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

---

Add terminal successfully!

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

- Import Template

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

There are two ways to select a template for 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

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Select Template

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Application Name</th>
<th>Application Version</th>
<th>Manufacturer Name</th>
<th>Model Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
<td>V1.00.05</td>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
</tr>
<tr>
<td>Omaha Restaurant</td>
<td>Omaha-TC-Restaurant-S90</td>
<td>V1.00.00</td>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
</tr>
<tr>
<td>Nashville Retail</td>
<td>Nashville-TC-Retail-S90</td>
<td>V1.00.02</td>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
</tr>
<tr>
<td>Omaha New</td>
<td>Omaha-TC-Retail-S90</td>
<td>V1.00.00</td>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
</tr>
<tr>
<td>880 Omaha Demo Rest</td>
<td>Omaha-TC-Retail-S90</td>
<td>V1.01.00</td>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
</tr>
<tr>
<td>Omaha Training Demo</td>
<td>Omni-TC-Retail-S90</td>
<td>V1.01.00</td>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
</tr>
<tr>
<td>Omaha Rest S90 wTip</td>
<td>Omaha-TC-Retail-S90</td>
<td>V1.00.01</td>
<td>PAX Global Technology Unlimited</td>
<td>S90 Counter Top Terminal</td>
</tr>
</tbody>
</table>

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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

Select application successfully!

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

Now Later

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

Many of the Merchant Terminal Parameters will be pre-set in the template, but there are several fields to complete for a specific merchant record.

Required Fields on the Processor Host (TSYS) Tab

- Bank Identification Number
- Agent Bank Number
- Agent Chain Number
- Merchant Number
- Store Number
- Terminal Number
- Merchant Name
- Merchant City
- Merchant State
- City Code
- Time Zone Differential
- Merchant Category Code
- Terminal ID (V) Number
- TSYS applications are Terminal Capture and, therefore, require terminal settlement each day. This can be either a manual or automatic process.
  - If an automatic settlement is desired, the Start Batch and End Batch times must be populated in order to settle the batch and 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

See the TSYS processor screens on the next page...
Se the Host URLs, Ports and Dial numbers on the next page...
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 (TSYS) 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...
Configuring the EMV Parameters

EMV Terminal Parameters will be pre-set in the terminal profile, but they can be edited for a specific merchant record. The page is divided into three sections:

- Enable/Disable EMV
- Contact Parameters
- Contactless Parameters

**TSYS to make the business decision as to the amounts.**

**EMV Parameters: Enable/Disable EMV**

EMV can be enabled or disabled for a specific merchant terminal.

- Enable
- Disable

**EMV Parameters: Contact Parameters**

- Terminal Online Floor Limit
  - Is editable
  - Transactions below the dollar amount will not be required to go online for approval
  - Defaults to 0.01 - Requires all transactions to go online
- PIN Floor Limit
  - Is editable
  - Transactions at or below this dollar amount do not require a PIN
  - Default set at 25.00

**EMV Parameters: Contactless Parameters**

- Contactless Trans Limit
  - The maximum allowable amount for a Contactless Transaction
  - Is editable
  - Default is set at 100.00
- Terminal Online Floor Limit
  - Is editable
  - Transactions below this amount do not require online approval
  - Default set at 0.01
- Contactless Online Floor Limit
  - Is editable
  - Contactless Transactions below this amount do not require online approval
  - Default set at 0.01
- CVM Required Limit
  - Is editable
  - The Maximum amount above which CVM is required
Default set at 50.00

<table>
<thead>
<tr>
<th>TSYS</th>
<th>EMV</th>
<th>Industry</th>
<th>EDC</th>
<th>Receipt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tip</td>
<td>Misc</td>
<td>Communication</td>
<td>Card Type</td>
<td>BroadPOS</td>
</tr>
</tbody>
</table>

**Enable/Disable EMV**

Enable EMV Feature: Enabled

**Contact Parameters**

- Terminal Online Floor Limit: 0.01
- PIN Floor Limit: 25.00

**Contactless Parameters**

- Contactless Trans Limit: 100.00
- Contactless Online Floor Limit: 0.01
- Terminal Online Floor Limit: 0.01
- CVV Required Limit: 50.00
The “Communication” Tab

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

This tab also sets communication between the PAX terminal and the POS/ECR system.

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
  - Device Type: EM100 (For terminals without Phone Line port – S300, etc.)

Communication between ECR/POS and PAX terminal field settings

These settings will be made or confirmed at the terminal level.

- Limit Length: Maximum message length (Defaults to 240)
- Port: Communication port for serial communication (Defaults to 10009)
- Communication Type: Defaults to COM1
  - Options:
    - COM1
    - COM2
    - USB
    - Ethernet
- UART Baudrate: Defaults to 9600

POS System Feature (Ethernet Only)

These fields come default to the required settings and require no changes.
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 and are editable.
- You can add a fifth header line.
- You can also add up to five footer lines.

![Receipt Tab Example](image-url)
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)
- Key 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
- Swipe Sound: Beeps when a card is swiped through the MSR
- Demo Mode: Allows the terminal to be downloaded directly into “Demo” Mode
- Card Swipe Timeout: Length of time the terminal will wait for card swipe after initiation of a transaction before it times out
- Swipe Any Time: When enabled, will allow PAN entry before the dollar amount is input(Integrated and Semi-Integrated environments)
• Contactless Module: Presents options for No Contactless reader, Various External Readers (VIVOTech 4500/4800) or Internal Reader

• No Paper Mode: Determines how the terminal will respond if there is no paper in the tray
  o Off: Will not allow the transaction to proceed if there is no paper in the tray
  o 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
  o 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
- Disabled
- Password Protect

*The “sale” transaction is always enabled and is not editable.*

Descriptions for the fields in the “Others” section on the nextpage...
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:

- **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
Debit Features:

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

Debit Features: Transactions

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

Debit Features: Others

- Tip: Available options are:
  - Enabled
  - Disabled
- Pre-Dial: Options are:
  - Enable
  - Disable
  - Only For Swipe (Not used with Debit)

Descriptions for the fields in the EBT section on the next page...
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

- Manual Entry: When enabled, allows manual entry of the card number - Options are:
  - Enabled
  - Disabled
  - Password Protected
- 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:
- Expiry Date Prompt: Prompts for entry of the expiration date - Options are:
  - Enabled
  - Disabled

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

- **Gift EDC Support**: Enable or disable Gift support - Available options are:
  - Enabled
  - Disabled

Gift Features: Transactions

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

- **Add Value**: Options are:
  - Enabled
  - Disabled
  - Password Protected

- **Issue**: Options
  - Enabled
  - Disabled
  - Password Protected

- **Balance Inquiry**: Options are:
  - Enabled
  - Disabled
  - Password Protected
• Void: Options are:
  o Enabled
  o Disabled
  o Password Protected
• Deactivation: Options are:
  o Enabled
  o Disabled
  o Password Protected

Gift Features: Others

• Manual Entry: Options are:
  o Enabled
  o Disabled
  o Password Protected
• Tip: Manual Entry: Options are:
  o Enabled
  o Disabled
• Pre Dial: Options are:
  o Enabled
  o Disabled
• Tip: Options are:
  o Enabled
  o Disabled
• Expiry Date Prompt: Options are:
  o Enabled
  o Disabled

Cash Back Features

The “Cash Back Features” functionality is a record keeping feature that is extremely rarely used, and is set with the following values by default.

<table>
<thead>
<tr>
<th>Cash Back Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Option 1 *</td>
</tr>
<tr>
<td>Amount Option 3 *</td>
</tr>
<tr>
<td>Amount Option 2 *</td>
</tr>
<tr>
<td>Amount Option 4 *</td>
</tr>
</tbody>
</table>

The amounts are editable via the Amount Option dropdown fields.
Confirmation Prompts

- Options are:
  - Enable
  - Disable

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:

- Additional Features
- Amount Options
- Percentage Options

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

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

- **Tip Select:** When enabled, allows suggested tip amounts/percentages to be printed on the receipt – Options are:
  - Enabled
  - Disabled
- **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
- **Tip Unit:** Determines whether the tip will be in whole dollars or dollars and cents – Options are:
  - In Cents
  - In Dollars

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.

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Card Type Tab: The Card Type tab on the next page...
Card Type Tab

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 Card Present: 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...
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

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)
BroadPOS Tab: Other Sections (These fields will rarely, if ever, be changed.)

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...