

User's Guide

Paytronix Merchant Processor iPad Application

Updated November 9, 2018

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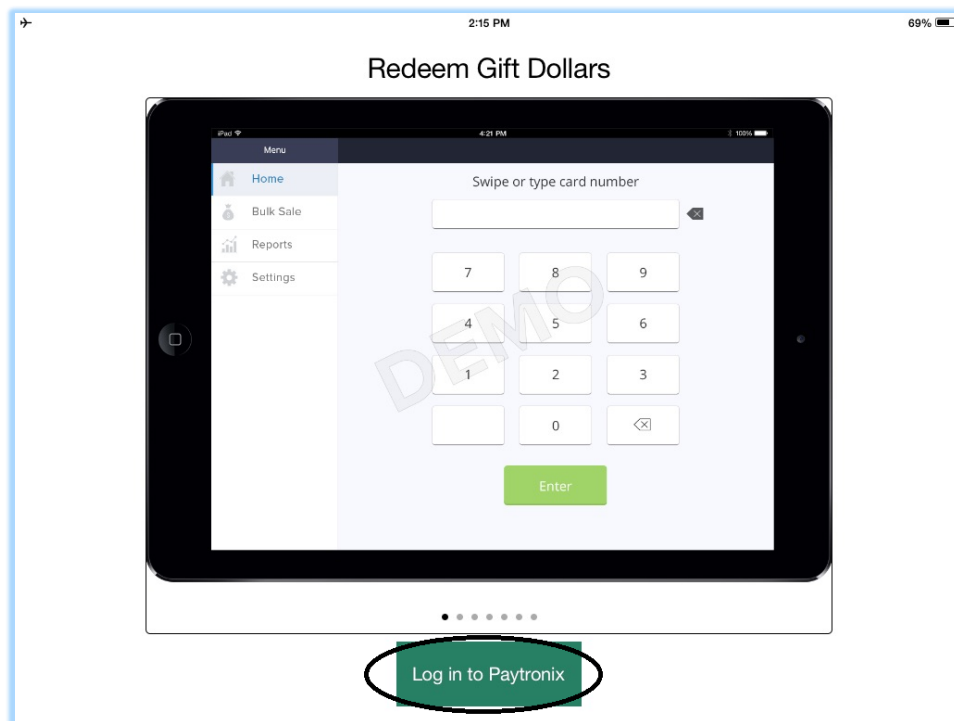
Set Up

Downloading the Application:

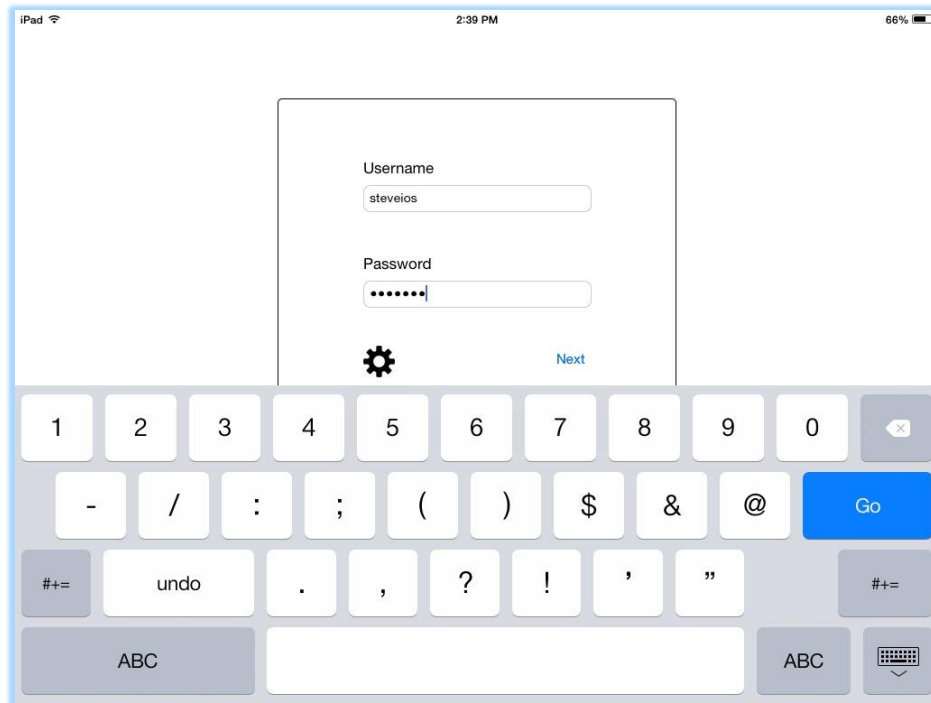
1. Launch the App Store from the iPad device.
2. Search for "Paytronix Merchant Processor" in the search bar.
3. Press "GET" to download and install the App (it may ask for your App Store credentials if you don't have automatic downloads turned on).
4. Once the App is downloaded and installed it will reside on your iPad Home Screen.

Getting the Application Ready for Use:

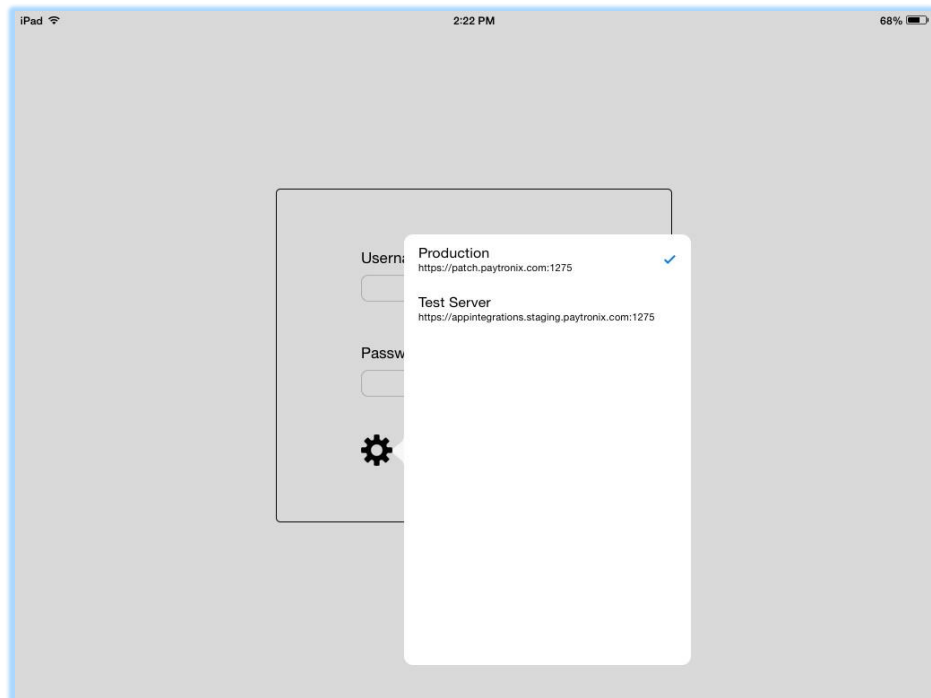
1. Launch the Paytronix Merchant Processor App (You will see swipeable screens on the Home page of the app giving you an overview of the app itself).
2. Press the "Log in to Paytronix" button at the bottom of the screen.



3. Enter your Username and Password. This is provided by your corporate office. If you don't have this information, please contact your corporate office.



4. Press the gear icon, it will prompt you to choose which server to point the application to. Choose Production.



5. Press "Next".

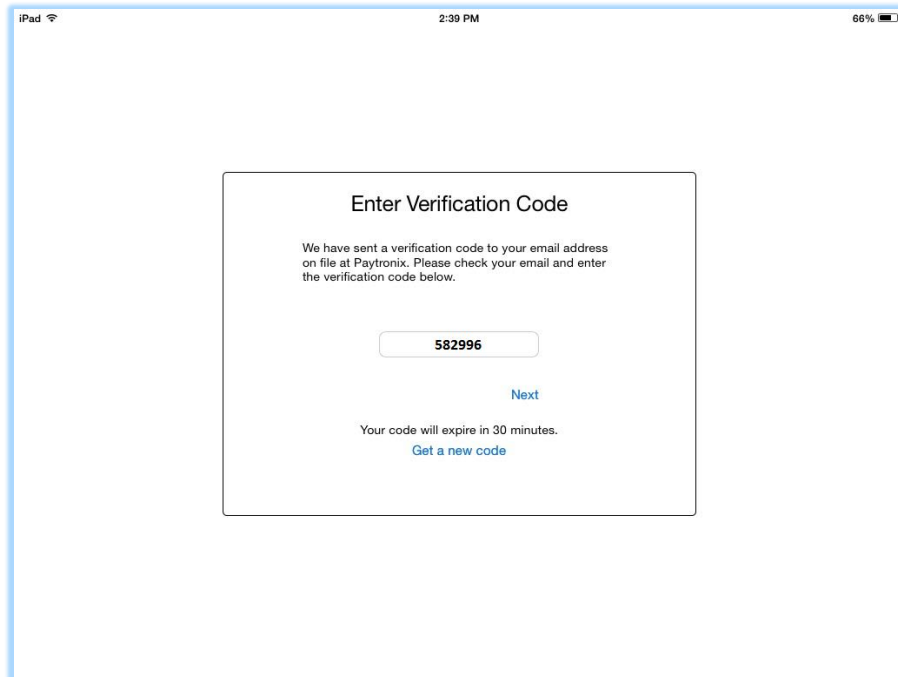
- A verification code will be sent to the email address associated to the user credentials used in the previous step.

HelloSteve, A terminal has been activated with your username.

Your validation code is 582996.

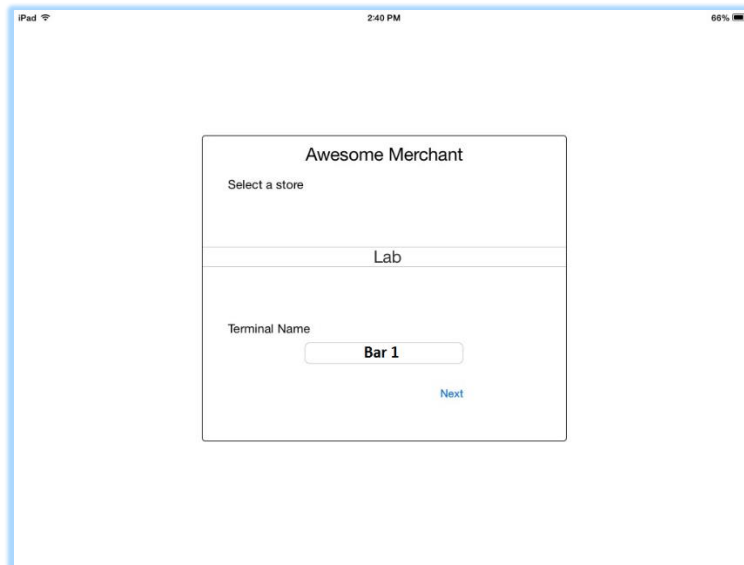
Please enter this validation code at the terminal to continue setting up your program. If you believe this to be in error, please contact support.
This is an auto-generated message.
Please do not reply.

- Enter the code and press "Next".



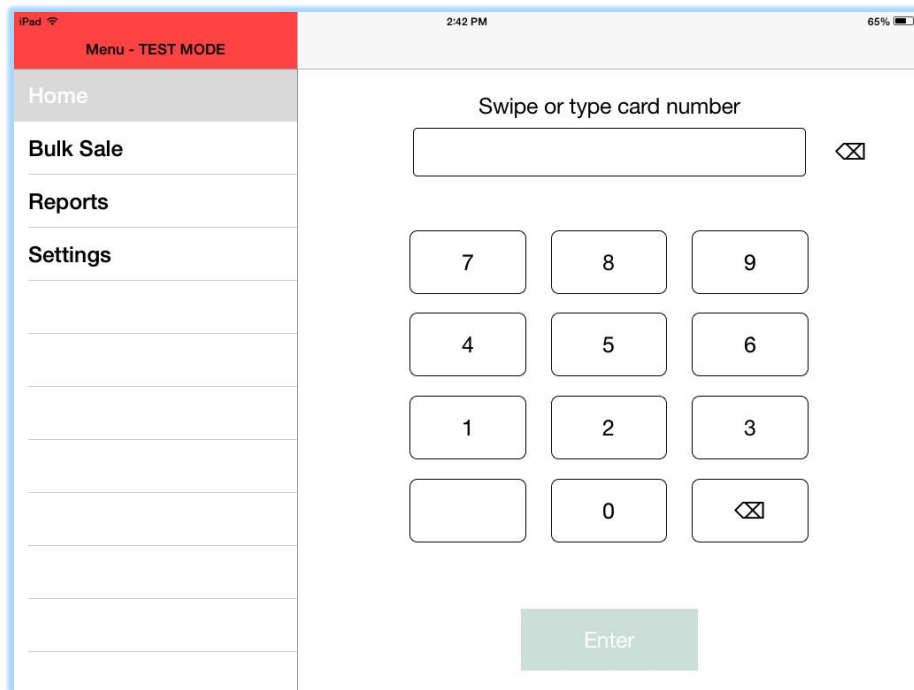
- Select your **specific** store, this is extremely important for liability and reporting purposes

9. Enter a terminal name for the device. (It is important to choose a unique name that is descriptive, such as "Bar 1" so that you can keep track of your devices).



The screenshot shows the iPad app interface for 'Awesome Merchant'. At the top, it says 'Awesome Merchant' and 'Select a store'. Below that, there is a dropdown menu with 'Lab' selected. Underneath, there is a 'Terminal Name' label and a text input field containing 'Bar 1'. A blue 'Next' button is located at the bottom right of the form.

10. Press "Next".
11. The app will make communication out to the Paytronix servers to connect. If successful, you will be brought to the app Home Screen. If unsuccessful, please refer to FAQs for troubleshooting.



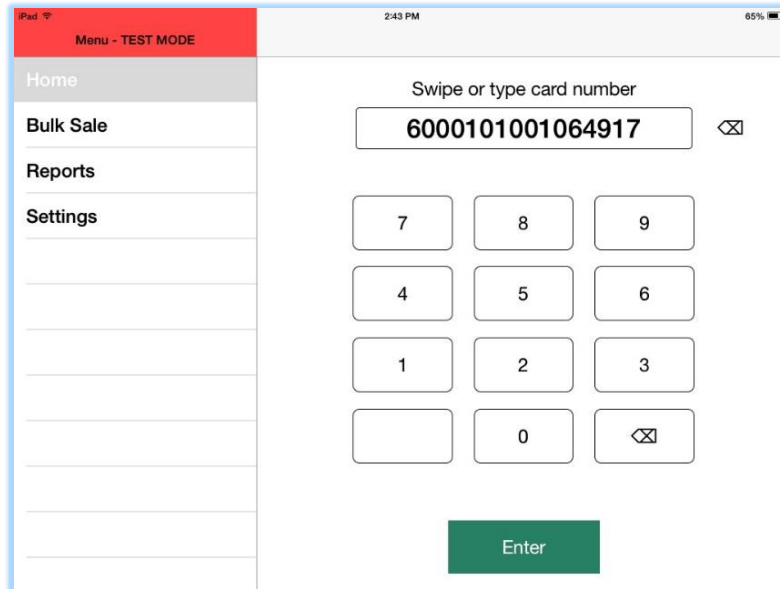
The screenshot shows the iPad app Home Screen. On the left, there is a red header bar with 'Menu - TEST MODE'. Below it, a sidebar menu lists 'Home', 'Bulk Sale', 'Reports', and 'Settings'. The main content area has a title 'Swipe or type card number' and a text input field with a clear button. Below the input field is a numeric keypad with buttons for digits 7, 8, 9, 4, 5, 6, 1, 2, 3, and 0, along with a clear button. At the bottom, there is a green 'Enter' button.

You are now ready to use the App!

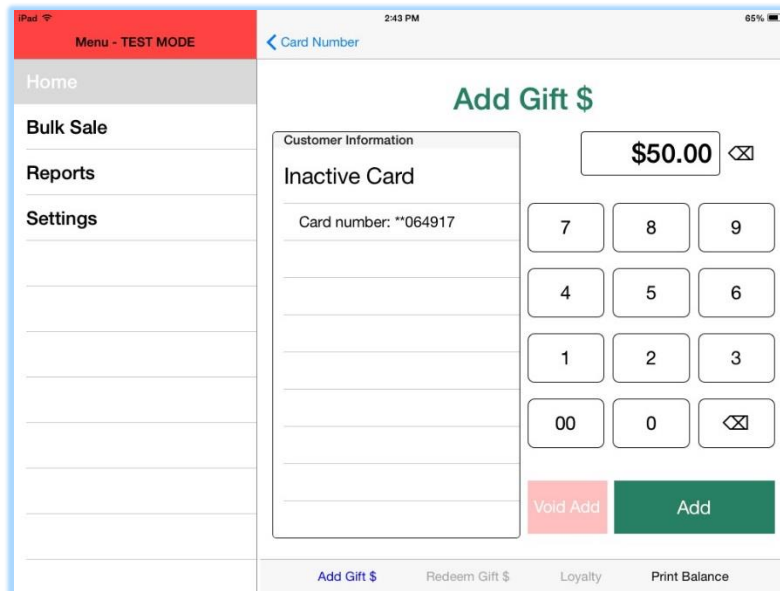
Gift Cards

Selling a Gift Card:

1. From "Home" screen swipe or type INACTIVE card.



2. Enter amount to be sold and press the "Add" button at the bottom right corner.



3. Card is activated and value is added.
4. Choose to print receipt or not.

Bulk Selling Gift Cards:

1. Press "Bulk Sale" button on left nav menu.
2. Swipe or type first card number and press "Next".

Menu - TEST MODE

Home

Bulk Sale

Reports

Settings

Swipe or type first card number

6000101001063216

1 Enter First Card Num...

2 Enter Last Card Num...

3 Enter Number of Cards

4 Enter Amount

5 Confirm Sale

7 8 9

4 5 6

1 2 3

0

Next

3. Swipe or type last card number and press "Next".

Menu - TEST MODE

Home

Bulk Sale

Reports

Settings

Swipe or type last card number

6000101001063307

✓ Enter First Card Num...

2 Enter Last Card Num...

3 Enter Number of Cards

4 Enter Amount

5 Confirm Sale

7 8 9

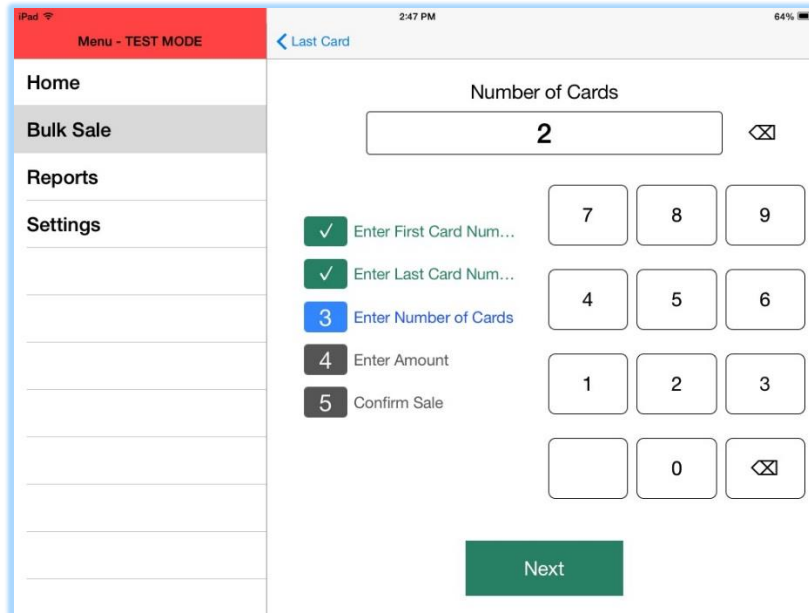
4 5 6

1 2 3

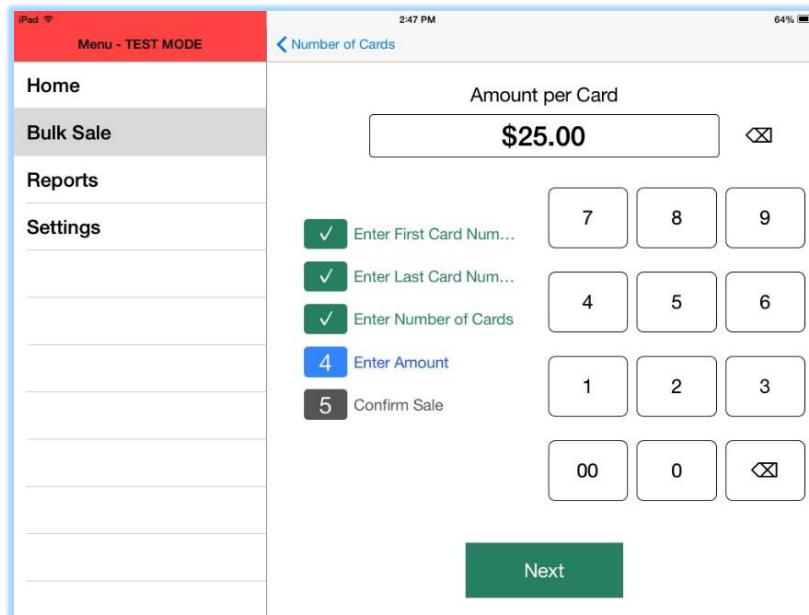
0

Next

4. Enter the number of cards in the sequence.



5. Enter the amount to add to the cards.



- Press the "Confirm Sale" button.

The screenshot shows the iPad app interface. On the left is a navigation menu with options: Home, Bulk Sale, Reports, and Settings. The main screen is titled "Confirm Bulk Gift Sale". It features a list of items on the left with green checkmarks and a blue button labeled "5 Confirm Sale". On the right, there is a form with the following fields:

- First Card: **1063216
- Last Card: **1063307
- Number of Cards: 2
- Amount: \$25.00
- Total Amount: \$50.00

A green "Confirm Sale" button is located at the bottom right of the form.

- Choose to print receipt or not.

Adding Value to an Existing Gift Card:

- From "Home" screen swipe or type card.
- If card is active the "Redeem Gift \$" screen will appear along with the amount of value on card.
- Press "Add Gift \$" button on bottom left of screen ("Add Gift \$" screen will appear).

The screenshot shows the iPad app interface. On the left is a navigation menu with options: Home, Bulk Sale, Reports, and Settings. The main screen is titled "Add Gift \$". It features a form with the following fields:

- Customer Information: Inactive Card
- Card number: **064917
- Amount to add: \$50.00

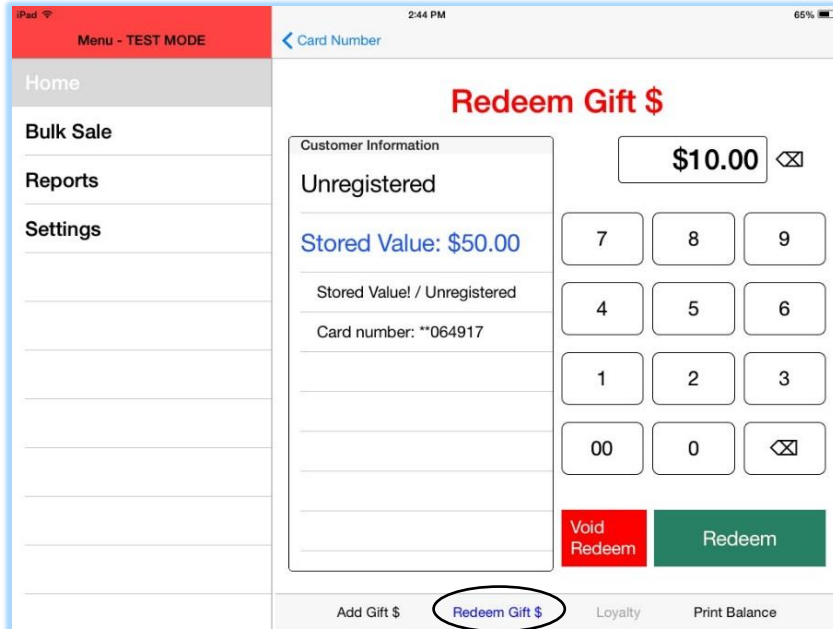
A numeric keypad is visible on the right side of the form. At the bottom right, there are two buttons: "Void Add" (red) and "Add" (green). At the bottom left, there is a blue button labeled "Add Gift \$" which is circled in red.

- Enter amount to add to card and press "Add" button.
- Value will be added to card and receipt is shown.

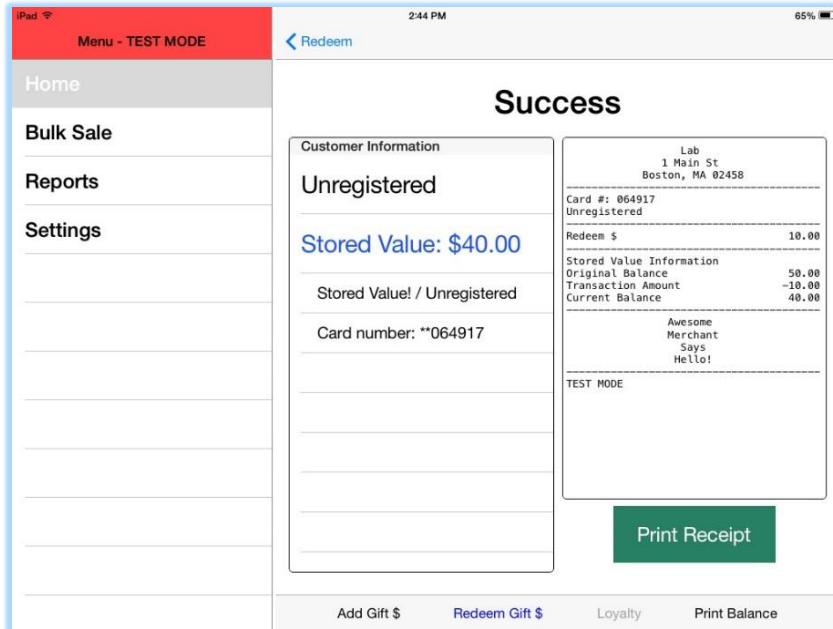
6. Choose to print receipt or not.

Redeeming a Gift Card:

1. From the "Home" screen swipe or type card.
2. If card is active the "Redeem Gift \$" screen will appear along with amount of value on card.
3. Enter amount to redeem from card and press "Redeem" button.



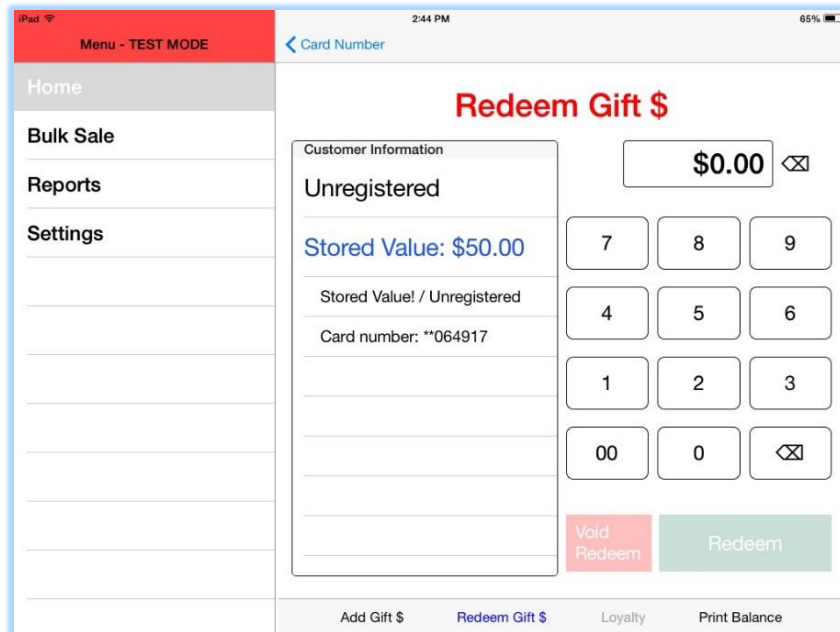
4. Screen shows amount left on card and receipt.



5. Choose to print receipt or not.

Balance Inquiry:

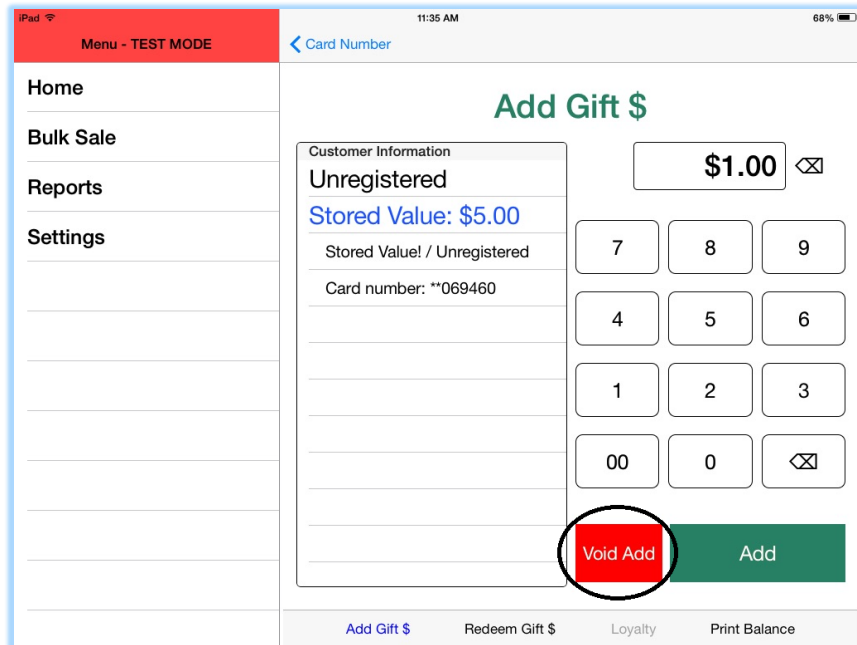
1. From "Home" screen swipe or type card.
2. If card is active "Redeem Gift \$" screen will appear.
3. The current value of the card is shown on the left column under "Customer Information".



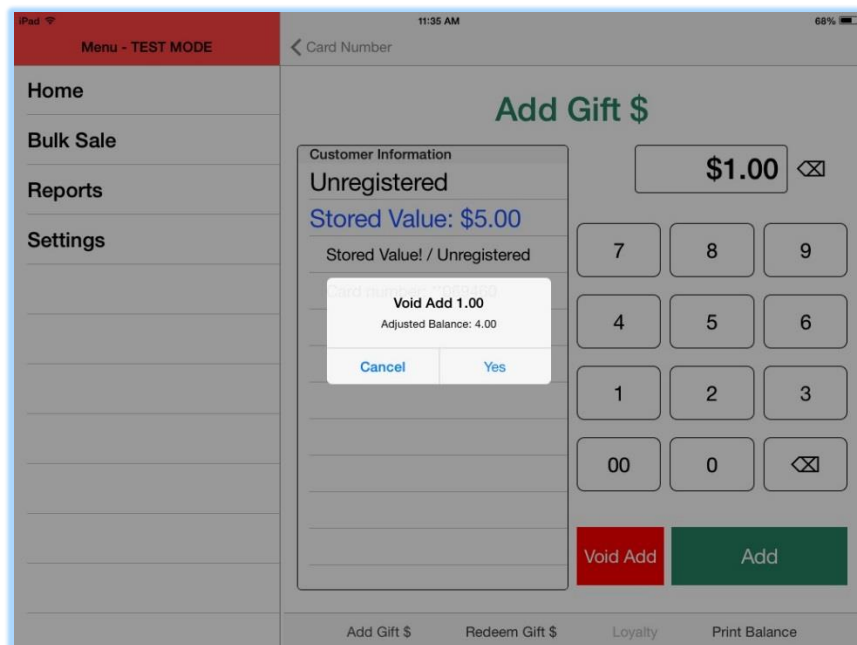
4. Can choose to print balance by pressing "Print Balance" button on bottom right corner of screen.

Void Add Gift Dollars:

1. Use this feature if the value you added is incorrect
2. From "Home" screen swipe or type card.
3. Press "Add Gift \$" button in bottom left corner.
4. Enter amount to void add.
5. Press "Void Add" button.

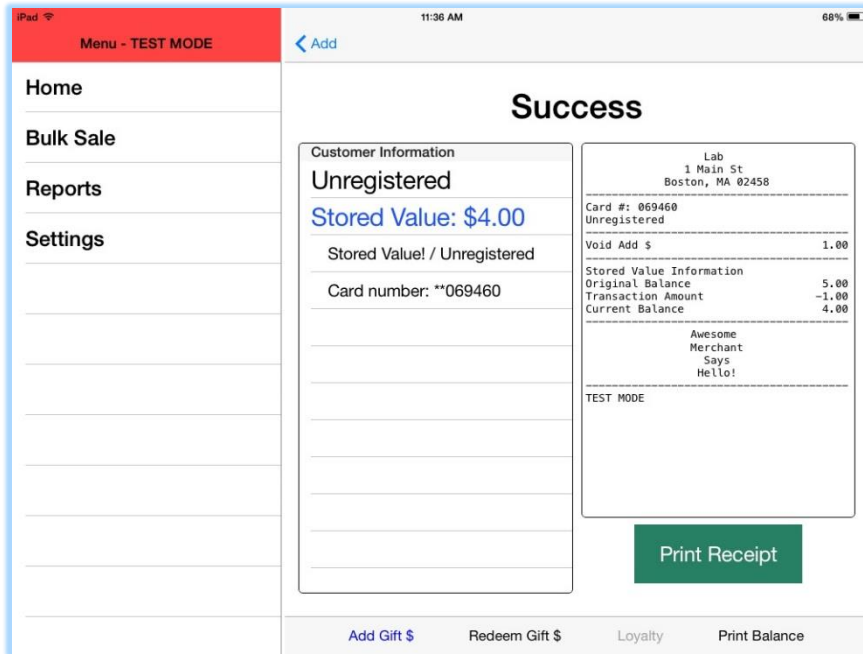


6. Popup modal will appear asking to confirm the void and showing what the adjusted balance will be.



7. Press "Yes" and value will be removed from card.

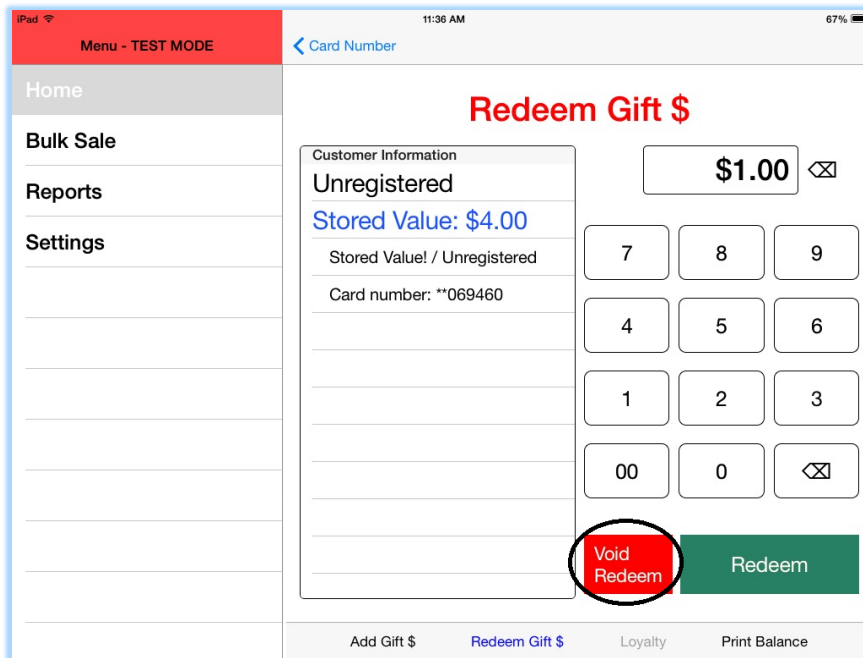
8. Final balance and receipt will show on screen.



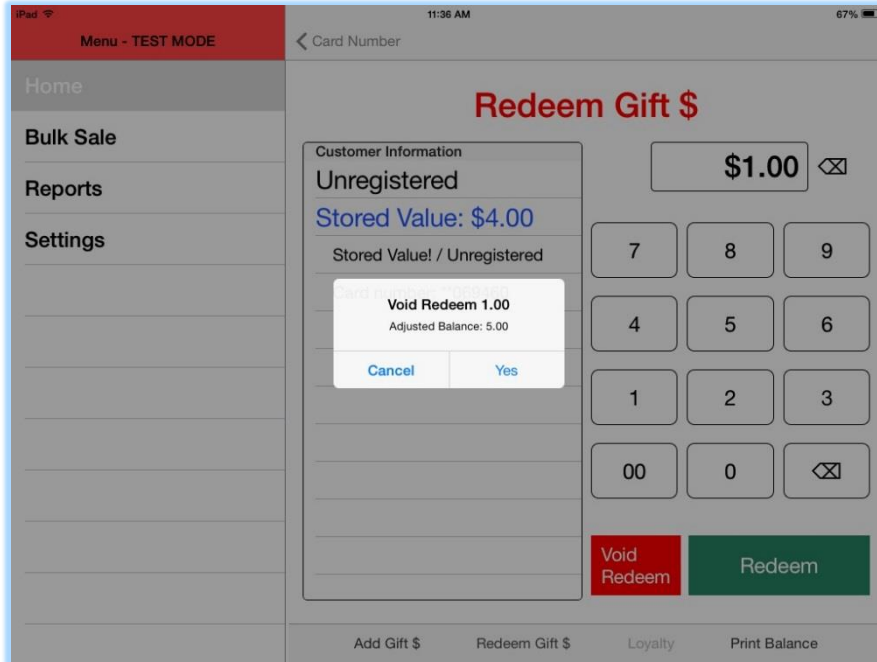
9. Choose to print receipt or not.

Void Redeem Gift Dollars:

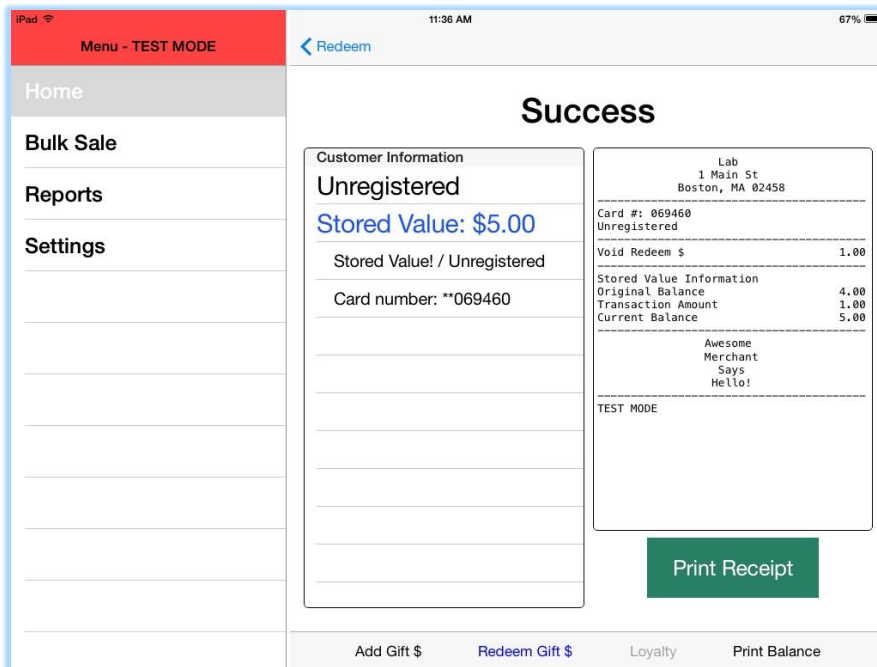
1. Use this feature if the value you redeemed is incorrect
2. From "Home" screen swipe or type card.
3. Enter amount to void redeem.
4. Press "Void Redeem" button.



- 5. Popup modal will appear asking to confirm the void and showing what the adjusted balance will be.



- 6. Press "Yes" and the value will be added back to the card.
- 7. Final balance and receipt will show on screen.



- 8. Choose to print receipt or not.

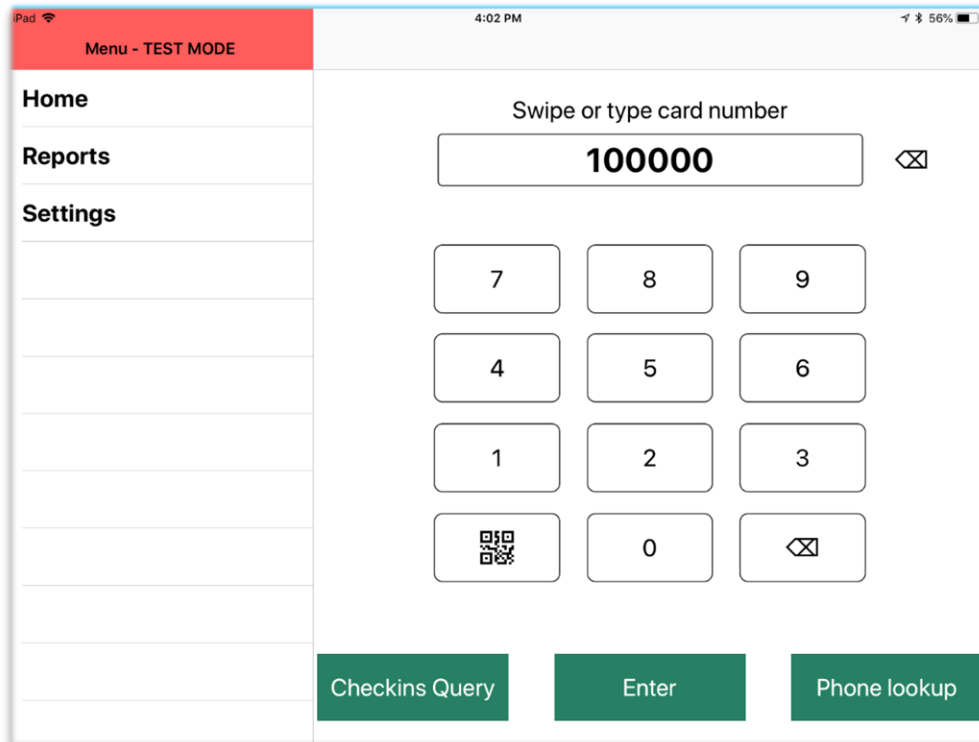
Loyalty Cards

Checkins Query and QR Scan:

Guide information to come later.

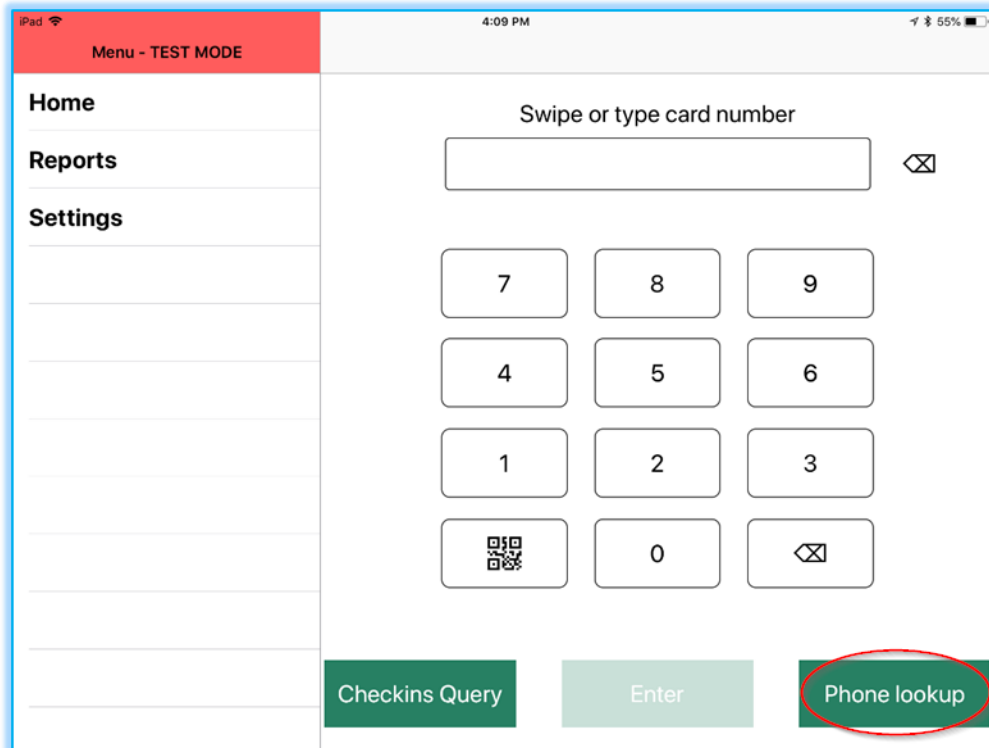
Activating a New Loyalty Card:

1. Swipe or type in the card number and then press "Enter." The card will automatically be recognized as a loyalty card and not a gift card.
 - a. If the card is already active, the cardholder information and balances will appear.

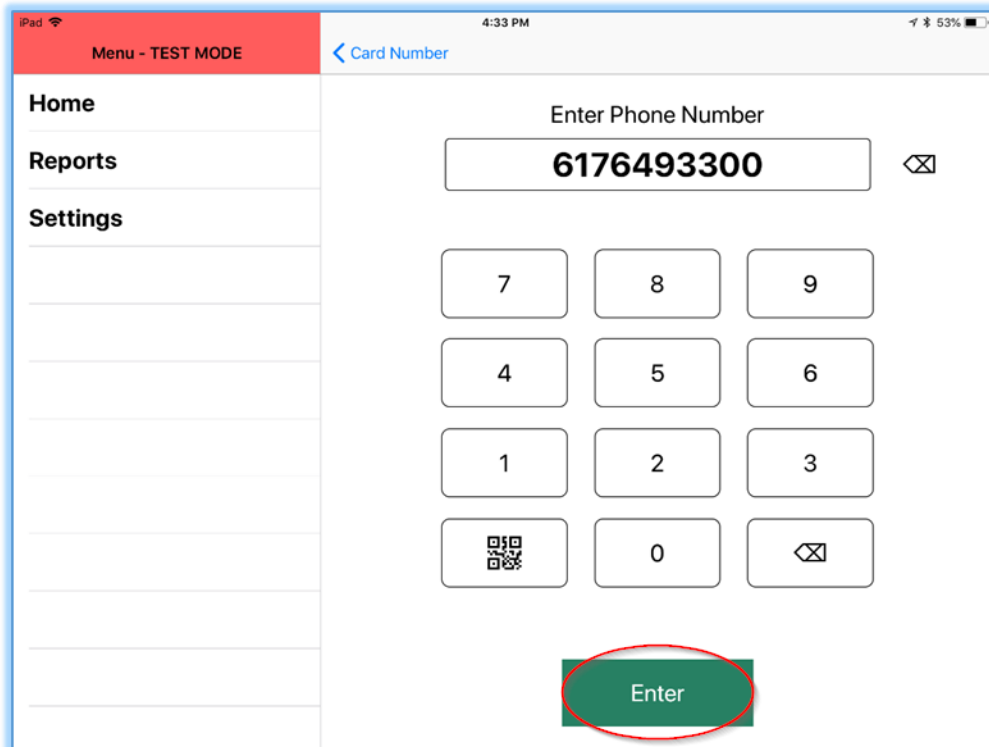


Phone Lookup:

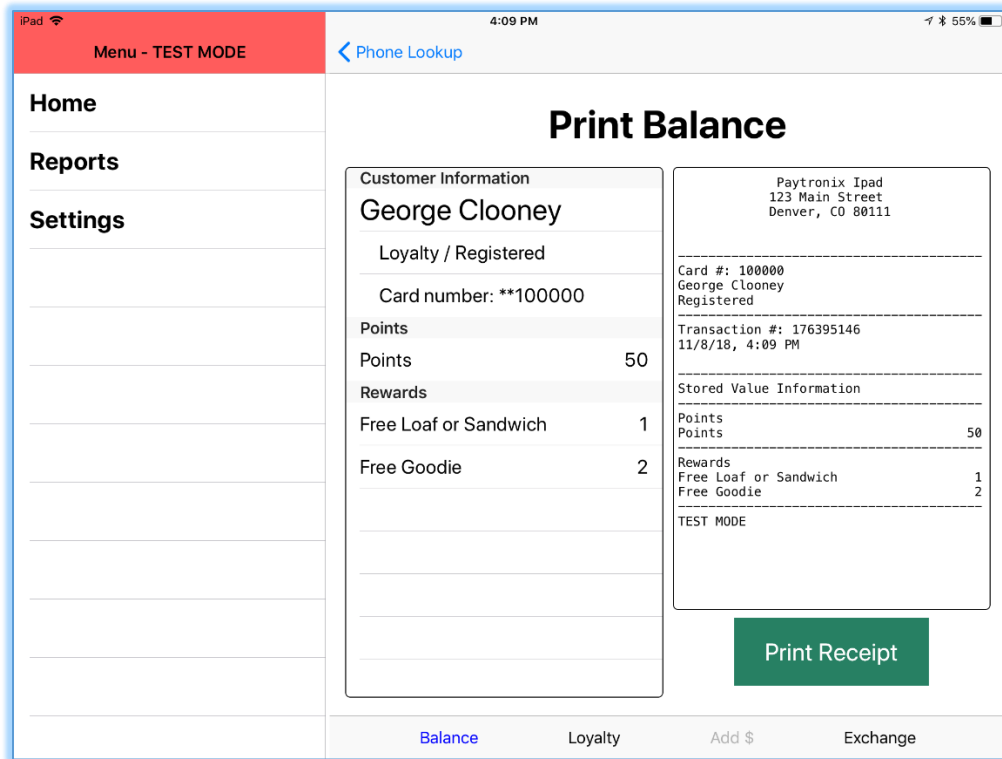
1. Click on the "Phone lookup" button.



2. Enter the phone number and press "Enter."



3. You can now access the customer's points, rewards, and information.



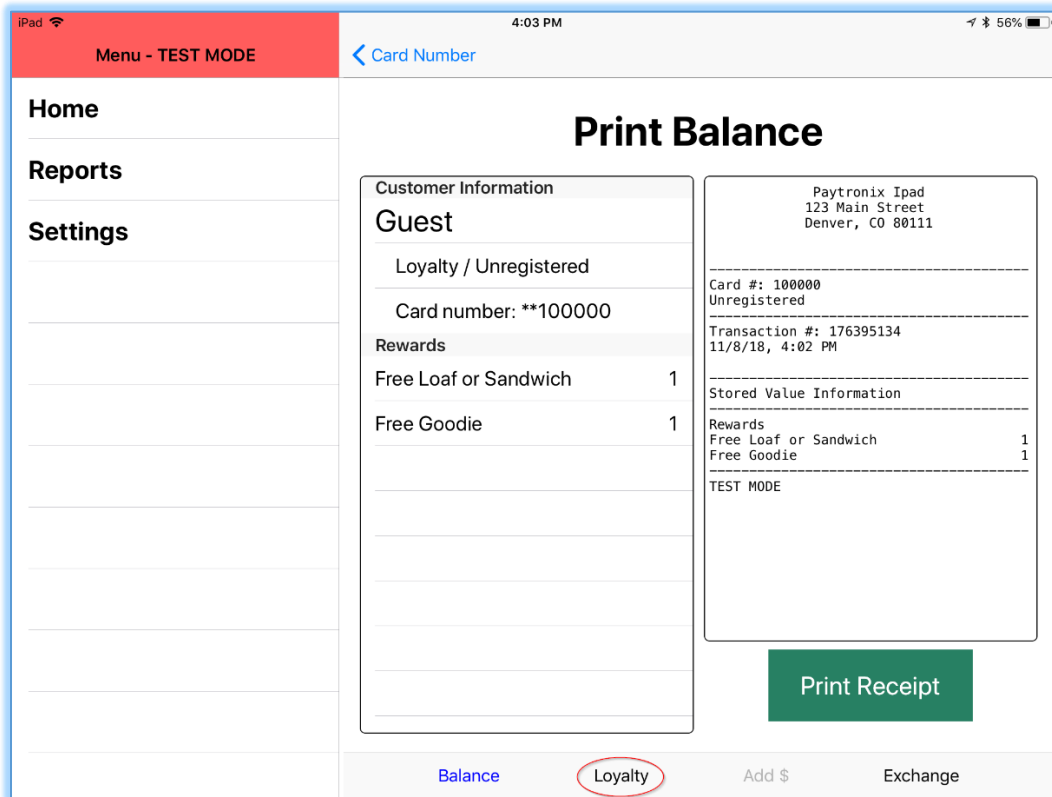
Balance Inquiry:

1. Swipe or type in the card number and then press "Enter."
2. You'll automatically be directed to the Balance tab.

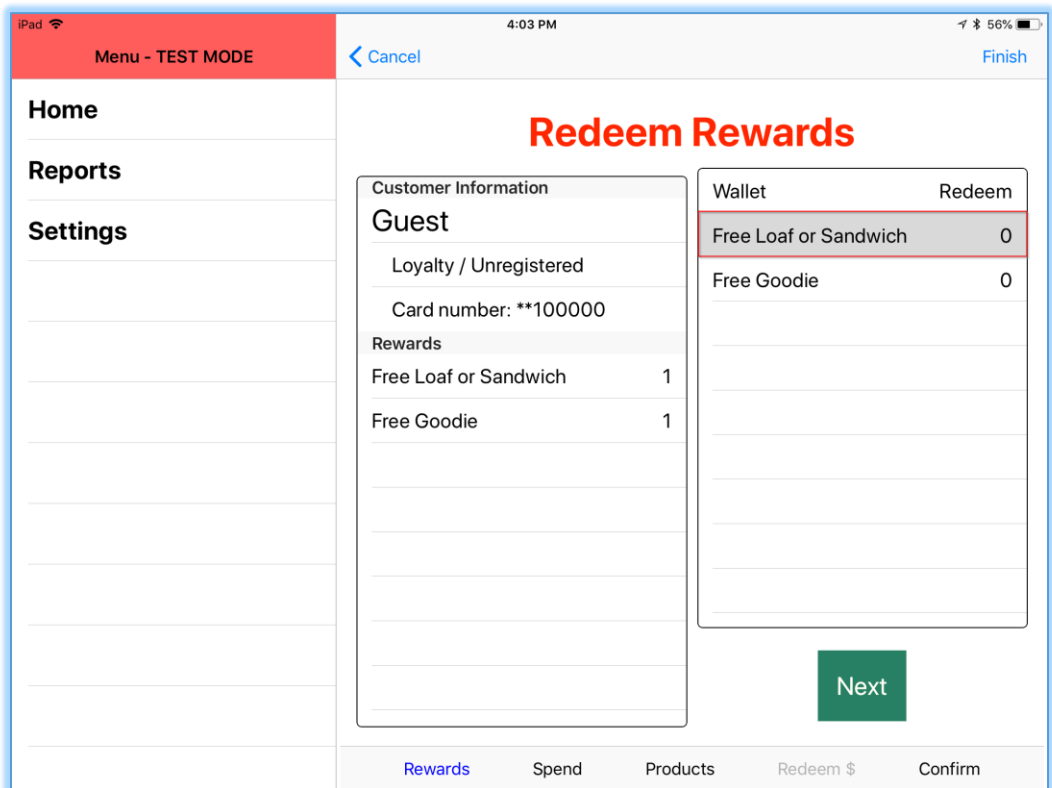
Redeem Rewards:

1. Swipe or type in the card number and then press "Enter."

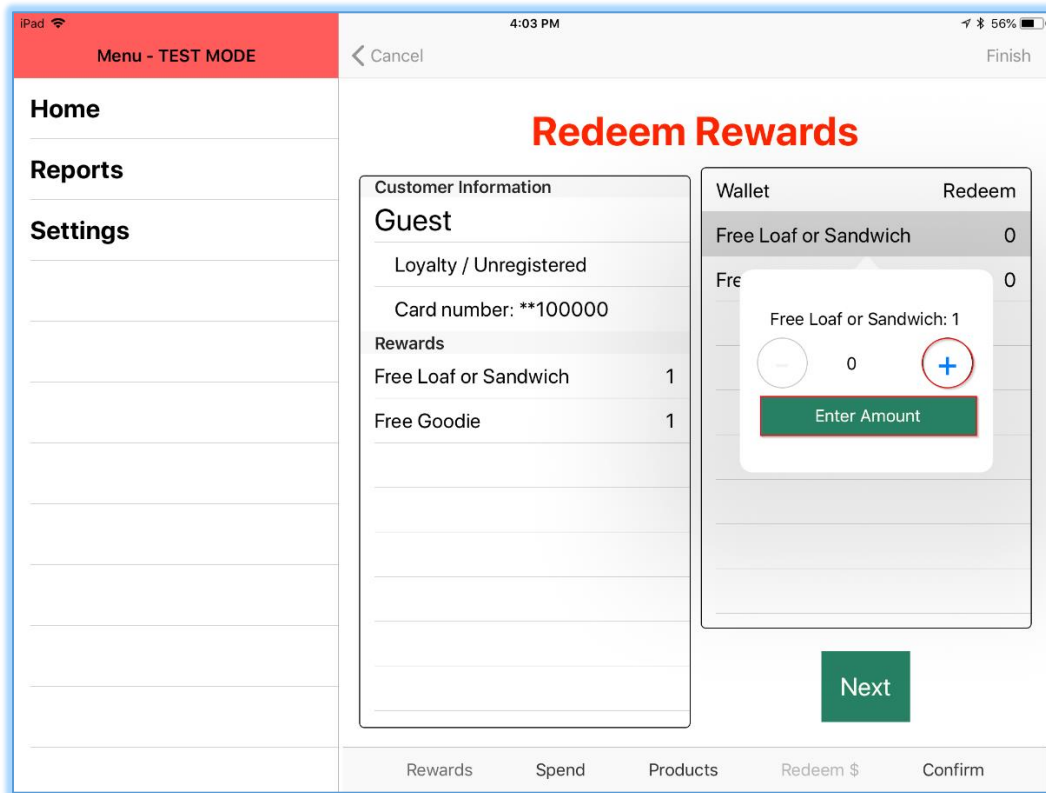
- 2. Press the "Loyalty" button.



- 3. Press the Reward that you'd like to redeem.



4. Add the amount of each of the reward that you would like to redeem and press "Enter Amount."



5. Confirm the rewards that you would like to redeem and press "Next."

Add Dollars Spent:

1. Enter the dollar amount that the Guest spent and then press "Next."
 - a. The dollars will be converted to points and added to the Guest's total.

The screenshot shows the iPad app interface for the 'Add Dollars Spent' screen. The top status bar indicates 'iPad', signal strength, 4:03 PM, and 56% battery. The app header is 'Menu - TEST MODE' with a red background. Below the header is a navigation menu with 'Home', 'Reports', and 'Settings'. The main content area is titled 'Add Dollars Spent' in green. It features a 'Customer Information' section with 'Guest' as the name, 'Loyalty / Unregistered' status, and 'Card number: **100000'. Below this is a 'Rewards' section with 'Free Loaf or Sandwich' and 'Free Goodie', each with a quantity of 1. To the right of the customer information is a numeric keypad with buttons for digits 0-9, a '00' button, and a delete button. The amount '\$0.00' is displayed in a red box. A green 'Next' button is located below the keypad. At the bottom of the screen is a navigation bar with 'Rewards', 'Spend', 'Products', 'Redeem \$', and 'Confirm' options.

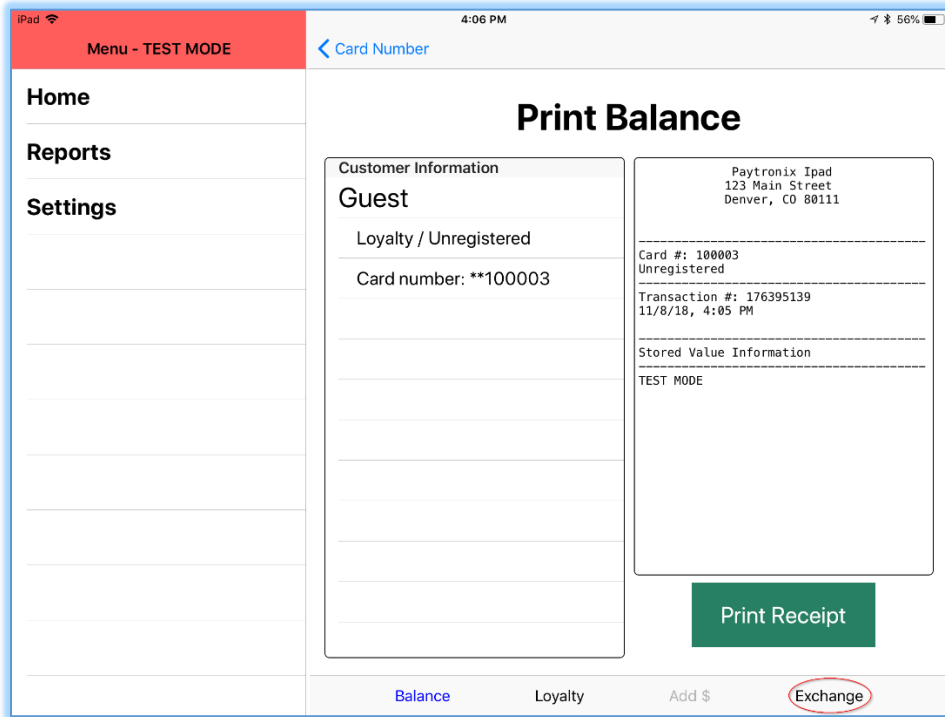
Add Products Bought:

Guide information to come later.

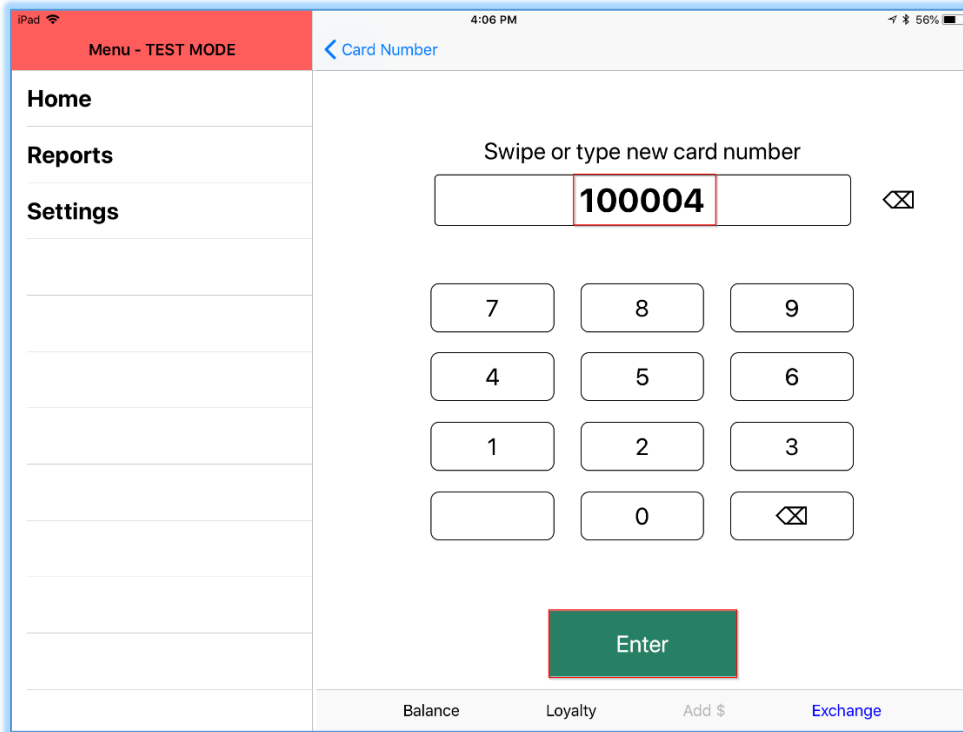
Exchange Card:

1. Enter or scan the card that you would like to exchange.

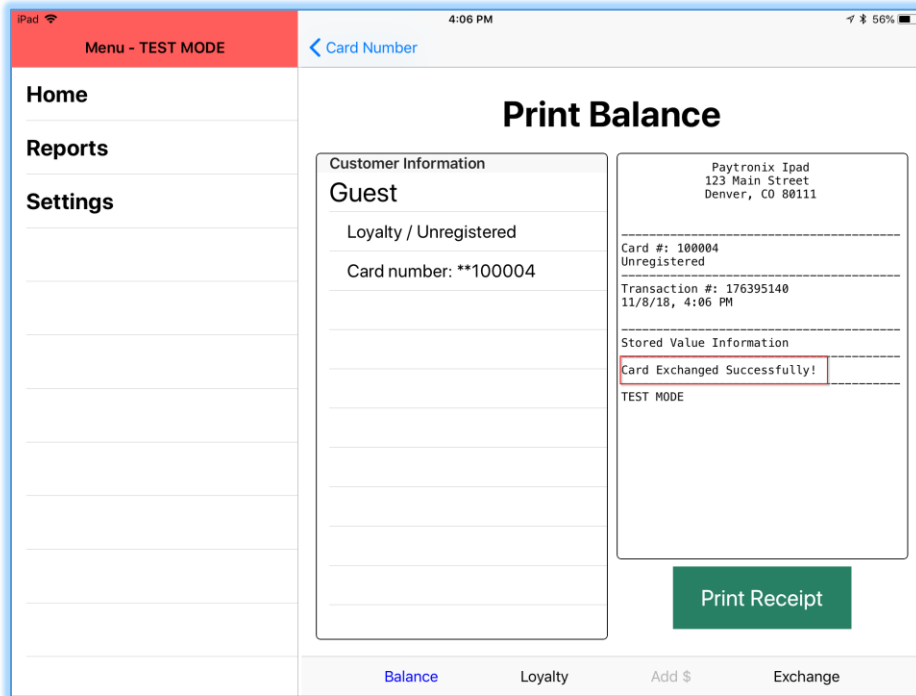
- 2. Press the "Exchange" tab button.



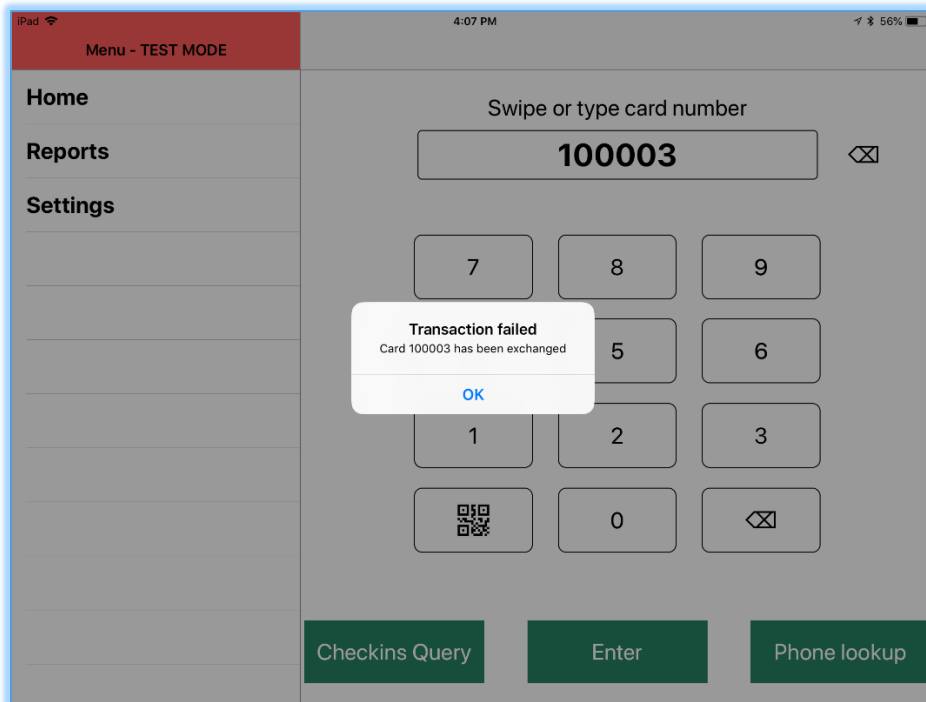
- 3. Swipe or enter the number of the card to which you would like this Guest to be exchanged and press "Enter."



- 4. Check the receipt to confirm that the Guest has been exchanged to a new card.



- 5. After being exchanged, the old card number will no longer be usable.



Reporting and Settings

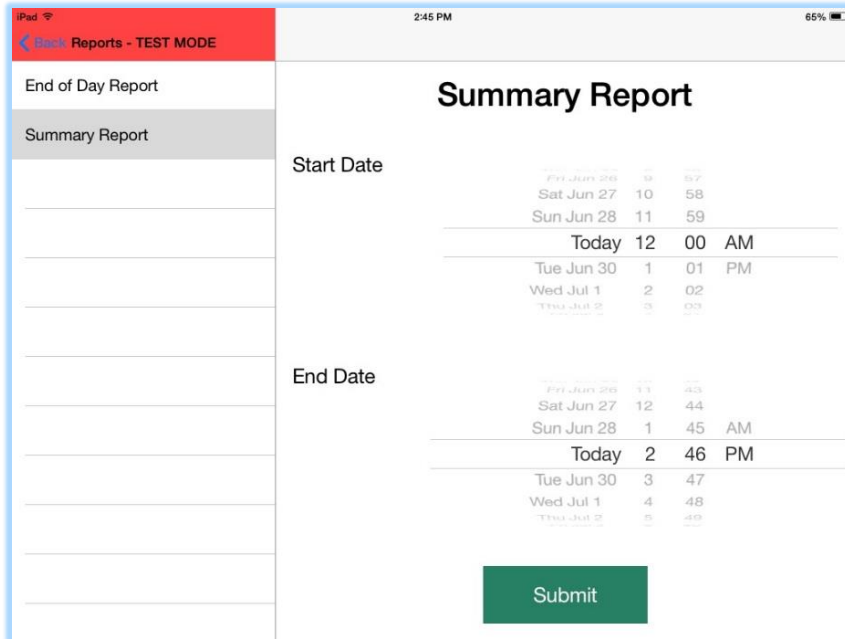
Reporting – End of Day:

1. Press “Reports” button from left navigation menu.
2. Press “End of Day Report” button.
3. Add, Redeem, and Void transactions will show at the top and detailed transactions will show at the bottom.

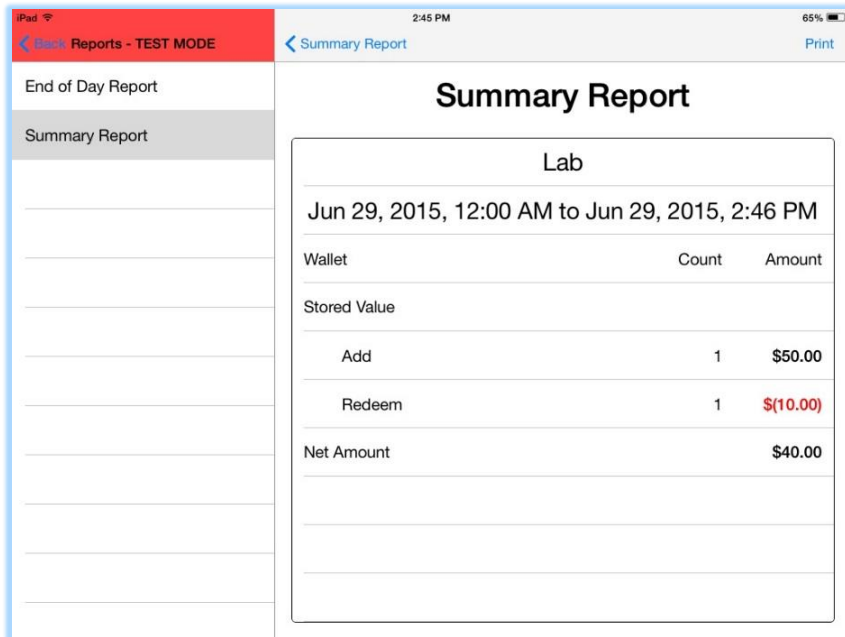
End of Day Report					
Lab					
Jun 29, 2015, 12:00 AM to Jun 29, 2015, 2:45 PM					
Wallet		Count		Amount	
Stored Value					
Add		1		\$50.00	
Redeem		1		\$(10.00)	
Net Amount				\$40.00	
Stored Value Detail					
Card #	Date	Time	Txn Id	Activity	Amount
064917	Jun 29	14:43	229	Add	\$50.00

Reporting – Summary:

1. Press “Reports” button on main screen.
2. Press “Summary Report” button.
3. Choose a “Start Date” and “End Date” for transactions to be seen.

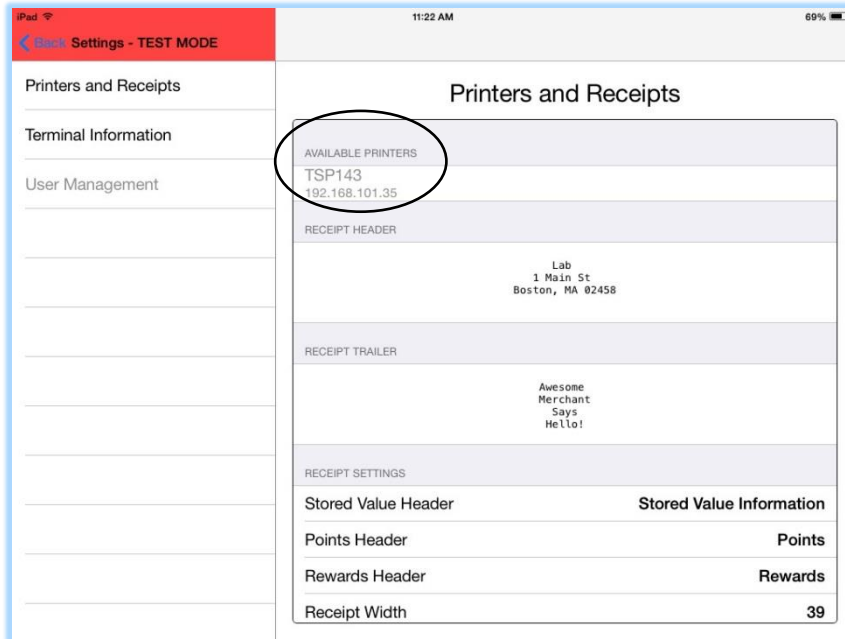


4. Press “Submit” button.
5. Transaction summary information will show on next screen.

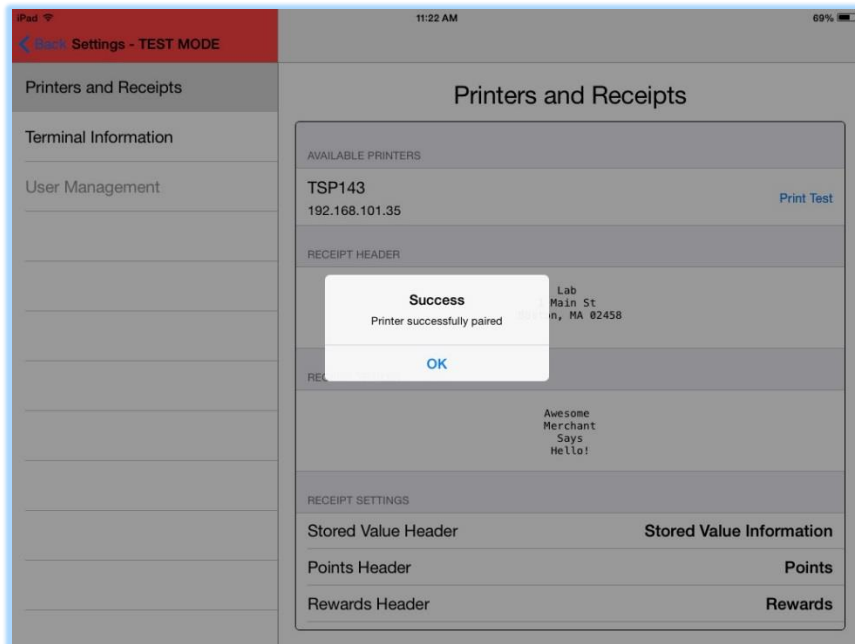


Settings – Printers and Receipts:

1. To set up and view the Printer and Receipt information of the device press the “Settings” button from the left navigation menu and then press “Printers and Receipts”
2. The available printers will show up in the “Available Printers” section.

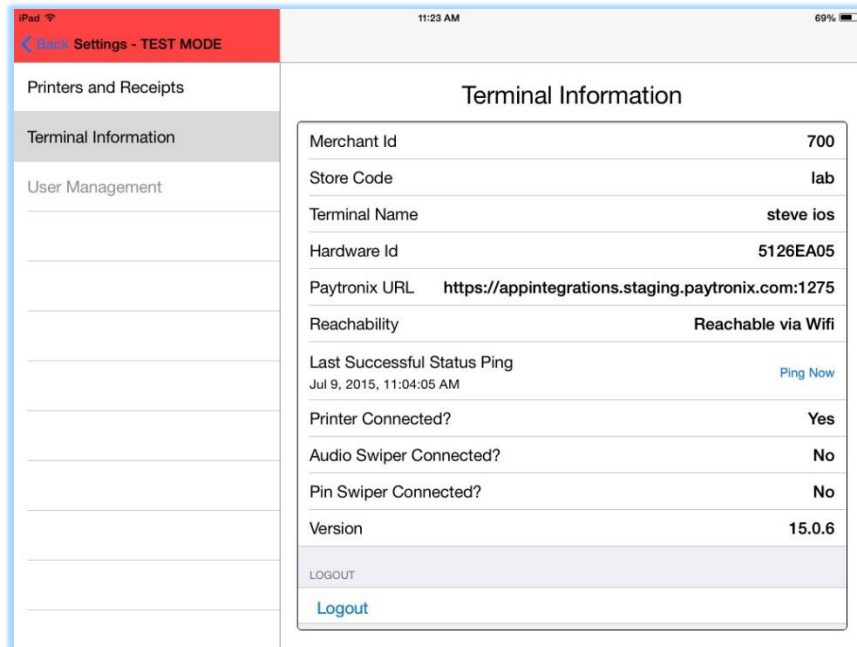


3. Touch the printer you want to pair with. A pop-up model will appear saying the printer has been successfully paired.



Terminal Information:

1. To view the terminal information of the device press the "Settings" button from the left navigation menu and then press "Terminal Information".



a.

[Please use the FAQs guide for troubleshooting & common error messages for login:](#)