

Paytronix POS Operators Guide Verifone Terminal

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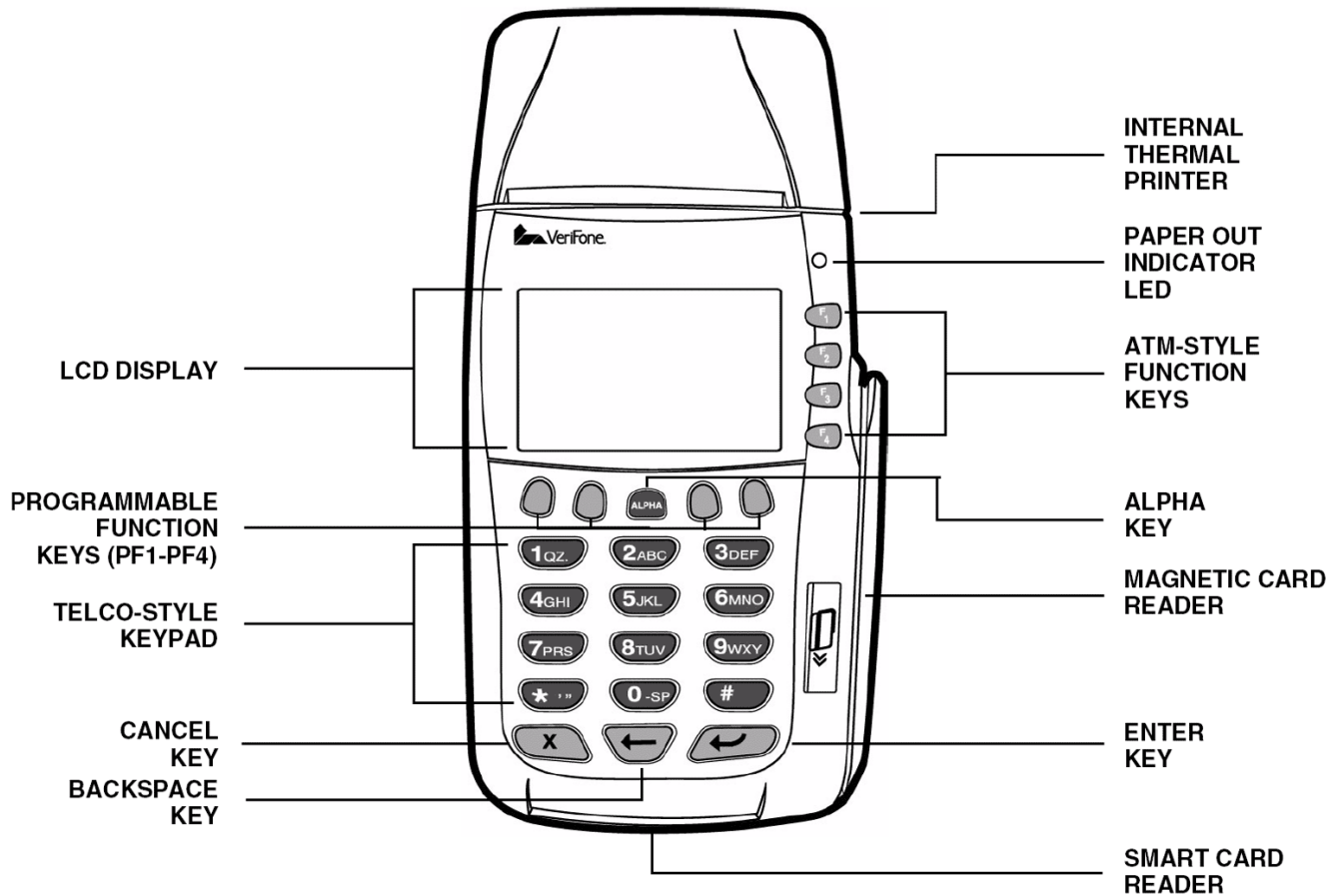
Introduction

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 Vx520 and Vx570 terminals.

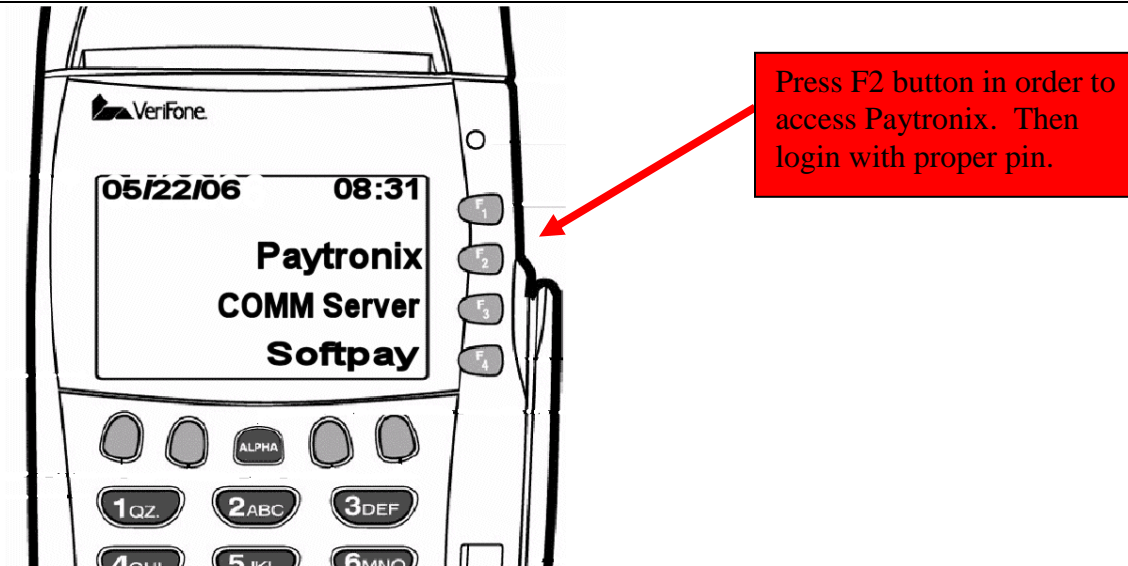
Verifone Terminal Image



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

Once initiating Paytronix on the screen, the user will see 6 different options on the main menu.

Screen 1:

1. Balance Inquiry
2. Add Points and Pay
3. Redeem Rewards
4. Report Functions
5. Media Exchange
6. Manager Functions

Screen 2:

1. Void Points
2. Logout

You can navigate between Screen 1 and Screen 2 by pressing the purple key under the ⏴ or ⏵.

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:

- a. To find out the value of a card, press “**1. Balance Inquiry**” from the numeric keypad.
- b. You are now prompted to “Swipe or Type Card #”.
- c. 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 Points and Pay

The Add Points and Pay functionality allows for the activation of a loyalty card if the card is not yet active and adds points to the guest’s card. If the guest has any rewards available on his/her account, the Add Points and Pay flow will also allow for the redemption of these rewards after the points have been added. To use this functionality, do the following:

- a. Press “**2. Add Points and Pay**” from the numeric keypad.
- b. Swipe or type the card number of the guest’s card.
- c. Enter the dollar amount the guest has spent during his/her visit. (Generally, the check subtotal from the POS)
- d. Press enter. Points will be added to the guest’s account based on the dollars spent amount.
- e. If rewards are available on the guest’s account, the screen will display an option to redeem any applicable rewards. The available amount will show in parenthesis. Enter the reward amount to be redeemed and press enter.
- f. A guest receipt will automatically print. A sample receipt is shown. Hand the receipt to the guest.
- g. If a reward was redeemed, the screen will display the “Tear off receipt and press any key to continue” line. Press any key to continue. A cash drawer slip will print. Place the printout into the cash drawer.
- h. 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
Points Earned	10
Redeem Free Entrée	1

You have the following reward available:	
Reward Dollars	5.00
You have accrued the following points towards your next reward:	
Points Balance	50.00
Receipt Trailer Information	

CASH DRAWER SLIP	
Store Name	
11/15/2007 02:59:05 Term ID:712-615-123	
999999 Store Manager	
Redeem Reward	
1	
Free Entrée	
Card #: ****04340***	
Auth #: 488912	
Trans#: 1038	
Receipt Trailer Information	

III. Redeem Rewards

Redeem Rewards is a function that allows for the redemption of rewards without accruing points on the guest's card. This function will display every reward option, not just the ones applicable to the guest's account.

To use this functionality, do the following:

- a. Press "**3. Redeem Rewards**" from the numeric keypad.
- b. Swipe or type the card number of the guest's card.
- c. The screen will display the first reward to be redeemed. Input the amount to be redeemed or press enter to continue to the next reward.
- 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 Rewards	
Free Entrée	1

Reward available:	
Reward Dollars	5.00

Point balances:	
Points	50.00

Receipt Trailer Information	

CASH DRAWER SLIP	
Store Name	
11/15/2007 02:59:05 Term ID:712-615-123	
999999 Store Manager	
Redeem Reward	
1	
Free Entrée	
Card #:	****04340***
Auth #:	488912
Trans#:	1038

Receipt Trailer Information	

IV. Media Exchange

Media Exchange is a function performed to transfer the value and history of one card onto another card. Used in the case of a bad magnetic stripe, physical card damage, or to replace a virtual card number with a physical card.

After Card Exchange, the old card will no longer be recognized as valid. Please retain the old card and follow your corporate policy for its destruction.

To use this functionality, do the following:

- a. Press "**5. Media Exchange**" from the numeric keypad.
- b. Swipe or type the card number of the guest's card.
- c. Swipe or type the new, inactive card number. (card must be inactive)
- d. A guest receipt will automatically print. A sample receipt is shown. Hand the receipt to the guest.
- e. 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

Media Exchange	

Rewards available:	
Reward Dollars	5.00


Point balances:	
Points	50.00

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. 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

2. 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.

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 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.
8. 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.
9. 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 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.
8. 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.
9. 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.