Reseller Seamless Commerce QRG

06/04/2024

V1.1

Preface

TECHNICAL SUPPORT

If you encounter a problem installing, registering, or operating this product, please review the documentation. If you are unable to resolve the issue, please contact PAX. The level of access to this Service is determined by the support plan arrangements made between PAX and the Organization. Please consult this support plan for further information about entitlements, including the hours when telephone support is available.

Monday-Friday 9:00 AM to 1:00 AM EDT
Saturday 9:00 AM to 5:00 PM EDT
Sunday Closed
Hours Subject to Change

TECHNICAL SUPPORT CONTACT INFORMATION

Phone: (877) 859-0099
Email: support@pax.us
URL: www.pax.us

Revision History

Date	Version	Description
08-03-2021	v1.0	• Initial Release.
06-04-2024	v1.1	• Updated the document with Rashae Turner's notes on based on the 08-03-2021 release document.

Table of Contents

1. Introduction

The Reseller Seamless Commerce is the ROOM App Admin Portal. It allows resellers to assist their merchants in managing all the features of the ROOM App. These features include but are not limited to product inventory, customer loyalty, sales, Online order management, advanced reports, and employee user maintenance.

1.1 Purpose

This Quick Reference Guide will highlight the most frequently used Seamless Commerce features. The Reseller Admin Portal gives resellers the flexibility to support their merchants by assisting with managing the POS on the ROOM App, Admin Users, and Accessing their Online Ordering Platform.

Seamless Commerce Reseller Admin Portal:

https://portal.seamlesscommerce.com/Reseller/ResellerEntrance/Login

1.2 Intended Audience

The guide is intended for use by:

- Resellers/ISO for support of merchants.

1.3 Acronyms and Terms

Acronyms and Terms	Definition
Catalog	Manage inventory such as Products, Categories, Modifier Groups, and Product Attributes
Configuration	Configure settings for stores and reseller accounts such as Logo, Taxes, and API Webhooks.
Dashboard	The dashboard shows the Reseller information and the number of Stores associated with the Reseller Account.
Device	Search and edit all devices listed within a Reseller account.
OLO	Online Ordering
POS	Point of Sale or Point of Service. The hardware and software used to collect and transmit non-cash payments for goods and/or services. The device where retail sales occur and payment transactions are initiated.
Resellers	Manage all Sub-reseller accounts.
Stores	Users can search for and manage all active/inactive stores from this category.
SSO	Single Sign OnNex

Acronyms and Terms	Definition
Users	Manage all users within a Reseller account, such as Reseller users, store users (Merchant Admin Portal), Ok and online users. Users can also create reseller and store user roles.

2. Navigational Sidewalk

The National Sidewalk is used to help Resellers find specific features quickly. If you are unsure where you are in the Reseller Portal, you can look at the Navigation Sidewalk as a guide. The tab you are in is darkened to help find your location.
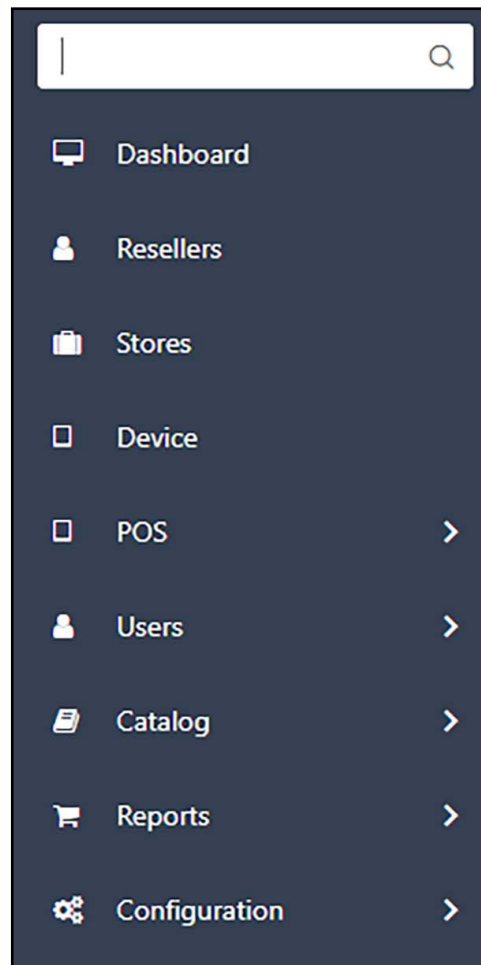

2.1 Definitions

- Dashboard: The Dashboard shows the Reseller information and the number of Stores associated with the Reseller Account.

- Resellers: Manage all Sub-reseller accounts.

- Stores: You can search for and manage all your active/inactive stores from this tab.

- Device: Search and edit all devices listed in your Reseller account.

- POS: View and Manage ROOM App features: Activation logs, Employee Maintenance, Customer Maintenance, Special Pricing, Batch, and POS configurations.

- Users: Manage all users under your Reseller account such as Reseller users, store

users (Merchant Admin Portal) and online users. You can also create reseller and store user roles.

- Stores

- Catalog: Manage your inventory, including products, categories, modifier groups, and attributes.

- Reports: Email export and convert various reports by transactions, low stock, products never purchased, and email reports to PDF.

- Configuration: You can configure settings for stores and your reseller accounts, such as Logos, Taxes, and Webhooks.
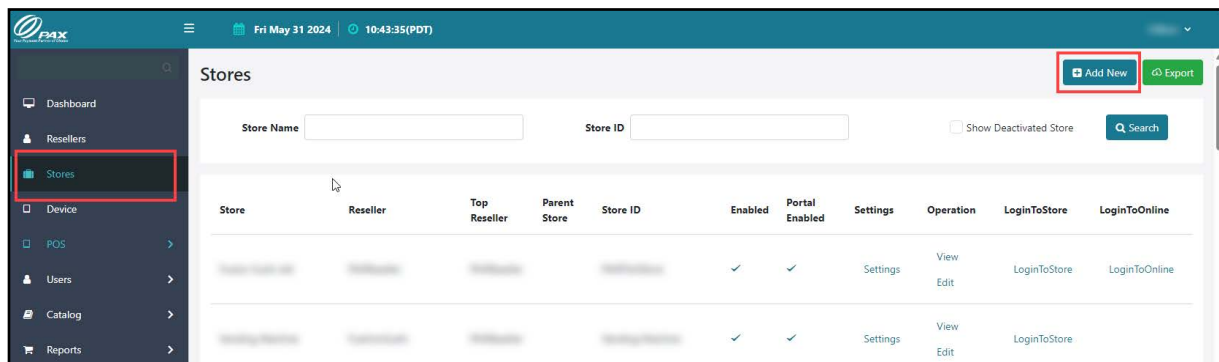
3. Managing Stores

The Stores tab allows you to create and manage your merchants. You can also create new stores, export store reports, and search for stores by store name and store ID.
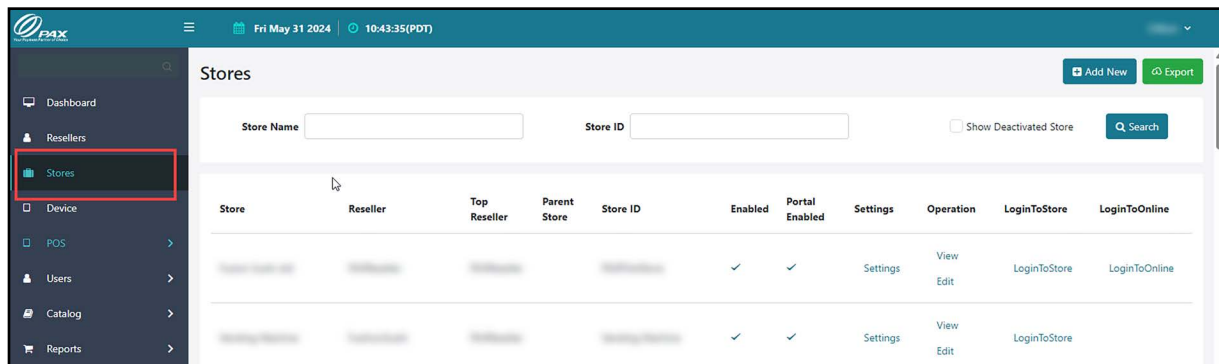
3.1 Adding a Store
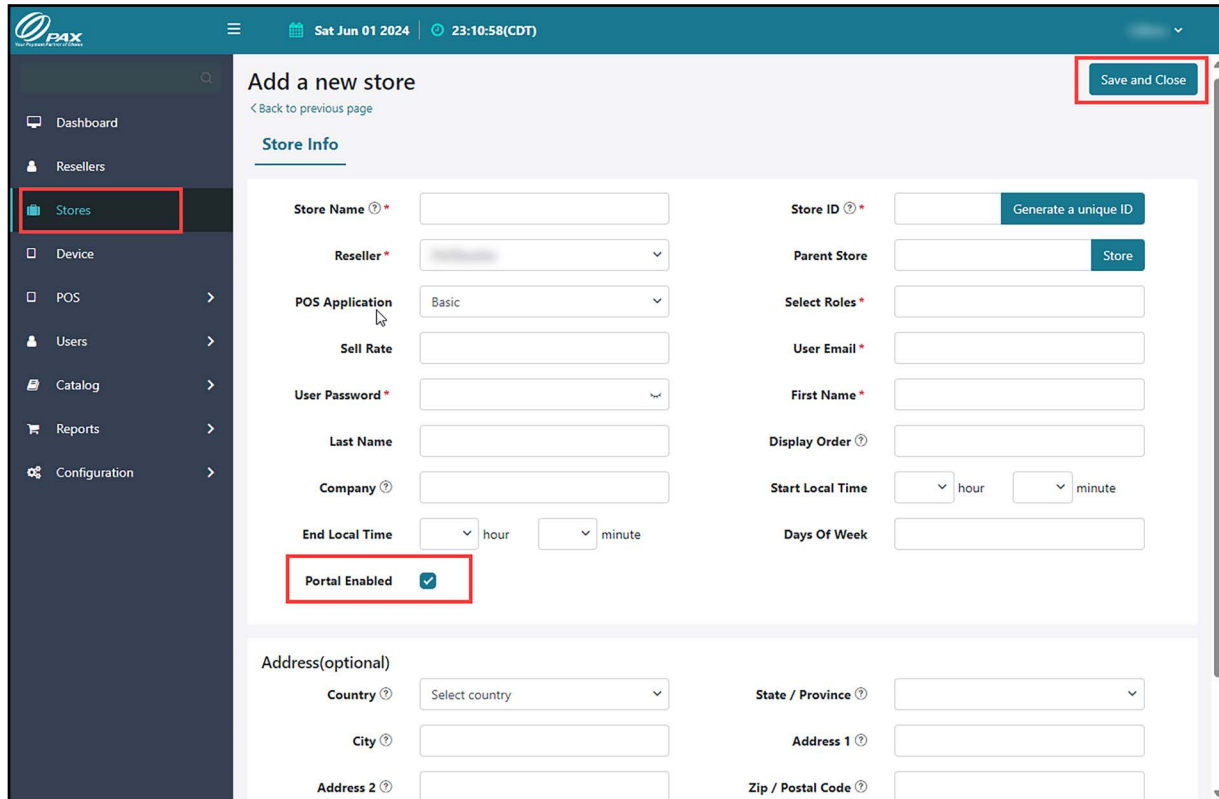
Follow these steps to Add a new Store:

Select: **[Stores]** > **[+ Add New]** >

After selecting **+ Add New** a pop-up window called **Add a new store** will display.

- Complete all the fields with a red Asterisk {*}.

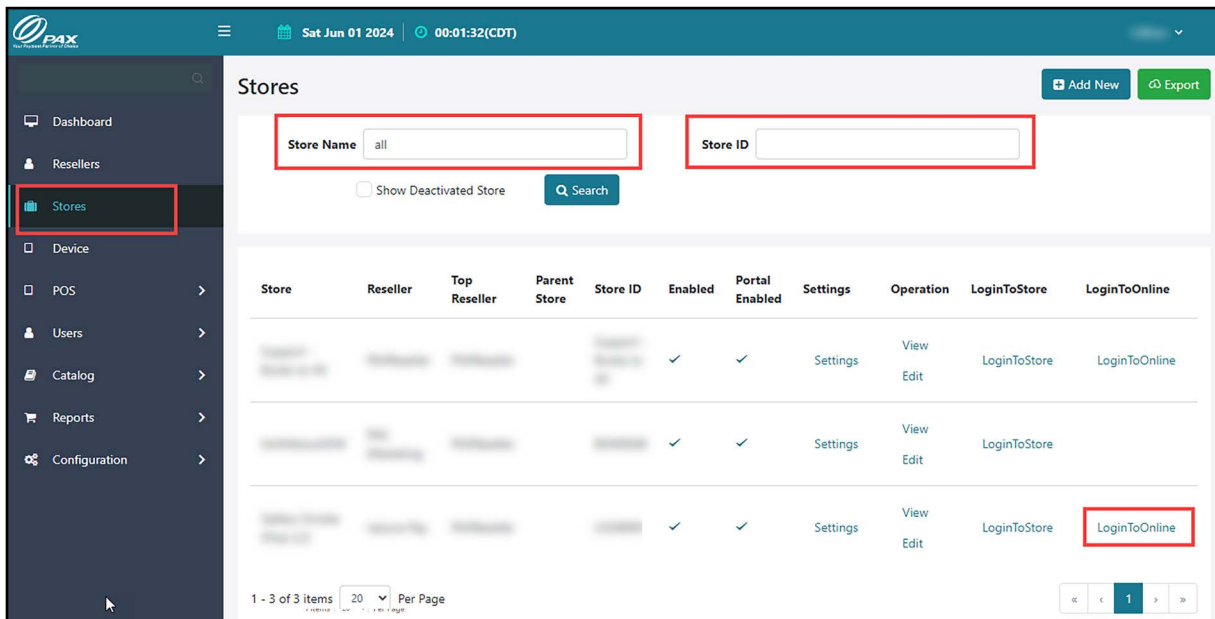- Verify the **Portal Enabled** option is enabled.

- Select **[Save and Close]**.

3.2 Accessing the Online Ordering (OLO) Admin Portal

Single Sign On (SSO) is available with ROOM. The Reseller and Merchant can access the OLO Admin

Portal from Seamless Commerce.

Follow these steps to access the Online Ordering Admin Portal:

1. Select **[Stores]** on the Navigation Sidewalk.

2. Use the filter options to narrow the search for your Store.

3. When you have located your Store if Online Ordering is enabled for your Reseller Account you

will see **Login to Online**.

4. Select **[Login to Online]** and the OLO Admin Portal will open in a separate web browser tab.

4. Managing Devices

4.1 Seamless Commerce

Follow these steps to add a new store to your seamless commerce admin portal.

1. Select **[Device]** in the Navigational Sidewalk, then select **[+ Add New]**.

2. Complete all the fields with a red asterisk (*****).

3. Select **[Save and Close]**.

4. Go back to the **Devices** and search for the Serial Number you added.

5. Select **[Edit]** and capture/copy the **Register Request Encrypt Key** and **Register Response Encrypt**

Key for the PAXSTORE.

- Please Note: When you are editing the Device, be advised that only one Terminal can be enabled to Receive Online Orders.

- Please Note: Register the request encrypt key, and register the response encrypt key, must be entered into the parameters in the PAXSTORE. (paxstore.us)

5. POS Management

Use the POS tab to manage the POS in the ROOM Application.

5.1 POS Management Capabilities

The POS tab allows you to view and manage key App features such as Employee POS Users, Loyalty Customers, Specialty Pricing, Receipts, Logos, and more.

Use this tab to customize the ROOM App to fit your merchants' needs.

Please Note: Presentation is only needed if you are managing the secondary screen on an E800 device.

6. Managing Users

Create and manage users and user roles for your Seamless Commerce Reseller Account and for the Merchant (Store) Seamless Commerce Account. Merchants also have access to this feature from their login portal.
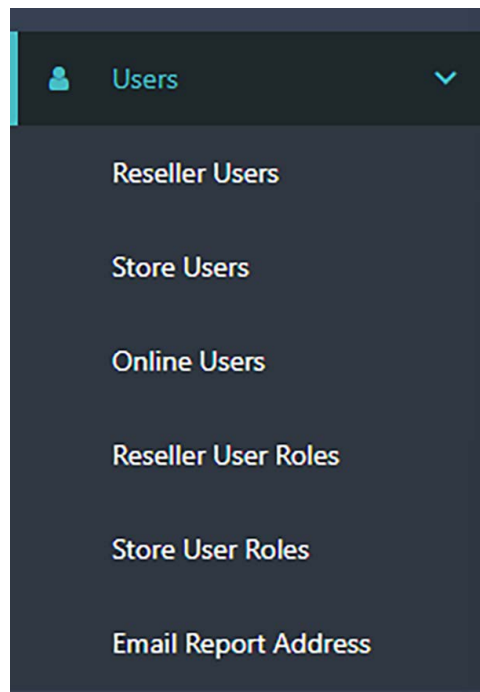
6.1 Create a User

Follow these steps to create a new Seamless Commerce Reseller or Store User.

1. Select **[Users]** in the Navigational Sidewalk.

2. Select whether you are creating a **[Reseller or Store User]**.

3. Select **[+Add New]** then complete all the fields with a red asterisk (*).

- Please Note: You must create a temporary password for the user. Users can change their password once they have logged into their account.

4. Select **[Save & Close]**.

7. Managing Inventory

Use the Catalog tab to manage all products/inventory. You can customize how it appears in the App, Stock Quantity, Display Order, Tax Categories.
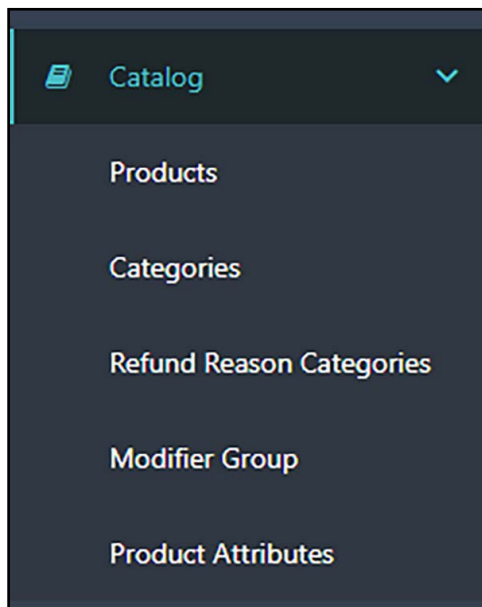
7.1 Adding Inventory

Follow these steps to add inventory to a ROOM store in seamless commerce, there are 2 ways to add

inventory:

- Inventory Import
- Manually Add Inventory

7.2 Inventory Import

Please Note: If you do not have the Inventory Import Templates you can request one from ROOM@pax.us.

Available Templates:

- Categories
- Modifier Group
- Products

Follow these directions to Import Inventory from the Reseller Level:

1. Select **[Stores]** on the Navigational Sidewalk.

2. Search for your Store name.

3. Select **[Login to Store]**.
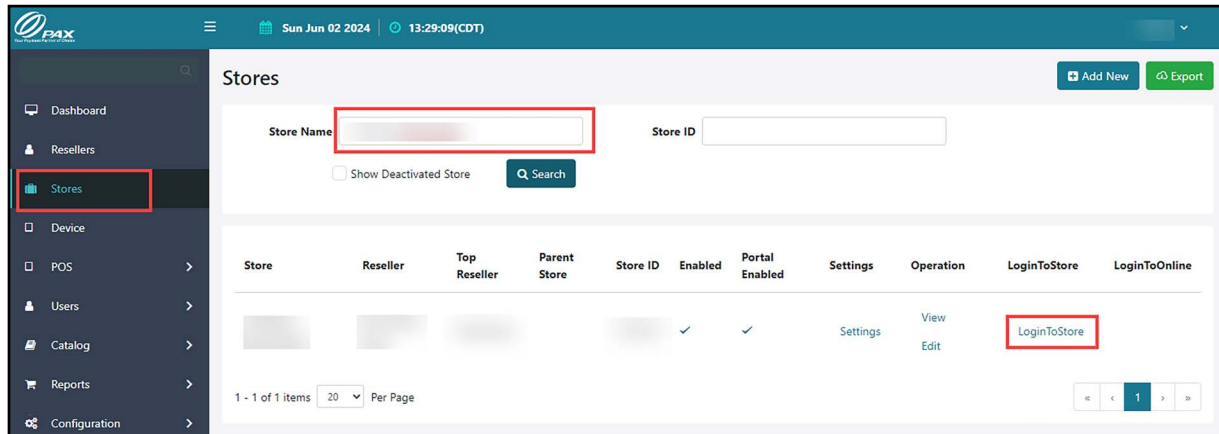
4. Select **[Catalog]** > **[Products]** > **[Import].**
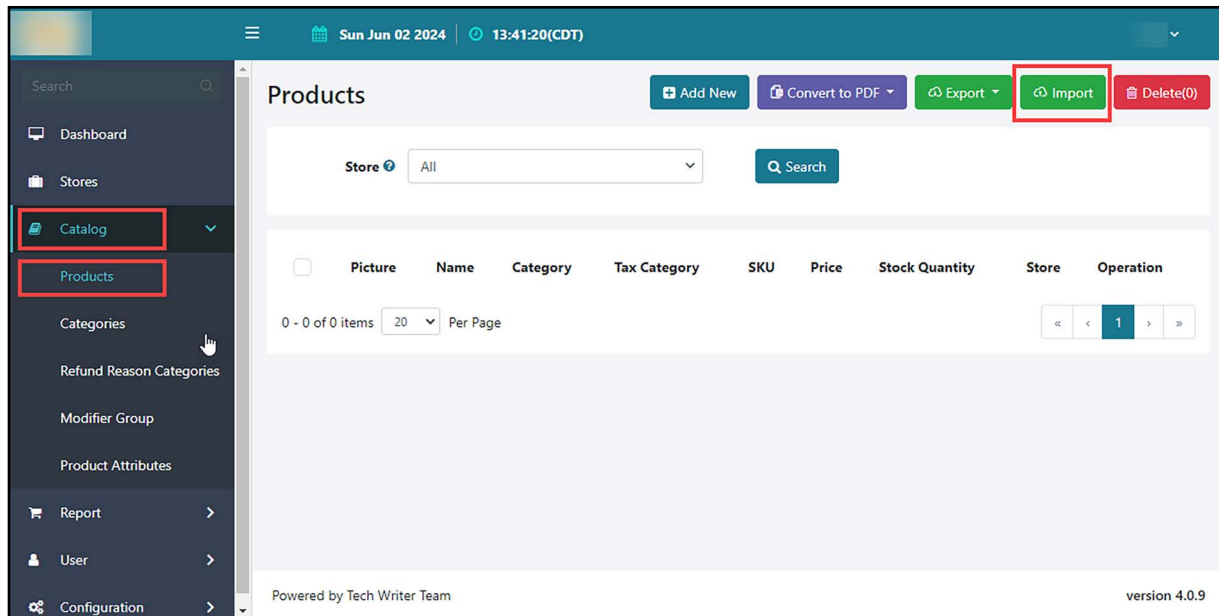
After selecting **Import,** a pop-up window called **Import from Excel** will appear.

      1. Select the **[Store]** from the drop-down list.

      2. If using an Import Mapping Template, select the **[Template]** from the drop-down list.

      3. Select the inventory **[import Excel file]**.

      4. Select **[Yes]** to save.

Please Note: If there is an error in your EXCEL file, Seamless Commerce will provide an Error Report.

Import from Excel

Import requires a lot of memory resources. That's why it's not recommended to import more than 500 - 10,000 records at once. If you have more records, it's better to split them to multiple Excel files and import separately.

Store *	[_____ ▾]
Import Mapping Template	[-- ▾]
Excel file *	Choose File No file chosen
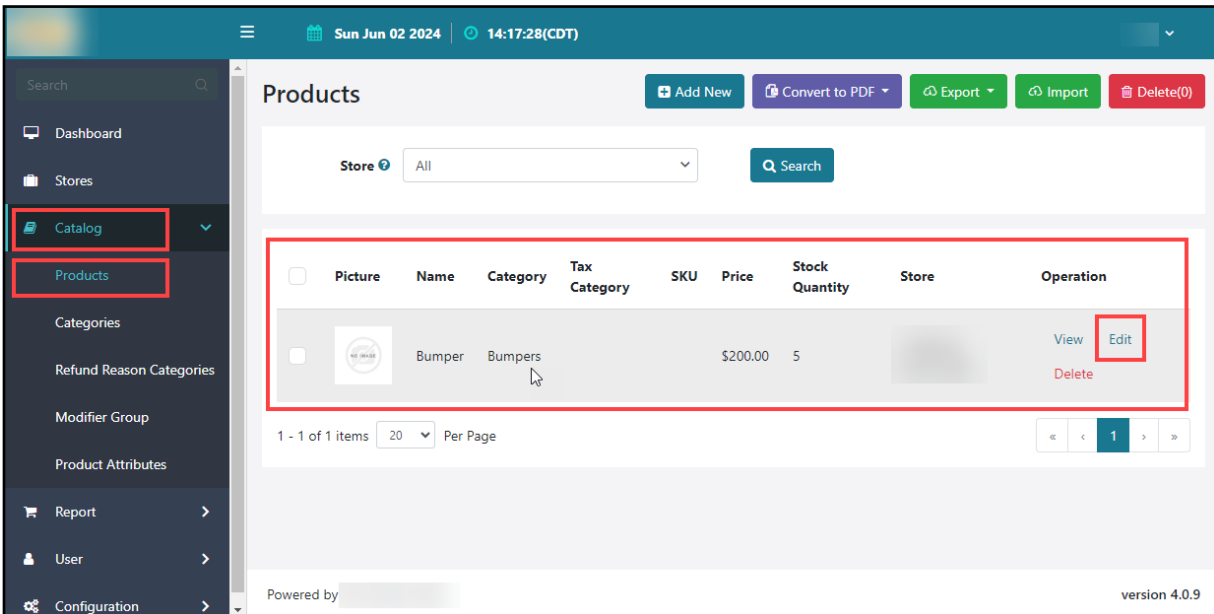
Download(Simple Template   Complex Template

    Simple Template With Data   Complex Template With Data)

Cancel   Yes

5. Once your items have been uploaded, select **[Edit]** to edit product details such as adding an image or age restrictions.

6. Repeat these steps using all inventory template imports.

7.3 Manually Add Inventory

Adding inventory manually may take a little longer, but it gives you the ability to customize each product as they are being added. Follow these steps to add inventory manually from the Reseller Level:
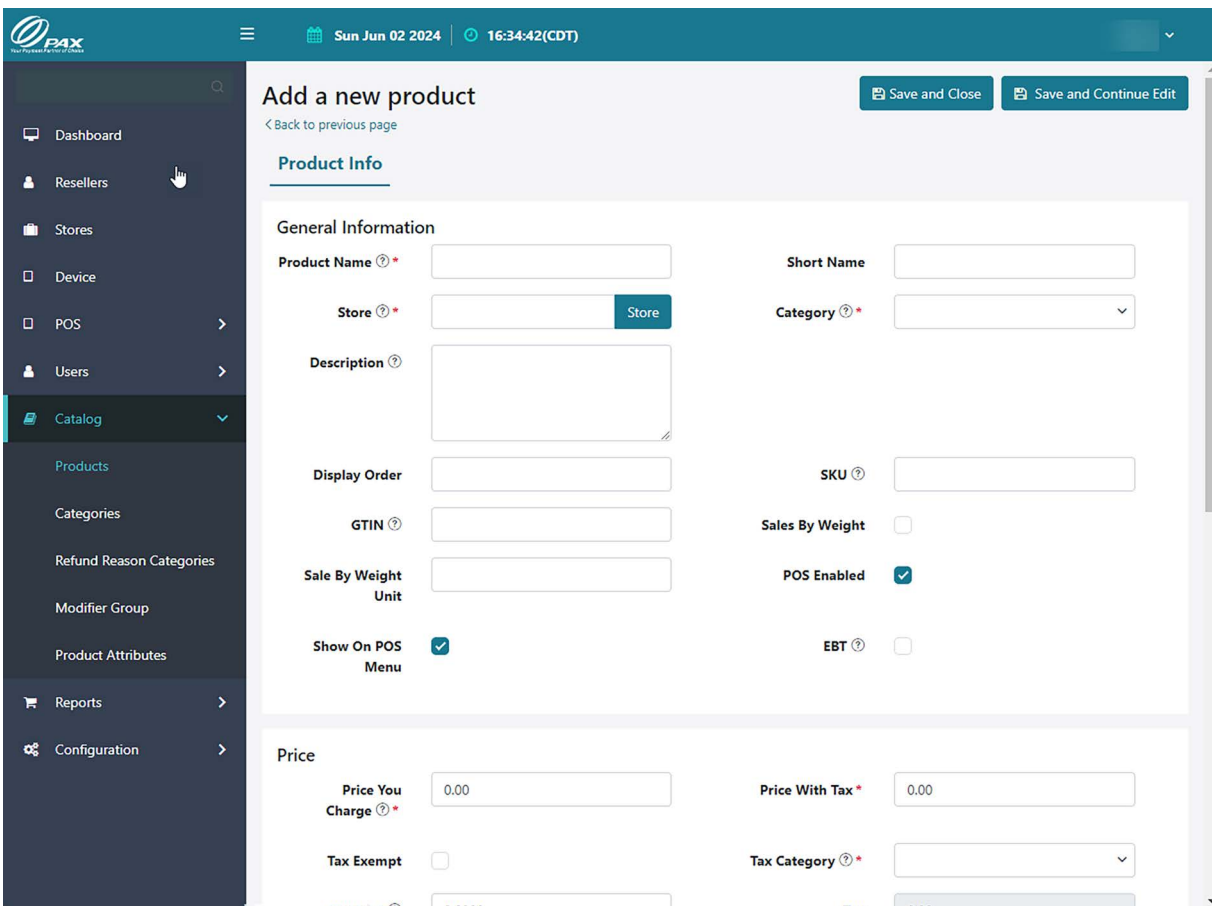
1. In the Navigational Sidewalk select **[Catalog]**, then select **[Product]**.

2. In the top right corner, select **[+Add New]**.

3. There are three tabs in the **Add a new product** menu.

• Product Information: Add all general product information in the four subsections; General Information, Prices, Inventory, and Mapping.

• Pictures: Add images of the product.

• Attributes: View changes specific to this item that are not in a modifier group. Attributes can be added by selecting **[Catalog > Product Attributes> Add New]**. Examples: No Pickles, everything on the side, or choose a product color (Red, Blue, Green).

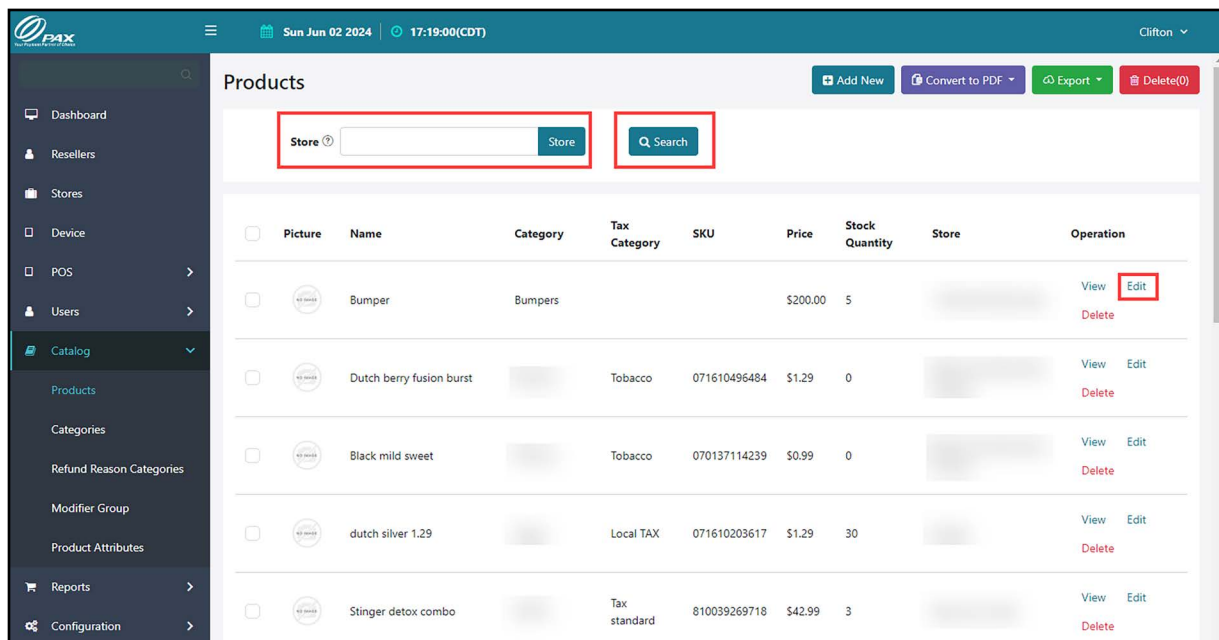4. After adding all the product details, select **[Save & Close]**.

7.4 Edit Inventory

Once you have added the inventory to the Admin Portal you are able to return to the items and edit them at any time. Be sure you are editing the items for the correct Merchant Store. Follow these steps edit inventory after it has been added to your admin portal:

1. Select **[Catalog]** and choose **[Product, Categories, Modifier Groups, or Product Attributes]**.

Please Note: If you have more than one store in your Reseller Account, search for the appropriate store.

2. You can also use the filter options to perform a deeper search by Category, Product Name, or SKU.

3. Select **[Edit]** next to the item you want to edit.

4. Edit your item then select **[Save & Close]**.

8. Disable a Store, Device, or User

Follow these steps to disable a Store, device, or User.

1. Select the tab for a **[Store, Device or Users]** in the Navigational Sidewalk.

2. Use the filters to narrow your search then select **[Search]**.

Please Note: If you are disabling a user select whether you are disabling a Reseller or Store User.

Please Note: To see deactivated stores, devices, or users, check the box that says **[Show Deactivated Users]** before you click **[Search]**.

Once you have located the store, device, or user, select **[Edit]**.

From the Edit Details Screen, un-check the **[Active Box]** then select **[Save & Close]**.

9. PAX Terminal Setup

You must have two applications to successfully perform transactions on the terminal. You must have downloaded the ROOM application along with a payment processing application of your choice. You must perform these actions by using PAXSTORE on a desktop rather than directly on the terminal.

Please Note: If you have not had training please reach out to technical support and they can provide the most up to date schedule for PAXSTORE training."

PAX Customer Support

For questions or help with the terminal installation please contact your service provider or PAX customer support.

For questions or help with the PAXSTORE please contact your service provider or PAX customer support.

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Sunday Closed
Hours Subject to Change

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