PAX Technology Inc.
BroadPOS Users Guide
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BroadPOS Users Guide

Section 1: Your BroadPOS Account........................................................................................................Pages 4 - 7
Section 2: Creating a Merchant........................................................................................................Page 8
Section 3: Creating a Terminal & Selecting an Application................................................................Page 9
Section 5: Configuring Parameters.....................................................................................................Pages 10 -16
Section 6: Connecting the Terminal to BroadPOS........................................................................Page 17
Section 1: Your BroadPOS Account

Your BroadPOS Account is the primary method you have of managing the software and settings on your PAX Terminal. The software allows you to remotely upload changes to any PAX Terminal that is connected to the BroadPOS Server. This portion of the Users Guide will discuss how to request the account, and how to manage the Users on your account, and will offer a brief introduction on the various sections of the BroadPOS system.

Your BroadPOS account will be created for you by a PAX Technical Service employee. It is created using information gathered from the Reseller Information Worksheet (see Appendix A). You should have received this form in an email from PAX Technology. Once the RIW is filled out and returned to PAX, your account is created and activated. Once activated by PAX, an email containing a link to the BroadPOS Reseller Portal, your accounts Username, and a temporary password is generated by our system. Please check your email accounts Spam folders as this email comes from an automated sender and is often considered spam by email systems. Once you have logged into the system, you will be taken to a web page that will require you to change your password. (It is recommended that you use Copy and Paste to input the temporary password).

After changing your password, you will be redirected to the BroadPOS landing page seen below.
The BroadPOS system divides management up into six sections. To access those sections simply click the link in the Navigation Pane on the left hand side of the web page. The Six sections are: My Merchants, My Terminals, My Sims, My Tickets, User Management, and My Profile. As you can see, the titles are fairly explanatory, but each section will be explained briefly below.

**My Merchants** – This Section is used to manage the Merchants you have created. Every Terminal must belong to a merchant. You may find it useful to create a Test Merchant for yourself; this will allow you to use BroadPOS to manage any Demo terminals you may have located in your office. The My Merchants section will show you a list of all your Merchants, their status, their industry type, a phone number to reach them, and an email link so you can email them directly. In the upper right hand portion of the page is a link that will allow you to create new merchants (described in section 2 of this document).

**My Terminals** – This Section is, of course, used to manage the Terminals each merchant has been assigned. The My Terminals section will show you a filterable list of all of the terminals that have been assigned to merchants. The list is filterable my model, merchant, and individual serial number. The actual window displays the terminal serial numbers, model number, merchant, location information (if input), status, and application deployment status. In the upper right hand portion of the page is a link that will allow you to create new terminals (described in section 3 of this document). Each serial number functions as a link to the terminal information page for that specific terminal. This page shows the same information as is available on the main terminal page; however it also has a row of buttons under the terminal window that enable a variety of functions. They are; Return, Edit, Activate, Inactivate, Copy, and Delete. The Return button will return you to the My Terminal page. The Edit button will allow you to edit the information shown on the terminal information page. Activate and Inactivate allow you to activate and inactivate terminals, note that a terminal must be active before it can be used, and inactive before it can be deleted. The Copy button will allow you to copy the application and parameters of the selected terminal onto another terminal of your choosing. This is very useful when deploying multiple terminals that have the same application and parameter information. The Delete button will remove the terminal from the active system. As stated above, a terminal must be inactivated before it can be deleted. Also note that this will remove any application data from the BroadPOS system, but not the actual terminal, and that the terminal can be reassigned to a different merchant if you so desire. The Terminal Information page has a link to the application page for that terminal. It is located in the upper right hand corner of the page, just above the terminal window. Clicking on that link will take you to the Application Information page for that specific terminal. It contains the history of any application that has been downloaded from BroadPOS onto that terminal. It also shows the application version, the application timestamp, the download status of the application, the download timestamp (if the application has been downloaded) and a link to both the application page, and the parameter page. If you click on the application name, you will be taken to the application information page. Which gives some basic information about the application such as version, EDC types accepted, the Industry, and Capture type. The application information page also contains a link to the parameters page which is discussed in depth in Section 4 of this document.
**My SIMs** – This section of the landing page only applies to companies who have purchased a SIM card and data program from PAX Technology. The SIM information page contains a list of SIM cards, the activation status, the carrier, merchant name, terminal serial number and model, and current and previous balance. If you click on the individual SIM number, you are taken to the SIM information page. This section will allow you to control the terminal the SIM is assigned to, activation status, view the SIM’s history, reassign the SIM to a different terminal, and to view usage information (filterable from the previous year to the previous day’s usage).

**My Tickets** – The My Tickets section allows you to create Help Tickets in the Help Desk System. These tickets are monitored by customer support, and our engineering team. You can also view the status of your ticket, and see any responses to your issue from PAX. The ticket creation system is very straightforward and user friendly. As always, you can call Technical Support rather than create a ticket if you wish.

**User Management** – The User management allows you to create different users in the BroadPOS system. Each user is given their own individual log in id to the server. There are four levels of account privilege. Access to functionality is controlled by hiding menus for activities that level is unauthorized to access. The Administrator sees all the menus, and can operate and make changes as desired. The operator only has access to the My Terminals, and My Merchants. User Administrator only has access to the User Management section. The Viewer level can see all of the sections but is unable to change anything.

**My Profile** – My profile is a page that contains the information that was used by PAX to create the account. It is fully editable by the Administrator. It is important to keep the information in this portion of the account up to date. If you forget your password and request a password change, the information gets sent to the email address listed in this window. If you no longer have access to that email, access to your account will be delayed.
Section 2: Creating a Merchant

This section of the Users Guide covers the creation of Merchants. Every Terminal must have a merchant assigned to it in BroadPOS in order to download applications onto the Terminal. This section of the BroadPOS system also allows you to manage the applications and terminal options for each PAX terminal the merchant has.

1. Select the My Merchants link in the BroadPOS Navigation pane.
2. In the right hand corner of the information window click the blue Add Merchant link.
3. Input the correct information into all boxes marked with a red asterisk.
   a. The rest of the information can be filled in if desired.
4. Click the Submit button at the bottom of the page.
5. You will be asked if you wish to create a terminal for this merchant. If you are ready to add the terminal select the NOW button, if not select LATER.
6. The Merchant has now been created, and will be visible in the My Merchants window.

### Add Merchant

<table>
<thead>
<tr>
<th>GENERAL INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merchant Name *</td>
</tr>
<tr>
<td>Email *</td>
</tr>
<tr>
<td>Country *</td>
</tr>
<tr>
<td>City *</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Merchant Type *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail</td>
</tr>
<tr>
<td>Restaurant</td>
</tr>
<tr>
<td>Retail w/Tip</td>
</tr>
<tr>
<td>Lodging</td>
</tr>
<tr>
<td>Business to Business: B-2-B</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BUSINESS INFORMATION</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>PRINCIPAL INFORMATION</th>
</tr>
</thead>
</table>

| REFERENCE |
Section 3: Creating a Terminal & Selecting an Application

The creation of a Terminal has been divided into two separate sections because the parameter portion of the process can be lengthy. The first two steps in the process are described in this section. Note that if you selected the NOW option in step 5 in the last section you will start this procedure at step three.

1. Select the My Terminals link in the navigation pane on the BroadPOS system.
2. Select the blue Add Terminal link in the right hand corner above the My Terminals Information window. You will be directed to the Add Terminal page.
3. Select the Merchant this terminal will belong to using the dropdown box.
4. Enter the Serial Number of the terminal twice. (Note you cannot use a Terminal that is already assigned to a Merchant, you must delete it can be reassigned.)
5. The Manufacturer and Model Name fields will auto populate with data from the BroadPOS server. If they do not match the terminal please contact PAX Technical Support.
6. You can put any location notes in the location line if desired.
7. Submit the terminal for creation. You will be warned that the terminal will not function until you select an application for the terminal, and you will be asked if you wish to do that NOW, or LATER. Select the appropriate button.
8. If you selected NOW, you are taken to the Select Application Page. If you selected LATER, to reach this page simply select the terminal in the My Terminals page then select the blue Select Application link. This page will only show you applications you have been granted access to by PAX Technology. If you do not see an application you need, contact PAX Technology Technical Support. If you have access to a large number of applications, you can filter them by using the fields above the display window.
9. Select the application appropriate for the Merchant by selecting the radio button next to the application, and pressing the submit button.
10. After submitting the application, you will be warned that to make the Terminal work you must configure parameters for it. If you are ready you can select NOW, if not select LATER.
Section 4: Configuring the Terminal Parameters

This section of the manual covers the configuration of the terminal parameters. The terminal parameters are the set of options and choices that the terminal will default to. This includes the Merchant and Terminal ID’s, choices about which EDC types are authorized, and even what the receipt header and trailer will say. This section will not define every terminal parameter as there are a large amount of them, and not all applications/hosts have every option. The picture below shows the Configure Parameters Tabs for a TSYS application on an MT30 in Restaurant mode. As is standard, everything marked with a red asterisk must be filled in to submit the parameter file. Certain information that is standard for that Host is prefilled for you upon the creation of the parameter; this information usually should be left as is.

Please Note: You should configure ALL options then Submit the Parameter File.

![Configure Parameter](image-url)
The Industry Tab. The options that appear here are largely based upon which industry the application is intended for. Typically the restaurant industry type has more choices than the retail industry. If for some reason you are unsure about which industry type to choose, you are often better off choosing restaurant. Tips can always be disabled, but usually cannot be enabled on a retail application. Also note that if you are configuring an SP30 or MT30 the industry mode of the terminal must match the industry mode of the ECR or you will get errors.

As you can see above, the Industry type is grayed out. The industry type is chosen by the application, and is shown for informational purposes only. This particular parameter has enabled Commercial Cards, this option has to be supported by the host and enabled at the host level. The HALO refers to the Maximum amount allowed for a single Sales Transaction, or an EDC refund. If the value is set to zero, there is no limit. (Subject to card and host limits). The Merchant Surcharge Fee is there to allow the merchant to charge a fee to cover EDC processing costs (if allowed by law). Table Number and Number of Guests prompts are options that will cause the terminal to prompt the cashier to input the table number or number of guests as appropriate.
The EDC Tab. The EDC tab displays the options for each EDC Type. The various EDC types have EDC and Host specific options, so not all choices will apply. It’s possible even that some Hosts will not allow various EDC types.

<table>
<thead>
<tr>
<th>TSY'S</th>
<th>Industry</th>
<th>EDC</th>
<th>Receipt</th>
<th>Misc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication</td>
<td>Card Type</td>
<td>BroadPOS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CREDIT Features**

- **Transactions**
  - Sale *
  - Refund *
  - Void Sale *
  - Void Forced *
  - Verify *
  - Forced *
  - Void Refund *
  - Balance Inquiry *

- **Account Truncation**
  - On Display *
  - Manual Entry *
  - Secure Card *
  - Tip *

**DEBIT Features**

- **Transactions**
  - Sale *
  - Balance Inquiry *
  - Refund *

- **Account Truncation**
  - On Display *
  - Tip *

Please note that the Account Truncation options for ANY EDC only refer to whether or not the last four numbers of the EDC account will be displayed. No full account number will ever be displayed no matter which option you choose. If you disable the Account Truncation options, then no part of the account/card number will be shown on the receipt.
Most of the entries illustrated on the last two pages have three options. Those options are enabled, disabled and password protected. The password protected options requires that the terminal password be input whenever that type of transaction is going to be processed.
The Receipt tab allows you to enter the information you would like displayed on the receipts. It is much easier to input the information on the parameter file web page than it is to input the information into the terminal using its keypad. However, note that the Casio ECR’s are only able to display four lines for the header and four lines for the trailer. Anything put in line five will not be printed on the receipt.

<table>
<thead>
<tr>
<th>TSYS</th>
<th>Industry</th>
<th>EDC</th>
<th>Receipt</th>
<th>Misc</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td>Card Type</td>
<td>BroadPOS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Header Line 1</td>
<td>TestMerchant-US</td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Header Line 3</td>
<td>Jacksonville, Florida,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Header Line 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Trailer Line 1 | | | | |
| Trailer Line 3 | | | | |
| Trailer Line 5 | | | | |

The Miscellaneous tab includes the options for the terminal password, whether or not demo mode is on by default, and if a contact module is enabled. The Max Transactions Count field should be left at the default number. The Batch protections options are not protected, which lets anyone using the terminal to run a batch close, or password protected, which forces the password to be input before a batch close transaction will be run.

<table>
<thead>
<tr>
<th>TSYS</th>
<th>Industry</th>
<th>EDC</th>
<th>Receipt</th>
<th>Misc</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Communication</td>
<td>Card Type</td>
<td>BroadPOS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Menu Timeout (100ms)</td>
<td>300</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batch Protection</td>
<td>Not protected</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Max Transactions Count</td>
<td>1500</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Swipe Sound</td>
<td>Enabled</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System Password</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demo Mode</td>
<td></td>
<td>Disabled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key Sound</td>
<td></td>
<td>Enabled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contactless Module</td>
<td></td>
<td>Disabled</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Submit  Cancel
The Communications tab controls the default communications method the Terminal will use, what backup if any the terminal will use, and some general default communications values. 

Note that the options available in this field are very much terminal specific. All PAX terminals that are capable of Ethernet connection can use either a static IP address, or can use DHCP to acquire an IP Address from the network. An S80/S90 will not have the section labeled Communication Between ECR and Pos, those options are for SP30’s and MT30’s. Most PAX terminals have more than one communication method; as a result you usually have the option to assign a backup method of communication as well as the Primary Communication Type. Also be aware that if you only have one communication method, do not assign it as both the primary and backup communication method.
The Card Type tab has options that control whether a card type is allowed or not, as well as some security options specific to that particular card brand name. The entire list of cards is not shown as the options are all similar. The Card BIN file and Commercial Card BIN file options should not be modified except by PAX personnel. The CVV option can be set for Manual Entry Only, or when the card is swiped or both when it’s swiped and manual entry. If turned to the both setting, the terminal will prompt the card user to input the CVV after every transaction. The settings displayed below are the default choices for all PAX applications.
The Final Tab on the Parameters page is the BroadPOS Options. The choices displayed in the picture below are the standard options that are preset in all PAX applications. The health report interval can be set to a twenty-four hour period or it can be set to report at a specific time. The Application Update settings should be left unmodified. The LAN settings only refer to the BroadPOS server itself, and should be left unmodified unless told otherwise.

Upon hitting the Submit button, the parameters should be ready for download onto the Terminal. If you have left any of the asterisked entries blank, you will receive an error message like the one illustrated below. As you can see, the message clearly states what information you have left blank so you can easily find and correct the issues. After an error free submission, the parameter will get a time stamp, and the downloaded flag will show not downloaded.
Section 6: Connecting Your Terminal to BroadPOS

The process of downloading the parameter file onto the terminal is simple. All that is required is an internet connection, and power for the terminal.

1. Ensure that you have a valid connection to the Internet.
2. Powercycle the terminal. After the terminal completes the Health Test and connects to the Internet, it will attempt an Online Activation. The activation is when the terminal connects to the BroadPOS server, and logs into the server using its serial number. Once the BroadPOS server has validated the terminal, it checks the application and parameter time stamps on the terminal (if any) against the time stamps in the BroadPOS server. If the time stamps in the BroadPOS server are newer it initiates the download process.
3. The download process usually takes between 2 – 5 minutes depending on what is being downloaded (application and parameter files versus a parameter file) and the speed of your connection.
4. After a successful download, the terminal will require a reboot. Simply press the Cancel key on the terminal to reboot it.
5. The Terminal will boot up with the new application and parameter files installed.

While the method listed above will work with a new or already in service terminal, you can also initiate an update via the menu options in the terminal.

**NOTICE: The Terminal will NOT upgrade with transactions in memory. The batch must be closed prior to any upgrade process.**

1. Depress either the Menu key, or on an SP30 the F Key.
2. Navigate to the System Settings menu. (Usually menu selection 5)
3. Navigate to the App Management menu. (Again usually menu selection 5)
4. Enter the Terminal Password
5. First Select the "Activate" option
6. Select "Online"
7. Once the terminal has activated select option two; App Update. The terminal will connect to the BroadPOS server and begin the same steps described in step two above; from here the process is identical to the above process.