

How to update Ocius Engage Terminals

£100 CONTACTLESS LIMIT INCREASE

Verifone[®]



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UK Gateway (OCIUS) Customer Test Platform (CST)

On October 1st 2021 the £100 contactless limit changes will be deployed to our CST (Customer Test) environment so customers who wish to test their payment system with the £100 transaction limit have the ability to do so (Please bear in mind that you will need a CST Terminal to do so).

UK Gateway (OCIUS) Live Production Platform

On 15th October 2021 the live environment will be updated to support the £100 contactless changes, the way in which you need update the terminal to apply the limits will vary depending on the version of software that is being used, this document will cover the steps that need to be followed for all Ocius Engage versions.

How to mark an Ocius Engage Terminal for the £100 Contactless Update – software versions 2.8.1.4 – 2.10.0.5

Prerequisites:

- The device needs to have an active network connection so the device can speak with our update server.
- The device needs to be running software version 2.8.1.4 or higher (instructions can be found below on how to check this).
- The device needs to be logged in (if the device is integrated with a till it needs to show either waiting for merchant login or ready on screen)

Step 1 – Check the Terminal version

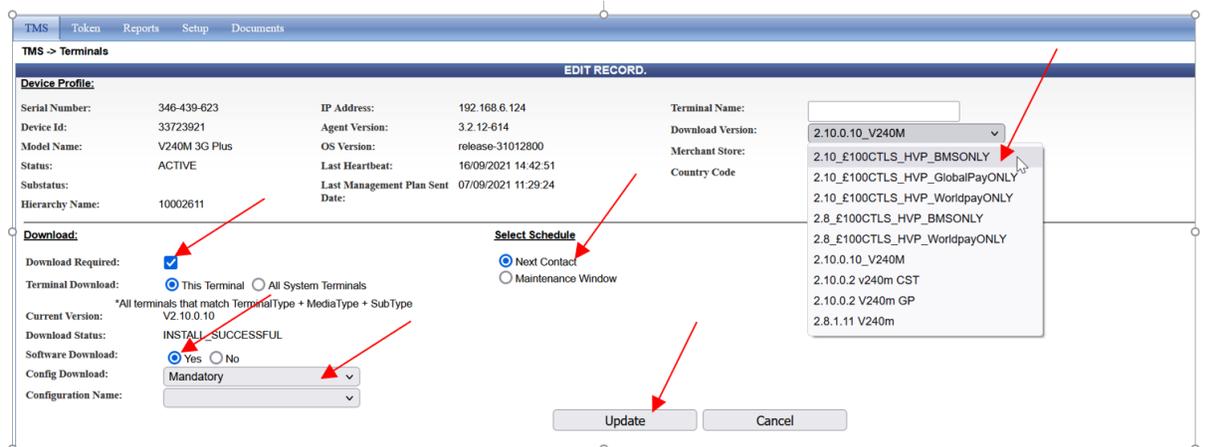
Before proceeding with the update, you will first need to check the version of software that your terminal is running (you will need to know this later on during the update process), you can find out your terminal version by following the below steps:

1. Tap the blue banner or press the * key
2. You may be prompted for a password when pressing * if you are on a later version, if the terminal does prompt for this enter (12345)
3. Select “Supervisor” (password 12345)
4. Select “Version Info”
5. Select “Software”
6. On the next screen you will a version that will being either 2.8 or 2.10, note down what this shows as.

Step 2 – Marking the Device for a download In Webcom

Marking the device for the £100 CTLS update will need to be performed through the Webcom portal, the below details the steps involved for this process.

1. Login to the Webcom portal and navigate to “TMS”, “Terminals”.
2. Under “Terminals” search for the PTID you would like to mark for the update.
3. Select the pencil icon in the left-hand side of the screen next to the device PTID.
4. Once on the device profile screen you will then need to select the relevant version listed under “Download Version” for the CTLS £100 limit update the package will follow the format of Version branch used on terminal (what you noted down earlier when checking software version this will either be a 2.8 or 2.10 version), this will be followed by `_£100CTLS_HVP_` and then finally the acquirer I.E BMS, Worldpay Or Globalpay. From this dropdown list select the download version that correlates with your terminal version/acquirer setup.
5. Set the software download flag to “Yes”.
6. Tick the “Download Required” tick box.
7. Set the “config download” dropdown to “Mandatory”
8. Select to apply the download either “Next Contact” (will occur automatically on the devices next heartbeat) or “Maintenance Window” (will occur automatically overnight).
9. Select “update” to schedule the download.



Please Note: When updating the configuration there is an option to update ‘this terminal’ or ‘all system terminals’. If you have a total estate size of 100 or less, then you should use the latter, as there is a 100 terminal capacity limit. If more than 100 terminals are marked the download will not schedule.

Please Note: when using ‘all system terminals’, the terminaltype, mediatype, subtype and configuration name should be the same.

Step 3 – Pulling through the update on the Devices

As mentioned above when scheduling the download this can be scheduled for either “Next Contact” or “Maintenance Window”. If the download is scheduled for “Next Contact” this will occur upon the devices next heartbeat with VHQ, if it is scheduled for “Maintenance Window” this will occur upon the devices next maintenance heartbeat with VHQ (a maintenance heartbeat automatically occurs during maintenance window which is early hours of the morning). If you would like to speed up this process you can manually request both a regular and maintenance heartbeat through the device by following the below steps:

1. Tap the blue banner or press the * key
2. You may be prompted for a password when pressing * if you are on a later version, if the terminal does prompt for this enter (12345)
3. Select “Supervisor” (password 12345)
4. Select “Request Heartbeat”
5. Select “Regular Heartbeat” or “Maintenance Heartbeat” depending on what is needed
6. Once “Heartbeat Requested” is shown press the red cancel button until you are back at the main screen (note you need to be logged in for the device to heartbeat).

Step 4 - How to confirm the update has applied

Once the device starts the update you should then automatically see the screen show a prompt to indicate that a download is available, from here you can then either press the red x to postpone or the green tick to proceed with the download/install, once the download starts you will see a few



different screens firstly you will see a downloading screen which will show the percentage of much of the packet has been downloaded this will then be followed by a download completed screen, once the install part of the process begins you will then see the device reboot a few times to apply the files, eventually this process will complete and you will then be returned to the main screen on the terminal at this point the install will have completed.

You can also check this via Webcom as the portal's "download status" field will track the devices status through the download/install process and report as required.

SCHEDULED

DOWNLOAD_STARTED

DOWNLOAD_SUCCESSFUL

INSTALL_STARTED

INSTALL_SUCCESSFUL

How to mark an Ocius Engage Terminal for the £100 Contactless Update - software version v2.10.0.10

Prerequisites:

- The device needs to have an active network connection so the device can speak with our update server.
- The device needs to be running software version 2.10.0.10 (instructions can be found below on how to check this).

Step 1 – Check the Terminal version

Before proceeding with this method of update, you will first need to check that your terminal is running version 2.10.0.10, you can find out your terminal version by following the below steps:

1. Tap the blue banner or press the * key
2. You may be prompted for a password when pressing * if you are on a later version, if the terminal does prompt for this enter (12345)
3. Select “Supervisor” (password 12345)
4. Select “Version Info”
5. Select “Software”
6. On the next screen you will a version that will being either 2.8 or 2.10, note down what this shows as.

Step 2 – Marking the Device for a download In Webcom

Marking the device for the £100 CTLS update will need to be performed through the Webcom portal, the below will detail the steps involved for this process (this differs slightly from that of marking devices on 2.8.1.4 - 2.10.0.5).

1. Login to the Webcom portal and navigate to “TMS”, “Terminals”.
2. Under “Terminals” search for the PTID you would like to mark for the update.
3. Select the pencil icon in the left-hand side of the screen next to the device PTID.
4. Set the “Config Download” dropdown to “Mandatory”
5. Tick the “Download Required” tick box.
6. Select “update” to schedule the download.

Please Note: When updating the configuration there is an option to update ‘this terminal’ or ‘all system terminals’. If you have a total estate size of 100 or less, then you should use the latter as there is a 100 terminal capacity limit. If more than 100 terminals are marked the download will not schedule.

Please Note: when using ‘all system terminals’, the terminaltype, mediatype, subtype and configuration name should be the same.

TMS -> Terminals

EDIT RECORD.

Device Profile:		Terminal Name:	
Serial Number: 804-116-810	IP Address: 192.168.1.53	Terminal Name:	
Device ID: 34938042	Agent Version: 3.2.14-633	Download Version:	2.10.0.10_P400
Model Name: P400 Plus	OS Version: release-31013000	Merchant Store:	
Status: ACTIVE	Last Heartbeat: 07/10/2021 10:01:09	Country Code:	826
Substatus:	Last Management Plan Sent Date: 07/10/2021 02:16:00		
Hierarchy Name: 20012077			

Download:

Download Required: **Download Required:**

Terminal Download: This Terminal All System Terminals

Current Version: *All terminals that match TerminalType + MediaType + SubType
V2.10.0.10

Download Status: INSTALL_SUCCESSFUL

Software Download: Yes No

Config Download: Mandatory

Configuration Name:

Select Schedule:

Next Contact Maintenance Window

Step 3 – Pulling through the update on the Devices

To pull through the update on the device you will simply need to logout and back into the unit, this will differ depending on whether your device is in an integrated (In POS mode) or in standalone mode.

If you are using a till system and the device is an integrated state (showing either “Waiting For Merchant Login” or “Ready”) the logout and login functionality will be controlled by your EPOS system, in this case you may need to consult with your EPOS provider to confirm how to perform the logout/login process.

If the device is in a standalone state, you will simply need to perform the below steps:

1. When on the sale screen press the * key
2. Press the down arrow on the screen
3. Select “Log Out User”
4. Press the green tick on screen to logout
5. When prompted for “please login user” press enter
6. Press option to login user
7. Enter user ID and press the green enter button
8. Enter user PIN/password and press the green enter button

Step 4 - How to confirm the update has applied

When logging into the device as per the above, you will then see the device perform a TMS call automatically, this will pull across the download and apply to the device. Once completed the device will return to the main screen.

You can also check via the Webcom portal to confirm if the download has been successful, if this has you will see that the “Last Config Update Date:” field under “TMS”, “Terminals” next to the device will be updated to reflect this.

Download Required:

Last Config Update Date: 23/09/2021 10:36:53



Additional Help & Support

If you experience any issues during the update process and require additional support, please contact the merchant helpdesk on 0333 323 6677.