Accessing BroadPOS

To access your BroadPOS Terminal Maintenance Account on the web:

- Navigate to [https://secure.broadpos.com](https://secure.broadpos.com)
- Input your User Name (not case sensitive)
- Input your Password (case sensitive)
- Input the Identifying Code (not case sensitive)
- Click the “Login” button

This will open the “Welcome” Screen...
Add a Merchant

- Click on “My Merchants

This will open the “My Merchants” screen...

- Click on “Add Merchant” in the upper right corner

This will open the “Add Merchant/General Information” screen...
The “Add Merchant” screen only requires the “General Information” data. The “Business Information”, “Principal Information” and “Reference” sections are not required.

Additionally, “Retail” and “Restaurant” will be the only Merchant Types you will need to consider.

- Populate all of the stared (*) fields in the General Information screen
  - Merchant Name
  - Contact
  - Email
  - Phone
  - Country
  - State/Province
  - City
  - Zip Code
  - Address
  - Merchant Type
- Click on “Submit”
The “Add Merchant” confirmation screen will open, and you will be presented with the option to add a terminal to the record either now or at a later time.

- Click on the “Now” button

This will open the “Add Terminal” screen...

**Adding a Terminal to the Merchant Account**

- Input the terminal Serial Number
- Confirm the Serial Number
- Press the “Tab” key on your keyboard to auto-fill the Manufacturer Name and Model Name
- Click on the “Submit” button

The “Add Terminal” confirmation screen will open and you will be presented with the option to...
...Import a Previously built Template or Add an Application and build the record from scratch.

(A template includes the *terminal application* to be loaded into the terminal as well as the default settings for the terminal record.)

- To add a template:
  - Click the “Now” button
- To select an application and build the record from Scratch
  - Un-check the “Import Template” box
  - Click on the “Now” button

For our purposes, we will Import a Template, so click the “Now” button

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**Add terminal successfully!**

To make this terminal work, you MUST select application for it.
Would you like to select now or later?

- [ ] Import Template

[Now ➔] [Later ➔]

This will open the “Select Template” screen...
Adding a Template

There are two ways to select a template to the record:

- Filter out all of the templates except for the one you want
  - Type the name of the template in the “Template Name” field
  - Click on the “Filter” button
  - Click on the radio button adjacent to the desired template
  - Click on the “Submit” button

Or…
• Select the template directly from the list by clicking on the radio button adjacent to the desired template
• If there are more than five options, you may have to navigate through two or more pages of template options by clicking on the arrows in the “Go to Page” area below the list
• Click on the “Submit button”

The “Add Application” confirmation screen will open...
The confirmation screen will present the option of configuring the merchant terminal parameters now or later.

- Click on the “Now” button

This will open the parameter configuration screen...
**Configuring the Terminal Parameters**

Most of the Merchant Terminal Parameters will be pre-set in the template, so there won’t be a lot to do here.

**Required Fields on the Processor Host (First Data Omaha) Tab**

- Merchant Number
- Device ID (Typically, this will be 4 digits, the last 4 digits of the Serial Number will ensure the uniqueness of the Device ID)
- It is strongly recommended that the Start Batch and End Batch times be populated in order to clear the terminal Database (transaction journal) so as to avoid filling the terminal memory
  - The terminal will hold up to 1500 transactions
  - Once that threshold has been reached, new transactions will not be allowed until the batch data (Database) has been cleared from the terminal memory

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**Configure Parameter**

<table>
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<tr>
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<td>Card Type</td>
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<td></td>
</tr>
</tbody>
</table>

**Host Features**

- Capture Type: Host Based
- Terminal ID: PPX1
- TPP ID: DRX083
- ETC Type: Did To Host
- Start Batch Time: 23:30
- Batch Interval Minutes: 2

**Host URLs**

- Primary Auth URL: support.datewire.net/mercport/1023456789
- Primary Batch URL: support.datewire.net/mercport/1023456789

**Dial Parameters**

- Primary Auth Phone: 186630495515
- Primary Auth Dial Baudrate: 1200
- Backup1 Auth Phone: 18002280574
- Backup1 Auth Dial Baudrate: 1200
- Backup2 Auth Phone: 18002280574
- Backup2 Auth Dial Baudrate: 1200
- Primary Batch Phone: 186630495515
- Primary Batch Dial Baudrate: 1200
All of the Host URLs, Ports, Phone Numbers and Baud Rates are pre-set in the record, so there is no need to make further changes to the Processor Host (First Data Omaha) Tab.

Most of the fields in the rest of the tabs contain options, and will most likely be pre-set in the terminal template. This includes the Communication tab, which we’ll go through next...
The “Communication” Tab

The “Communication” tab sets the Terminal to Host communication parameters. The default setting is for IP communications with Dial Backup.

LAN Settings: DHCP

Most terminals configured for IP (LAN) communications will be configured for DHCP. By default, the record is set this way and will require no further editing in the “General” and “LAN” fields.

“General” Fields Settings

- Primary Comm. Type: LAN
- Backup Comm. Type: Dial Up

“LAN” Fields Settings

- DHCP: Enabled
LAN Settings: Static

“General” Fields Settings

- Primary Comm. Type: LAN
- Backup Comm. Type: Dial Up

“LAN” Fields Settings

- DHCP: Disabled
- Local IP: Provided by the Merchant
- Netmask: Provided by the Merchant
- Gateway IP: Provided by the Merchant
- DNS IP: Provided by the Merchant

Dial Up Settings

- Primary Comm. Type: Dial Up
- Backup Comm. Type: Disabled
“Dial Up” Fields Options Settings

- Prefix: Used for “outside line” access (9 access or other required prefix)
- Dial Mode: Tone or Pulse
- Dial Tone Check:
  - Enabled: Checks for dial tone before dialing
  - Disabled: “Blind” Dials – does not check for a dial tone

<table>
<thead>
<tr>
<th>Dial Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix:</td>
</tr>
<tr>
<td>Dial Mode:</td>
</tr>
</tbody>
</table>

The “Receipt” Tab

The “Receipt” tab is populated when the “General Information” portion of the “Add Merchant” screen is completed.

- The first four lines of the receipt are automatically populated
- You can add a fifth header line
- You can also add up to five footer lines

Configure Parameter

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<td></td>
</tr>
<tr>
<td>Header Line 1</td>
<td>Guitar Blvd</td>
<td>Header Line 2</td>
<td>4423</td>
<td>My Street</td>
</tr>
<tr>
<td>Header Line 3</td>
<td>Carlsbad, CA 92014</td>
<td>Header Line 4</td>
<td>5555555555</td>
<td></td>
</tr>
<tr>
<td>Header Line 5</td>
<td></td>
<td></td>
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<tr>
<td>Trailer Line 1</td>
<td></td>
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<td>Trailer Line 2</td>
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Effective Time(EST)
The “Misc” Tab

There are several options available in the “Misc” tab. Some of the more common changes that are made are:

- System Password
- Batch Protection (Password)
- Batch Pre-Report type
- PINpad type (Internal/External)
- Buzzer Sound (Terminal Beep)

*Generally, any time you see the word “Protection”, it refers to “Password Protection”.*
Other, less commonly changed, options include:

- **Menu timeout**: Default is 30 seconds
- **Pre-Print**: Will cause the terminal to print header information after the final “Enter” or card swipe
- **Demo Mode**: Allows the terminal to be downloaded directly into “Demo” Mode
- **Check Dup Transaction**: Causes the terminal to compare the transaction with the current batch information for the same dollar amount, card number and presents options to proceed with the transaction or cancel
- **Batch Report Type** (*The same options apply to the Batch Pre-Report)*:
  - **Condensed**: EDC Type (Credit, Debit, EBT, Gift, etc.), Card Type, Last four digits of the card number, total number of transactions, Total dollar amount of the batch
  - **Short Report**: Same as Condensed Report (See above)
  - **Journal Report**: EDC type (Credit, Debit, EBT, Gift, etc.), Batch Number, Batch Date, Card Type, Transaction Type (Sale, Void, Credit, etc.), Transaction #, Transaction Date, Transaction Time, Entry Mode (Swiped, keyed), Account # (Truncated by default), Auth Code, Reference #, Number of sales on that card, Total dollar amount on that card, Total Number of Transactions, Total dollar amount for all transactions
  - **Totals Only**: EDC Type (Credit, Debit, EBT, Gift, etc.), Batch Number, Batch Date, Number of transactions by card type, Total Transactions, Total dollar amount for batch
- **Contactless Module**: Presents options for No Contactless reader, Various External Readers (VIVOTech 4500/4800) or Internal Reader

- **Receipt Timer**: Sets the delay between printing the merchant and customer copies of the receipt.
  - The default setting is 5 seconds
- **Batch Pre-Report**: Enables the Batch Pre-Report
  - If disabled, the report will not print
- **No Paper Mode**: Determines how the terminal will respond if there is no paper in the tray
- Off: Will not allow the transaction to proceed if there is no paper in the tray
- On: Will allow the transaction to proceed whether or not there is paper in the tray
  - Will not print a receipt even if there is paper present
- Auto: Will allow the transaction to proceed whether or not there is paper in the tray
  - Will print a receipt if paper is present

While these are the areas where changes may be most often made, the remaining tabs may require the occasional change and are described below...
EDC Tab
The “EDC” Tab is where the terminal payment types are set. The EDC types available in the basic application are:
- Credit
- Debit
- EBT
- Cash

Credit Features: Transactions
Use this area to enable various Credit transaction types. There are three options for each transaction type:
- Enabled
  *The “sale” transaction is always enabled and is not editable.
- Disabled
- Password Protect

![Configure Parameter]

Descriptions for the fields in the “Others” section on the next page...
Credit Features: Others

The “Others” section of the various tabs allows you to set behavioral rules for all transaction types. In the “Credit Features” area, the options are:

- Print Disclaimer: When set to “Yes”, a disclaimer will print at the bottom of the receipt. *The disclaimer hard coded into the application and is not editable.*
- Print Card Holder Name: When set to “Yes”, the card holder’s name will print below the signature line
- Print Customer Copy: When set to “Yes”, a customer copy of the receipt will be printed
- Manual Entry: Options are
  - Disabled
  - Enabled
  - Password Protected
- Tip: Enables or disables Tip Processing: Options are
  - Enabled
  - Disabled
- Pre-dial: When enabled, the terminal will dial after the transaction is initiated – Options are:
  - Enabled
  - Disabled
  - Only For Swipe
- Secure Card: Options are:
  - Disabled
  - Re-enter Last 4 digits
  - Re-enter All Digits
  - Confirm Card Number
  - Re-enter Last 4 Digits and Confirm
  - Re-enter All Digits and Confirm
- Surcharge Fee Mode: Options are:
  - Disabled
  - Flat Fee
  - In Percentage
  - Highest
- Surcharge Fee Name: Name the fee whatever you wish
- Surcharge Flat Fee: Input the desired flat fee
- Surcharge in Percentage: Input the desired percentage (0-99)
- Surcharge Fee Confirm: Options are:
  - Enabled
  - Disabled
- Maximum Single Amt For Store and Forward: Input the maximum allowable dollar amount for a single Store & Forward transaction
• Maximum Total Amt For Store and & Forward: Input the maximum allowable dollar amount for a Store and Forward batch

Debit Features:

• Debit EDC Support: Enable or disable Debit support Available options are:
  - Enabled
  - Disabled

Debit Features: Transactions

• Sale: No options available – Always enabled whrnDebit support is enabled
• Refund: Available options are:
  - Enabled
  - Disabled
  - Password Protected

Debit Features: Others

• Print Customer Copy: When set to “Yes”, a customer copy of the receipt will be printed
• Options are:
  - Yes
  - No

Descriptions for the fields in the EBT section on the nextpage...
EBT Features:

- Debit EDC Support: Enable or disable EBT support. Available options are:
  - Enabled
  - Disabled

EBT Features: Transactions

- Sale: No options available – Always enabled when EBT support is enabled
- Refund: Available options are:
  - Enabled
  - Disabled
  - Password Protected
- Withdrawal: Options are:
  - Enabled
  - Disabled
  - Password Protected
- Balance Inquiry: Options are:
  - Enabled
  - Disabled
  - Password Protected

EBT Features: Others

- Print Customer Copy: When set to “Yes”, a customer copy of the receipt will be printed
  - Options are:
    - Yes
    - No
- Manual Entry: When enabled, allows manual entry of the card number. Options are:
  - Enabled
  - Disabled
  - Password Protected
(EBT Features: Others – Contued)

- **Tip:** When enabled, allows Tip Processing - Options are:
  - Enabled
  - Disabled

- **Pre-dial:** When enabled, the terminal will dial after the transaction is initiated – Options are:
  - Enabled
  - Disabled
  - Only For Swipe

Descriptions for the fields in the “Cash Features” section on the next page...
Cash Features

The “Cash Features” functionality is a record keeping feature that is extremely rarely used, and is disabled by default.

- **Cash EDC Support**: Disabled by default – Options are:
  - Enabled
  - Disabled

Cash Features: Transactions

- **Sale**: Always enabled and not editable
- **Refund**: Available options are:
  - Enabled
  - Disabled
  - Password Protected
- **Void Sale**: Available options are:
  - Enabled
  - Disabled
  - Password Protected
- **Void Refund**: Available options are:
  - Enabled
  - Disabled
  - Password Protected

Cash Features: Others

- **Print Customer Copy**: When set to “Yes”, a customer copy of the receipt will be printed
- **Options are**:
  - Yes
  - No
- **Tip**: When enabled, allows Tip Processing - Options are:
  - Enabled
  - Disabled
Tip Tab

The “Tip” tab is where the rules for Tip Processing are established for the terminal. Within the ‘General’ settings section, there are four sub-sections:

- General
- Additional Features
- Amount Options
- Percentage Options

You can also set up to three tips in the record.

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**General**

- **Input Mode**
  - Input Tip Amount

**Additional Feature**

- **Tip Select**
  - Disabled
- **Tip Unit**
  - In Cents

**Amount Options**

- **Amount Option 1**
  - 3.00
- **Amount Option 3**
  - 7.00

**Percentage Options**

- **Percentage Option 1**
  - 20
- **Percentage Option 3**
  - 40

**Tip 1**

- **Tip Prompt**
  - Disabled

**Tip 2**

**Tip 3**

Tip Tab: descriptions for the Tip tab on the next page...
Tip Tab: General

- **Input Mode:** Sets up how the tip amount is to be entered into the terminal. Options are:
  - Input Tip Amount
    - Will be added to the base amount to create the total dollar amount of the transaction
  - Input Total Amount
    - Enter the total amount of the transaction, including tip

Tip Tab: Additional Features

- **Tip Select:** When enabled, allows suggested tip amounts/percentages to be printed on the receipt. Options are:
  - Enabled
  - Disabled

- **Tip Unit:** Determines whether the tip will be in whole dollars or dollars and cents. Options are:
  - In Cents
  - In Dollars

- **Amount Threshold:** Sets a pre-defined dollar amount so that, when the transaction amount is below the threshold, the suggested “Dollar Amounts” will print. When the transaction amount reaches the threshold amount, the suggested “Percentage” dollar amount will be printed on the receipt. Options are:
  - Input the threshold dollar amount

These are the suggested dollar amounts to be printed on the receipt. There are three fields to be populated:

- Amount Option 1: Default amount is 3.00
- Amount Option 2: Default amount is 5.00
- Amount Option 3: Default amount is 7.00

These amounts can be edited to suit the requirements of the merchant.

**Tip Tab: Percentage Options**

These are the suggested tip percentages to be printed on the receipt. There are three fields to be populated:

- Percentage Option 1: Default percentage is 20
- Percentage Option 2: Default percentage is 30
- Percentage Option 3: Default percentage is 40

These percentages can be edited to suit the requirements of the merchant.

Tip Tab: descriptions for the “Tip 1” “Tip 2” and “Tip 3” sections on the next page...
Tip Tab: Tips 1, 2 and 3

All three sections are identical. You can enable up to three separate tip lines, depending on the merchant requirements.

- Tip Prompt: When enabled, will prompt the server to add a tip – Options are:
  - Enabled
  - Disabled
- Default Tip: Allows for a predetermined tip amount to be added to the transaction
  - Input the dollar amount to be defaulted
  - 0.00 will disable the default amount
- Name: Allows the designation of the tip recipient – Options are:
  - You can edit the “Name” fields so that they reflect the merchant’s requirements. For example “Server”, “Concierge”, “Manager”, etc.

Card Type Tab: The Card Type tab on the next page...
The Card Type tab is divided into nine editable segments, and is rarely touched:

- Card Bin
- Visa
- MasterCard
- American Express
- Diners Club
- Discover
- JCB
- enRoute
- Others

Card Type Tab: descriptions for the Card Type tab on the next page...
Card Type: Card BIN

The Bin ranges are pre-set in bin files and are not individually editable. There are two separate files included:

- Card BIN file
  - Contains the BIN ranges for all non-commercial cards
- Commercial Card BIN File
  - Contains the BIN ranges for all commercial cards

Card Type: Visa

All card type options are identical, so we will just describe the Visa section.

- Type: Visa (or other corresponding card type)
  - Not editable
- Mask: when **DISABLED**, the Card Brand will be **DEACTIVATED** – Options are:
  - Enabled
  - Disabled
- AVS For Swipe: Will prompt for AVS data when a card is swiped – Options are:
  - Disabled
  - Address Only
  - ZIP Only
  - Both
- AVS For Card Not Present: When enabled, will prompt for AVS data when the card is not present: Options are:
  - Disabled
  - Address Only
  - ZIP Only
  - Both
- Card Present Mode: Tells the terminal to assume the “presence” status of a card – Options are:
  - Always Present
    - Assumes the card is always present
  - Always Not Present
    - Assumes the card is always NOT present
  - Prompt
    - Does NOT assume the presence or non-presence of the card
    - Prompts for the operator to tell it whether or not the card is there

Continued next page...
- **AVS For Card Present**: When enabled, will prompt for AVS data when a card is present – Options are:
  - Disabled
  - Address Only
  - ZIP Only
  - Both

- **CVV**: When enabled, sets the conditions under which CVV data will be prompted for – Options are:
  - Disabled
  - Manual Entry Only
  - Manual and Card Not Present

BroadPOS Tab on the next page...
BroadPOS Tab

BroadPOS Tab: Auto Health report

The Auto Health Report (Health Check) serves to keep you informed on the terminal components by contacting the BroadPOS Server at regular intervals and checking the condition of those components (Processor, Power Tolerances, etc.).

Some things to keep in mind about the Auto Health Report (Health Check):

- The report will not initiate if there are transactions in the terminal memory
  - This means that if there is an open batch, the terminal will not update
  - Also, even if there is not an open batch, if there is still transaction data in the terminal database, the terminal cannot update
- The Auto Health Report requires IP connectivity between the terminal and the BroadPOS Server
- The Health Check will automatically take place each time the terminal is power cycled

Field descriptions:

- Type: Determines whether the Health Check will occur at a specific time each day or at specific intervals throughout the day – Options are:
  - Specific Time
  - Fixed Interval
- Time: Sets the time of day that the Health Check will take place
  - Will initiate at a specific time each day
  - Default is set at 6:00 AM
- Interval: The amount of time between Health Check sessions
  - Will initiate at specific intervals throughout the day
  - Default is set at about every 24 hours (100ms x 864,000)

Now, save your work...
The Submit Button

Once you have made your edits, it is necessary to save them to the BroadPOS system. In order to do that, simply

- Click on the “Submit” button

You can click on the Submit button from any screen in “Edit” mode to save your changes. When you have done so, you will be brought to the Parameter screen:

The Parameter screen gives you a lot of information:

- Parameter Timestamp: Tells you when the last edit was saved in the terminal
- Effective Time: Tells you when the record became ready for downloading
- Download Flag: Gives you the current download status of the changes in the record
- Download Time: Tells you if and when the edited parameter was downloaded
- Operator: Tells you who made the edits to the download record
- Disable: Allows you to disable any record change
Edit an Existing Terminal Record

To edit an existing record, do this:

From the MainMenu:

- Click on “My Terminals
- Enter the Terminal Serial Number in the “Terminal S/N” field
- Click on the “Filter” button

This will filter out all terminals other than the one you want to edit.

- Click on the Terminal S/N
This will open the Application screen...

- Click on the Application Name

This will open the View “Application” screen...

- Click on “View Parameter”

This will open the “Parameter” screen...
• Click on “Re-configure Parameter”

This will open the “Configure Parameter” screen...

From here, proceed as shown above...

For Multi-Merchant setup, go to the next page...
Multi-Merchant Setup

First Data Omaha Tab

On the Processing Host tab (First Data Omaha) under Merchant Parameters:

- Input the parameters for the Main Merchant (Merchant 1)

Multi-Merchant Tab/Merchant 1

On the Multi-Merchant tab Under Merchant 1:

- Enable Multi-Merchant Support
- Enable Merchant (Password Protect)
- Input the specific merchant data for Merchant 1 (Use the same ID data from the Processing Host tab, Merchant Parameters section)
  - Merchant Name
  - Merchant Password
  - Merchant Number
  - Device ID, etc.
Multi-Merchant Tab/Merchant 2

On the Multi-Merchant tab Under Merchant 2:

- Enable Multi-Merchant Support
- Enable Merchant (Password Protect)
- Input the specific merchant data for Merchant 2
  - Merchant Name
  - Merchant Password
  - Merchant Number
  - Device ID
  - Etc.

Repeat for all subsequent merchants.

*Separate DataWire IDs are required for each separate merchant.*