

## iPad App Setup for Merchant Users

- What items need to be created in order to setup a location on an iPad?
- How do I create a user and give the iPad permission group to that user?
- After creating a user, what is the next step to ensure that the iPad is ready to be used at a specific location?
- The user and software config file has been created, what's next?

**i** Before starting to setup a location to use the Paytronix iPad Loyalty App, you will add the following permission group(s) to ensure that the users responsible for this process are able to log into the app and create the necessary config file for the app to function properly.

### **i** iPad Merchant Setup Permission Group - For Corporate User Admin

- Merchant Home
- Change own password
- Merchant Authenticate iOS Terminal
- Merchant Setup Software Configuration - Read
- Merchant Setup Software Configuration - Write

### **i** iPad Merchant Setup Permission Group - For Location Users

- Merchant Home
- Change own password
- Merchant Authenticate iOS Terminal

What items need to be created in order to setup a location on an iPad?

**Paytronix will create the following items for a merchant's first iPad location:**














- Create a config file set for iOS
- Create iOS Configuration File
- Create iOS Software Config
- Create and give iPad Permission Group to appropriate corporate user admin(s)

Once these items have been created in our system, for any future locations that would like to use the Paytronix iPad app, **we recommend the corporate user admin create a user per location and give those users the appropriate iPad Permission Group(s).**

How do I create a user and give the iPad permission group to that user?

**i** If you are a user admin that already has these permission groups applied to their account, you can proceed to the following steps below. If you need this permission group added to your account, please contact another User Admin in your organization or reach out to the Paytronix Support Team for further assistance.

1. Navigate to the Paytronix Portal and in the Quick Find search bar, type in "Manage Other Users"

	manage other users <span style="float: right;">x</span>
	Manage Other Users
	Report Center
	Customer Service
	Marketing Tools
	Order and Delivery
	Reconciliation Tools
	Store Administration
	Program Administration
	User Administration
	Billing
	Money Movement
	Collapse

2. Next, click on "New User"

[Home](#) / [Select User](#)

## Select User

[New User](#)    

3. Then, fill out all the necessary information including a valid email address to send the verification code to

<b>User Type*</b>	Merchant
<b>Status*</b>	Active
<b>Locked Out Until</b>	N/A
<b>Username*</b>	<input type="text"/>
<b>Password*</b>	<input type="password"/>
	<input type="password"/>
<b>First Name</b>	<input type="text"/>
<b>Middle Initial</b>	<input type="text"/>
<b>Last Name</b>	<input type="text"/>
<b>Address</b>	<input type="text"/>
<b>Address 2</b>	<input type="text"/>
<b>City</b>	<input type="text"/>
<b>Country*</b>	<Select One>
<b>State/Province*</b>	<Select One>
<b>Zip/Postal Code</b>	<input type="text"/>
<b>Phone</b>	( <input type="text"/> ) <input type="text"/> - <input type="text"/>
<b>Mobile Phone</b>	( <input type="text"/> ) <input type="text"/> - <input type="text"/>
<b>Fax</b>	( <input type="text"/> ) <input type="text"/> - <input type="text"/>
<b>Email</b>	<input type="text"/>
<b>Receive System Notifications</b>	<input type="checkbox"/>

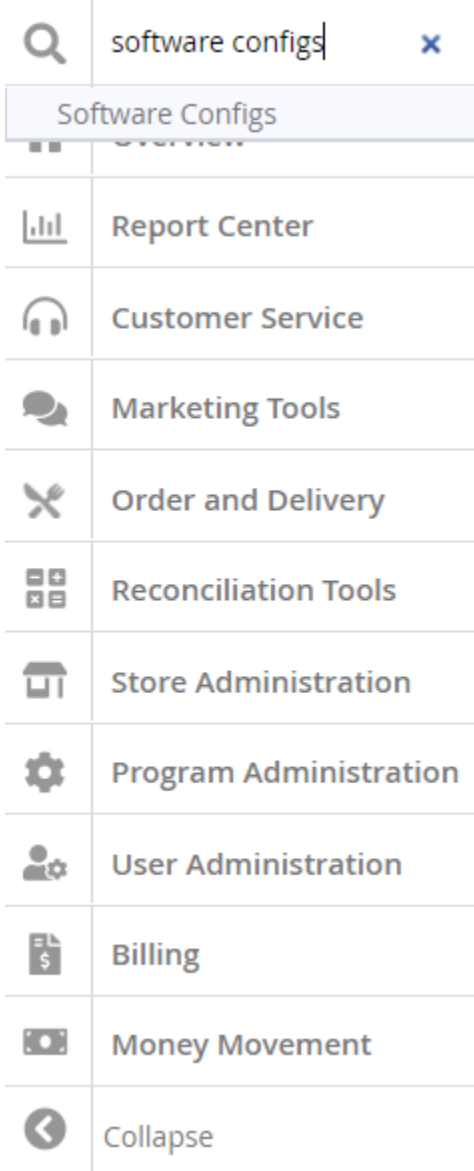
4. Finally, scroll to the bottom of the user page and select the appropriate iPad Permission Group for either corporate user admins or location users in the Merchant Groups:

<b>Permission Groups</b>	<b>System Groups:</b>	
	<input type="checkbox"/> CSR - Lookup   View Only <input type="checkbox"/> CSR - Lookup   View   Edit info <input type="checkbox"/> CSR - Lookup   View   Edit Info   Adjust <input type="checkbox"/> Denver Master Class 2019 <input type="checkbox"/> IT - Store Admin <input type="checkbox"/> IT - User Admin DO NOT USE <input type="checkbox"/> LSM - Corporate HQ <input type="checkbox"/> LSM - Reviewer <input type="checkbox"/> LSM - Store Level User <input type="checkbox"/> Merchant Admin <input type="checkbox"/> Merchant CSR <input type="checkbox"/> Merchant Default <input type="checkbox"/> Merchant Email Manager <input type="checkbox"/> Merchant Email Self Reviewer <input type="checkbox"/> Merchant Finance <input type="checkbox"/> Merchant Franchisee <input type="checkbox"/> Merchant Marketing <input type="checkbox"/> Merchant Order and Delivery <input type="checkbox"/> Merchant Reports - Charge <input type="checkbox"/> Merchant Reports - General <input type="checkbox"/> Merchant Reports - Loyalty	<input type="checkbox"/> Merchant Reports - Reconciliation <input type="checkbox"/> Merchant Reports - RFM <input type="checkbox"/> Merchant Reports - Stored Value <input type="checkbox"/> Merchant Store Admin <input type="checkbox"/> Merchant Store Manager <input type="checkbox"/> Merchant User Admin <input type="checkbox"/> Merchant Web Order Setup <input type="checkbox"/> Mktg - Campaign/Account Filters <input type="checkbox"/> Mktg - Email/Account Filters <input type="checkbox"/> Mktg - Messaging Full Access <input type="checkbox"/> Mobile App Image Editor <input type="checkbox"/> Multi-Merchant Access <input type="checkbox"/> Reports - Dashboards & Analyzer <input type="checkbox"/> Reports - Dashboards Only <input type="checkbox"/> Reports - General <input type="checkbox"/> Reports - Loyalty <input type="checkbox"/> Reports - Money Movement <input type="checkbox"/> Reports - Reconciliation <input type="checkbox"/> Reports - Stored Value <input type="checkbox"/> Text and SMS view and edit capability
	<b>Groups:</b>	
	<input type="checkbox"/> Account Lookup <input type="checkbox"/> Adjustments <input type="checkbox"/> Corporate Finance <input type="checkbox"/> eGift Order Resend <input type="checkbox"/> Franchisee Reports	<input type="checkbox"/> iPad Merchant Setup Permission Group - Corporate User Admin <input type="checkbox"/> iPad Merchant Setup Permission Group - Location Users <input type="checkbox"/> IT <input type="checkbox"/> User Admin

After creating a user, what is the next step to ensure that the iPad is ready to be used at a specific location?

1. Once the necessary user for that location has been created, you will want to ensure that the software configuration file for that location has been created. To create the software configuration file for that location, follow the steps below.

1. Navigate to the Paytronix Portal and in the Quick Find search box type "Software Configs"



2. Once you reach the software configs page, select "New Software Configuration"

[Home](#) / [Select Software Configuration](#)

## Select Software Configuration

[New Software Configuration](#)    

3. Then, select the store you are creating the software configuration for in the dropdown menu

4. Then, add a label to easily identify the location and that it is an iOS software config file. For example "[LOCATION NAME] iOS Config File" where you fill out the brackets with the store name

5. From the platform dropdown, select "Paytronix iOS"

<b>Store</b>	n/a
<b>Label*</b>	
<b>Platform*</b>	<Select One>
<b>Configuration File Set</b>	<Select One> Paytronix Verifone 3750 configuration DropTank Clapton Paytronix Aloha User Program <b>Paytronix iOS</b> Paytronix Maitre'D Paytronix SIM on MICROS 3700 Paytronix SIM on MICROS 8700 Paytronix SIM on MICROS 9700 Paytronix Pixel Point Paytronix POSitouch Paytronix POSitouch User Program Paytronix Xpient User Program Paytronix Controller on SCO UNIX Paytronix Controller on Windows

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6. Finally, from the Configuration File Set, select the configuration file set that has the iPad or iOS label in it.

The user and software config file has been created, what's next?

- Once the user and the software config file for the location has been created the next step will be to have the user log in using the credentials that have been setup.
- The new user will receive a verification code to the email specified in their account
- Then, once successfully logged in, it is important to run some tests to make sure all the functions needed at the location are functioning properly