



## **Reseller Seamless Commerce QRG**

08/03/2021

V[1.0]

## Preface

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Monday-Friday 9:00 AM to 1:00 AM

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Sunday Closed

The level of access to this Service is 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.

## TECHNICAL SUPPORT CONTACT INFORMATION

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## Revision History

Date	Version	Description
08-03-2021	v1.0	Initial release.

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## 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.

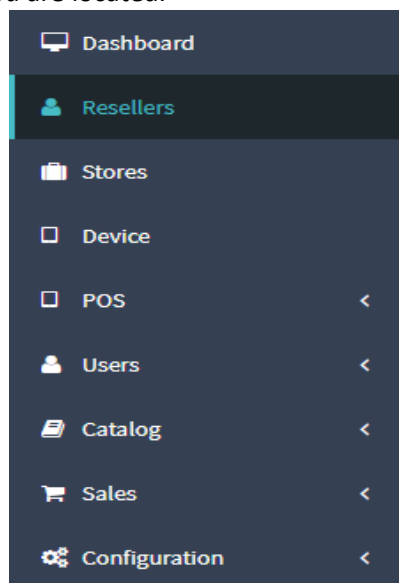
### 1.3 Table - Acronyms and Terms

Acronym	Definition
Catalog	Manage your inventory such as Products, Categories, Modifier Groups, and Product Attributes
Configuration	Configure settings for stores and your reseller account such as Logo, Taxes, and 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 in your 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.
POS	View and Manage ROOM App features: Activation logs, Employee Maintenance, Customer Maintenance, Special Pricing, Batch and POS configurations.
Resellers	Manage all Sub-reseller accounts.
Sales	Manage transaction, gift cards, and view sales reports for stores in your reseller account.
SSO	Single Sign On

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

## 2. Navigational Sidewalk

The National Sidewalk is used to help Resellers locate specific features quickly. If you are unsure of 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 identify where you are located.



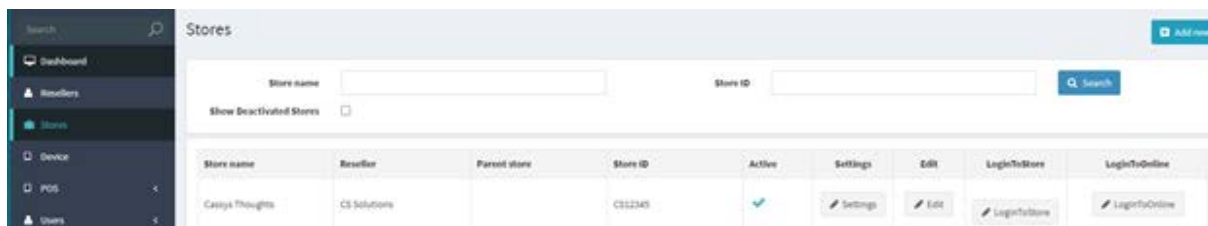
### 2.1 Definitions

- **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.

- **Catalog:** Manage your inventory such as Products, Categories, Modifier Groups, and Product Attributes.
- **Sales:** Manage transactions, gift cards, and view sales reports for stores in your reseller account.
- **Configuration:** Configure settings for stores and your reseller account such as Logo, Taxes, and Webhooks.

## 3. Managing Stores

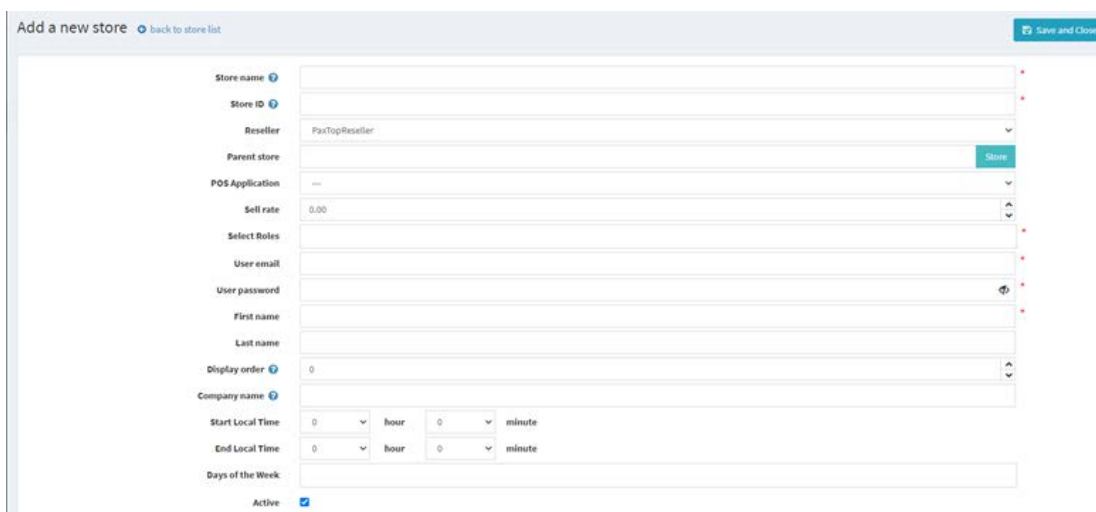
You can create and manage your merchants from the Stores tab.



### 3.1 Adding a Store

Follow these steps Add a new Store:

1. To add a new Store, click **[Stores]** on the Navigational Sidewalk then click **[Add New]**.
2. Complete all the fields with a Red Asterisk (\*).
3. Be sure the Active box is checked, the click **[Save & Close]**.

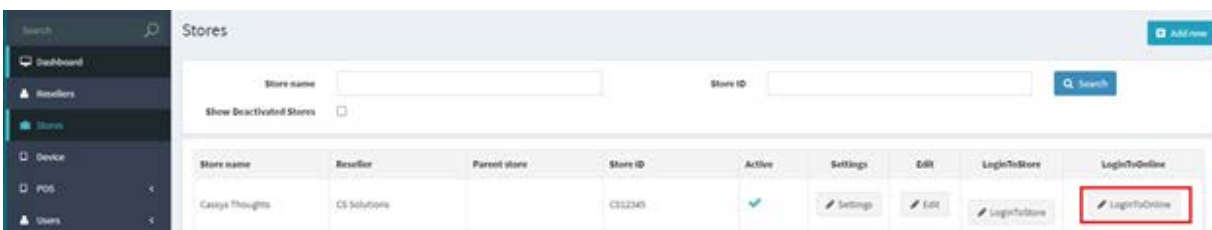


## 3.2 Accessing the Online Ordering (OLO) Admin Portal

Single Sign On (SSO) is available with ROOM. Both the Reseller and Merchant can access the OLO Admin Portal from Seamless Commerce.

Follow these steps to access the Online Ordering Admin Portal:

1. Click **[Stores]** on the Navigational 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. Click **[Login to Online]** and the OLO Admin Portal will open in a separate web browser tab.



## 4. Managing Devices

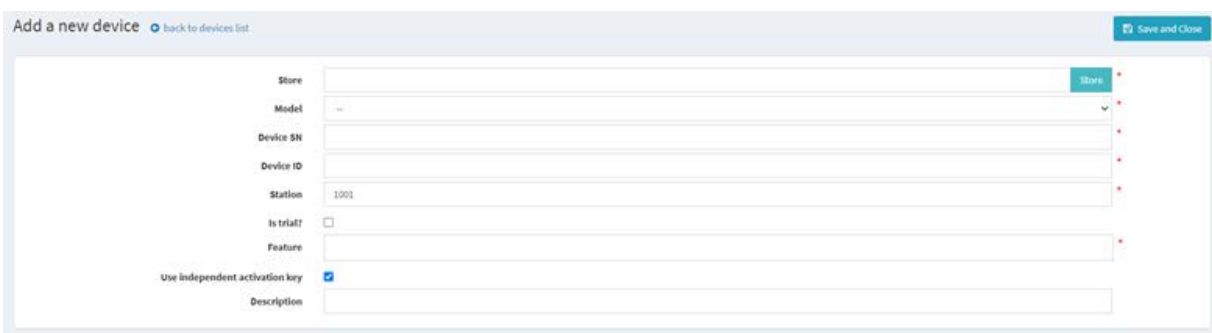
### 4.1 Adding a New Device

To add a new device to a Merchants Store you must be logged into your Reseller Account.

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

#### 4.1.1 SEAMLESS COMMERCE

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



The screenshot shows the 'Add a new device' form. At the top left is the title 'Add a new device' and a link 'back to devices list'. At the top right is a 'Save and Close' button. The form contains several fields: 'Store' (dropdown), 'Model' (dropdown), 'Device SN' (text), 'Device ID' (text), 'Station' (text, value: 1001), 'Is trial?' (checkbox), 'Feature' (text), 'Use independent activation key' (checkbox, checked), and 'Description' (text). Red asterisks (\*) are placed to the right of the Store, Device SN, Device ID, and Feature fields, indicating they are required.

1. Click **[Device]** in the Navigational Sidewalk, then click **[+ Add New]**.
2. Complete all the fields with a red asterisk (\*).
3. Click **[Save and Close]**.

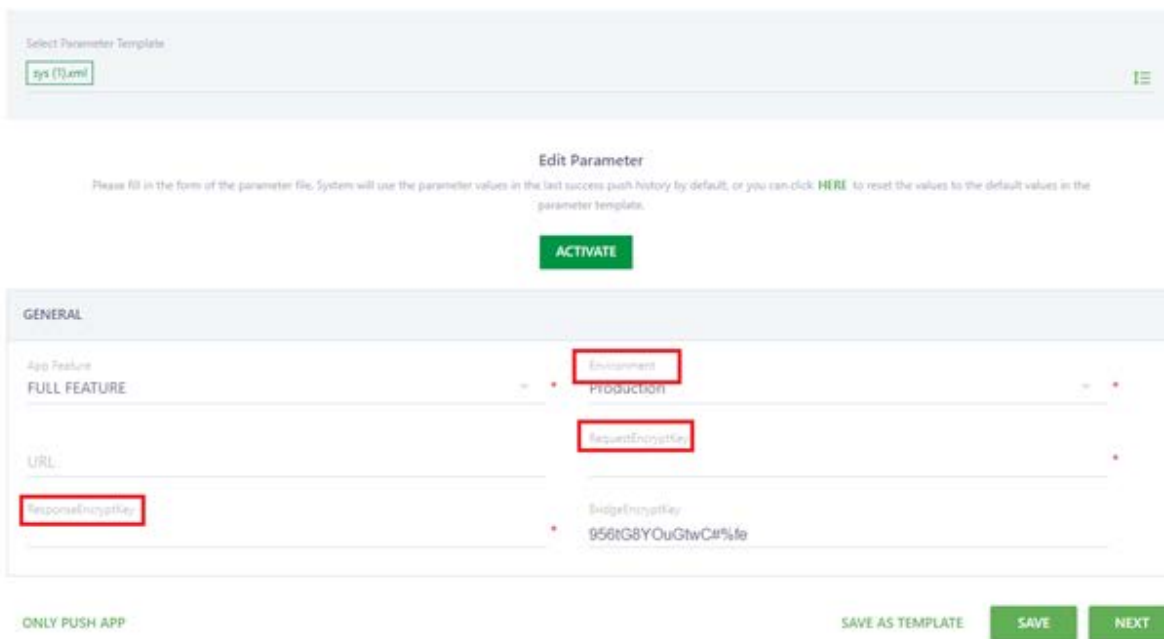


4. Go back to the **Devices** and search for the Serial Number you added.
5. Click **[Edit]** and capture/copy the **Register Request Encrypt Key** and **Register Response Encrypt Key** for PAXSTORE.
  - **Please Note: When you are editing the Device be advised that only 1 Terminal can be enabled to Receive Online Orders.**



## 4.1.2 PAXSTORE- ADDING A ROOM DEVICE

Follow these steps to add the ROOM Application to the terminal:



1. **Login** to PAXSTORE

2. If you have not already done so, add your new terminal.
3. While in the **Terminal Details**, click **[+PUSH APP]** to add the ROOM Application to the terminal.
4. Use the **Register Request Encrypt Key** and **Register Response Encrypt Key** from Seamless Commerce as your App parameters for PAXSTORE. Select the Production environment and enter your encryption keys from Seamless Commerce.
  - **Please Note: Do Not change the Bridge Encrypt Key.**
5. Proceed to download the App to the terminal.
6. Once the App has been downloaded to the terminal click **[Activate]**, then login with the POS **User ID and Password**.

## 5. POS Management

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

### 5.1 POS Management Capabilities

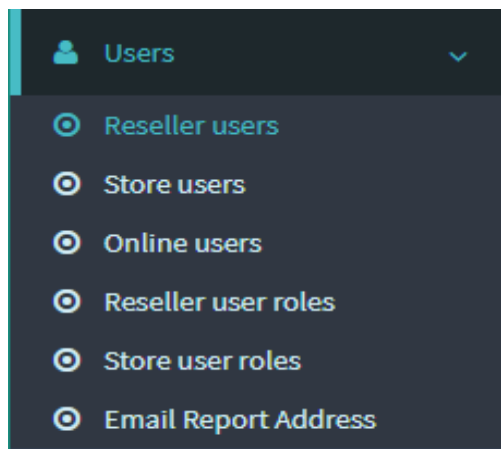
The POS tab allows you to view and/or manage key App features such as Employee POS Users, Loyalty Customers, Specialty Pricing, Receipts, Logos and more.

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.

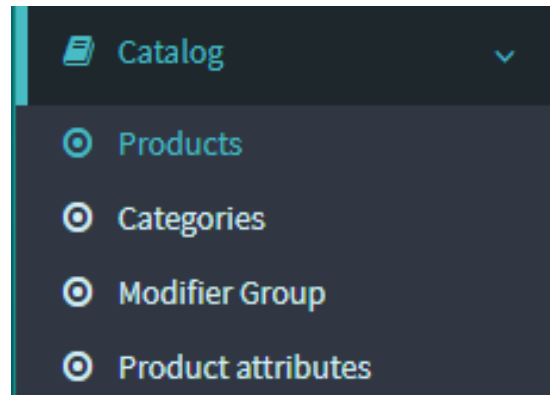
1. Click **[Users]** in the Navigational Sidewalk.
2. Select whether you are creating a **[Reseller or Store User]**.
3. Click **[+Add New]** then complete all the fields with a red asterisk (\*).

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

4. Click **[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

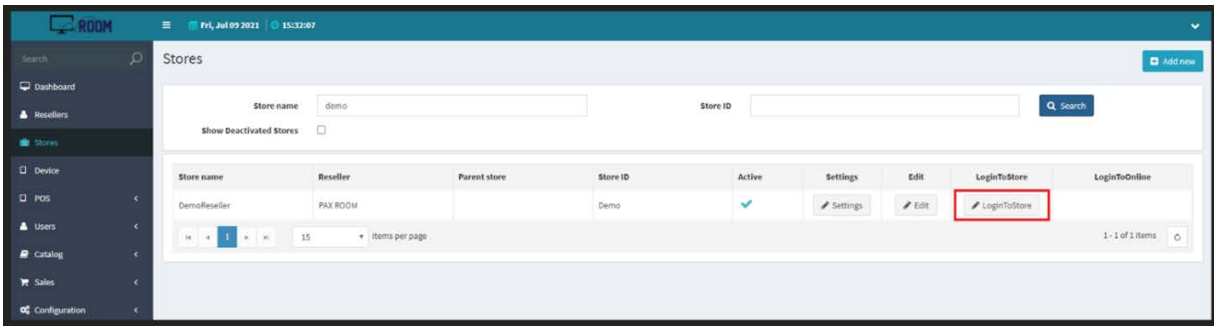
### 7.2 Inventory Import

**Please Note:** If you do not have the Inventory Import Templates you can request one from [ROOM@pax.us](mailto:ROOM@pax.us).

Available Templates:

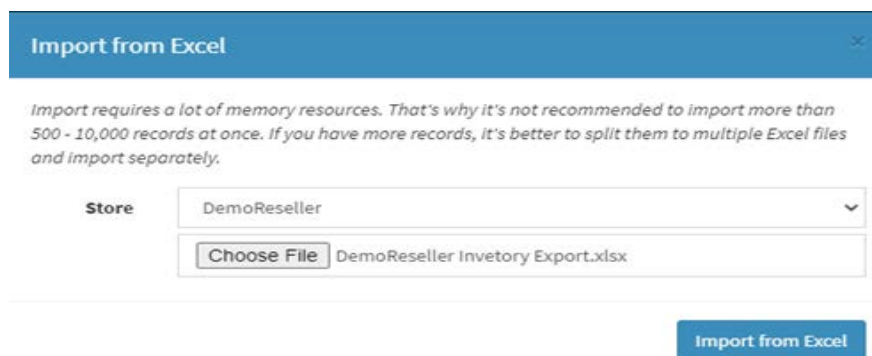
- Categories
- Modifier Group
- Products

Follow these directions to Import Inventory from the Reseller Level:

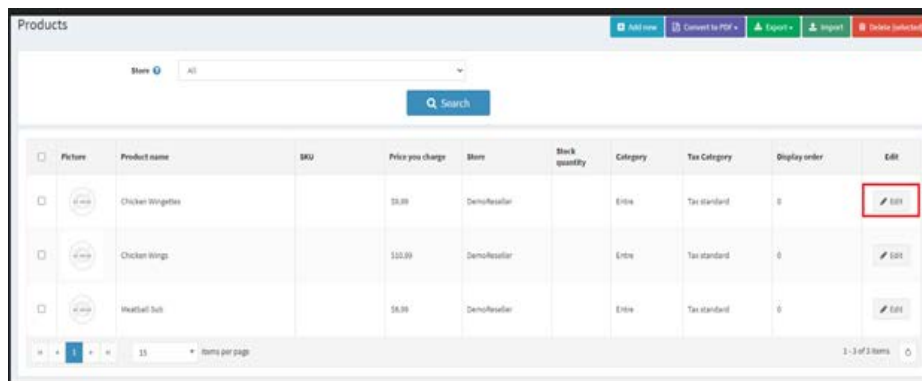


1. Click **[Stores]** on the Navigational Sidewalk.
2. Search for your Store name.
3. Click **[Login to Store]**.
4. Click **[Import]** and then attach the file you would like to upload to your store's inventory.

Please Note: If there is an error in your EXCEL file, Seamless Commerce will provide an Error Report. However, all items with an exception of what's in the error report will be uploaded.



5. Once your items have been uploaded, click **[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

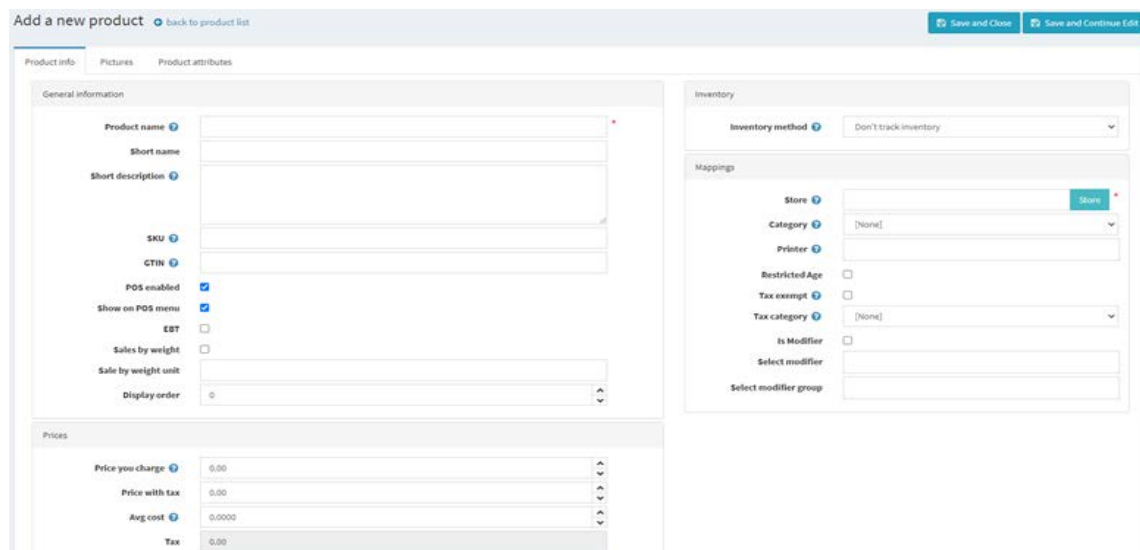
Adding inventory manually may take a little longer, but it gives you the ability to customize each product as they are being added. Follow these steps to add inventory manually from the Reseller Level:

1. In the Navigational Sidewalk click **[Catalog]**, then click **[Product]**.
2. In the top right corner, click **[+Add New]**.



The screenshot shows the 'Products' page interface. At the top right, there are four buttons: '+Add New' (highlighted with a red box), 'Convert to PDF', 'Export', and 'Delete (selected)'. Below these buttons are input fields for 'Store', 'Category', 'Product name', and 'SKU', along with a 'Search' button.

3. There are 3 tabs in the **Add a new product** menu.
  - **Product Information:** Add all general product information in the 4 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).



The screenshot shows the 'Add a new product' form with the 'Product info' tab selected. The form is divided into several sections:

- General information:** Fields for Product name, Short name, Short description, SKU, CTIN, POS enabled (checked), Show on POS menu, EBT, Sales by weight, Sale by weight unit, and Display order.
- Prices:** Fields for Price you charge (0.00), Price with tax (0.00), Avg cost (0.0000), and Tax (0.00).
- Inventory:** Inventory method dropdown set to 'Don't track inventory'.
- Mappings:** Fields for Store, Category (None), Printer, Restricted Age, Tax exempt, Tax category (None), Is Modifier, Select modifier, and Select modifier group.

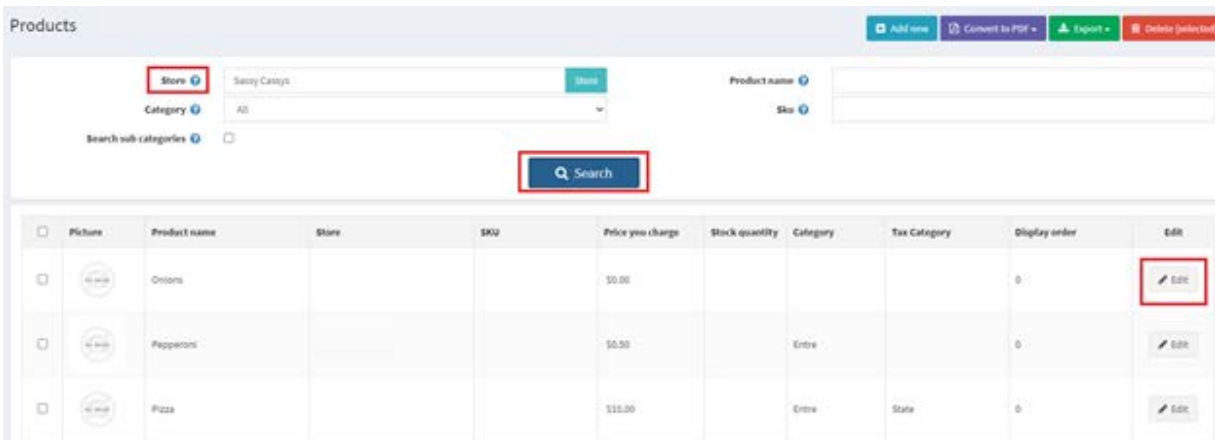
At the top right of the form, there are two buttons: 'Save and Close' and 'Save and Continue Edit'.

4. After adding all the product details, click **[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. Click **[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. Click **[Edit]** next to the item you want to edit.
4. Edit your item then click **[Save & Close]**.



## 8. Disable a Store, Device, or User

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

1. Click the tab for a **[Store, Device or Users]** in the Navigational Sidewalk.
2. Use the filters to narrow your search then click **[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]**.**
3. Once you have located the store, device, or user, click **[Edit]**.
4. From the **Edit Details Screen**, un-check the **[Active Box]** then click **[Save & Close]**.

## 9. PAX Terminal Set-Up

### 9.1 E-Series Set-Up

If you are using an E-Series terminal (E500, E600, E700, E800), you need 2 apps for ROOM.

1. **The ROOM App**- Download the ROOM App to the Android side of the terminal.
2. **The payment Application**- You must have the payment application downloaded to the Q20 in order to process payments on the terminal. Add your Q20 to the PAXSTORE and push the appropriate payment application for the Merchant's store.

### 9.2 Standalone Android Set-Up

If you are using a standalone Android Terminal, you will need to have both the ROOM App and the Payment Application downloaded to the terminal to process local/in-store payments.

## PAX Customer Support

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

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