

PAXSTORE MERCHANT SETUP QRG

Date: 09-23-2019

Version: 1.0

Preface

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Version: 09-23-2019 v1.0

Status: [] Draft [★] Release [] Modify

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Technical Support

Contact Information:

Phone: (877) 859-0099

Email: support@pax.us URL: www.pax.us

Revision History

Date	Version	By	Description
09-23-2019	V1.0	Clif Euler	1. Initial Release

1 Introduction

This document describes the PAXSTORE merchant setup process. There are three ways to add a new merchant. Add through the reseller or sub-resellers category tree section option, the reseller or sub-resellers Organization option or through the import option.

2 Create a Merchant

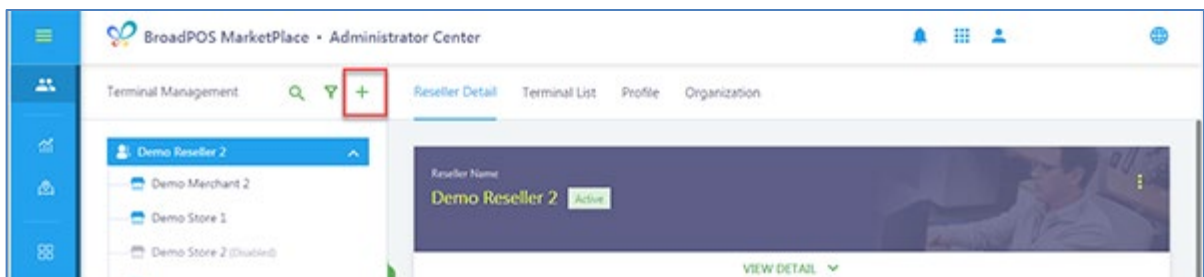
Before a terminal can be activated, it must be assigned to a merchant. Merchants must be assigned to a reseller or sub-reseller. The reseller or sub-resellers profile must be activated before adding a new merchant. Only Administrator-level access can create a new merchant.

To create a merchant, from Terminal Management, navigate to the assigned reseller or sub-reseller and then select to add the new merchant. Choose one of the following methods:

2.1 Category Tree Method

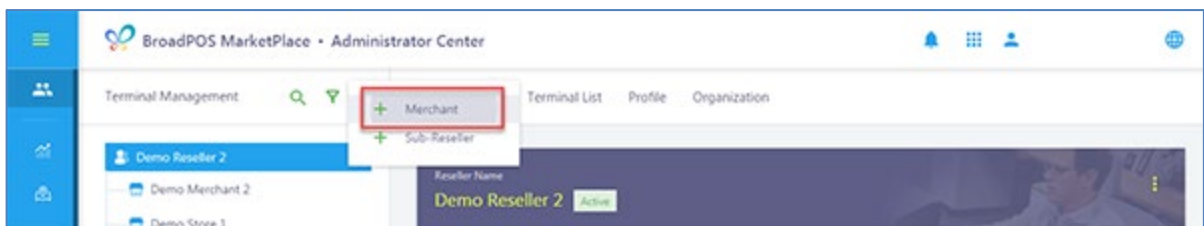
To create a merchant, from Terminal Management, navigate to the assigned reseller or sub-reseller to add the new merchant. The reseller or sub-resellers profile must be activated before adding a new merchant.

Select **[+]** icon.



Select the **[+ Merchant]**. A merchant detail pop-up screen will display.

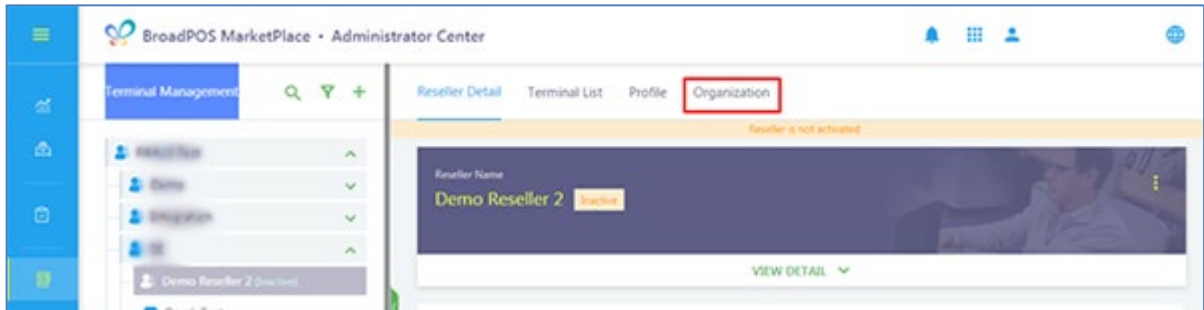
(Note: If the Reseller or Sub-reseller is not active the “+ Merchant” will not appear.)



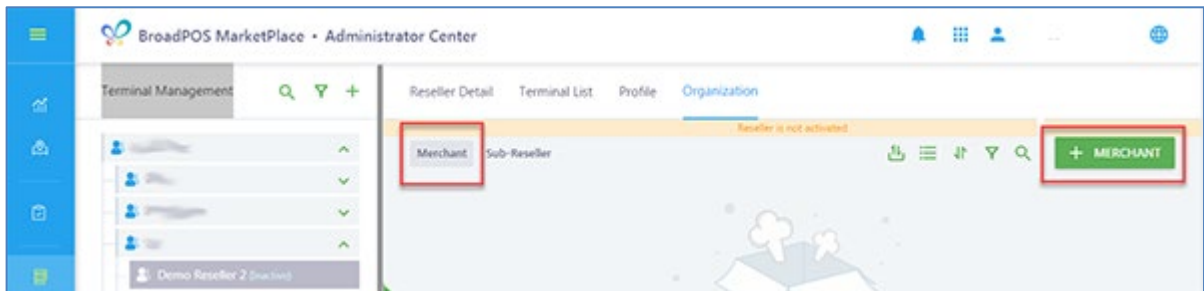
2.2 Organization Option Method

To create a merchant, from Terminal Management, navigate to the assigned reseller or sub-reseller to add the new merchant. The reseller or sub-resellers profile must be activated before adding a new merchant.

Select **[Organization]**.



Select **[Merchant]** then select **[+ MERCHANT]**. A merchant detail pop-up screen will appear.



2.3 Merchant Detail Pop-up Screen

Fill in the Merchant detail information fields. Fields with the red asterisk are required. Please use the drop menu options when prompted.

Complete the following fields:

- **Merchant Name** - The merchant company name.
- **Login Name (Email Address)** - The merchant admin's email address. This field is for reference only unless creating a merchant user account.
- **Create a merchant user account** - (Optional) Checking this box would create a login for the merchant upon account creation. The merchant would receive a Merchant Activate Notification email. Marketplace, reseller and sub-reseller admins for this merchant can still push apps to the terminal from the Administrator Center.
- **Contact Name** - The merchant admin's full name.
- **Country** - The country where the merchant company is located.
- **Phone No.** - (Optional) The merchant admin's phone number.
- **State/Province** - (Optional) The state or province where the merchant company is located.
- **Postal Code** - (Optional) The zip code for the merchant company.
- **City** - (Optional) The city where the merchant company is located.
- **Description** - (Optional) A short description of the company.

- **Address** - (Optional) The address for the merchant company.
- **Reseller** - The name of the reseller or sub-resellers account the merchant falls under. This is pre-populated based on the account used when creating a merchant. To change this field, click the list icon to the right and select a new reseller or sub-reseller.
- **Merchant Type** - (Optional) The type of business for the merchant company, such as retail, restaurant, etc. To change this field, click the list icon to the right and select a new reseller or sub-reseller.
- **Activate merchant** - Automatically activates the merchant after creation.

Merchant Detail Form

After completing the form and if the merchant account is ready to be activated select the Activate merchant option. Select **[OK]** to save settings. Select CANCEL to exit without saving.

Create Merchant

Merchant Name *

Login Name(Email Address) * Create merchant user account

Country
Contact Name * Please Select *

State/Province
Phone No. Please Select

Postal Code City

Activate merchant

CANCEL **OK**

2.4 Import Multiple Merchants

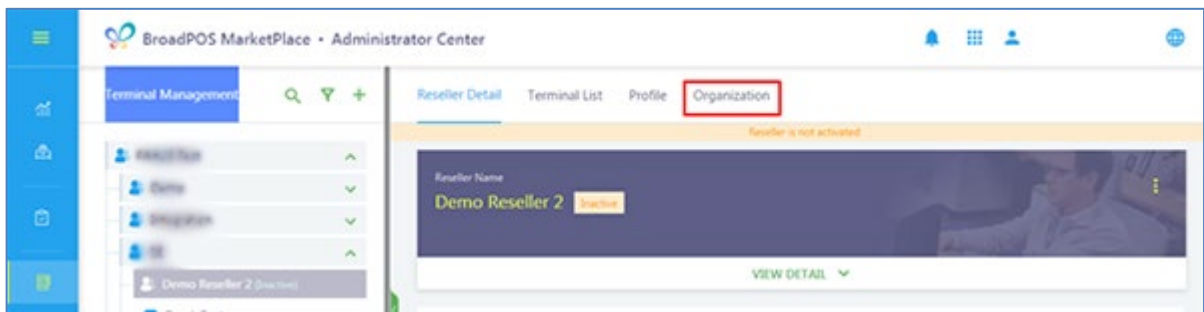
To create multiple merchants at one time, the PAXSTORE supports a merchant import option. Before initiating the merchant, import procedure downloads the Merchant Import Template and add the merchant information to the template file prior to importing.

To import multiple new merchants, from Terminal Management, navigate to the assigned reseller or sub-reseller to add the new merchant. The reseller or sub-resellers profile must be activated before adding a new merchant.

Select **Organization > Import/Export Icon > Import Merchant**. A merchant import pop-up screen will display.

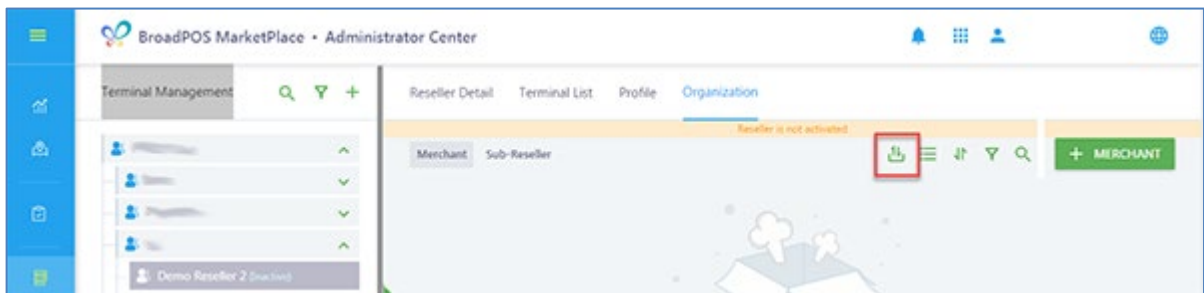
Organization

Select the **[Organization]** option.



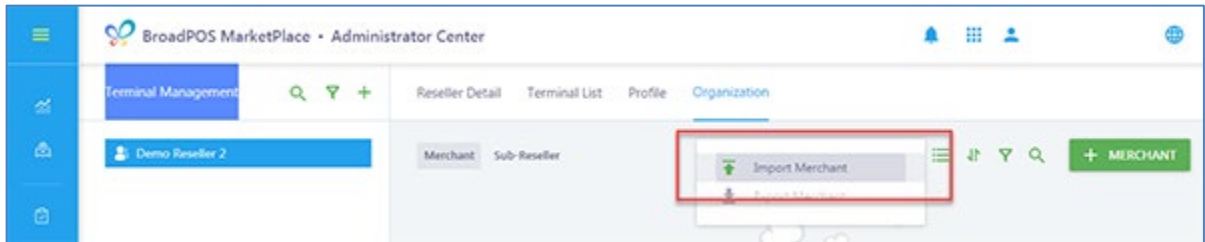
Import/Export Icon

Select the **[Import/Export Merchant icon]**. An Import/Export Merchant pop-up window will display.



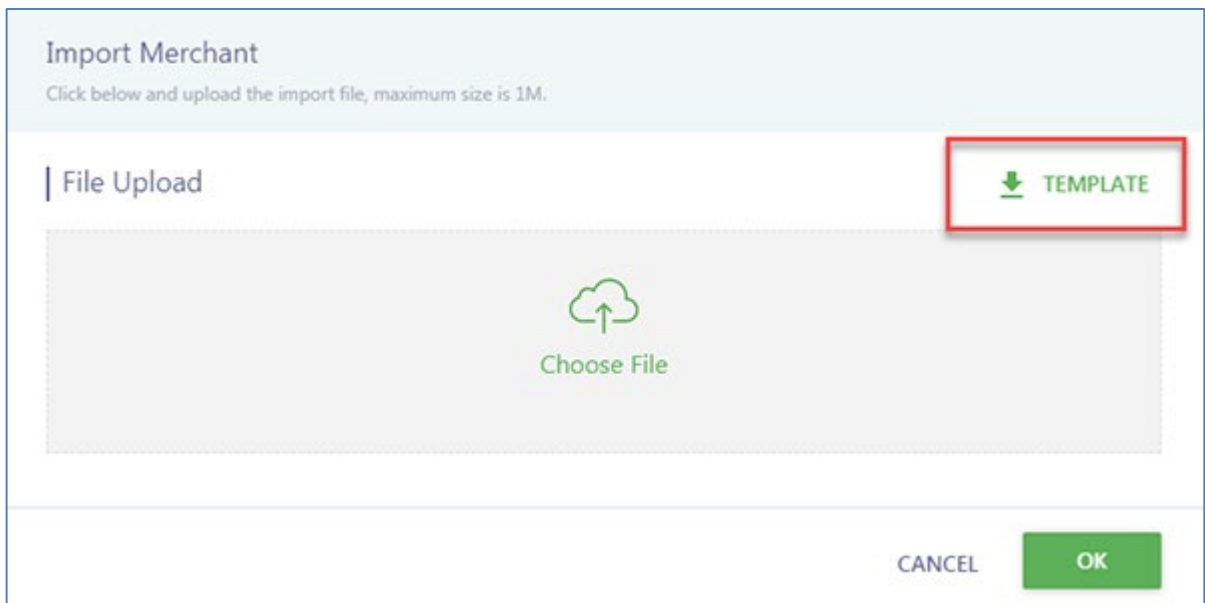
Import/Export Merchant Pop-Up Menu

Select the **[Import Merchant]** option.



Download the Merchant Import Template File

To download the Merchant import template file, select the **[TEMPLATE]** option. The file will download to the computer. Enter the merchant profile information per the template and store the file locally.



Merchant Template File Sample

Merchant Name / Login Name	Reseller	Reseller Type	Contact Name	Phone No.	Country	State/Province	City	Postal Code	Address	Description	Status	Create Merchant User Account
Demo Store 3	bbb@pax.com	Demo Reseller 2	Floral	CM	906-795-2222	U.S.A.	California	Beach View	90444	344 High Beach Ave	Active	Yes
Demo Store 4	bbb@pax.com	Demo Reseller 2	Floral	CM	906-795-2223	U.S.A.	California	Beach View	90445	365 High Beach Ave	Active	Yes
Demo Store 5	bbb@pax.com	Demo Reseller 2	Floral	CM	906-795-2224	U.S.A.	California	Beach View	90445	1035 Sand Bar Ave	Active	Yes


Import Merchant File

Drag and drop the Merchant import file into the **Choose File** section or select [**Choose File**] to search for the file. Select [**OK**] to import the file.

Import Merchant

Click below and upload the import file, maximum size is 1M.

| File Upload ↓ TEMPLATE



Choose File

CANCEL
OK

Successful Merchant File Import

When the file is successfully imported a pop-up message will display how many merchants were created successfully. The newly imported merchants will display under the reseller account.

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Terminal Management 🔍 ⚙️ +

- ▶ Demo Reseller 2
- ▶ Demo Merchant 2
- ▶ Demo Store 1
- ▶ Demo Store 2
- ▶ Demo Store 3
- ▶ Demo Store 4
- ▶ Demo Store 5

3 merchant(s) created successfully

Merchant - Sub-Reseller									
1	Demo Store 3	CMF	2019-09-19 17:30	Active	2	Demo Store 4	CMF	2019-09-19 17:30	Active
3	Demo Store 5	CMF	2019-09-19 17:30	Active	4	Demo Store 2	CMF	2019-09-19 17:15	Active
5	Demo Store 1	CMF	2019-09-19 17:10	Active	6	Demo Merchant 2	CMF	2019-09-19 17:11	Active

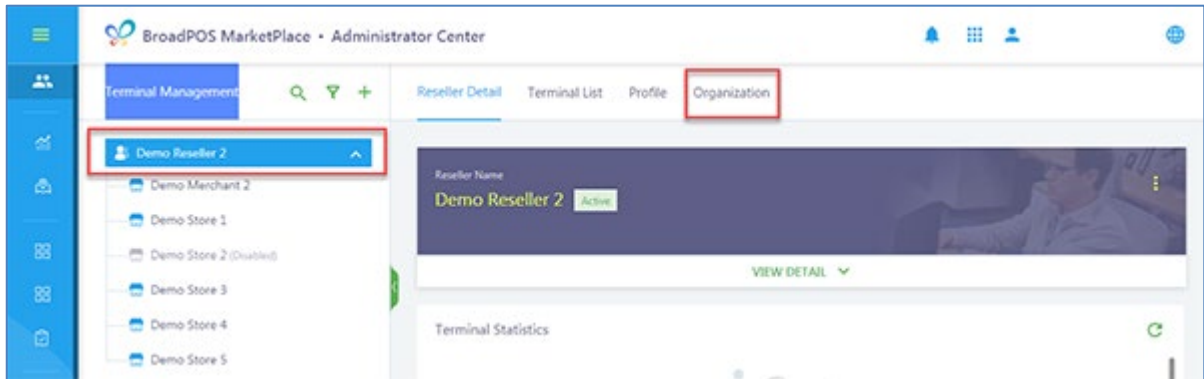
20 / Page 6 Records

2.5 Merchant Activation

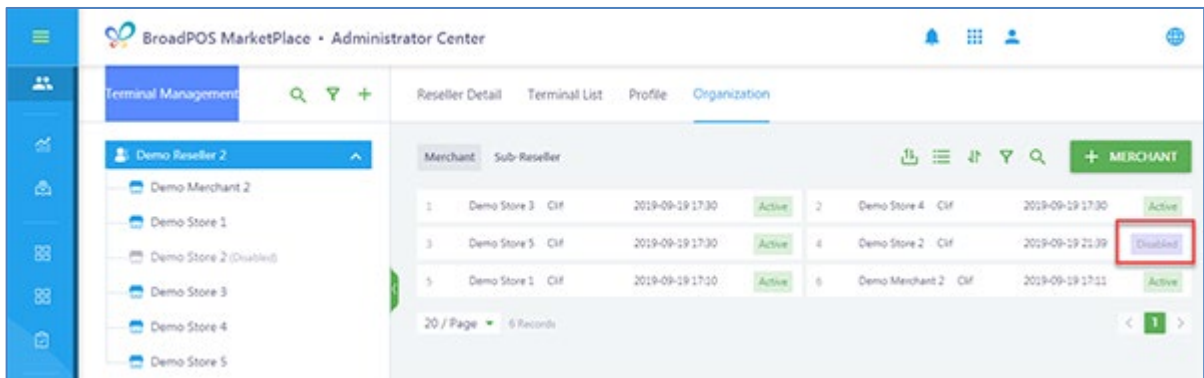
If activation was not done automatically, it can be manually set. There are two ways to manually set the activation for a merchant. The first method can be completed from the Reseller or Sub-Reseller level and the Organization option. The second method is using the Options feature.

Organization Method

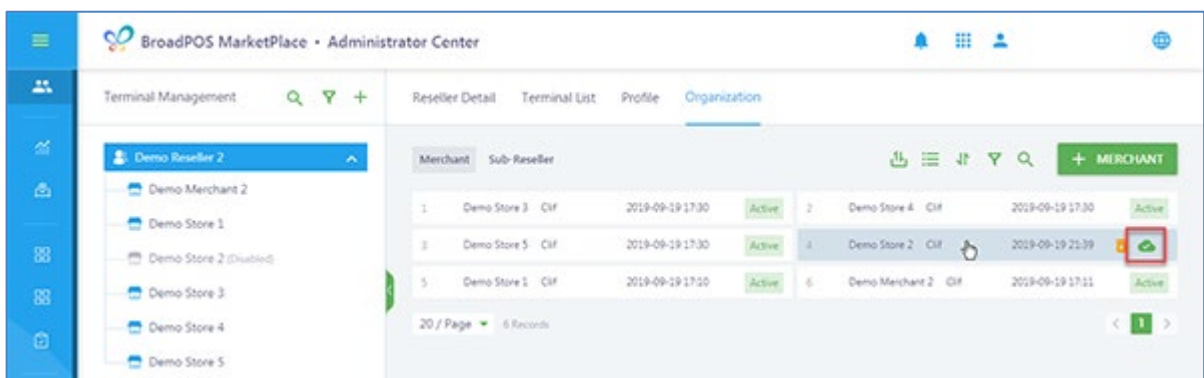
From the Reseller or Sub-Reseller level select **[Organization]** to display a list of the merchants.



From the list of merchants locate the merchant showing as disabled.

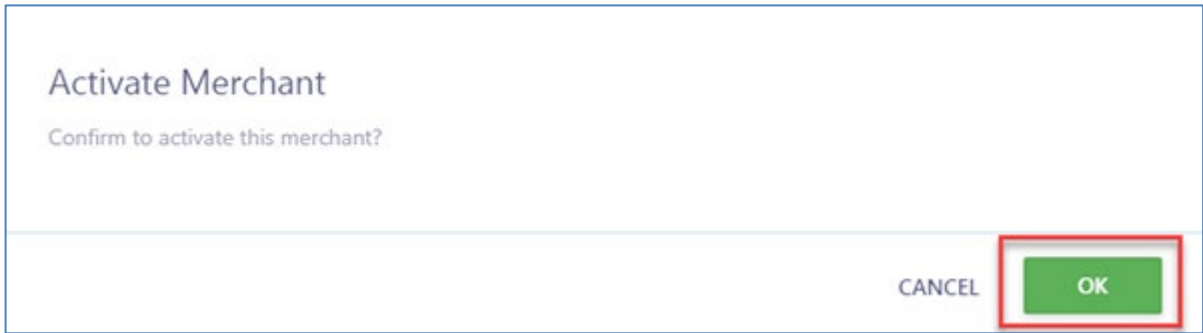


Hover the cursor over the Disabled option and it will change the button to show a delete and activate icons. To enable the merchant, select the **[Activate]** icon.



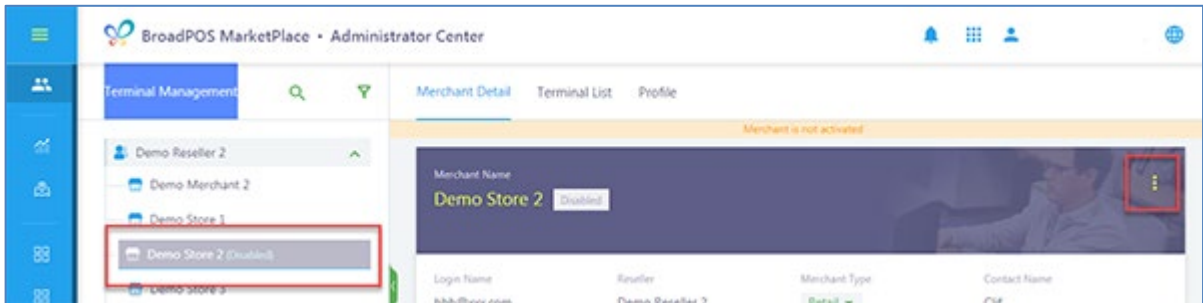
Activate Merchant

An Activate Merchant pop-up window will appear. Select **[OK]** to activate the merchant or CANCEL to exit and not activate.

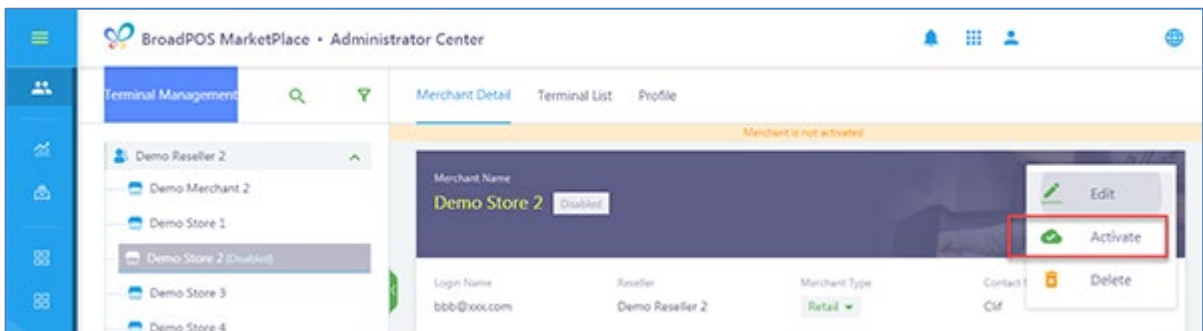


Options Feature Method

From the Reseller or Sub-Reseller level select the **[Options]** icon to display a pop-up window with the Activate option.

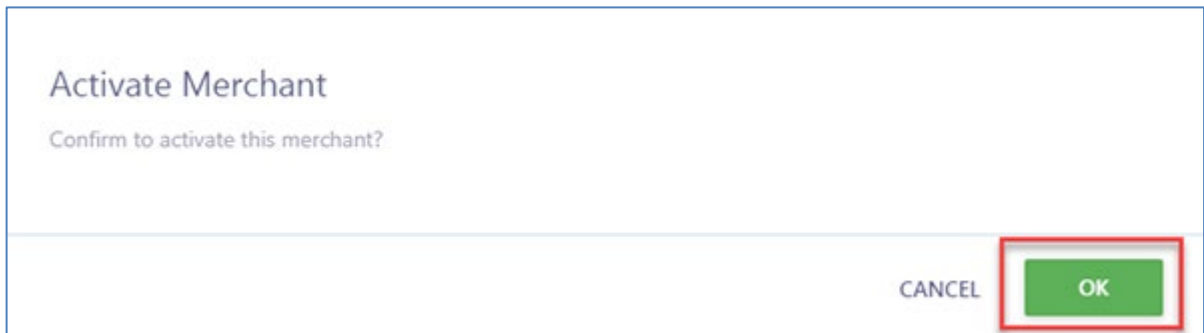


Select the **[Activate]** option to activate the merchant.



Activate Merchant

An Activate Merchant pop-up window will appear. Select **[OK]** to activate the merchant or CANCEL to exit and not activate.



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