Corporate Training Guide for PX iPad Gift App

Pre Setup

- All clients must have signed a Paytronix Service Agreement prior to the below setup process
- Once the service agreement is signed, a customer deployment interview (CDI) will be held with the merchant and Paytronix team
- As of part of the initial setup merchant must call/email your Technology Consultant or support to setup store configuration files on the admin web portal
  - Contact information will be provided during the CDI
  - Store configuration is a one-time setup procedure

User Management and Permissions

- Merchant corporate admin users are responsible for staff user setup and permissions
  1. Login to the Paytronix web portal and navigate to User Administration > Manager Other Users section
  2. Create/edit a user on Paytronix merchant portal who will be responsible for setting up the device in the store (this permission should only be provided to appropriate staff)
  3. First Name, Last Name and **Email** must be entered for the user
  4. Email address is **required** to send the device validation code (this is extremely important when setting the PX app on the iPad)
  5. Click submit
- Click on "edit web page Permissions for this user"
  1. Give the user iPad authentication permission by selecting the "**Merchant Authenticate iOS Terminal**" permission
  2. Click submit
- Provide the merchant user their credentials
  - Username and password
- Provide the user with their store name in the PX systems
  - This is required for association and pairing with the Paytronix Merchant Processor Application. Be sure to mention that the correct store name must be selected during setup
  - This is extremely important as specific transactions from the app will be associated to the store the user selects during setup process
- Provide user with FAQ, Users guide, and Quick Reference guides from Paytronix support site for training purposes