Shift4 Command Center Installation Quick Guide

This guide will take you through installing a downloaded installation package. This guide assumes that a Shift4 Command Center installation package with a profile that contains at least one device has already been downloaded, and that this is a brand new UTG installation. If you have any questions concerning the process, contact the Shift4 Payments Customer Support team at 702.597.2480, option 2.

**Important:** Command Center can only be used with UTG version 5.0.0.3011 or higher.

Running the Installation Package

To install and connect a new UTG to Shift4 Command Center, complete the following steps:

1. Run the downloaded installation package as a user with local admin rights on the target machine where the UTG will be running.

2. On the Welcome screen, enter your Verification ID and click Verify. If you have access to Shift4 Command Center, you can also find the Verification ID under Installations. If you do not have access to Shift4 Command Center, you will need to contact your Shift4 Command Center administrator.

3. On the Confirm Account screen, verify your Account and Profile name and click Confirm.

4. On the Enter Attributes screen, enter the following:
   - *(Optional)* File ID / MID – Enter a numeric value no longer than ten digits.
   - *(Required)* Merchant Description – Enter the name of the merchant that will be using the service.
   - *(Required)* Location – Enter the location where the service will be used.
   - *(Optional)* Lane/Register – Enter the lane that will be using the service.

5. Click Next.
6. When a profile with devices is selected for the installation package, you will be prompted to enter the following information on the Enter Device Details screen.

- Enter the Source Serial number – The serial number under which the device will be processing transactions. You will only need to enter the source serial once during installation and it will be applied to all the configured devices for the profile.
- Enter the Device Name
- Enter the API TID – When signed in as the Account Administrator, this number can be found in Lighthouse Transaction Manager under Settings > EMV Devices. You will be prompted to enter the API TID for each device that has been configured for the profile.
- Enter a COM Port – Plug the device into your machine and use Windows device manager to view the COM port Windows assigns to the device, then enter that COM port. You will be prompted to enter the COM port for each device that has been configured for the profile.
  - If you are only configuring one USB connected device for this UTG, you can select Auto from the Port list. If Auto is selected, the UTG will automatically search for the COM port assigned to the device. This makes finding and selecting the Windows assigned COM port unnecessary. The auto setting cannot be used for multiple devices on the same UTG or for serial connected devices. If you decide later to add more devices to the UTG, you will need to edit the original device configuration and select the actual COM port to which it is connected.

**Important:** If you are using Ingenico devices with Windows 7, the Ingenico device driver must be version 3.14 or later in order to use the Auto setting.

7. Click **Next**.
8. On the Thank You screen, click **Done**.
Note: The installation should generally take less than 2 minutes. If the profile was sufficiently defined and if the prompted values are entered correctly then the UTG should be ready to process transactions at this point. The devices may need to download their settings which may take some extra time but should happen automatically.

Important: The UTG will be started as a service. To run the UTG in Stand Alone, you will need to schedule a task in Shift4 Command Center to stop the UTG and follow with a task to start the UTG in Stand Alone, or manually stop the UTG on the local machine and start in Stand Alone.

9. The Shift4 Command Center Agent will be installed as a service under the Local System account. This should be changed in Windows services to run the Shift4 Command Center Agent and the UTG under an account that is securely locked down. To change from the Local System account to a more secure account, complete the following steps:
   • The locked down account for the Shift4 Command Center Agent will need permission to start and stop the UTG. When the installation package is complete, you should see the Machine Nickname (after selecting Machines from top menu) and you should see UTG as the Service Type (after selecting Services from the top menu).
   • If you have not completed the connection steps listed above, even if you have previously installed and configured a UTG on a local machine, it will not be visible in Shift4 Command Center.

10. When the installation package is complete, you should see the new UTG as the Service Type (after selecting Services from the top menu).
11. The new UTG can now be managed from Shift4 Command Center.
12. If the download package was created, downloaded, and run, but an error message was displayed, see Dealing with Installation Errors in the Troubleshooting section.

Trouble Shooting

Dealing with Installation Errors

If there is a problem during the package installation, such as a connection issue, an installation may fail to complete properly. When an installation fails, an error message will be displayed. However, the UTG and Agent may have been installed on your machine, and you may see the installation show up in Shift4 Command Center. Depending on the error message, you can attempt the installation again, but you will need to consider the following:
   • If a message is displayed that the Verification ID you entered failed, check the following:
     o Verify that the correct verification ID was provided and entered.
     o Verify your installation package has not exceeded the Install Period end date.
     o If your installation package has exceeded the Install Period end date, or the problem persists, you will need to contact your Shift4 Command Center Administrator.
• If a message is displayed that the Shift4 Installer was unable to complete the installation process successfully, you can try installing the package again, but before you do so, you will need to complete one of the following:
  o If you already have an existing UTG on your machine, locate the Shift4 folder and delete the Command Center subfolder.
    ▪ In order to delete the Shift4 folder, you will need to stop the in4m agent service if it is running.
  o If the machine does not have an existing UTG, delete the complete Shift4 folder.
    ▪ In order to delete the Shift4 folder, you will need to stop the UTG (stand-alone or service) and the in4m agent service if they are running.
    ▪ Verify that the UTG has been deleted. For example, if you are using Windows 10, go to Control Panel > Programs and Features, and look for Universal Transaction Gateway®.

Note: If you have a problem deleting the Command Center subfolder or the Shift4 folder, you may need to stop the UTG and the Agent under Windows Services.