



**Secure Offline Stand-In™**  
Continue securely processing your transactions – even in the event your Internet goes down.

Secure Offline Stand-In™ (SOS) provides merchants using Shift4's Universal Transaction Gateway® with DOLLARS ON THE NET® the ability to continue processing transactions even when Internet connectivity is lost.

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## Enhanced Offline Mode

### What is Enhanced Offline Mode?

Enhanced Offline mode provides additional functionality and security when the Universal Transaction Gateway® (UTG) cannot connect to the Shift4 data center. In **Enhanced Offline** mode, the UTG closely mimics online mode by generating a Token on all authorization and sale requests. Other function requests, such as sale with referral and void continue to function as they have in traditional Offline mode.

An additional feature is available called **Secure Offline Stand-in™**. For interfaces that have the **Stand-in** box checked, a user-defined dollar amount, located beneath the checkbox called the Floor Limit can be set. With the Stand-in Floor limit set, when the UTG is offline, it returns an approval on all authorization and sale requests that are below the Floor Limit, and a referral on all authorization and sale requests that are above the Floor Limit.

The UTG will store the requests in an encrypted file. Once back online, the UTG will attempt to authorize those transactions. Any transaction that is unable to be authorized will have to be resolved by the auditor. There is obviously a risk to the merchant when enabling this feature as not all of the transactions may be approved once the UTG comes back online. However, the benefits of being able to accept transactions while offline may be worth the risk.

**Note:** PIN Debit is not available in Offline Mode since it is not possible to validate the PIN number unless the system is online.

The table below illustrates the results of the major transaction types with and without Enhanced Offline mode.

Function Request	Enhanced Offline Mode	Below, At, or Above Floor Limit	Results when the UTG is unable to connect to Shift4 <small>Note: Stand-in must be enabled to set a floor limit</small>
Auth or Settle	On	Below or At	Auth with a token
Auth or Settle	On	Above	Referral with a token
Auth or Settle	Off	N/A**	Referral with no token
Offline Auth or Settle	Off or On	N/A	Auth with a token
Void	Off or On	N/A	Error 9775 (Function Not Supported In Offline mode)

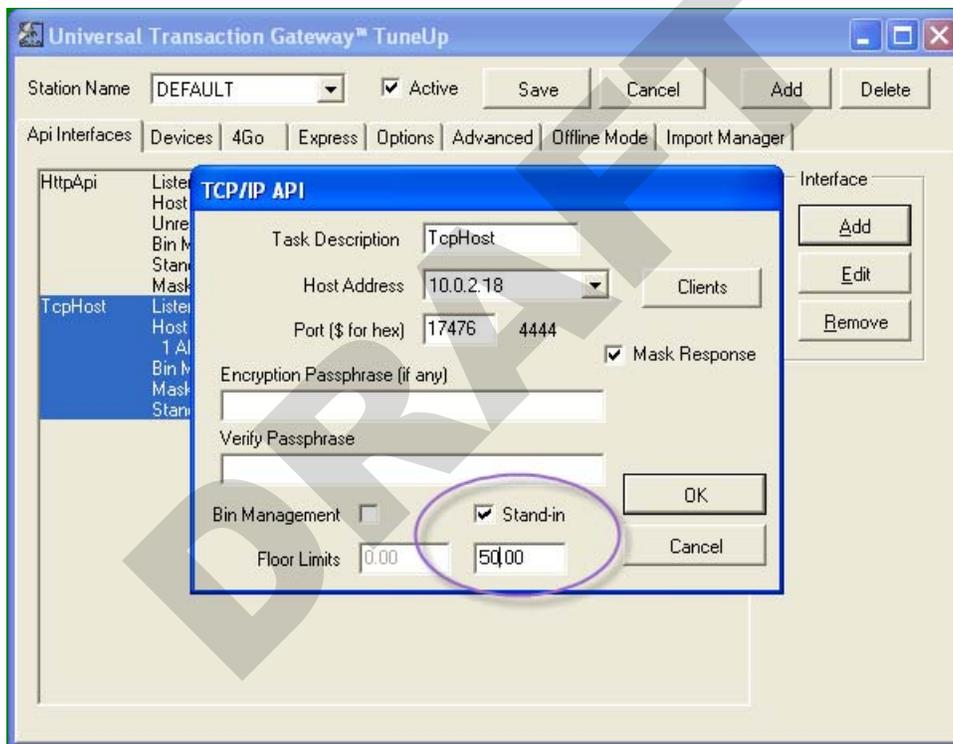
\*\* Floor limit is only available when Enhanced Offline Mode is on.

## How Do I Enable **Secure Offline Stand-in™** and Set the Floor Limit?

1. From the **Universal Transaction Gateway TuneUp** screen, click the **Api Interfaces** tab. If no Interface type has been configured, add the desired Interface type. In the Figure below, the TCP/IP Interface has already been added and will be used as the example.

**Note:** All of the Interface types (TCP/IP API, HTTP API, etc.), have the options for Stand-in and Floor Limit. In this example, the TCP/IP Interface will be used.

2. Double click the **TCP** interface to bring up the **TCP/IP API** screen (see figure below).
3. In the **TCP/IP API** screen, check the **Stand-in** box to enable Stand-in and enter the desired dollar amount in the **Floor Limit** box.
  - a. Above the **Floor Limit**, the UTG will return a referral and a Token.
  - b. At or below the **Floor Limit**, the UTG will return an approval and a Token.



4. Click **OK** to accept changes.
5. In the Universal Transaction Gateway TuneUp screen, click **Save**.

Enhanced Offline mode is required to take advantage of **Secure Offline Stand-in™** and Floor Limit. If you opted to select the Stand-in check box, you can set a user-defined dollar amount, located beneath the checkbox, called the Floor Limit. With the Floor limit set, when the UTG is offline, it returns an approval on all authorization and sale requests that are below the Floor Limit and a referral on all authorization and sale requests that are above the Floor Limit.

The UTG will store the requests in an encrypted file. Once back online, the UTG will attempt to authorize those transactions. Any transaction that is unable to be authorized will have to be resolved by the auditor. There is obviously a risk to the merchant when enabling this feature as not all of the transactions may be approved once the UTG comes back online. However, the benefits of being able to accept transactions while offline may be worth the risk.

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Auth or Settle	Off	N/A**	Referral with no token
Offline Auth or Settle	Off or On	N/A	Auth with a token
Void	Off or On	N/A	Error 9775 (Function Not Supported In Offline mode)

\*\* Floor limit is only available when Enhanced Offline Mode is on.

Verify Enhanced Offline Mode is selected. See the HTTP or TCP/IP Interface sections for information on selecting Stand-in and setting a Floor Limit.

- It is recommended that you select **Return Error on Void if Offline**. This option allows an error message (**function not supported in offline mode**) to be sent when the POS/PMS is attempting to send a void (08) and the UTG is unable to connect to the data center.
- An additional new feature is the **Decline All Non-Bank Cards** option. Selecting **Decline All Non-Bank Cards** returns a declined response for all non-bank cards if the UTG goes into Offline Mode.

**Note:** When in Offline Mode, if a gift card transaction is sent with a token rather than card information, the UTG cannot determine if the card is a gift card. The transaction will be treated as a credit card transaction, even if the **Decline All Non-Bank Cards** option is selected. The transaction will follow the other Offline Mode settings as a credit card.