the Direct Pump Interface (DPI) uses typically COM0 and the HVD uses COM1. For interfacing to alternate serial dispensers, a PIE interface is sometimes used, in which case it replaces the DPI or, if working in tandem, a USB-to-RS232 converter is added to the Terminal head to offer additional COM ports. Again, use care if changing these values as it could break usability. These are set at the factory at the time of initial configuration.

Automatic Tank Gauge

Another peripheral that the M4000 terminal supports through serial communication is automatic tank gauging systems. Initially it supports the Veeder Root TLS-350 (or equivalent) with the same stipulation that a USB-to-RS232 may need to be added to connect. Drop-down menus allow selection of port and parameter values.

Terminal Settings - Dallas - 4000105

View Terminals

General System Network Communication Automatic Tank Gauge

Automatic Tank Gauging

Veeder Root

ATG Port

None

ATG Baud Rate

COM3

COM4

COM5

COM6

COM7

COM8

COM9

None

ATG Parity

ATG Stop Bits

ATG Data Bits

ATG Handshake

ATG Security Code

Update Cancel

Payment Card Configuration

Payment Card Configuration - Dallas - 4000105

View Terminals

+ Assign Card

Card Name	Approving Network	Capturing Network	
VISA	MSA	MSA	Edit Delete
Multi Service	MSA		Edit Delete
American Express	MSA		Edit Delete
Master Card	MSA		Edit Delete
Discover	MSA		Edit Delete
Proprietary	Proprietary		Edit Delete

Edit

Card Name Multi Service

Approving Network MSA

Capturing Network MSA

Update Cancel

Assigning a Card

Use the “+ Assign Card” button in the upper-left to enter a new Card Name and assign approval and capturing network associations.

Editing and Deleting a Card

For each card item, there is on the right side an “Edit” button for modifying the Network assignments and a “x Delete” button for removing the card.

Dispenser Configuration

Dispenser Configuration - Dallas - 4000105

[View Terminals](#)

+ Add Dispenser

Name	Terminal	Dispenser ID	Type	
Pump #2 - JetA	Dallas - 4000105	2	DPI	Settings Tank Connections x Delete
Pump #1 - 100LL	Dallas - 4000105	1	DPI	Settings Tank Connections x Delete

Clicking on a Terminal’s “Dispensers” button shows a list of Dispensers currently assigned to the terminal. Along with a Name and Terminal fields are included the Dispenser ID, the Type of dispenser interface.

Adding and Deleting Dispensers

There are customary “+Add Dispenser” and “x Delete” action buttons for managing the dispenser list. Management of many of the items on this list, as well as the lower level “Setting” and “Tank Connection” items are typically configured by QTpod at the time of manufacture and testing.

Dispenser Settings Tabs

There is a hierarchy of connectivity that should be followed when considering any changes to this level of Siteminder configuration. Examples: 1) Tanks with a particular Fuel type will need to be pre-configured as present at a site in order for a dispenser to deliver it. 2) Physical hardware must be installed in the pedestal and configured for it to be utilized properly. 3) Discounts, Taxes, and Discount Classes will all need to be pre-defined for use at a site in order to be assigned to a dispenser setting.

The “Pulses” and “Timeouts” tabs are there to support fine tuning of the M4000’s DPI hardware to work properly with the mechanical dispenser it is connected to. These tabs may-not be available depending on Terminal configuration and/or user-level restrictions.

The following screenshots are to be used as a reference for the data items that are available under each tab. Contact QTpod technical support if you need assistance in modifying any of these values.

General

Dispenser Settings - Pump #1 - 100LL (Dallas - 4000105)

View Dispensers

General Prices Discount Classes Taxes Pulses Timeouts

Dispenser Name
Dispenser Type

Product Name
Pulser Type

Dispenser ID (1-32)
Max Totalizer Digits

HV Display Number
Volume Unit

Current Totalizer Reading

Prices

Dispenser Settings - Pump #1 - 100LL (Dallas - 4000105)

View Dispensers

General Prices Discount Classes Taxes Pulses Timeouts

Product Name: 100LL

Volume Unit: US Gallons

Price per Unit:

Discount Table:

Discount Classes

Dispenser Settings - Pump #1 - 100LL (Dallas - 4000105)

View Dispensers

General Prices Discount Classes Taxes Pulses Timeouts

Name	Comment	Price
No Discount	\$0.00/g	2.50

Taxes – Dispenser

Dispenser Settings - 100 LL (BoulderTestUnit)

View Dispensers

General Prices Discount Classes **Taxes** Pulses Timeouts

Name	Used
State Tax Jet	false
FET Jet	false

Pulses

Dispenser Settings - 100 LL (BoulderTestUnit)

View Dispensers

General Prices Discount Classes Taxes **Pulses** Timeouts

Pulses to Slow Flow Engage

Pulses before Fast Flow

Pulser Resolution

Overshoot Pulses

Timeouts

Dispenser Settings - 100 LL (BoulderTestUnit)

[View Dispensers](#)

General Prices Discount Classes Taxes Pulses **Timeouts**

Maximum Sale Timeout (Minutes)

Inactivity Timeout (Seconds)

Authorization Timeout (Seconds)

Pump Runup Duration (Seconds)

Hose Prime Duration (Seconds)

Completion Delay (Seconds)

Dispenser's Tank Connections

Tank Connections - 100 LL

[View Dispensers](#)

Name	
100LL	<input type="button" value="x Delete"/>

Viewing and Editing Receipt Options

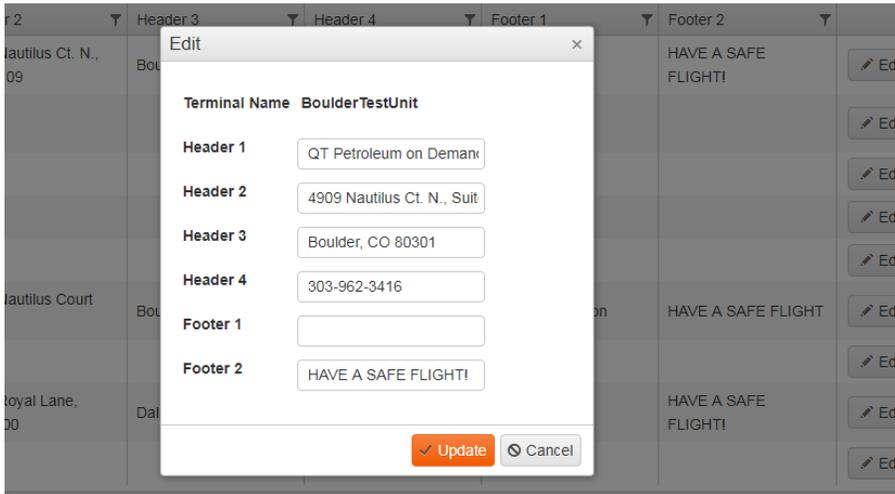
Home Transactions Configuration **Change Password** Log

Terminal Configuration

[View Sites](#) [View Receipt Options](#)

Name	Site	Device	Update ...
------	------	--------	------------

Clicking on the blue link “View Receipt Options” at the top left of the Terminal Configuration screen opens a new screen showing all the receipt fields that can be customized per terminal. On the right side of each terminal is an “Edit” button that opens a pop-up dialog box for editing the fields (see inset below).



Editing Terminal Messages

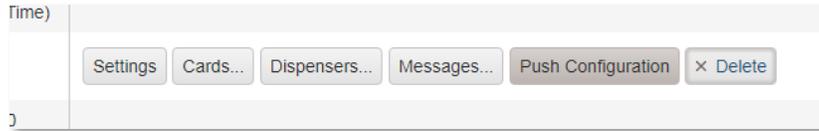
Clicking the “Messages” button for a terminal opens a list of text items that will be displayed on the terminal’s screen when triggered by a condition noted in the first column. Some of the items will serve as prompting labels to the screen’s side switches. Use the “Edit” button to allow changing the text via a pop-up dialog box.

Terminal Messages Configuration - Dallas - 4000105					
View Terminals					
Message For					
Confirmation	Please confirm your selection	Confirm	Change		Edit
Device Not Configured		This device has not been configured			Edit
Insert Access Card			Insert CAC Or Retry PIN		Edit
Invalid Card Presented	Invalid Card Presented	Press here to start over			Edit
No Dispenser Available	Pump is busy or not available	Try again or select another pump			Edit
Select Dispenser	Select Pump	Press here when done			Edit
Select Fuel Grade	Select Fuel Grade	Press here when done			Edit
User Selected Cancel	User cancelled the transaction	Press here to start over			Edit
Welcome Instructions		QT Petroleum On Demand	Automated Fuel Management System	Model 4000	Edit

Pushing Configuration to the Terminal

To the right of each Terminal item is a set of action buttons. Once all the settings for a terminal have

been configured, use the “Push Configuration” button to signal that an update for that terminal is ready to be retrieved. The QTpod terminals periodically query Siteminder and will then retrieve the updated configuration settings at that time.



Initial Factory Setup Tasks for Siteminder

The following instructions show how a customer's company and site information is used by QTpod to pre-configure Siteminder for ease of migration from factory to site.

Many of these steps are already covered in previous configuration sections but there are differences because of access-rights. The QTpod Global Administrator has the required access rights to create a company within Siteminder, along with creating Company Administrator accounts and password management.

The following steps are done as QTpod Global Administrator to create a company in Siteminder and to assign a Company Administrator account.

1. **Login to Siteminder**
with a Global Admin/QT Admin account

2. **Company Configuration**
Go to Configuration -> Company in Siteminder
Create Company and enter all company level contact information.

3. **Add Device to the Company**
Click on Devices button next to the Company and **Add a device** with the correct serial number.

4. **Configure Company User Account**
Go to Configuration -> User Accounts
Create a user account for the new Company with Administrator role.

5. **Log off as Global Admin.**



The following steps are done by QTpod tech support personnel as a temporary stand-in for the Company Administrator. The company's site, terminal and dispenser information is used to pre-configure Siteminder for the initial installation operation.

6. Login with Company User Account

Logon with the new user account (with Admin role).

7. Configure Site

Go to Configuration -> Site

Add Site and site level contact information.

Click on Products and **Add Product** for the site. Click 'View Sites'.

Click on Tanks next to the site and **Add Tank**, Click 'View Sites'

Click on Taxes next to the site and setup taxes that will be used by the terminals at that site. Click 'View Sites'

Click on Tax Tables next to site and setup the Taxes and the order that they that will be applied by the terminals of that site. Click 'View Sites'

Click on Disc. Tables next to the site to setup the discount tables that will be by the terminals of that site. Click 'View Sites'

Click on the Disc. Classes next to the site and setup the discount classes that can be assigned to the customer accounts of the terminals in that site.

Click on Access Schedules next to the site and setup the time schedules to be applied to the terminals in that site.

8. Configure Terminal

Go to Configuration -> Terminals

Click Add terminal to add new terminals.

Click on Settings Next to the terminal to Setup tax table, Maximum sale amount, Amount of Fill-up key. Click network tab. Enter QT Gateway Terminal ID and Access Code as well as optional Merchant ID and Terminal ID for MSA.

Click on Cards next to the terminal to setup cards that will be used for the terminal. Click 'View Terminals'

Click on Messages to setup messages for the terminal.
When done, click 'View Terminals'

Click on View Receipt Options link on the top above the Add Terminal button to setup Receipt headers and footers for the terminals. When done, click 'View Terminals'

9. Configure Dispensers

Go to Configuration -> Terminal

Click on Dispensers next to the terminal to setup dispensers for that terminal.
Add each new dispenser using the +Add Dispenser button.

Click on Settings next to dispenser to setup Prices, discounts and taxes for that dispenser.

Click on Tank Connections button next to the dispenser and click on Add Tank Connection to indicate from which tank the fuel for the dispenser is being sourced.

10. Configure Customer Accounts used by the Site/Terminals

Go to Configuration -> Company.

Click on Customer Accounts next to the company to setup customer accounts for that company.

11. Push Configurations to each Terminal

12. Logoff User from Siteminder