

# PAXSTORE TRADITIONAL TERMINAL SETUP QRG

Date: 02-14-2020

Version: 1.1



### Preface

PAXSTORE TRADITIONAL TERMINAL SETUP QRG
Version: 02-14-2020 v1.1
Status: [ ] Draft [★] Release [ ] Modify
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Email: support@pax.us URL: www.pax.us



# **Revision History**

Date	Version	Description
11-05-2019	V1.0	1. Initial Release
02-14-2020	V1.1	1. Updated PAXSTORE Graphic
		2. Added Push Template Management section for 7.0 Release



# Introduction

This document describes the PAXSTORE Android terminal setup process.

# **Terminal Requirements**

Before a terminal profile can be created, it must be assigned to a merchant. The related merchant profile must be activated before it can add a terminal.

# Setting Up A New Terminal

This section covers setting up a new terminal profile.

To create a terminal profile, from Terminal Management, navigate to the assigned merchant and then select the **[Terminal List]** option. The Terminal List menu screen will display.



Select the [+ TERMINAL] option. The terminal detail screen will appear.



Fill in the terminal detail information fields. Fields with the red asterisk are required. Please use the drop menu options when prompted. Select **[OK]** to save settings.

Complete the following fields:

- **Terminal Name:** The name or identification of the terminal.
- TID: Is the terminal identification number. The length must be 8-16 characters.
- **SN:** Is the terminal serial number. If more than 1 terminal is being added this will be the first serial number. If more than 1 terminal is being added this will be the last serial number. Note: If more than one terminal is being added the serial numbers must be sequential.
- **Manufacturer:** This is the name of the manufacturer of the terminal. Select the drop-down arrow to display the manufacturer's names.
- Reseller: Is the name of the reseller the terminal is associated with. This field is pre-filled.
- Location: This field is used to describe the location of the terminal.
- Quantity: Is the number of terminal profiles to be created.
- End SN: Is the terminal serial number. If more than 1 terminal is being added this will be the last serial number. Note: If more than one terminal is being added the serial numbers must be



sequential.

- **Model:** This is the terminal model name. Use the drop-down arrow to display the terminal model names.
- **Merchant:** Is the name of the merchant the terminal is associated with. This field is pre-filled or select from the drop-down menu.
- Activate Terminal: This option is to activate the terminal account. The terminal must have a serial number and be assigned a merchant to activate it.

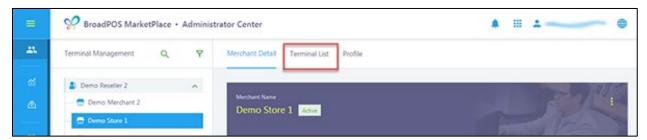
**Note:** If the terminal account is not activated, then when the terminal goes online it will not be able to access the PAXSTORE account.



When the terminal profile is successfully saved a pop-up confirmation window will display briefly.

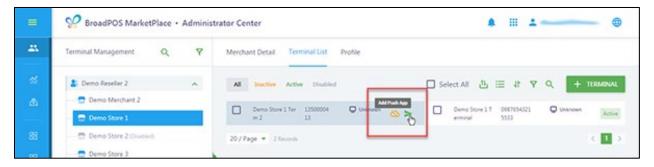
# Adding Applications to a New Terminal Profile

To locate a terminal profile, from Terminal Management, navigate to the assigned merchant and then select the **[Terminal List]** option. The Terminal List menu screen will display.





Select the terminal profile to download applications. Hover the cursor over the Active option and the pop-up options Disable and Add Push App will display. Select the option [Add Push App] green arrow icon.



An "Add Push App" pop-up window will display. Select the applications or template to be pushed to the terminal and then select **[OK]** to save.



After selecting OK the parameter file page will display. It is required to complete the parameter file before pushing the application.

### PAXSTORE TRADITIONAL TERMINAL SETUP QRG



After the parameter template is selected it is time to set up the application parameters. The parameters must be configured prior to download. All fields with a red asterisk must be completed. Please fill in the parameter file form. The parameter values in the last successful push history will be used by default, or edit the values as needed.

The parameter file uses tabs to identify related settings.

The following tabs are supported:

- Industry
- EDC
- Receipt
- Tip
- MISC

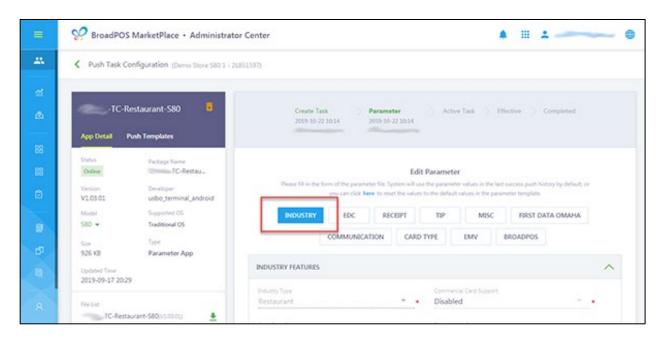
- Host
- Communication
- Card Type
- EMV
- BroadPOS

Note: The tabs may vary depending upon the supported application.



# **Industry Tab**

Supports industry-related parameter settings.



The following fields are supported in the Industry tab.

### **INDUSTRY FEATURES**

- Restaurant
- Cash Back Prompt
- Order Number Prompt
- HALO for Refund
- Merchant Surcharge Fee
- Invoice Mode
- Table Number Prompt
- Language for Display
- Split Tender

- Commercial Card Support
- Tax Amount Prompt
- HALO for Sale
- HALO for Cashback
- Surcharge for CashBack
- Clerk/Server ID Prompt
- Number of Guest Prompt
- Language for Printing



### STORE AND FORWARD

- Allow Store and Forward
- Upload Mode

### **FAST PAYMENT SERVICE**

#### VISA

- Allow Fast Payment
- Signature Limit
- Receipt Mode

### **MASTERCARD**

- Allow Fast Payment
- Signature Limit
- Receipt Limit

### **OTHERS**

- Allow Fast Payment
- Signature Limit
- Receipt Mode

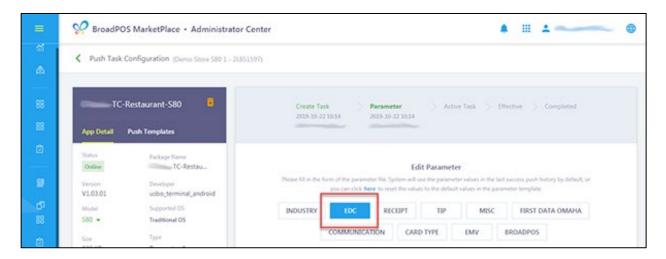
- Mode
- Retry on Offline on Demand
- Authorization Limit
- Print Receipt Limit
- Receipt Mode
- Authorization Limit
- Print Receipt Limit
- Authorization Limit
- Print Receipt Limit

**Note:** The fields may vary depending upon the industry type and supported application. Select the **[EDC]** tab at the top of the page.



# **EDC Tab**

The EDC tab supports electronic data capture transaction types.



The following fields are supported in the EDC tab.

### **CREDIT FEATURES**

CREDIT EDC Support

### **TRANSACTIONS**

- Sale
- Completion
- Refund
- Void Completion
- Void Refund

#### **OTHERS**

- Print Disclaimer
- Print Customer Copy
- Tip
- Secure Card
- Surcharge Fee Name
- Surcharge in Percentage (0-99) %
- Print Surcharge Fee on Receipt
- Maximum Total Amt for Store & Forward

- Pre-Authorization
- Forced
- Void Sale
- Void Forced
- Print Card Holder Name
- Manual Entry
- Pre-Dial
- Surcharge Fee Mode
- Surcharge Flat Fee
- Surcharge Fee Confirm
- Maximum Single Amt for Store & Forward



### **DEBIT FEATURES**

• EBT EDC Support

### **TRANSACTIONS**

- Sale
- Withdrawal

- Refund
- Balance Inquiry

### **OTHERS**

- Print Customer Copy
- Tip

- Manual Entry
- Pre-Dial

### **CASH FEATURES**

• Cash EDC Support

### **TRANSACTIONS**

- Sale
- Void Sale

- Refund
- Void Refund

### **OTHERS**

• Print Customer Copy

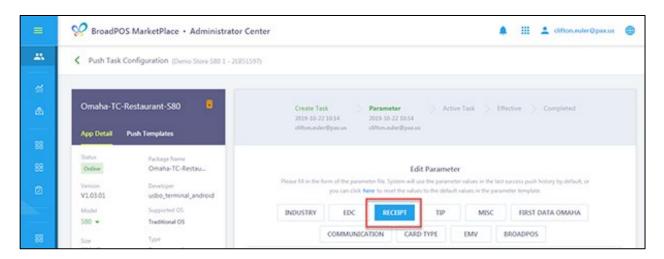
Tip

**Note:** The fields may vary depending upon the industry type and supported application. Select the **[RECEIPT]** tab at the top of the page.



### **RECEIPT Tab**

The Receipt tab supports receipt related options.



The following fields are supported in the Industry tab.

Note: The merchant information must be entered the receipt header lines.

### **HEADER LINE**

- Header Line 1
- Header Line 2
- Header Line 3

- Header Line 4
- Header Line 5

#### **TRAILER LINE**

- Trailer Line 1
- Trailer Line 2
- Trailer Line 3

- Trailer Line 4
- Trailer Line 5

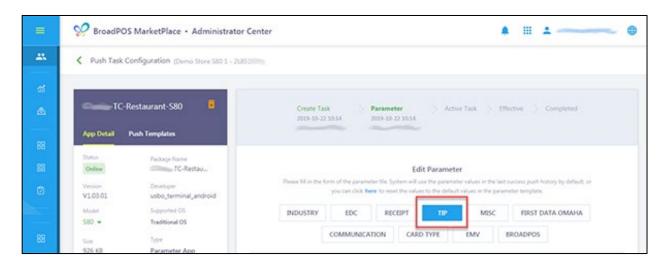
**Note:** The fields may vary depending upon the industry type and supported application.

Select the [TIP] tab at the top of the page.



### **TIP Tab**

The Tip tab supports tip related options.



The following fields are supported in the TIP tab.

### **GENERAL**

- Input Mode
- Tip Suggestion Print

### **ADDITIONAL FEATURES**

- Tip Select
- Tip Unit

### **AMOUNT OPTIONS**

- Amount Option 1
- Amount Option 2

### PERCENT OPTIONS

- Percent Option 1
- Percent Option 2

### TIP 1

- Tip Prompt
- Mode

### TIP 2

- Tip Prompt
- Mode

- Tip Edit Confirm
- Amount Threshold
- Amount Option 3
- Percent Option 3
- Name
- Default Tip
- Name
- Default Tip



#### TIP<sub>3</sub>

- Tip Prompt
- Mode

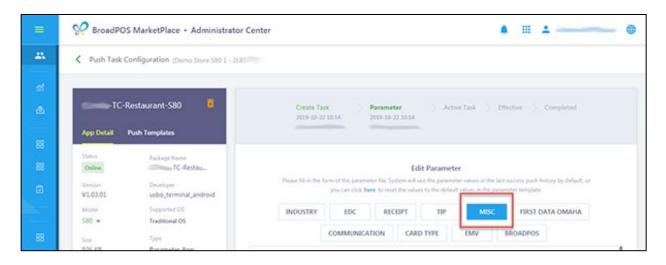
- Name
- Default Tip

**Note:** The fields may vary depending upon the industry type and supported application.

Select the [MISC] tab at the top of the page.

### **MISC Tab**

The MISC tab supports miscellaneous related options.



The following fields are supported in the MISC tab.

- Menu Timeout (100ms)
- Batch Protection
- Batch Pre-Report Type
- Pinpad Type
- Pre-Print
- EMV Card Remove Beep
- Contactless Module
- Func Report Protection
- Func Return Protection
- Receipt Font Type
- MID on Receipt
- System Password

- Batch Pre-Report
- Batch Report Type
- No Paper Mode
- Buzzer Sound
- Demo Mode
- Check DUP Transaction
- Func Void Protection
- Receipt Timer (100ms)
- EDC IDLE Timeout (100ms)
- Print Totals Sales on Tip Report

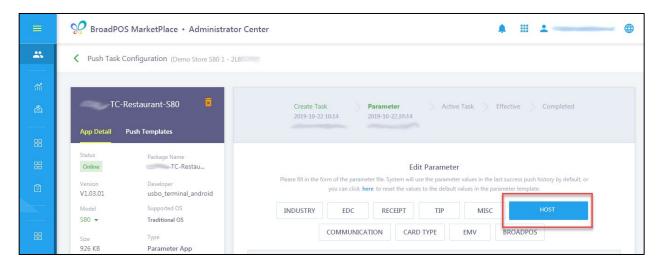
**Note:** The fields may vary depending upon the industry type and supported application.

Select the [HOST] tab at the top of the page.



### **HOST Tab**

The HOST tab supports host-related options.



The following fields are supported in the HOST tab.

### **HOST URLS**

- Primary Auth URL
- Backup Auth URL
- Primary Batch URL
- Backup Batch URL

#### **DIAL PARAMETERS**

- Primary Auth Phone
- Backup 1 Auth Phone
- Backup 2 Auth Phone
- Primary Batch Phone
- Backup 1 Batch Phone
- Backup 2 Batch Phone

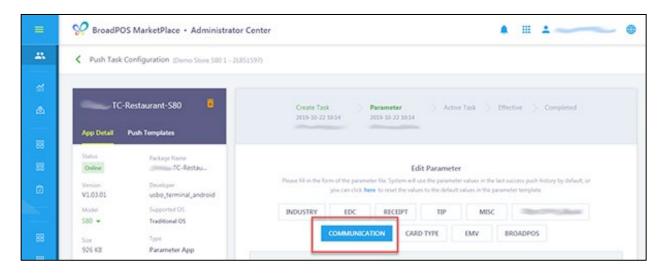
- Primary Auth Port
- Backup Auth Port
- Primary Batch Port
- Backup Batch Port
- Primary Auth Dial Baudrate
- Backup 1 Auth Dial Baudrate
- Backup 2 Auth Dial Baudrate
- Primary Batch Dial Baudrate
- Backup 1 Batch Dial Baudrate
- Backup 2 Dial Baudrate

**Note:** The fields may vary depending upon the industry type and supported application. Select the **[COMMUNICATION]** tab at the top of the page.



### **COMMUNICATION Tab**

The COMMUNICATION tab supports communication-related options.



The following fields are supported in the COMMUNICATION tab.

### **GENERAL**

- Primary Comm. Type
- Maximum Tries (1-9)
- Receive Timeout (100ms)

- Backup Comm. Type
- Connect Timeout (100ms)

### LAN

- DHCP
- Netmask
- DNS IP

- Local IP
- Gateway IP

### **DIAL UP**

Prefix Tone

**Dial Tone Check** 

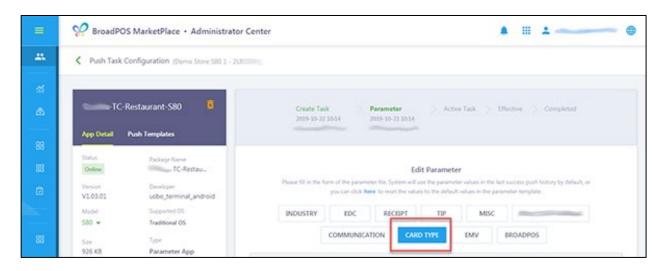
Note: The fields may vary depending upon the industry type and supported application.

Select the [CARD TYPE] tab at the top of the page.



### **CARD TYPE Tab**

The CARD TYPE tab supports card type related options.



The following fields are supported in the CARD TYPE tab.

#### **CARD BIN**

Card BIN File

#### **VISA**

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

### **MASTERCARD**

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

### **AMERICAN EXPRESS**

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

- Commercial Card BIN File
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present



#### **DINER CLUB**

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

#### **DISCOVER**

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

#### JCB

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

#### **ENROUTE**

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

### **OTHERS**

- Type
- Mask
- Tip 2 Discount (0-99.99) %
- Card Present Mode
- AVS for Card Present

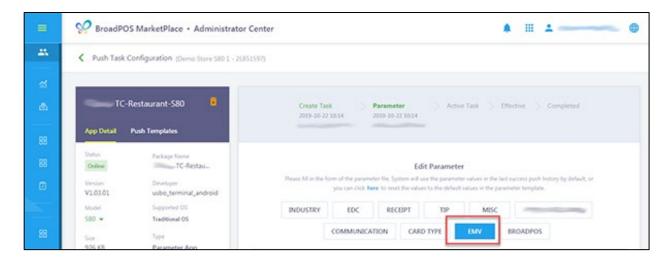
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present
- CVV
- Tip 1 Discount (00-99.99) %
- Tip 3 Discount (0-99.99) %
- AVS for SWIPE
- AVS for Card Not Present

**Note:** The fields may vary depending upon the industry type and supported application. Select the **[EMV]** tab at the top of the page.



# **EMV Tab**

The EMV tab supports EMV related options.



The following fields are supported in the EMV tab.

### **ENABLE/DISABLE EMV**

• Enable EMV Feature

### **CONTACT PARAMETERS**

Contact Triple Dip

### **CONTACTLESS PARAMETERS**

- Contactless Trans Limit
- Contactless Online Floor Limit

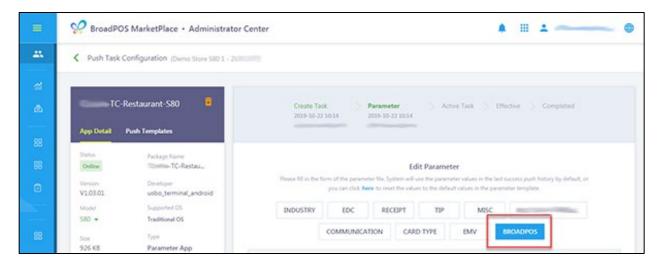
- Terminal Online Floor Limit
- Terminal Online Floor Limit
- CVM Required Limit

**Note:** The fields may vary depending upon the industry type and supported application. Select the **[BROADPOS]** tab at the top of the page.



# **BROADPOS Tab**

The BROADPOS tab supports BroadPOS related options.



The following fields are supported in the BROADPOS tab.

### **APPLICATION UPDATE**

Message Version

### LAN

- BroadPOS Domain/IP
- PAXTMS Domain/IP
- Max Buffer Length

- BroadPOS Port
- PAXTMS Port

### **BROADPOS DIAL UP**

### **PRIMARY**

- Phone Number
- Stop Bits
- Baud Rate

- Date Bits
- Parity
- Protocol

### **BACKUP**

- Phone Number
- Stop Bits
- Baud Rate

- Data Bits
- Parity
- Protocol



#### **PAXTMS DIAL UP**

#### **PRIMARY**

- Phone Number
- Stop Bits
- Baud Rate

### **BACKUP**

- Phone Number
- Stop Bits
- Baud Rate

- Date Bits
- Parity
- Protocol

#### Date Bits

- Parity
- Protocol

#### **AUTO HEALTH REPORT**

- Type
- Interval (100ms)

• Time (hh:mm)

### **Various Parameter File Save Options**

There are three possible options to finish the parameter file build and move onto setting the push settings.

- Select [NEXT] to save all tab parameter values and go to the + PUSH APP menu.
- Select [SAVE] to save the parameter values and then select [NEXT] to go to the + PUSH APP menu.
- Select [SAVE AS TEMPLATE] to save and name the parameter template file and then [NEXT] to go to the + PUSH APP menu.

**Note:** When selecting SAVE or SAVE AS TEMPLATE it will save all the parameter values in all tabs and is not exclusive to the currently open tab.

Select the [NEXT] option to continue to the + PUSH APP menu.



Select the [SAVE] option to save the parameter file.



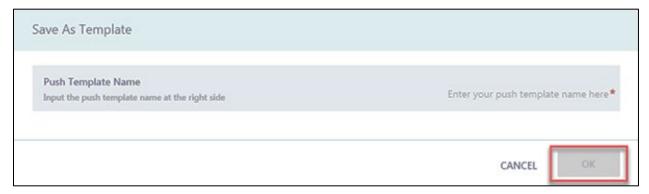
After selecting SAVE a pop-up message "Record Updated Successfully" briefly displays. If there is a field missing information a pop-up message will display with the required field information.

Select the [SAVE AS TEMPLATE] option to save and name the parameter template file for future use.





If **SAVE AS TEMPLATE** was selected then the screen below will display. Enter the parameter template name on the line and then select **[OK]** to save.



After selecting OK a pop-up message "Parameter template created successfully" will display briefly. Select [NEXT] to continue to the + PUSH APP menu.



There are two methods to push an application.

- Push Immediately
- Scheduled Push by Date and Time

### **Push Immediately:**

If the application needs to be pushed right away, verify the **Push Immediately** option is set to the ON position. Then select **[ACTIVATE]** to save the settings and set the application for immediate download to the terminal.

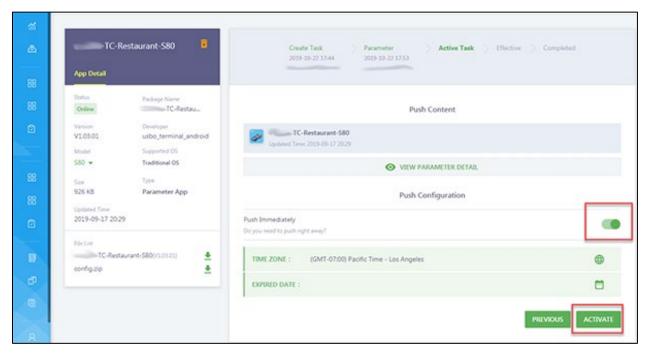
### **Scheduled Push:**

The scheduled push option can set the application or template push to occur by any future date and time. It can also set a date and time to stop the push attempts.



## **Push Immediately**

If the application needs to be pushed right away, verify the **Push Immediately** option is set to the ON position. Then select **[ACTIVATE]** to save the settings and set the application for immediate download to the terminal.



A pop-up confirmation message **Activate push task** will display. Select **[OK]** to confirm activating the push task. Select CANCEL to cancel the push task.



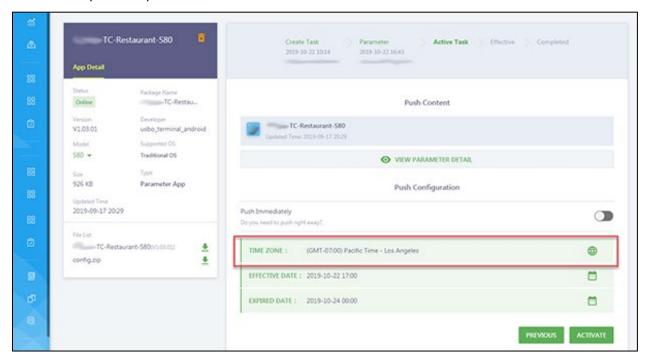
After selecting OK a pop-up message "Activated Successful" will display briefly.



### Scheduled Push

The scheduled push option can set the application or template push to occur at any future date and time. It can also set a date and time to stop the push attempts.

To set up the scheduled push verify the time zone. If the time zone needs to be adjusted, click anywhere on the displayed time zone date area to open the adjustment window. Select the time zone from the drop-down options.





Select the EFFECTIVE DATE option to set the date and time for the push. Click anywhere on the displayed date and time area to open the calendar. Set the year, month, day, hour, minute and then select **[OK]** to save settings.

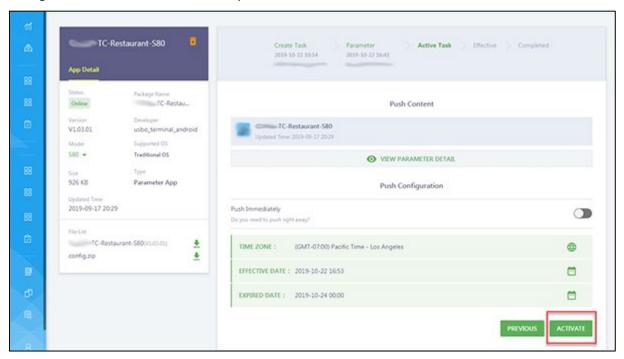


Select the EXPIRED DATE option to set the date and time to cancel push attempts. Click anywhere on the displayed date and time area to open the calendar. Set the year, month, day, hour, minute and then select **[OK]** to save settings.





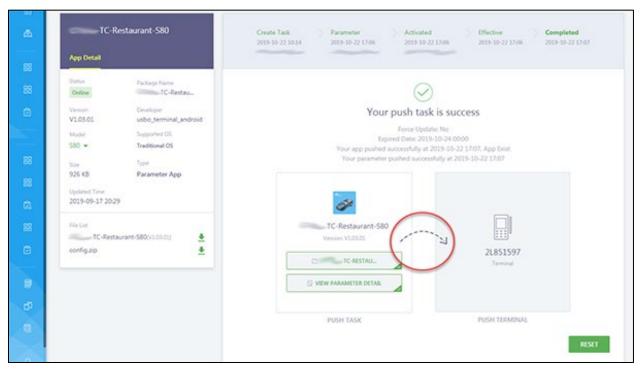
Select **[ACTIVATE]** to save settings. When the configured time is reached the push application attempt will begin until successful or until the expired date and time are reached.





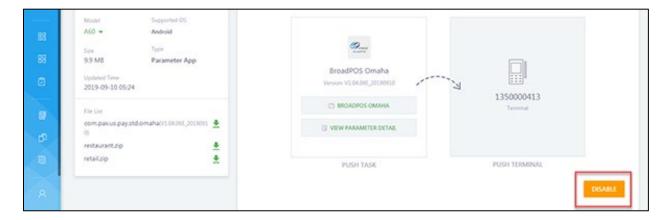
As soon as the push starts a screen will display the application push information. Note the transfer arrow is moving to show the application is being pushed to the terminal. If the arrow is not moving, then the push has completed.

**Note:** The terminal must be turned on and connected to the internet for an application to be successfully pushed.





To disable the application push process during the push process, select the [DISABLE] option.

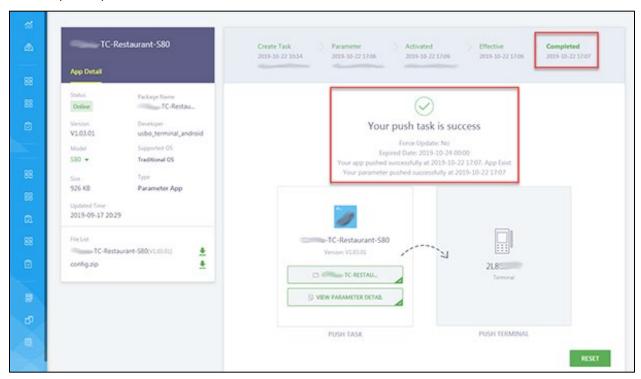


To confirm disabling the push select [OK]. This will disable the push task during the download.





If the push is successful, the screen will display a message "Your push task is success" and will display the completed push date and time information.



To reset the push task, select the [RESET] option.



To confirm the reset option, select [OK]. The Push task will be pending after reset, confirm to reset.



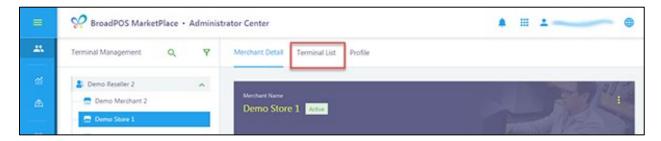
A pop-up message will display "Push task reset successfully" and then will return to the parameter file setup section.



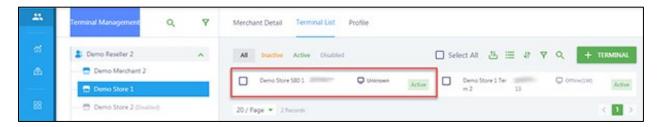
# Edit an Existing Parameter File

This section covers editing an existing application parameter file.

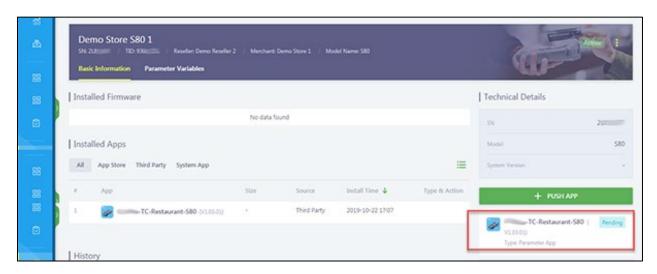
To locate a terminal profile, from Terminal Management, navigate to the assigned merchant and then select the **[Terminal List]** option. The Terminal List menu screen will display.



Select the terminal profile to download an application.

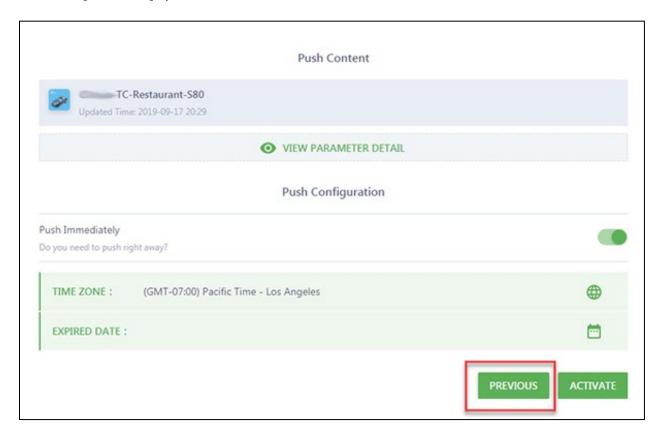


In the + PUSH APP section select the application to edit parameters.

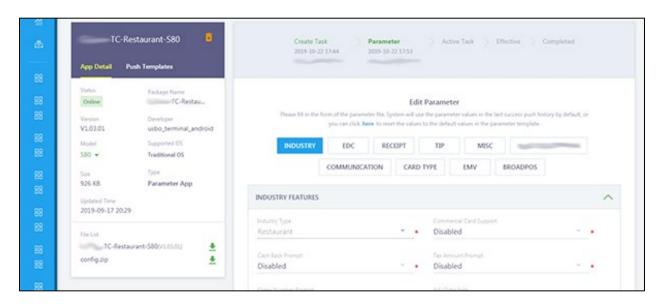




Select the [PREVIOUS] option.



Edit the parameter file as needed. For detailed parameter file and push setup information please review the **Adding Applications to a New Terminal Profile** section.

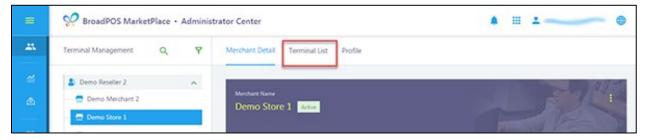




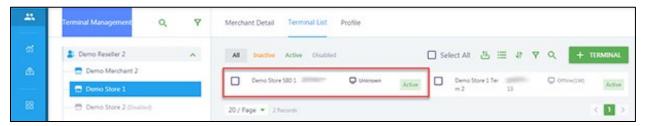
# Push a Saved Parameter File

This section covers pushing a saved parameter file.

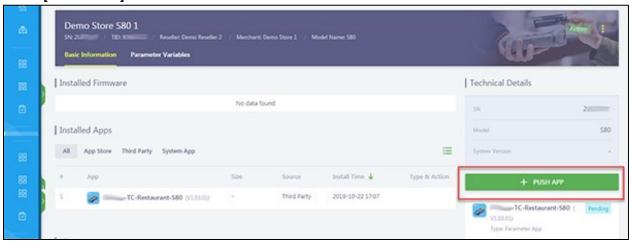
To locate a terminal profile, from Terminal Management, navigate to the assigned merchant and then select the **[Terminal List]** option. The Terminal List menu screen will display.



Select the terminal profile to download a saved parameter file.

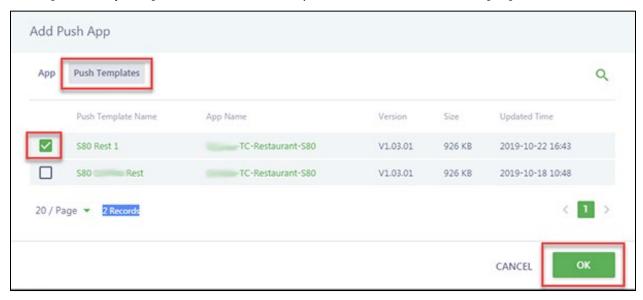


### Select [+ PUSH APP].



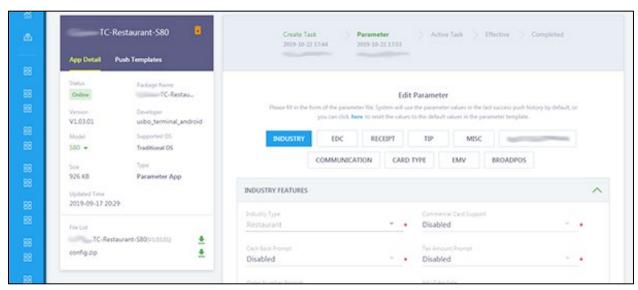


Select [Push Templates], then select the desired parameter file and then select [OK].



A confirmation message will briefly display "Push Task Added Successfully".

Edit the parameter file as needed. For detailed parameter file and push setup information please review the **Adding Applications to a New Terminal Profile** section.



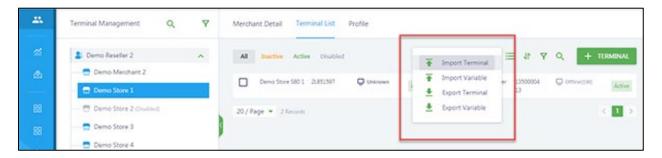


# Terminal Import/Export Feature

The terminal import/export feature supports importing multiple terminals and exporting the terminal file.

There are four import/export terminal file options.

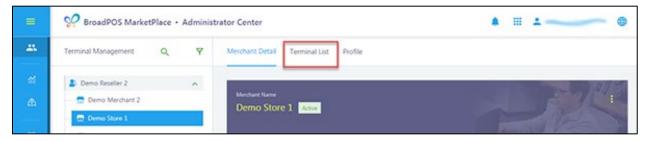
- Import Terminal
- Import Variable
- Export Terminal
- Export Variable



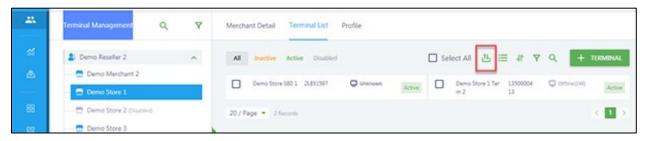
### **Import Terminal**

The import terminal feature supports importing multiple terminals using a template-based file. The import terminal option includes a template that can be downloaded.

To locate a terminal profile, from Terminal Management, navigate to the assigned merchant and then select the **[Terminal List]** option. The Terminal List menu screen will display.

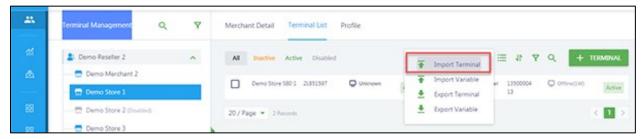


### Select the [Import/Export] icon.



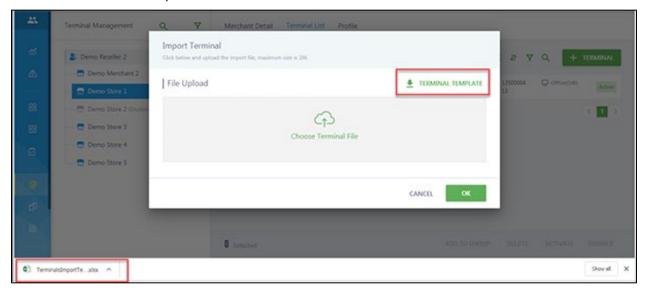


Select the [Import Terminal] option.



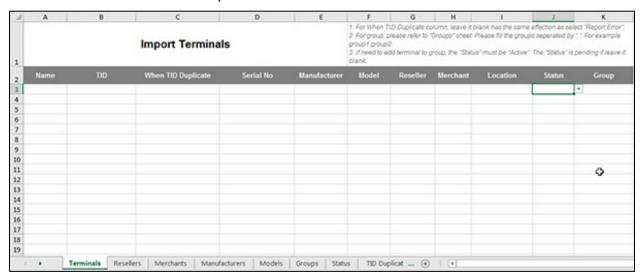
To import multiple terminals an import file must be created. There is a terminal import template file available for download.

To download the terminal template file, select the **[TERMINAL TEMPLATE]** option. The terminal template file will download to the local PC. Select the TerminalsImportTemplate.xlsx file located at the bottom of the screen to open or save.





Below is a sample of the **Terminal Import Template** file. Please review each tab and fill in the fields as needed. Save the file for future import.





The following tabs are included in the Terminal Import Template.

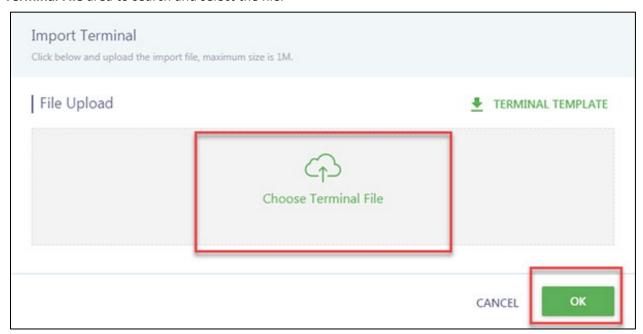
- Terminals
- Resellers
- Merchants
- Manufacturers

- Models
- Groups
- Status
- TID Duplicate Tolerance

### Important notes:

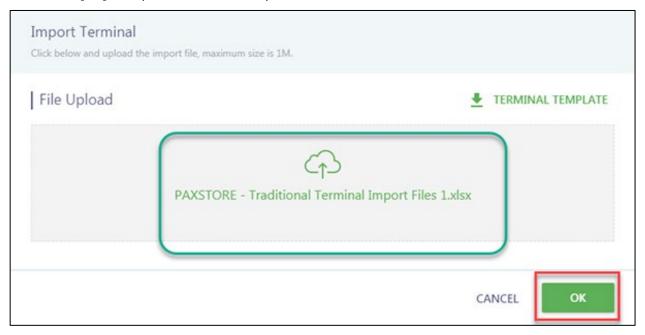
- 1. When setting up the TID Duplicate tab, leaving a field blank will default the value to Report Error.
- 2. For the Groups tab, please refer to the "Groups" section in the PAXSTORE. Please fill in the groups separated by a comma ",". For example, group1,group2,group3,.
- 3. When adding a terminal to Group, the terminal status must be Active. The status will default to Pending if the field is blank.

To import the **Terminal Import File**, drag and drop to the Choose Terminal File area or select the **Choose Terminal File** area to search and select the file.





Next select **[OK]** to import the Terminal Import File.



If the Terminal Import file is imported successfully a pop-up message will display as "1 terminal(s) created successfully".

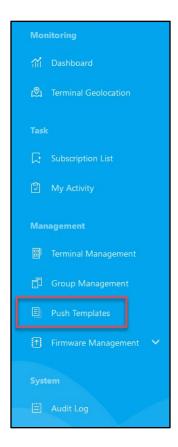


### Delete Template (7.0 Release)

The new feature Delete Template can delete a template if there is more than one template.

The option is included in the Push Template section. Select Push Templates > Select a Template > Push Templates > Hover over Template to delete > Select the trach can icon to delete the template.

Step 1: Select [Push Templates] from the PAXSTORE Dashboard.

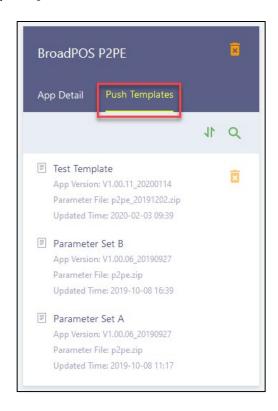


Step 2: Select the template to delete.



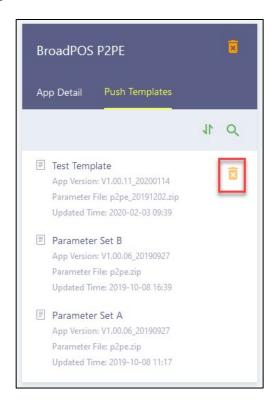


Step 3: Select the [Push Templates] tab.





Step 4: Select the [Trash Can] icon next to the test icon.



Step 5: Confirm to delete the Parameter Template select [OK].





# Pax Customer Support

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

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paxstore.support@pax.us (877) 859-0099 www.pax.us

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