Your Payment Partner of Choice

Simple Register Quick Setup Guide

11-04-2020

V1.0

Preface

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TECHNICAL SUPPORT

If there is a problem while installing, registering or operating this product, please make sure to review the documentation. If unable to resolve the issue, please contact PAX.

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

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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

Phone: (877) 859-0099

Email: support@pax.us

URL: www.pax.us

Revision History

Date	Version	Description
11-04-2020	v1.0	Initial release.

Table of Contents

1. Introduction

Welcome to Simple Register—Commerce Integration Made Easy.

1.1 Purpose

This document provides Simple Register users with information on setting up their store and terminals directly from the terminal. This guide also walks the users through the process of upgrading their subscription for additional enhancements.

1.2 Intended Audience

This guide is intended for use by:
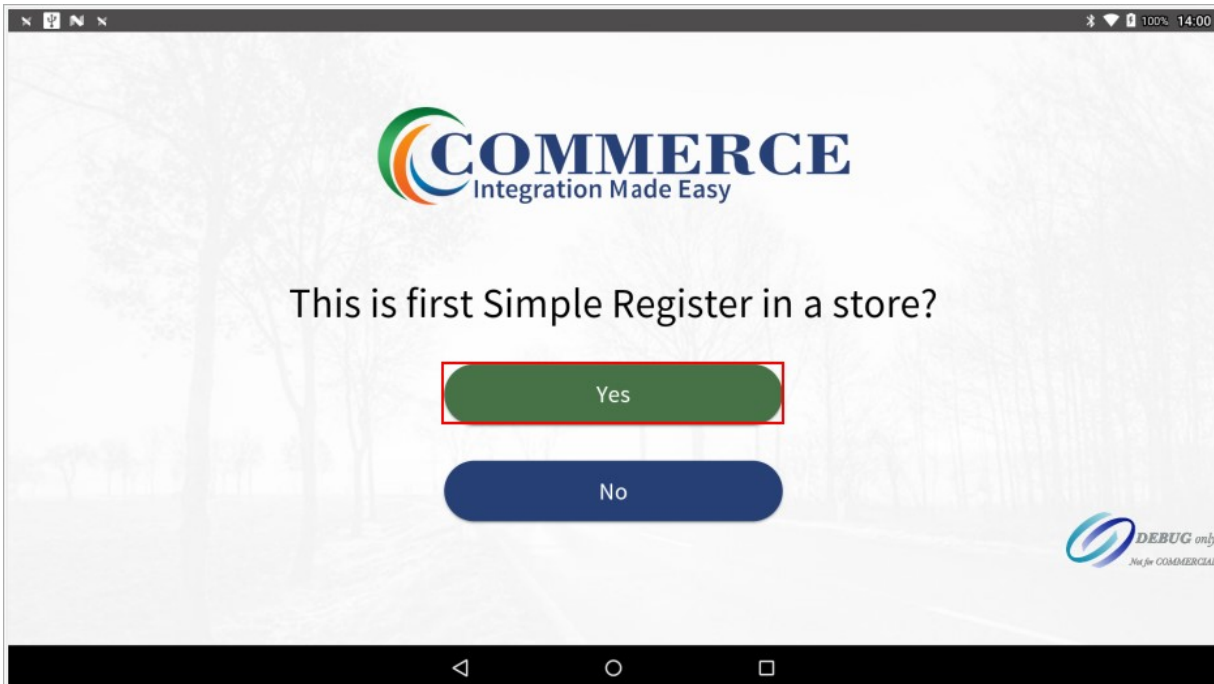
- ISOs
- Merchants
- Employees using Simple Register

2. Creating a Store

This section provides information on creating a store.
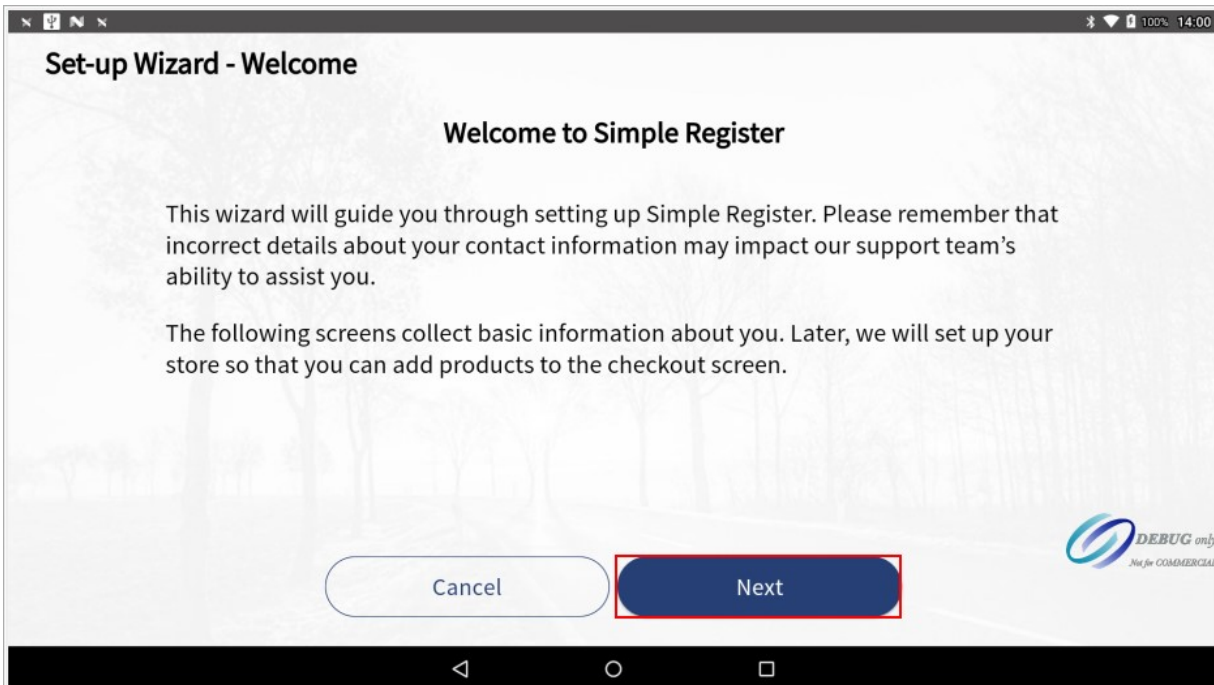
2.1 Creating a Store

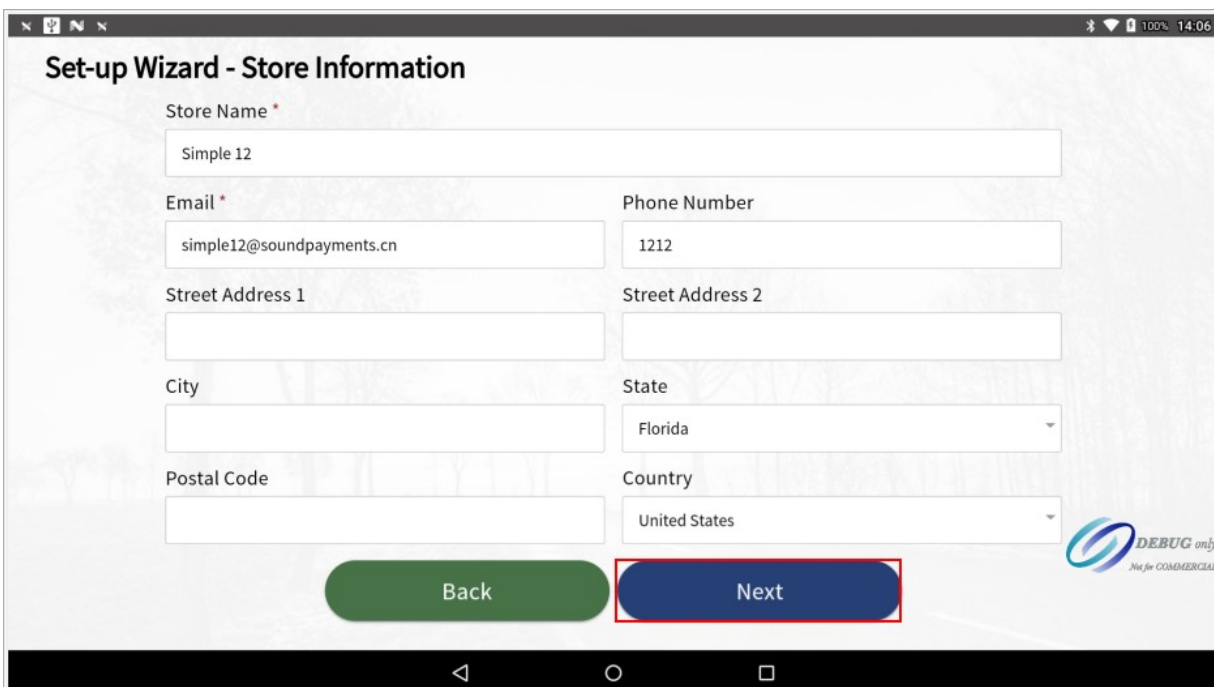Use the following steps to create a store.

>   1. On the homepage select **[Yes]** to create a store for the first POS device.

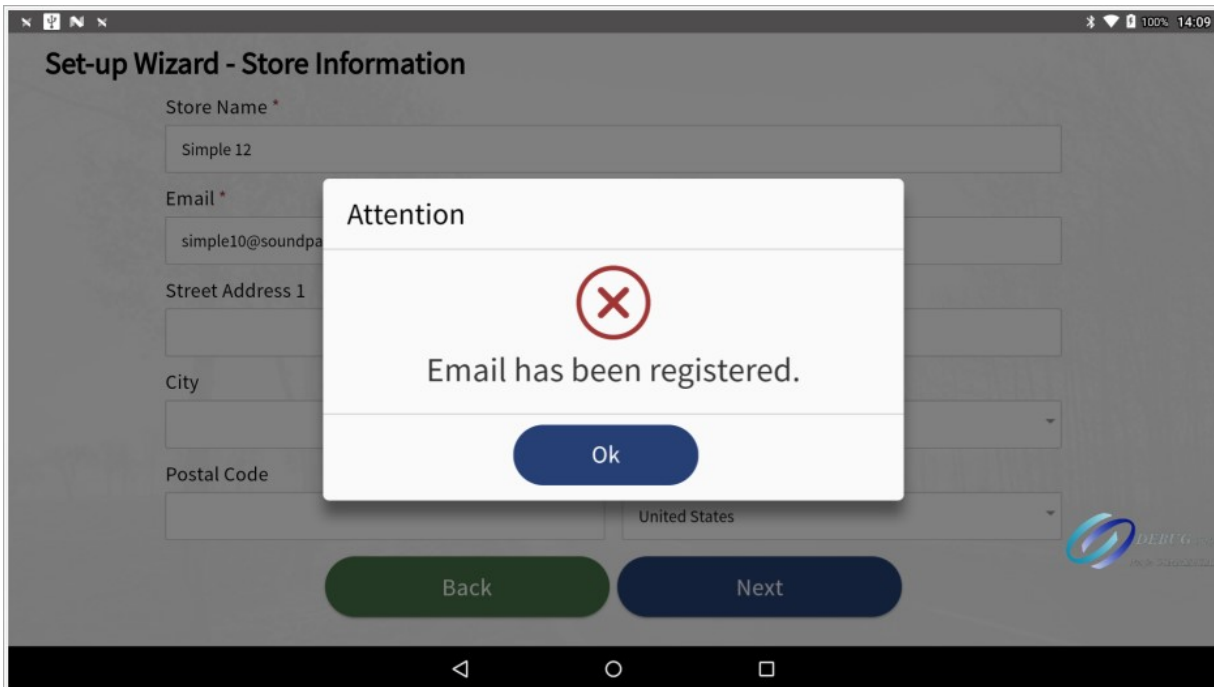2. Read the welcome information then select **[Next]**.

3. Input the store information then select **[Next]**. Sections marked with a red asterix are mandatory.

Note: Stores cannot share the same POS SN/ID, Store Name, and Email Address. The following error messages displays in instances where users attempt to use the same information to create a new Store.
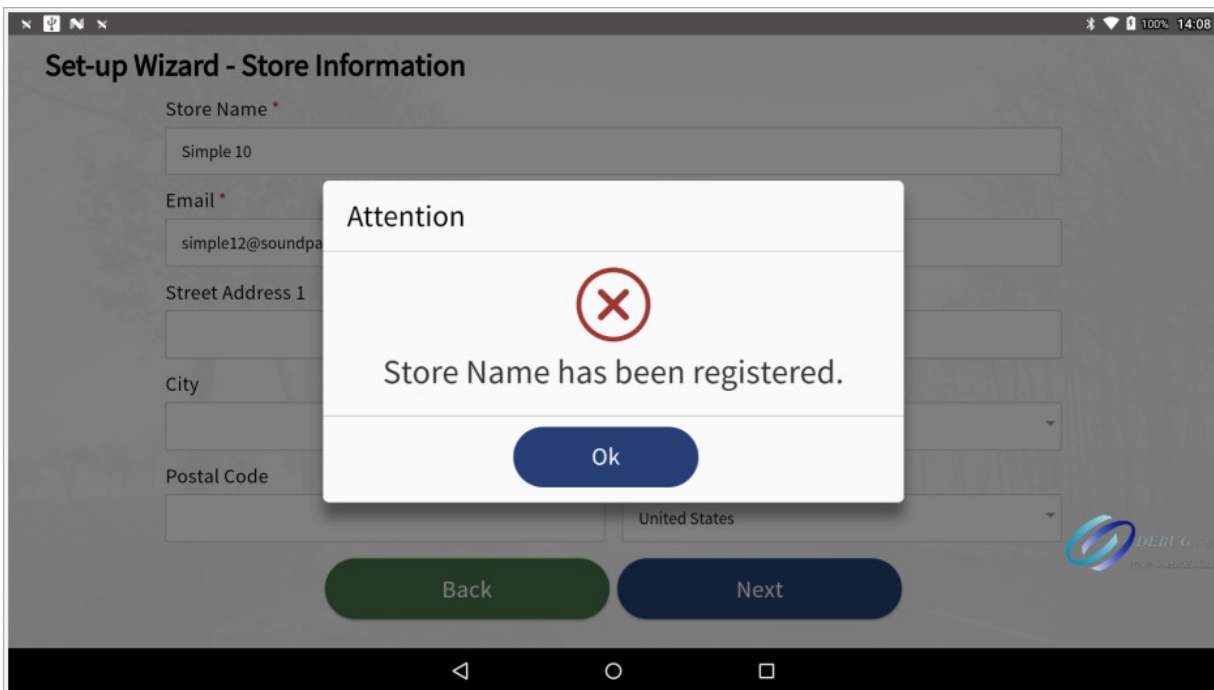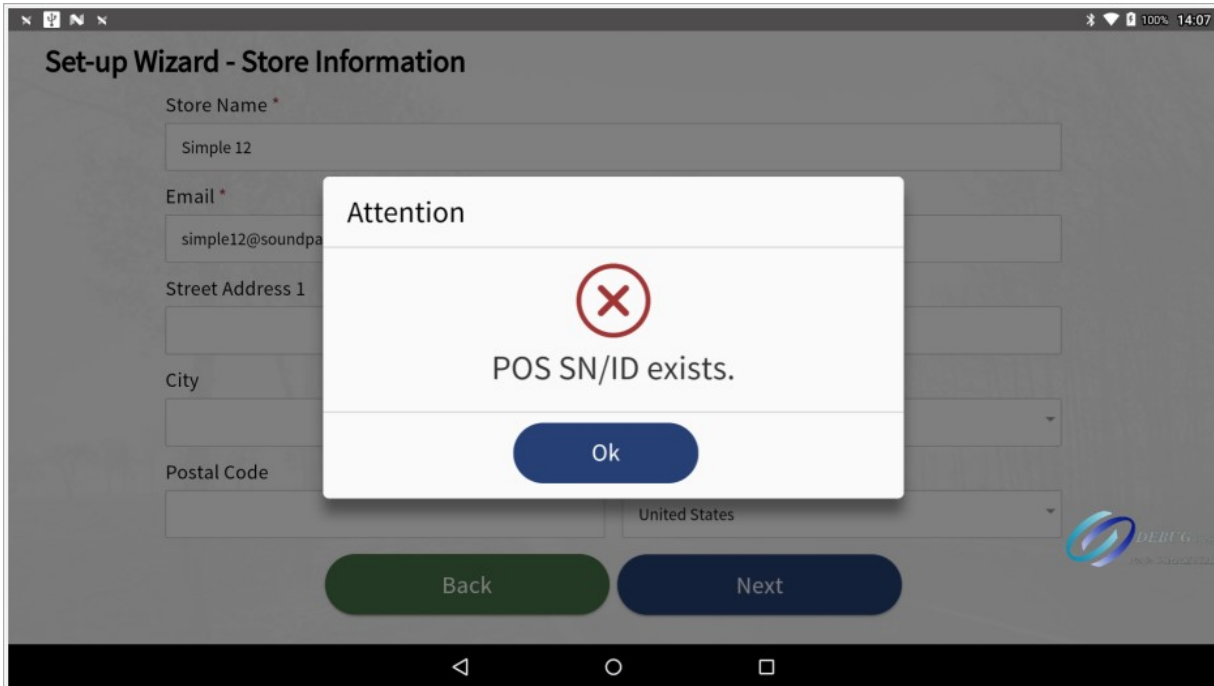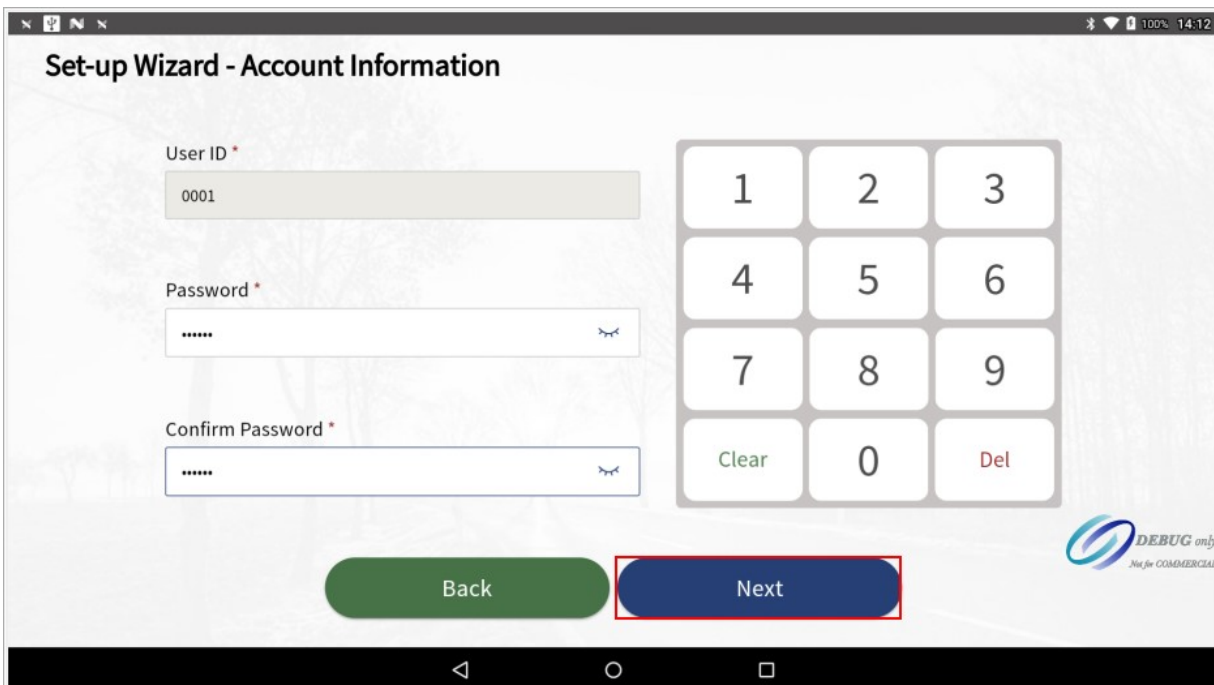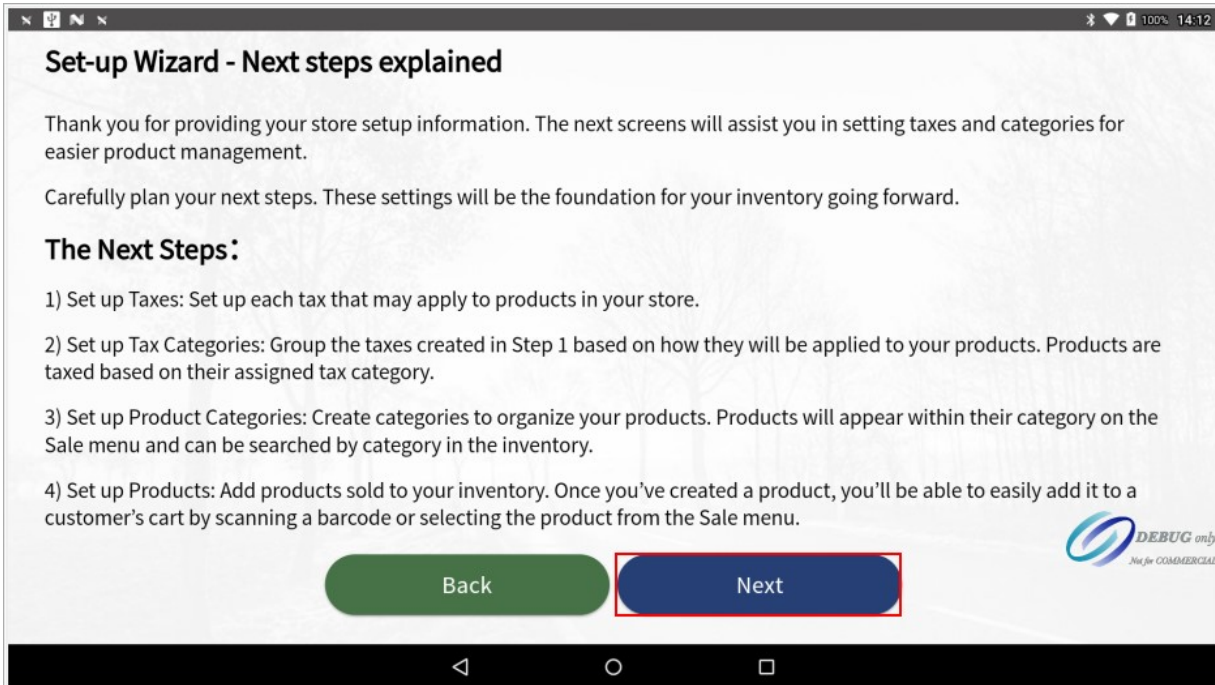
2.2 Setup Wizard

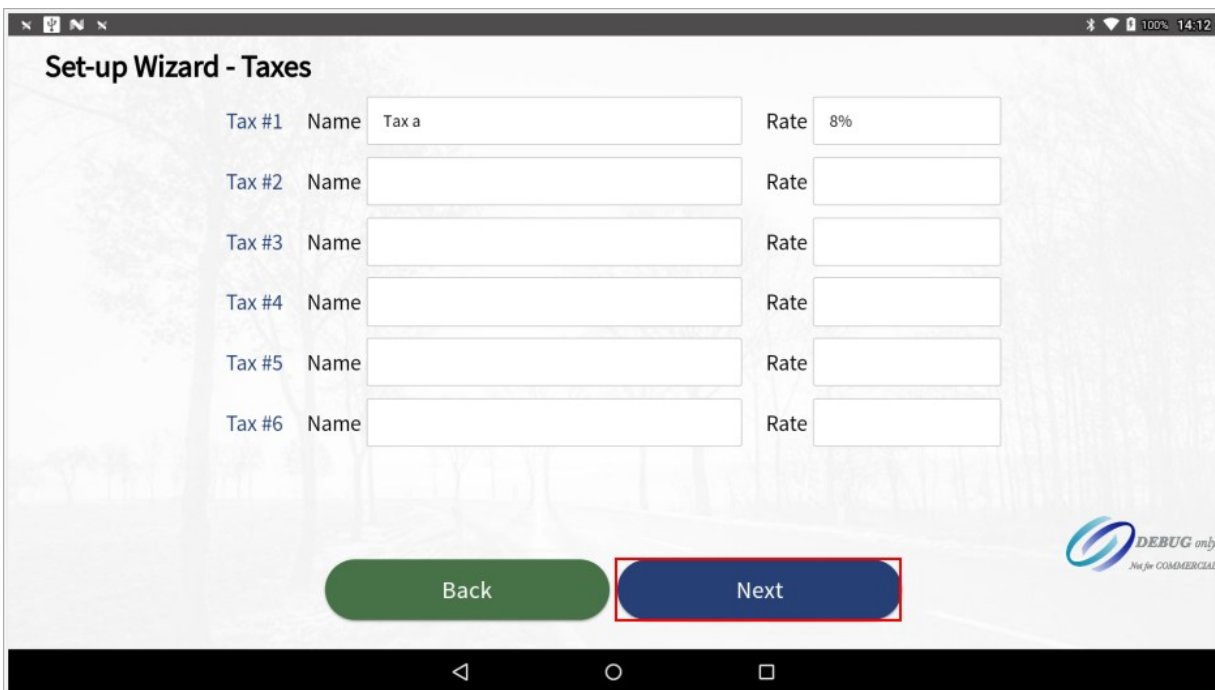Use the following steps to navigate the Setup Wizard.
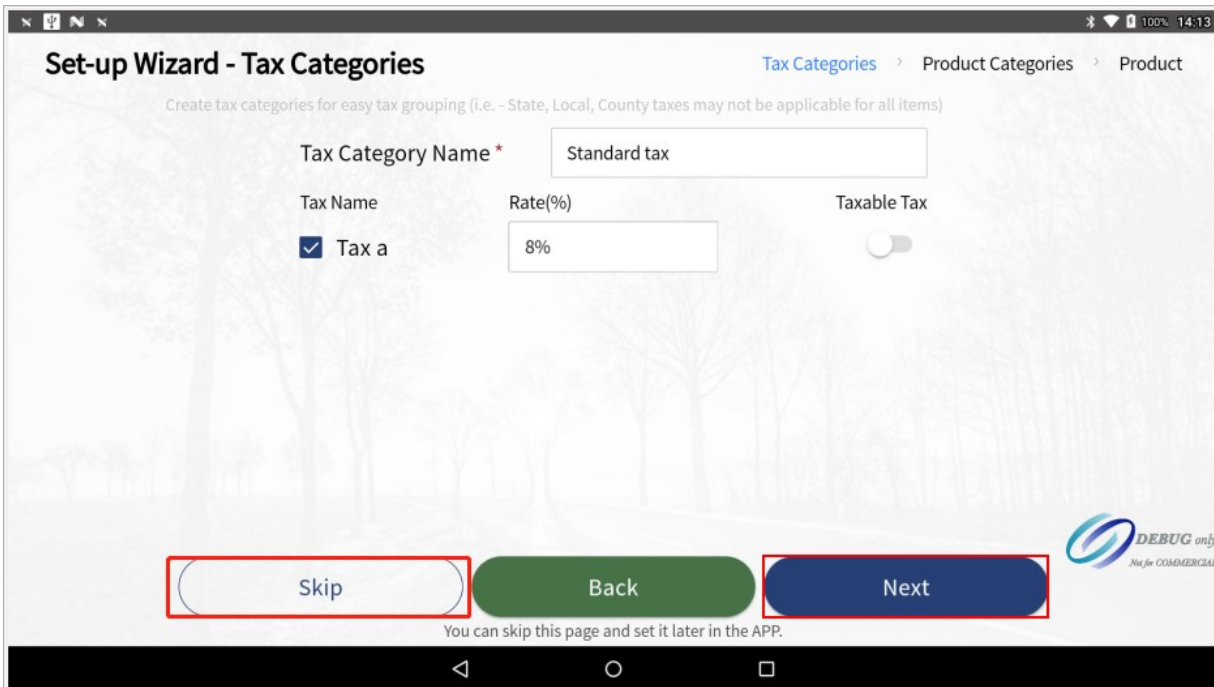
1. Set the login password for user: **0001**

2. Read the setup wizard information then select **[Next]**.

3. Users must set at least one tax template. Users **cannot** skip taxes in the Setup Wizard.

4. Enter the Tax Category information then select **[Next]**.

5. Enter the Product Category information then select **[Next]**.

6. Enter Product information then select **[Next]**.

7. Select the accepted Payment Methods then select **[Next]**.

8. The Save Successful confirmation displays. Select **[Ok]**.
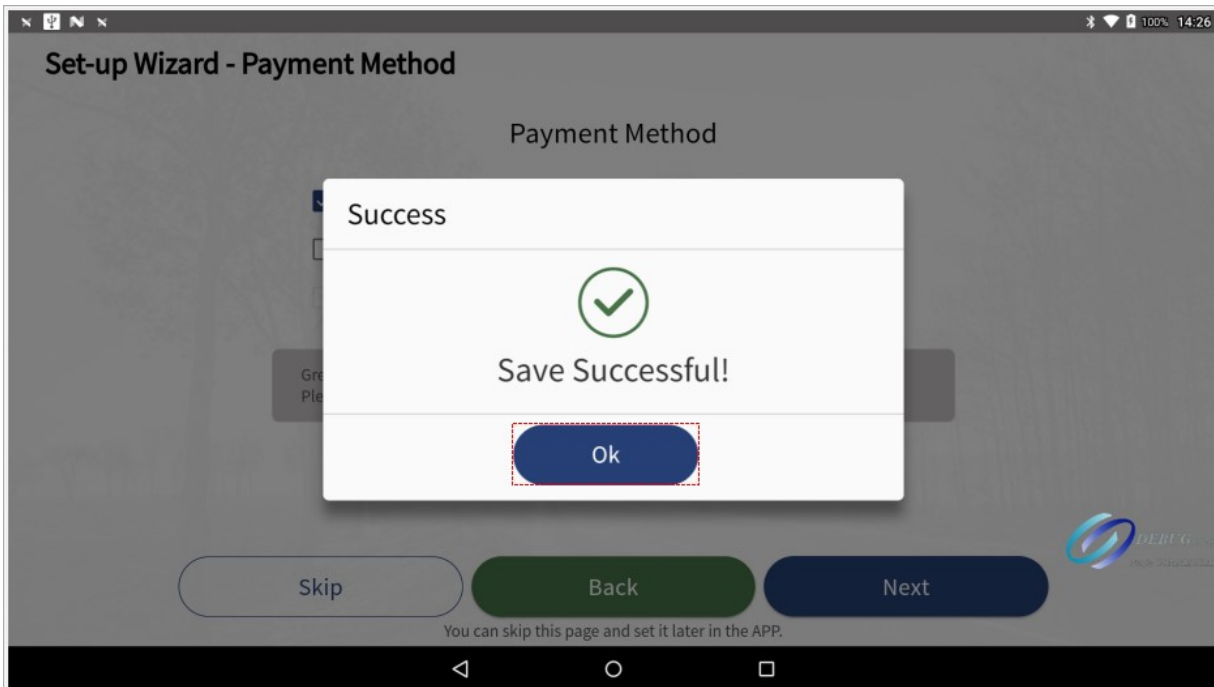
Note: Users can skip the Tax Categories, Product Categories, and Add Product sections by selecting **[Skip]**.
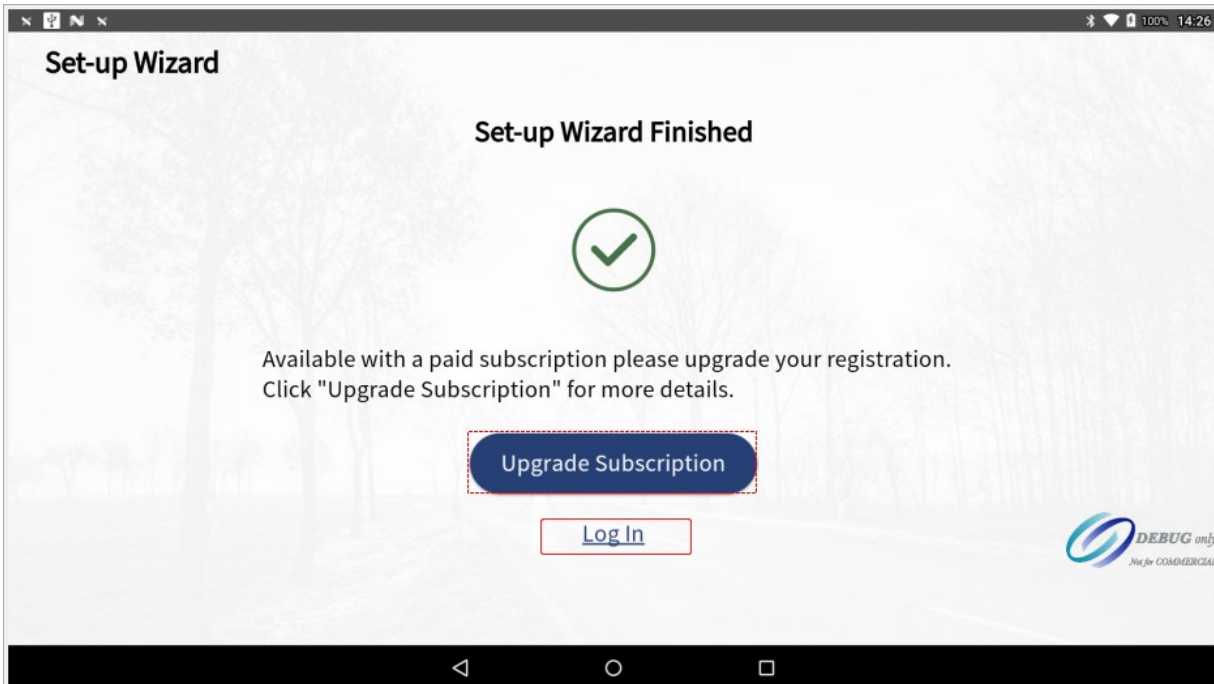
3. Send Upgrade Request

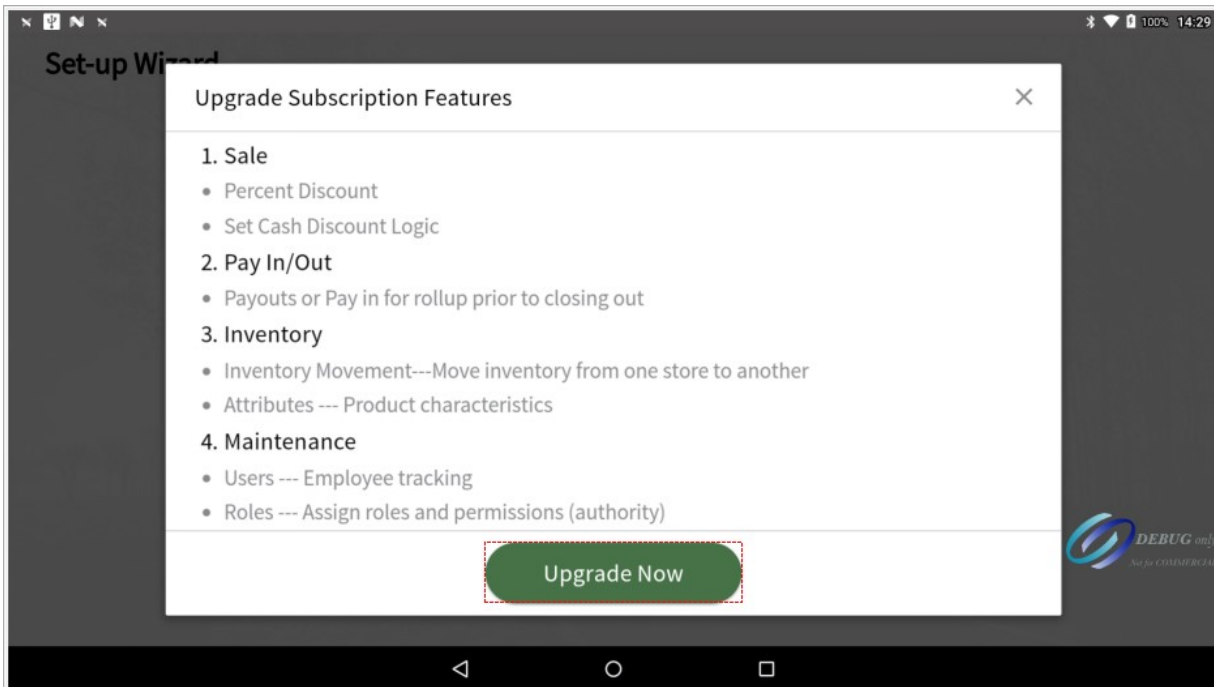This section provides information on sending upgrade requests.

3.1 Upgrade Subscription

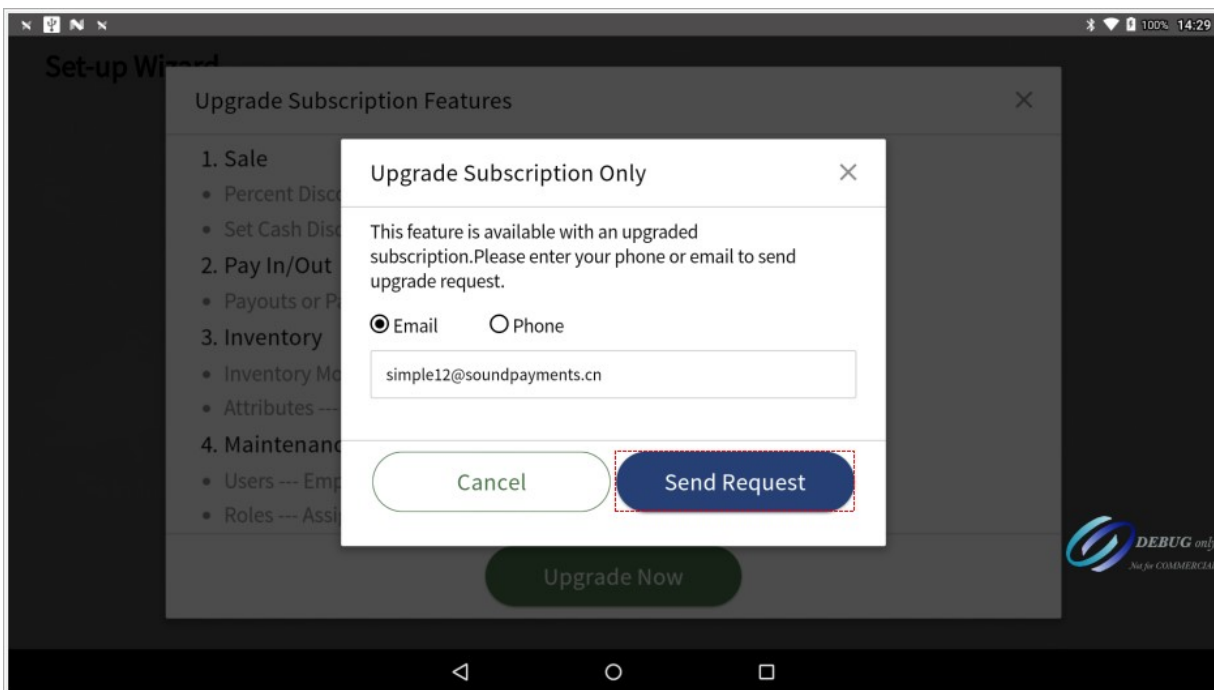Use the following steps to upgrade a subscription.

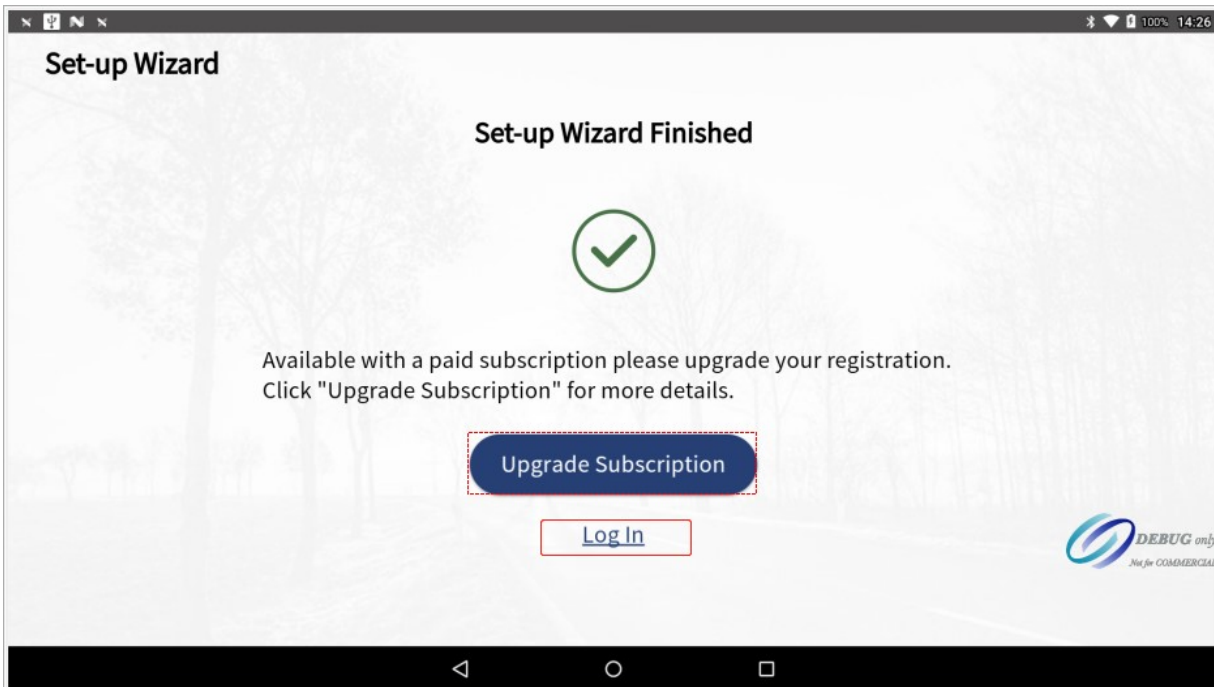> 1. Select **[Upgrade Subscription]**.

2. Select **[Upgrade Now]**.

3. Enter a phone number or email address then select **[Send Request]**.
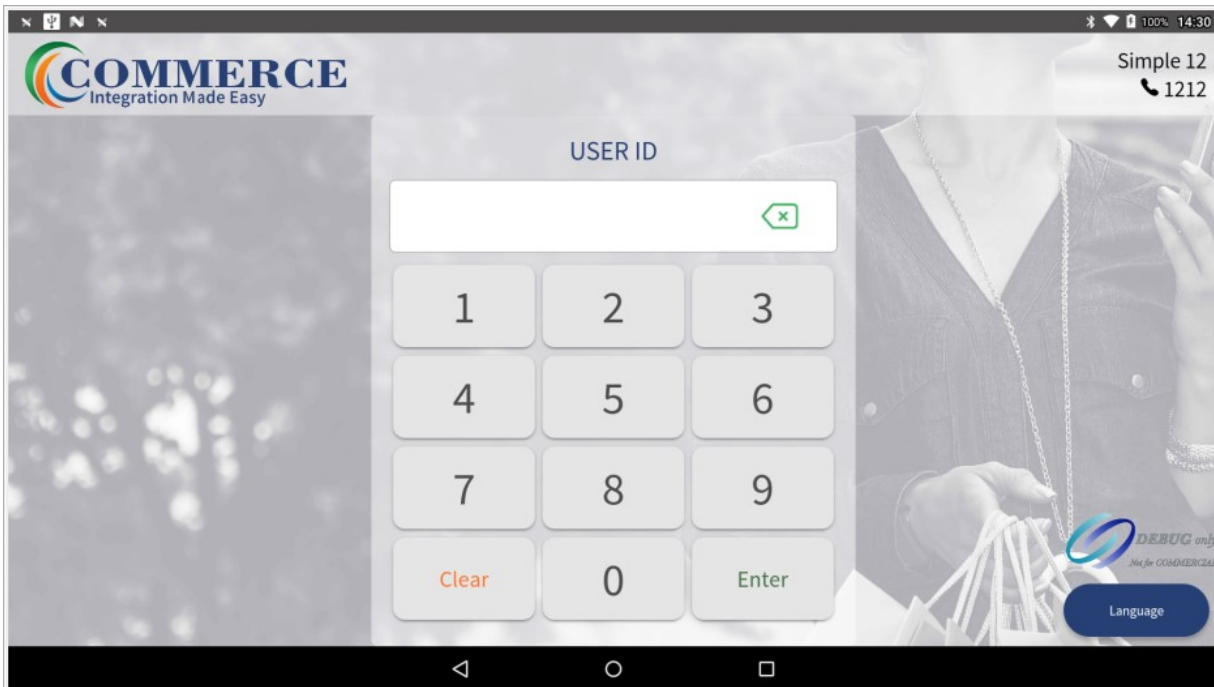
3.2 Login

Use the following steps to login to Simple Register.

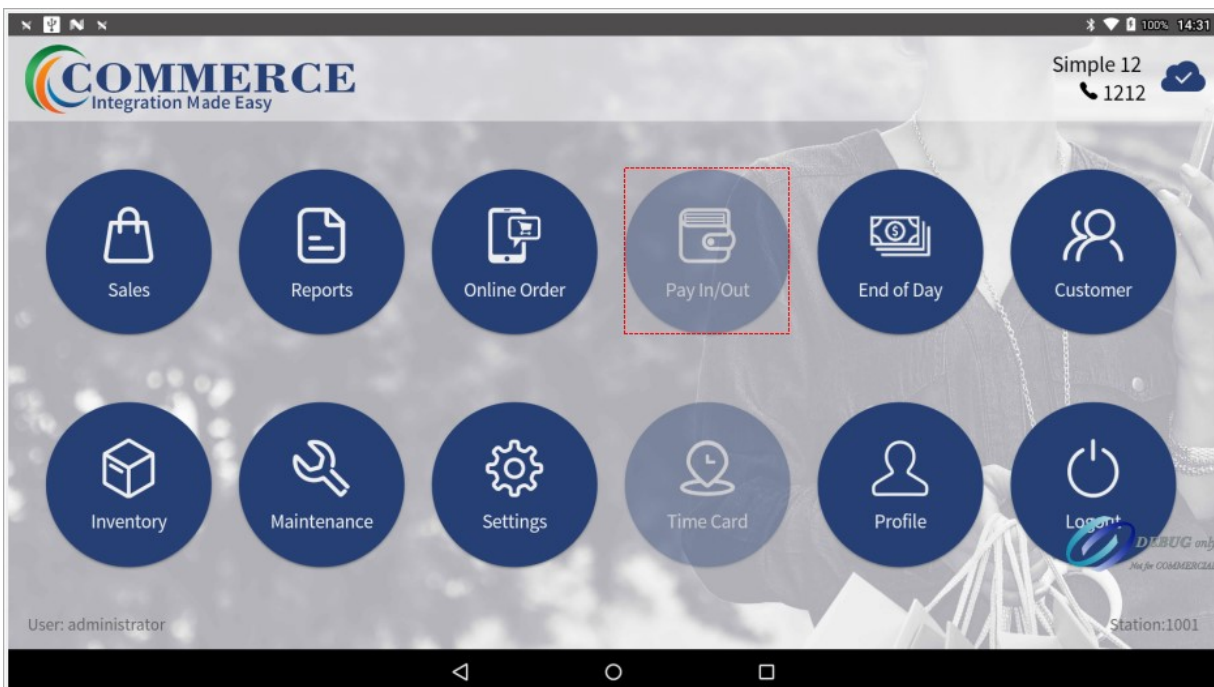1. Select **[Login]** for immediate access to Simple Register.

2. Enter the **User ID 0001** and the password created during the Setup Wizard.

Note: Users can send an Upgrade Request by clicking on any grayed-out icon.
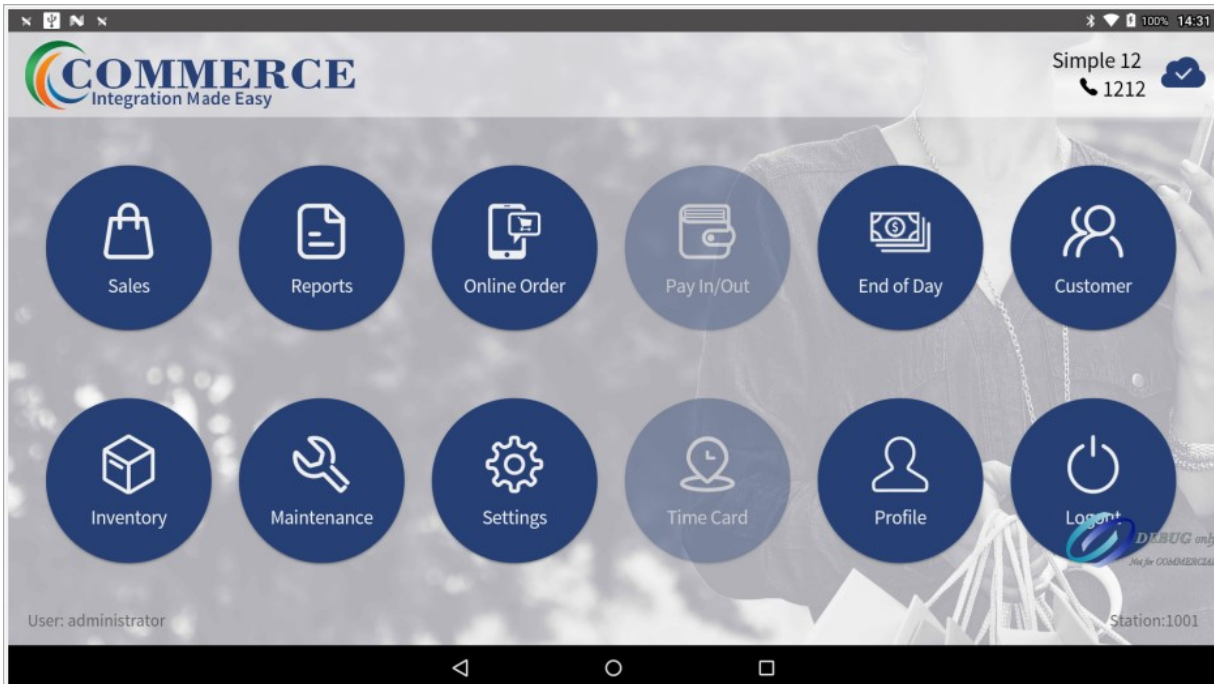
4. Second POS Device Activation

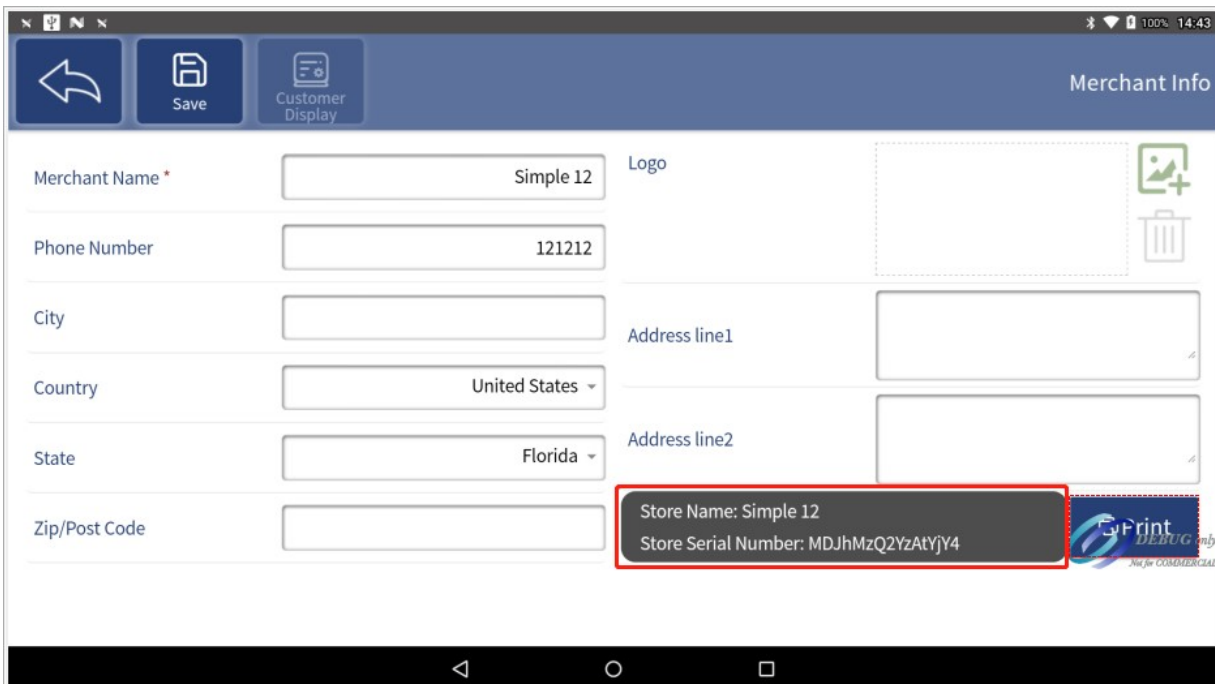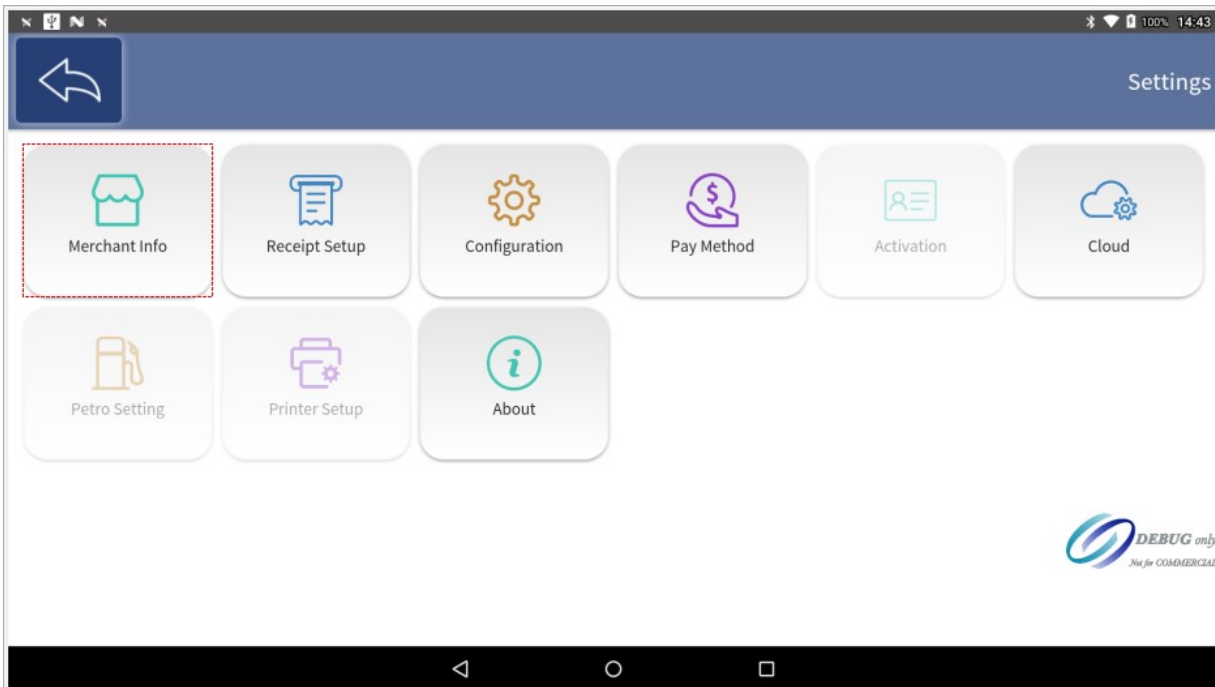This section provides instructions for activating a second POS Device.

4.1 Get Store Name and Serial

Use the following steps to get the Store Name and Serial Number.

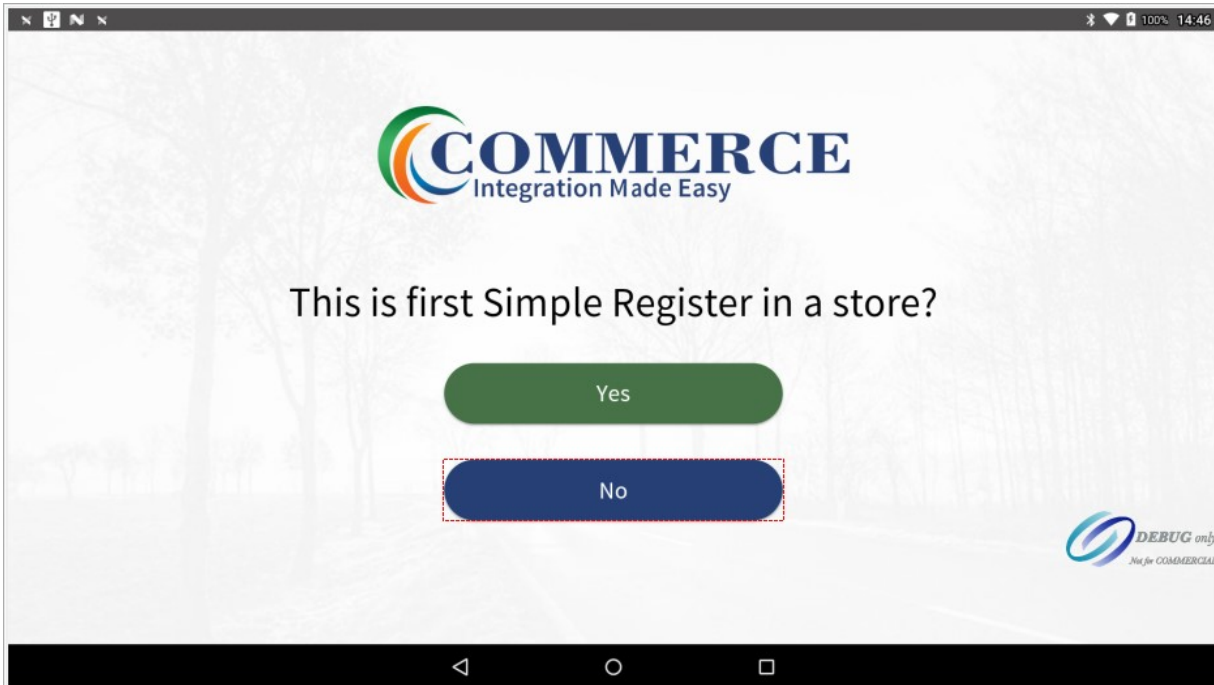> 1. In the first POS Device select **[Settings]**.

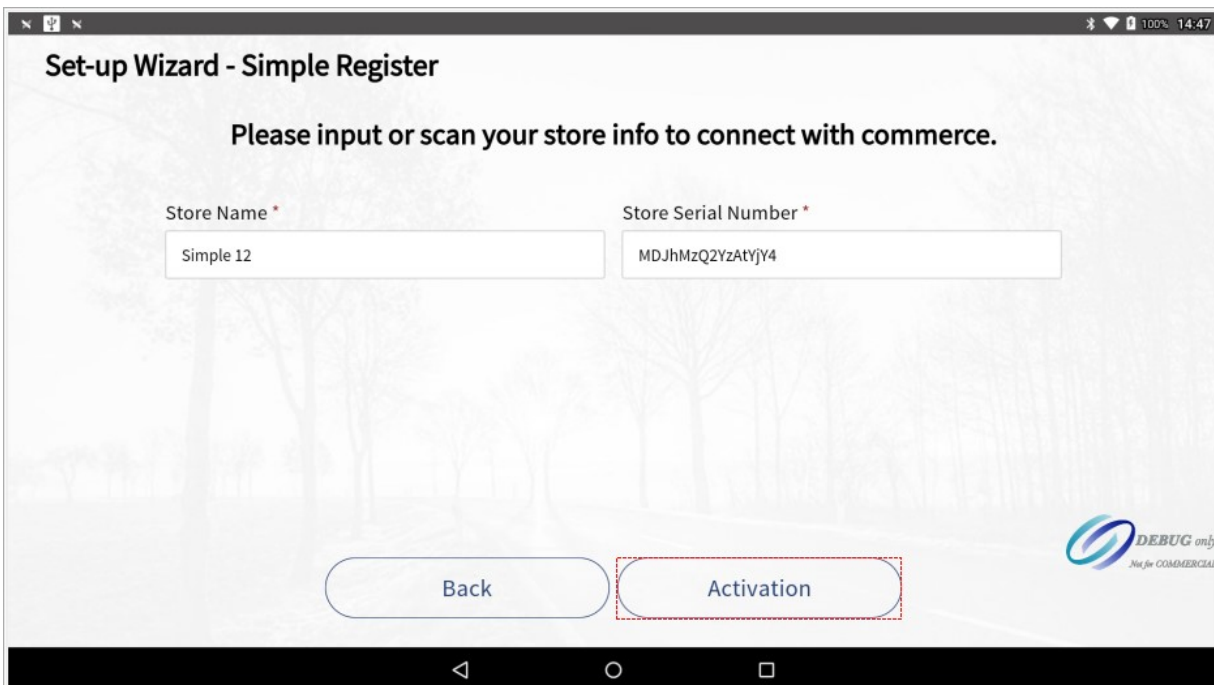2. Select **[Merchant Info]** to get the Store Name and SN.

4.2 Activate a Second POS Device

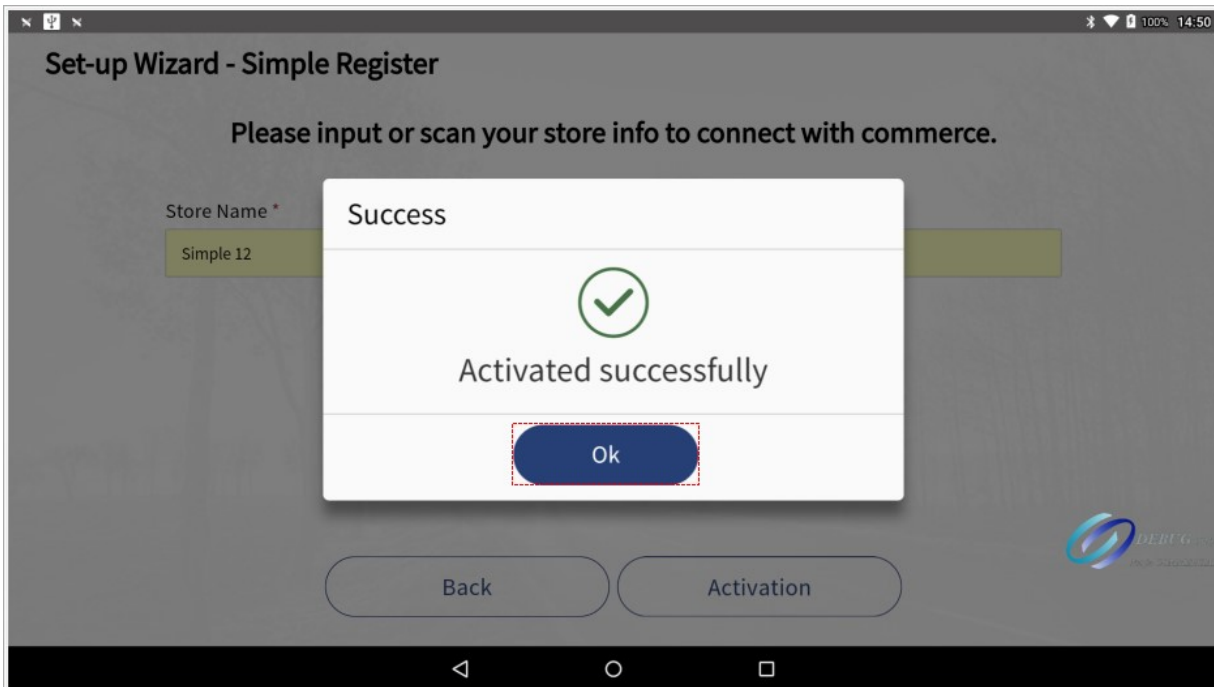Use the following steps to Activate a Scond POS Device.

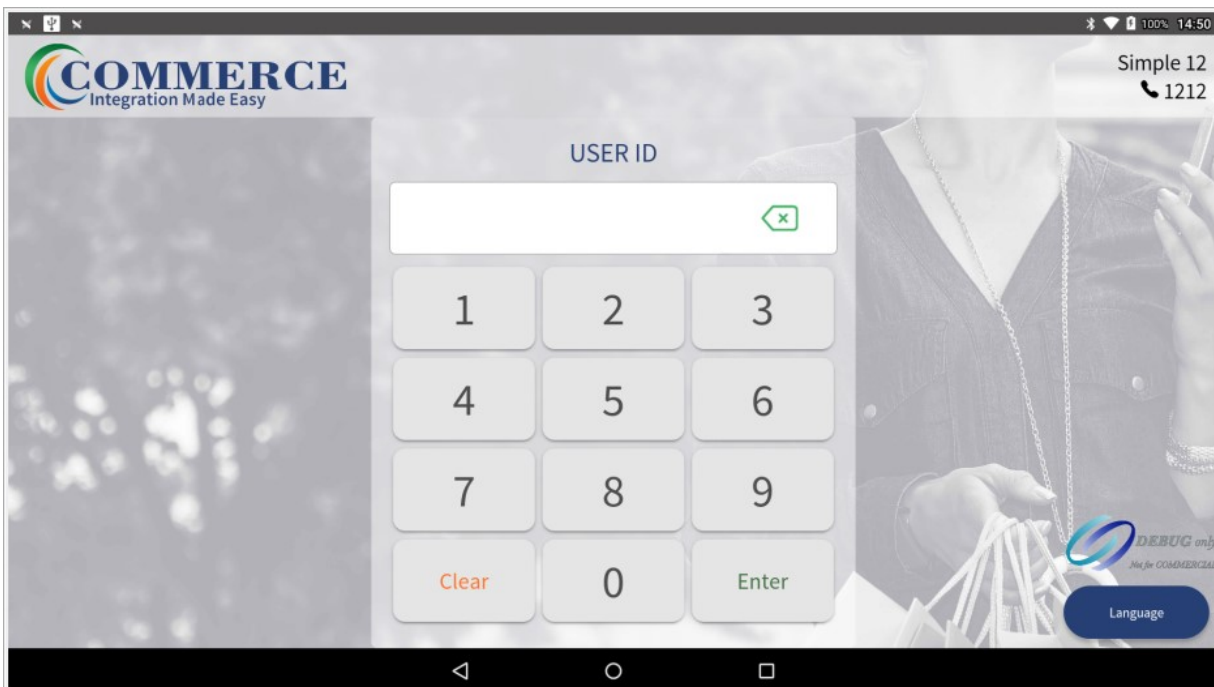1. From the homepage select **[No]**.

2. Enter the Store Name and Serial Number obtained from section 4.1 then select **[Activation]**.

3. The Activated Successfully confirmation displays. Select **[Ok]**.

4. Once complete, log in to the second terminal using **User ID 0001** and the original passcode for the store. With an upgraded subscription users can create a single sign-on for each user

PAX Customer Support

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

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