

Paytronix POS Operators Guide Verifone Terminal

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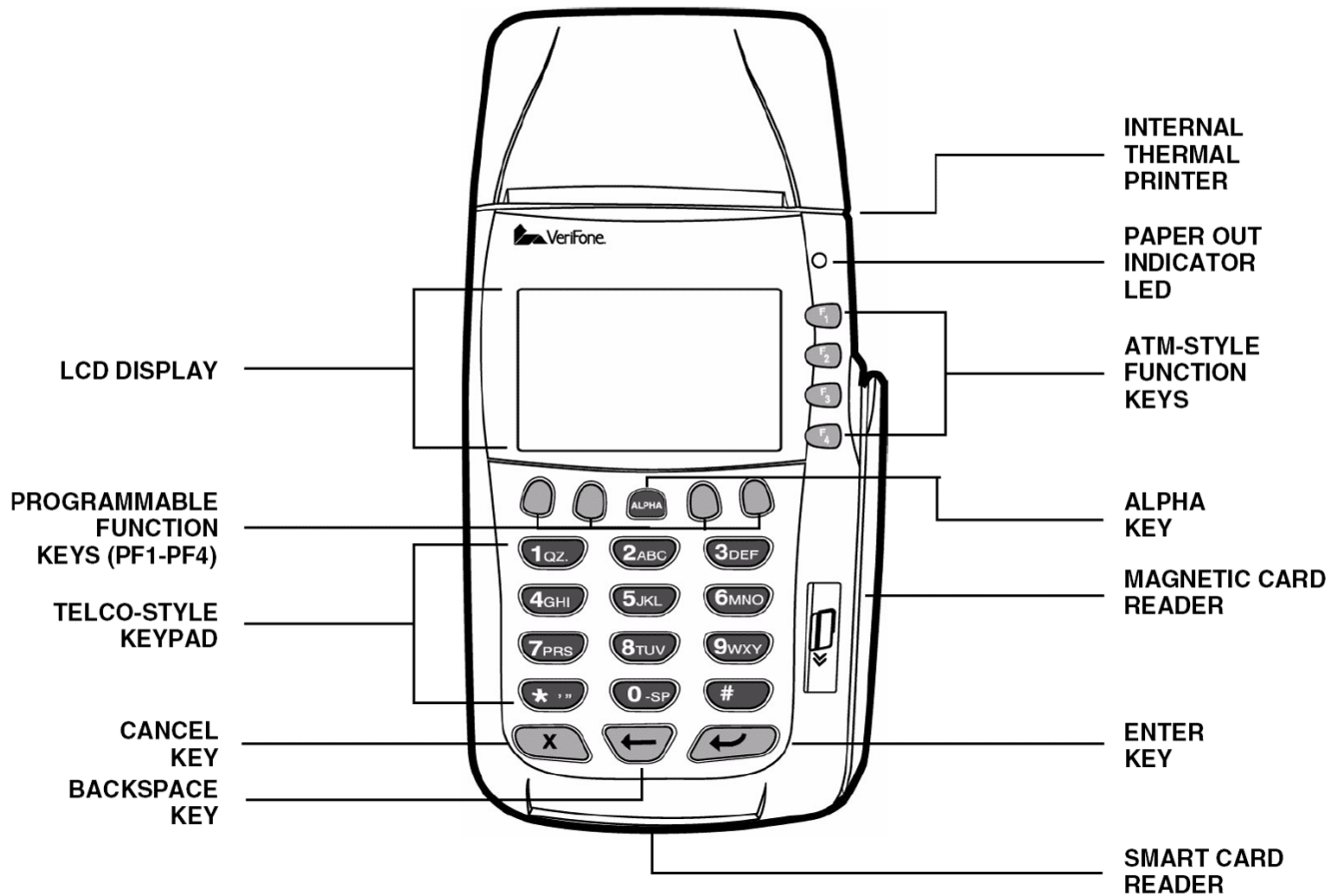
Introduction

This manual is to assist those using the VeriFone Terminals over IP and dial-up.

Verifone Terminal Models Supported by Paytronix

As of v14.1, Paytronix application has been tested on VeriFone Vx570 and Vx520 terminals.

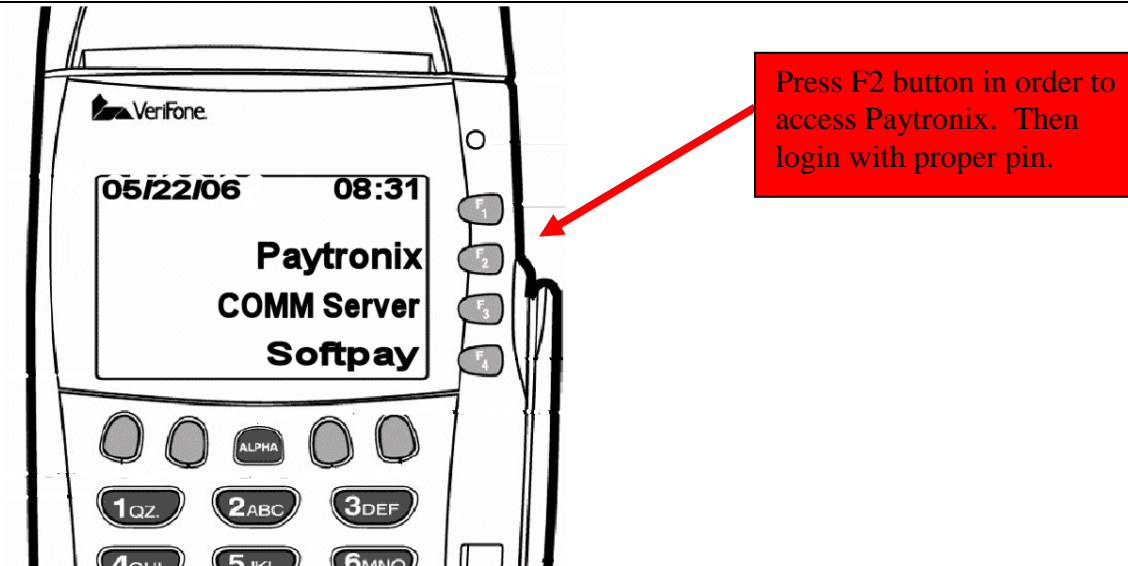
Verifone Terminal Image



Terminal Screen on Power-Up

When the terminal is initially powered up it will display a screen that shows the different applications that are installed. The screen resembles the image below.

To run Paytronix simply press the Function key next to the Paytronix name (example F2 in the image below)



COMM Server is software that manages IP communications. This application may or may not be installed. This is a third party application not provided by Paytronix.

Softpay (or similar name) is often software that runs credit cards. This is a third party application not provided by Paytronix and may or may not be installed.

Overview of Terminal Functions – Main Paytronix Menu

Paytronix Systems has developed a suite of different gift card functions that can be operated on a VeriFone Terminal. Once initiating Paytronix on the screen, the user will see 6 different options on the main menu. The options below also include Loyalty Functions. These will not be included if your program is Gift-only.

Screen 1:

1. Balance Inquiry
2. Add Points and Pay
3. Add Gift \$
4. Redeem Rewards
5. Redeem Gift \$
6. Manager Functions

Screen 2:

1. Report Functions
2. Media Exchange
3. Gift Auth
4. Gift Final
5. Bulk Gift Activate
6. Void Add \$

Screen 3:

1. Void Redeem \$
2. Void Accrue Points
3. Logout

Selecting Paytronix Application

The VeriFone Terminal can run multiple software applications. In a multi-application configuration, for example, running both credit cards and Paytronix, it is important to select the correct application. When powered on the system will initialize to a screen that displays the different applications. Press the key next to the Paytronix name to launch the Paytronix application.

Terminal Functions

The different terminal functions will be discussed in this section. Most of the functions discussed print a “Cash Drawer Slip”. This slip always should be placed in the cash drawer to assist in reconciliation processes at the close of business. The slips are also displayed below next to the associated function.

I. Balance Inquiry

The Balance Inquiry functionality allows a guest to obtain their card balances via manually entering the printed card number or by having the card swiped. To use this functionality, you must do the following:

- To find out the value of a card, press “**1. Balance Inquiry**” from the numeric keypad.
- You are now prompted to “Swipe or Type Card #”.
- Once the card is typed/swipe, the guest’s card balances appear on screen. To print the balance for the guest, press the PF4 button (4th purple button from the left). A sample receipt is shown.

| | |
|------------------------------------|---------------------|
| Store Name | |
| Store Address 1 | |
| Store Address 2 | |
| City, State ZIP | |
| Phone Number | |
| ----- | |
| Card #: | ****04340*** |
| Card Holder Name (if registered) | |
| Tier | |
| ----- | |
| 999999 Store Manager | |
| Transaction #1038 | 06/15/2004 02:59:01 |
| Balance Inquiry | |
| ----- | |
| Stored Value | |
| Current Balance | 15.00 |
| Exp Date: | 01/01/2012 |
| Reward and point Balances (if any) | |
| Receipt Trailer Information | |

II. Add Gift \$

The Add Gift \$ functionality allows a guest to either sell a new gift card to a guest or add additional money to an existing card. To use this functionality do the following:

- Press “**3. Add Gift \$**” from the numeric keypad.
- Swipe or type the card number of the guest’s card.
- Enter the dollar amount requested by the guest to put on the card.
- Press enter. A guest receipt will automatically print. A sample receipt is shown.
- After the guest receipt has printed. Press enter and the cash drawer receipt will print. Press enter and the balance information will be displayed on the screen and can be reprinted. Press enter to return to the functions screen.

| | |
|------------------------------------|---------------------|
| Store Name | |
| Store Address 1 | |
| Store Address 2 | |
| City, State ZIP | |
| Phone Number | |
| ----- | |
| Card #: | ****04340*** |
| Card Holder Name (if registered) | |
| Tier | |
| ----- | |
| 999999 Store Manager | |
| Transaction #1038 | 06/15/2004 02:59:01 |
| Add \$ | 50.00 |
| ----- | |
| Stored Value | |
| Original Balance | 00.00 |
| Transaction Amount | 50.00 |
| Current Balance | 50.00 |
| Reward and point Balances (if any) | |
| Receipt Trailer Information | |

III. Redeem Gift \$

Redeem Gift \$ is a single step redemption of gift cards. In a restaurant where guests pay at the Point-of-sale, tipping is usually NOT allowed from the gift cards and shortening the time to process the redemption is critical. For these cases, use this single step redemption of value from a guest's card. Do the following:

- a. Press "**5. Redeem Gift \$**" from the numeric keypad.
- b. Swipe or type the card number of the guest's card.
- c. Enter the total dollar amount of the check.
- d. Two receipts will print, one for the guest, one for the cash drawer.

| | |
|------------------------------------|---------------------|
| Store Name | |
| Store Address 1 | |
| Store Address 2 | |
| City, State ZIP | |
| Phone Number | |
| ----- | |
| Card #: | ****04340*** |
| Card Holder Name (if registered) | |
| Tier | |
| ----- | |
| 999999 Store Manager | |
| Transaction #1038 | 06/15/2004 02:59:01 |
| Redeem \$ | 30.00 |
| ----- | |
| Stored Value | |
| Original Balance | 50.00 |
| Transaction Amount | 30.00 |
| Current Balance | 20.00 |
| Reward and point Balances (if any) | |
| Receipt Trailer Information | |

IV. Gift Auth and Gift Final

Gift Auth and Gift Final is a 2-step payment process that allows for a tip when redeeming from a guest's card. In order to use this, the guest's card must have monetary value on it. To use the Gift Auth and Gift Final functionality, you must do the following:

- a. From the main menu, press the purple key under the "↵" from the numeric keypad to go to screen 2.
- b. Press "**3. Gift Auth**" from the numeric keypad.
- c. Enter the total dollar amount (**before tip**) of the check.
- d. Swipe or type the card number of the guest's card.
- e. The transaction automatically prints two receipts; one for the guest to add the tip, total, and sign that will stay at the store, and a second receipt for the guest to keep. (Sample receipts are shown to the right).
- f. After the guest has completed signing the receipt, then the gift final function needs to be completed.
- g. Press "**4. Gift Final**" from the numeric keypad.
- h. Enter the Transaction Number (found on the receipt header)
- i. Enter the total amount of the requested redemption (including the tip)
- j. Confirm that what was entered is correct.
- k. Once the confirmation is complete, the redemption will occur, and a cash drawer slip for the total amount redeemed will print.

| | |
|-----------------------|----------------------|
| Store Name | |
| Store Address 1 | |
| Store Address 2 | |
| City, State ZIP | |
| Phone Number | |
| ----- | |
| Date | 01/01/2004 11:58:02 |
| Server | 999999 Store Manager |
| Txn# | 1002 |
| Card Type | Stored Value |
| Card # | ****135179 |
| Auth Code | 682751 |
| Card Balance | \$50.00 |
| ----- | |
| AUTH AMOUNT | \$36.75 |
| TIP | _____ |
| TOTAL | _____ |
| SIGNATURE | _____ |
| ----- | |
| GUEST (MERCHANT) COPY | |

V. Void Add \$

Void Add \$ will void money from a card. This function should be used when money has been mistakenly added to a card. Do the following:

- a. From the main menu, press the purple key under the “↵” from the numeric keypad to go to screen 2.
- b. Press “**5. Void Add \$**” from the numeric keypad.
- c. Enter the dollar amount to be voided
- d. Enter a promo code. Only applies to loyalty programs if promo codes are setup.
- e. Swipe or type the card number of the guest’s card.
- f. Two receipts will print, one for the guest, one for the cash drawer.

| | |
|----------------------------------|---------------------|
| Store Name | |
| Store Address 1 | |
| Store Address 2 | |
| City, State ZIP | |
| Phone Number | |
| ----- | |
| Card #: *****04340*** | |
| Card Holder Name (if registered) | |
| Tier | |
| ----- | |
| 999999 Store Manager | |
| Transaction #1038 | 06/15/2004 02:59:01 |
| ----- | |
| Void Add \$ | 5.00 - |
| ----- | |
| Stored Value | |
| Original Balance | 25.00 |
| Transaction Amount | -5.00 |
| Current Balance | 20.00 |
| ----- | |
| Receipt Trailer Information | |

VI. Void Redeem \$

Void Redeem \$ will void a redemption transaction. In other words a card was used to pay for an item but it should not have been. This payment needs to be voided and the money refunded back to the card. This function will void the payment transaction. Do the following:

- a. From the main menu, press the purple key under the “↵” from the numeric keypad twice to go to screen 3.
- b. Press “**1. Void Redeem \$**” from the numeric keypad.
- c. Enter the dollar amount of the payment to be voided
- d. Swipe or type the card number of the guest’s card.
- e. Two receipts will print, one for the guest, one for the cash drawer.

| | |
|----------------------------------|---------------------|
| Store Name | |
| Store Address 1 | |
| Store Address 2 | |
| City, State ZIP | |
| Phone Number | |
| ----- | |
| Card #: *****04340*** | |
| Card Holder Name (if registered) | |
| Tier | |
| ----- | |
| 999999 Store Manager | |
| Transaction #1038 | 06/15/2004 02:59:01 |
| ----- | |
| Void Add \$ | 7.00 - |
| ----- | |
| Receipt Trailer Information | |
| ----- | |
| Stored Value | |
| Original Balance | 20.00 |
| Transaction Amount | 7.00 |
| Current Balance | 27.00 |

VII. Bulk Gift Activate

Bulk Gift Activate allows multiple cards (must be sequential) to be activated in a single transaction. The maximum number of cards in a transaction is 100. If successful, all cards will be activated with a same \$ amount. Do the following:


- a. From the main menu, press the purple key under the “↵” from the numeric keypad to go to screen 2.
- b. Press “**5. Bulk Gift Activate**” from the numeric keypad.
- c. Enter the dollar amount to be added to each card.
- d. Enter the discount percentage.
- e. Swipe or type the card number of the first card to be activated.
- f. Swipe or type the card number of the last card to be activated
- g. Enter total number of cards to be activated.
- h. Two receipts will print, one for the guest, one for the cash drawer.

| | |
|-----------------------------|---------------------|
| Store Name | |
| Store Address 1 | |
| Store Address 2 | |
| City, State ZIP | |
| Phone Number | |
| ----- | |
| 999999 Store Manager | Term ID:1 |
| Transaction #1038 | 11/15/2007 02:59:01 |
| ----- | |
| Multiple Gift Card Sale | |
| Auth #: | 532693 |
| Number of Cards sold | 2 |
| Amount added per card | 10.00 |
| Total Amount | 20.00 |
| ----- | |
| Card #: | Balance |
| ****129901*** | 10.00 |
| ****130057*** | 10.00 |
| ----- | |
| Receipt Trailer Information | |

Terminal Reports

The Report functionality allows a merchant/franchisee to run some reports on site to get up to date information on either the current period (day) or previous period (day) activities of the various Paytronix functionality.

The reports will allow the Store Manager at the end of the day to reconcile Paytronix transactions with the cash register.

From the main menu, press the purple key under the “” from the numeric keypad.

1. Summary Reports

- a. Current Period
This report allows a merchant/franchisee to print up a report in receipt form of the current period's activities of wallet activity on all gift card and redeemed rewards.
- b. Last Period
This report allows a merchant/franchisee to print up a report in receipt form of the last period's activities of wallet activity on all gift card and redeemed rewards.

2. End of Day Reports

- a. Current Period
This report allows a merchant/franchisee to print up a report in receipt form of the current period's activities of wallet activity on all gift card and redeemed rewards. It also includes a detailed list of all stored value activity on Redeem, Void Add, and Void Redeem. After viewing/printing, you are given the option of performing a close day. The Close Day functionality allows a merchant/franchisee to close out all of the present day's activities of the Paytronix functionality.
- b. Last Period
This report allows a merchant/franchisee to print up a report in receipt form of the last period's activities of wallet activity on all gift card and redeemed rewards

3. User Report

This report allows a merchant/franchisee to print up a report in receipt form of the list of all users with access to the Paytronix application.

4. Pending Auth Report

The Pending Auth report allows a merchant/franchisee to view all Paytronix Authorized transactions that have not been finalized to date.

Manager Functions

From the Paytronix main menu, press “**6. Manager Functions**” from the numeric keypad. The following functions appear:

1. Manual System Refresh

The Manual System Refresh allows the merchant/franchisee to refresh their terminal’s configuration in case the Paytronix application is experiencing technical difficulties. In general, this is a diagnostic tool. To use this do the following:

- Press “1” from the numeric keypad to enter Manual System Refresh.
- If you want to refresh the system, press “1,” or if you decided not to refresh, press “2” on the numeric keypad to go back to the Manager Function Main Menu.

2. User Management

The user management function allows the merchant/franchisee to perform the following functions:

a. Add a User

You need to repeat these steps for each employee. The GM could keep a spreadsheet with UserID, PIN and the persons first/lastname. Keep this spreadsheet in safe place.

1. Login to Paytronix
2. Press (1) Manager Functions
3. Press (2) User Management
4. Press (1) Add User
5. Enter User ID: <= this will be the cashier ID that will appear in reports for this user
6. Enter PIN: <= the PIN number that the cashier will login under, choose 4 digits
7. Enter Username: <=enter the persons name using ALPHA key or just enter UserID again
8. Cashier or Manager <= normally choose cashier. Managers have the ability to run reports, close day and access Manager Functions
9. User Added Press Enter

b. Delete a User

You should do this to remove the default user 999999

1. Login to Paytronix
2. Press (1) Manager Functions
3. Press (2) User Management
4. Press (2) Edit User
5. Select User
6. Press (1) Delete User
7. Are you sure? Press (1) Yes

c. Get a User list

This will print out a list of users so you can see who is programmed into the terminal

1. Login to Paytronix
2. Press (1) Manager Functions
3. Press (2) User Management
4. Press (3) User Report

3. Key Parameters

This menu item displays some of the configuration values that are important to a correct terminal setup. Press 5 from “Manager Functions” menu to enter this screen, then the following parameters will be displayed on the screen:

Merchant ID = xx
Store Code = xx
S/N = xxx-xxx-xxx
Connectivity = IP (or Dial)

Press the PF4 button (4th purple button from the left) will print more parameters that may be useful for troubleshooting problems.

4. Dial Test

This function allow a test dialup transaction to be performed. Take the following steps:

- From “Manager Functions” menu, press 6 to enter Dial Test menu
- Press 1 to perform a dial transition using the primary phone #, or press 2 to perform a dial transaction using the secondary phone #.
- If there is a dial prefix value already being set up, the dial prefix value is used.
- If the dial test fails for whatever reason, an error message describing the failure is displayed on the screen, otherwise a message “Dial primary(secondary) # passed” is displayed.
- Press any key to go back to Manager Functions menu

Terminal Setup

This section outlines the steps that are needed just prior to a download of new software. This is not a common occurrence and is typically done with the assistance of a Paytronix customer representative.

Setup Process for Internet Connected Terminals

The steps to set-up the Verifone terminal are:

1. Plug an Ethernet cable into the 10BaseT port of the terminal.
2. Plug the power cable into the terminal.
3. The terminal will start to boot. If you are prompted to choose Credit Card software or Paytronix software, choose Paytronix (usually the second or third item in the list).
4. The terminal will prompt for a user PIN. Enter 999999 (six nines), and hit “enter”.
5. The terminal will prompt for your merchant ID. Do not guess! This must be entered correctly or the terminal will not work.
6. The terminal will prompt for a store code. Do not guess! This must be entered correctly or the terminal will not work.
7. The terminal will prompt for a terminal ID. You may enter any numeric value here, but it should be some meaningful value identifying the terminal within the store. For example, if you have two cash registers, each with a terminal, one terminal might have terminal ID “1” and the other “2”. Enter an ID number and press “enter”.
8. The terminal will ask how it is to connect to the Paytronix servers. Select LAN Ethernet and hit “enter”. Since Paytronix is using the Comm Server application to determine the network information, it will try to connect right after you hit enter. If this fails for any reason, you can start it again by using the Manual Sys. Refresh function from the Manager Functions menu in the Paytronix application.
9. Once the download is complete, you will be presented with a menu of functions. Now you must change the Store Manager PIN from 999999 to a more secure value. To do this:
 - a. Choose Manager Functions.
 - b. Choose User Management.
 - c. Choose Edit User.
 - d. Choose Store Manager.
 - e. Choose Change PIN.
 - f. Enter a new PIN for the store manager user. Do not leave this PIN at 999999, as it is an easily guessed PIN.

- g. Press the red X key twice to return to User Management.
 - h. You may now add additional users, such as Cashiers or other Managers. To do this, choose Add User.
10. You are now ready to train on the Gift Card program and perform transactions.

Setup Process for Phone Connected Terminals

The steps to set-up the Verifone terminal are:

1. Plug a dedicated phone line into the phone port of the terminal.
2. Plug the power cable into the terminal.
3. The terminal will start to boot. If you are prompted to choose Credit Card software or Paytronix software, choose Paytronix (usually the second or third item in the list).
4. The terminal will prompt for a user PIN. Enter 999999 (six nines), and hit "enter".
5. The terminal will prompt for your merchant ID. Do not guess! This must be entered correctly or the terminal will not work.
6. The terminal will prompt for a store code. Do not guess! This must be entered correctly or the terminal will not work.
7. The terminal will prompt for a terminal ID. You may enter any numeric value here, but it should be some meaningful value identifying the terminal within the store. For example, if you have two cash registers, each with a terminal, one terminal might have terminal ID "1" and the other "2". Enter an ID number and press "enter".
8. The terminal will ask how it is to connect to the Paytronix servers. Select Dial Up and pressing "1". You are now prompted if a dial prefix is needed to dial out. Choose "1" for Yes, and "2" for no based on your phone configuration. At this point Paytronix will start to dial out to establish a connection. If this fails for any reason, you can start it again by using the Manual Sys. Refresh function from the Manager Functions menu in the Paytronix application.
9. Once the download is complete, you will be presented with a menu of functions. Now you must change the Store Manager PIN from 999999 to a more secure value. To do this:
 - a. Choose Manager Functions.
 - b. Choose User Management.
 - c. Choose Edit User.
 - d. Choose Store Manager.
 - e. Choose Change PIN.
 - f. Enter a new PIN for the store manager user. Do not leave this PIN at 999999, as it is an easily guessed PIN.
 - g. Press the red X key twice to return to User Management.
10. You may now add additional users, such as Cashiers or other Managers. To do this, choose Add User.
11. You are now ready to train on the Gift Card program and perform transactions.