

SwipeSimple Terminal Deployment Guide

For Terminal Serial Number-based Deployment

Follow these detailed steps for Terminal Serial Number-based deployment (Method 1) on the chosen PAX hardware terminal (PAX A920, PAX A920 Pro or PAX A80)

Version: 5.1, dated July 16, 2024

Version notes:

- Updated to reflect latest guidance on boarding a terminal with Fiserv RapidConnect Nashville

Contents

Contents	2
SwipeSimple Terminal Deployment Guide: Introduction	3
Preparing to sell SwipeSimple Terminal	3
Deployment Preparation Checklist	5
Ready to Deploy SwipeSimple Terminal	6
Quick Summary of Terminal Serial Number-based deployment steps	6
Detailed Terminal Serial Number-based deployment steps involved	7
1. At PAXSTORE: Create Merchant's entry & hardware terminal entry	7
2. At PAXSTORE: Provision BroadPOS payment application	9
3. At PAXSTORE: Provision SwipeSimple application	11
4. At SwipeSimple RAMP (reseller portal): Create SwipeSimple Account	12
5. At deployment facility (or) in-house facility: Activate, box & ship the PAX hardware terminal	14
Appendix	17
Appendix A: List of compatible BroadPOS payment application versions as of August 29, 2023	17
Appendix B: Steps for configuring parameters for processor-specific payment applications	18
Appendix C: Steps to enable Debit Routing for SwipeSimple Terminal	25
Appendix D.1: Steps for SwipeSimple Initiated Auto-Batching at SwipeSimple RAMP	27
Appendix D.2: Steps for SwipeSimple Initiated Manual batching within the SwipeSimple app	29
Appendix D.3: Steps for BroadPOS Initiated Auto-batching at BroadPOS payment app in PAXSTORE	30
Appendix D.4: Steps for BroadPOS Initiated Manual Batching within BroadPOS payment app	32
Appendix E: Steps to enable data communication on the PAX hardware terminals	33
Appendix F: How to remotely push a SwipeSimple app update to Terminals	34
Appendix G: Steps to silence audio cues	36
Appendix H: Steps to conduct test transactions in SwipeSimple with Automatic Test Accounts	40
Appendix I: Steps you may conduct for Quality Assurance	41
Appendix J.1: SwipeSimple Merchant Account Type Definitions	42
Appendix J.2: Selling and Selecting SwipeSimple Merchant Account Types	43
Appendix K: Post-Auth Tip Setting in SwipeSimple	44
Appendix L: Automatic Adjustment Setting in SwipeSimple	45
Appendix M: Variable provisioning Cheat Sheet For TSYS merchant accounts	46
Appendix N: Variable provisioning Cheat Sheet For First Data Omaha merchant accounts	48
Appendix O: Variable provisioning Cheat Sheet For Vantiv(Worldpay/FIS) merchant accounts	50
Appendix P: Installing PAX BroadPOS Manager application	52
Appendix Q: List of BroadPOS application features that are compatible with SwipeSimple	53
Appendix R: List of BroadPOS application features that are not compatible with SwipeSimple	54

SwipeSimple Terminal Deployment Guide: Introduction

This document is a step-by-step guide for deploying SwipeSimple Terminal application on both the PAX A920 and the PAX A80 hardware terminals using the Terminal serial number-based deployment method (Method 1).

Preparing to sell SwipeSimple Terminal

Prior to selling and deploying SwipeSimple Terminal, you need to complete certain pre-conditions, a summary of which are listed below.

Be authorized to sell SwipeSimple	<p>If you have an existing CardFlight agreement to sell SwipeSimple, talk with your CardFlight Account Manager to ensure you have:</p> <ul style="list-style-type: none">• Completed an Addendum, if required <p>If you are not currently a SwipeSimple Reseller, contact the CardFlight Sales team at info@cardflight.com to learn more about the steps to become a reseller.</p>
Determine how to source PAX terminal hardware	<p>CardFlight does not sell hardware for SwipeSimple Terminal. As part of preparing to sell the product, you will need to determine if you will source PAX hardware:</p> <ul style="list-style-type: none">• Through distributors from whom you currently buy terminal hardware• Directly from PAX Technology, Inc. If you are new to purchasing and deploying PAX hardware, we are able to help with introductions to the PAX team. <p>All support of the hardware terminal itself is direct through PAX Technology, Inc.</p>
Obtain a reseller account at PAXSTORE, the online marketplace and terminal management system managed by PAX Technology, Inc.	<ul style="list-style-type: none">• Request a PAXSTORE reseller account by sending an email to your PAX account manager or to Heather Mlachnik (heather.mlachnik@pax.us) at PAX• Follow next steps outlined by PAX representatives to create a PAXSTORE account for the designated administrator within your organization• Activate PAXSTORE reseller account, by clicking on email from "noreply@paxstore.us" sent to designated administrator's email ID & resetting temporary password. Reseller account must be activated within 24 hours of receiving email from PAX

Schedule & participate in PAXSTORE training	<ul style="list-style-type: none"> Follow the steps outlined by PAX representatives to schedule and attend a 60 minute training session on PAXSTORE, conducted by PAX representatives. The training session is recommended for personnel within your organization who will be directly managing PAXSTORE (i.e., the designated administrators) and personnel who will be deploying the PAX A920 and the PAX A80 hardware terminals
Make a choice: Deploy using in-house resources OR Select deployment provider and scope of activity	<p>You can use choose to deploy SwipeSimple Terminal in two ways:</p> <ul style="list-style-type: none"> Option 1: Use in-house resource to deploy SwipeSimple Terminal and use a hardware distributor to purchase key injected PAX A920 and PAX A80 hardware terminals Option 2: Use deployment services offered by 3rd party deployment providers at an additional service fee to fulfill several or all steps required to deploy SwipeSimple Terminal
Select deployment method	<p>Two methods of deployment are currently supported:</p> <ul style="list-style-type: none"> Method 1: Terminal Serial number-based deployment In this method, Terminal Serial Number is used as the unique identifier for deployment. This method is useful if you already know the serial number of the device that will be deployed to the merchant, before beginning the rest of the steps. <p>Detailed steps for this method of deployment are explained in this document.</p> <ul style="list-style-type: none"> Method 2: Terminal Reference-based deployment In this method, a Terminal Reference is used for deployment. This method of deployment is currently being used for deployment at three distributors - TPG, POS Portal & CDE. This method is useful if you need to begin certain steps in the boarding process before knowing the serial number of the device that will be deployed to the merchant. <p>For this method of deployment, please see SwipeSimple Terminal Deployment Guide v2.x: Method 2.</p>

Deployment Preparation Checklist

Prior to initiation of SwipeSimple Terminal deployment for a specific device, please have the following items ready:

- Have the merchant's VAR Sheet available
- Confirm merchant's preferences on Debit Routing: Enabled or Not Enabled
- Confirm merchant's preferences on Batching: Automatic or Manual
 - If preference is for Automatic, at what time of the day?
- Confirm merchant's preferences on tipping: On Receipt, In Sales Flow, No Tip
- Confirm if merchant should be enabled for Automatic Adjustment
- Be familiar with how to enable the multiple options for Batching:
 - SwipeSimple initiated Auto batching? Read **Appendix D.1**
 - SwipeSimple initiated Manual batching? **Read Appendix D.2**
 - BroadPOS initiated Auto batching? Read **Appendix D.3**
 - BroadPOS initiated Manual batching? Read **Appendix D.4**

Ready to Deploy SwipeSimple Terminal

Quick Summary of Terminal Serial Number-based deployment steps


1. At PAXSTORE: Create Merchant's entry & hardware terminal entry
2. At PAXSTORE: Provision BroadPOS payment application
3. At PAXSTORE: Provision SwipeSimple application
4. At SwipeSimple RAMP (reseller portal): Create SwipeSimple Account
5. At deployment facility (or) in-house facility: Activate, box & ship the PAX hardware terminal

Detailed Terminal Serial Number-based deployment steps involved

Note: Operators implementing this step should have the following details:

- Merchant VAR sheet with establishment address
- Merchant email ID and contact details received from the merchant
- Serial number of the PAX hardware Terminal that has been identified for deployment, as the terminal serial number is needed for the Terminal Serial Number based method of deployment

1. At PAXSTORE: Create Merchant's entry & hardware terminal entry

Step Number	Details
1	Access PAXSTORE login screen at https://auth.paxstore.us/passport/login?client_id=account&market=www
2	Log in using reseller's designated administrator account and corresponding password
3	Once logged in, access the Grid icon () on the top right of the screen
4	In the dropdown, select the "Administrator Center" within the "BroadPOS Marketplace"
5	Under the Management Side Menu, select "Terminal Management" on the column menu. You will now see the screen loading details of your reseller account
6	Under the Organization Tab (at the top of the screen) click to view a list of all Merchants linked to your reseller account. To add a merchant, select the "+ Merchant" Icon on the right of the screen
7	<p>A new "Create Merchant" page appears with Merchant details to be completed:</p> <ul style="list-style-type: none">- Merchant name- Email Address (Do not check the "Create merchant user account box")- Country- Phone no.- Postal code- Description - Business that Merchant operates in- Address- Merchant type - Select any of the following options from the drop down: Government, B2B or Private sector- City- State <p>Select the "Activate Merchant" Checkbox and select "OK" after filling in Merchant details</p>

8	Select the cloud icon beside the Merchant name to activate the Merchant account
9	<p>Once activated, select the “Terminal List” Tab corresponding to the merchant account</p> <p>You will see the “+Terminal” icon now available on the right of the screen. Select the “+Terminal” icon. A new “create terminal page” appears with details to be filled</p> <p>Key details to be filled are:</p> <ul style="list-style-type: none"> - Terminal Name - SN: This is the hardware terminal’s serial number. This number is located on the back of the hardware terminal. - Manufacturer (Select “PAX”) from dropdown - Model: Choose “A920”, “A920 Pro” or “A80” from the drop down menu - Location
10	You will need to activate the newly created hardware terminal. Select the cloud icon beside the hardware terminal name to activate the hardware terminal.

2. At PAXSTORE: Provision BroadPOS payment application

Note: Operators implementing this step should have the following details:

- SwipeSimple can operate in its intended manner only with specific versions of the individual BroadPOS payment applications. See **Appendix A** for a list of BroadPOS Payment applications and specific compatible versions.
- Will this SwipeSimple Terminal will be using Fiserv Rapid Connect Nashville as a payment processor?
 - See **Appendix P** to install BroadPOS Manager first
- Will this SwipeSimple Terminal be enabled for debit routing?
 - See **Appendix C** for information about Debit Routing for SwipeSimple Terminal
- Merchant's batching preference: Auto-batching or Manual-batching
 - If merchant has opted for Manual-batching, no action is required.
 - If merchant has opted for Auto-batching, operators should have the merchant's desired **start batch time**. This information is required for Step 2.7 below.
 - See **Appendix D.1 - D.4** for information about batching.

Step Number	Details
1	Select the newly created hardware terminal entry within PAXSTORE
2	Select the "App & Firmware" tab. You will see the "+Push application" button on the screen. Select "+Push application" on the right of the screen to provision BroadPOS payment application.
3	<p>Search for the correct version of the payment application to be pushed to the hardware terminal</p> <ul style="list-style-type: none">- If the Merchant has a First Data Omaha processor account, search for "BroadPOS Omaha" and select the version compatible with SwipeSimple- If the Merchant has a TSYS Sierra processor account, search for "BroadPOS Sierra" and select the version compatible with SwipeSimple- If the Merchant has a Worldpay processor account, search for "BroadPOS Vantiv" and select the version compatible with SwipeSimple- If the Merchant has a Fiserv Rapid Connect Nashville processor account, search for "Rapid Connect" and select the version compatible with SwipeSimple <p>Select the required payment application and select "OK". The necessary payment application is added to the "Push Queue". The push queue is right below the "+Push application" button in case you need to go back to it.</p>
4	A new screen appears with the title, "Edit parameters".
5	Under "Edit Parameter", select the option available to reset parameters after every provisioning. This will ensure that information from previous builds is cleared out.

6	<p>Review <u>Appendix B: Steps for configuring parameters for processor-specific payment applications</u> for steps to configure parameters pertaining to each processor.</p> <p>Review <u>Appendix C: Steps to enable Debit Routing for SwipeSimple Terminal</u> for steps to configure on PAXSTORE to enable Debit routing</p> <p>Review Appendix D regarding batching to determine merchant practice for batching:</p> <ul style="list-style-type: none"> - Automatic or manual batching, either initiated by SwipeSimple or by BroadPOS - Note: Default for BroadPOS is manual batching. To enable automatic batching, you must take action. <p>To enable merchant for SwipeSimple Initiated Auto-Batching, review <u>Appendix D.1</u></p> <p>To enable merchant for SwipeSimple Initiated Manual Batching, review <u>Appendix D.2</u></p> <p>To enable merchant for BroadPOS Initiated Auto-Batching, review <u>Appendix D.3</u></p> <p>To enable merchant for BroadPOS initiated Manual batching, review <u>Appendix D.4</u></p>
7	<p>After entering parameter configuration, select 'Next" to save the details entered.</p> <p>The next screen has the “Push immediately” option, select it and select “activate”. The BroadPOS payment application is now ready to be pushed onto the hardware terminal.</p>

3. At PAXSTORE: Provision SwipeSimple application

Step Number	Details
1	Select the newly created hardware terminal account.
2	Select the “+Push application” on the right of the screen to provision SwipeSimple Terminal application.
3	<p>Search for “SwipeSimple” in the list of applications. The corresponding entry for SwipeSimple application appears.</p> <p>By default, the most recent version of SwipeSimple will be selected within the “Version” drop down box.</p> <p>Always select only the most recent version of SwipeSimple for downloading onto the PAX hardware terminal, unless informed otherwise by the SwipeSimple team</p> <p>In the case that an earlier version of SwipeSimple needs to be downloaded, select the “Version” drop down box. The latest version along with the previous versions of SwipeSimple appear. Select the SwipeSimple version recommended for download by the SwipeSimple team</p>
4	The next screen has “Push immediately” option, select it and select “activate” for the application to be pushed onto the terminal

4. At SwipeSimple RAMP (reseller portal): Create SwipeSimple Account

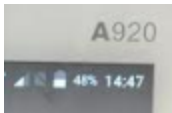
Note: Operators implementing this step should have the following details:

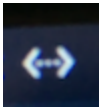

- Merchant VAR sheet with establishment address
- Merchant email ID and contact details
- Serial Number of the PAX hardware device chosen in previous Step 1 of this process
- Will this SwipeSimple device be enabled for debit routing?
 - See **Appendix C** for information about Debit Routing for SwipeSimple
- Merchant's batching preference: Auto-batching or Manual-batching
 - See **Appendix D.1** for Auto batching within SwipeSimple application [Recommended]
 - See **Appendix D.2** for Auto batching within BroadPOS payment application
 - See **Appendix D.3** for Manual batching within BroadPOS payment application
- Merchant's tipping preference: Tip on Receipt, Tip in Sales Flow, or No Tip
 - See **Appendix K** for additional information on tip settings
- Will this merchant be enabled for Automatic Adjustment?
 - See **Appendix L** for additional information on Automatic Adjustment settings

Step Number	Details
1	Log into SwipeSimple.com with your reseller credentials
2	Navigate to the left menu and select the "Companies" tab within the menu options. From the Accounts page, select "Add a New Company" button
3	Create a new SwipeSimple company account, entering: <ul style="list-style-type: none">• Merchant's name in the "Company Name" text box• Merchant's mobile # in the "Company Phone Number" text box• Merchant's email in the "Owner Email" text box and• Owner details in the "Owner Full Name" text box. Select the " SwipeSimple Terminal " software package
4	For the first account being created for this company, enter the below details: <ul style="list-style-type: none">• Account Address• Account City• Account State• Account Zip
5	From the available drop down, select the "A80", "A920", or "A920 Pro" hardware device option, to be associated with this account
6	For the Merchant processor, select the processor corresponding to the merchant account from the drop down list
7.1	Enter the hardware serial number of the PAX hardware device
7.2	Set "Post-Auth Tip Setting"

	<ul style="list-style-type: none"> - If merchant would like to add tip to a transaction at a later time: <ul style="list-style-type: none"> - Set the “Post-Auth Tip Setting” to “on Receipt” - If merchant would like accept tips in sales flow: <ul style="list-style-type: none"> - Set the “Post-Auth Tip Setting” to “in Sales Flow” - If merchant does not want/need to accept tips: <ul style="list-style-type: none"> - Set “Post-Auth Tip Setting” to “No Tips”
7.3	<p>Make selection to enable (or not enable) Debit Routing</p> <ul style="list-style-type: none"> - FOR TSYS & VANTIV (WORLDPAY) merchant accounts: <ul style="list-style-type: none"> - If merchant opts for Debit Routing, check the “Enable debit routing” - If merchant does not opt for Debit Routing, leave the box unchecked - FOR FIRST DATA OMAHA merchant accounts: Debit Routing is not available
7.4	<p>Set “Type of Batching”</p> <ul style="list-style-type: none"> - If merchant has opted for Auto-batching: <ul style="list-style-type: none"> - Set the “Type of Batching” value to “Automatic” - Set the “Batch Closure initiated via” value to either SwipeSimple (recommended) or BroadPOS - Set the time the batch is expected to close as defined in the previous Step 2.7 - If merchant has opted for Manual batching <ul style="list-style-type: none"> - Set the “Type of Batching” value to “Manual (through BroadPOS app)”
7.5	<p>If reseller has been enabled for Automatic Adjustment by their CardFlight Account Manager:</p> <ul style="list-style-type: none"> • Check “Enable Automatic Adjustment” to enable the Company account for Automatic Adjustment for the merchant <ul style="list-style-type: none"> ○ See Appendix L for additional information on Automatic Adjustment settings
7.6	Enter specific merchant account details corresponding to the merchant’s VAR sheet
7.7	Set merchant time zone
7.8	Select "Submit" button to create the merchant account
8	An automatic welcome email is sent to the Merchant email linked to the user account, with temporary password & details to log into SwipeSimple application on the PAX hardware device or SwipeSimple.com as a Merchant Admin user
9	<p>Optional: Pre-fill the merchant's tip preferences (Only for merchants who wish to accept tips)</p> <ul style="list-style-type: none"> - Navigate to the left menu and select the Accounts tab - Search for the newly created merchant account using the search tool - From the list of accounts visible, select the newly created account - Within the “Settings” tab, click on the “Edit Account Information” button - Within the new screen, select the “Transactions” tab - Under tip settings: <ul style="list-style-type: none"> - Change “Prompt for Tip?” to Yes - Edit default tip levels based on input from merchant - After completing edits, click on “Update Settings” button on the top right corner of the screen to save the settings

5. At deployment facility (or) in-house facility: Activate, box & ship the PAX hardware terminal

Step Number	Details
1	<p>Power the PAX hardware terminal with the same serial number as the one entered in the previous steps and connect to a communications source.</p> <p><i>Communication options for SwipeSimple Terminal on PAX A920 hardware terminal are:</i></p> <ul style="list-style-type: none"> - WiFi - 4G data provided through a data SIM card <p><i>Communication options for SwipeSimple Terminal on PAX A80 hardware terminal are:</i></p> <ul style="list-style-type: none"> - WiFi - Ethernet connectivity <p><u>Steps to connect to WiFi on the PAX A920, PAX A920 Pro and A80 hardware terminals</u></p> <ul style="list-style-type: none"> - From the PAX terminal home screen, select the “Settings” icon. - You will be prompted for a password. Enter either 9876 or pax9876@@ as the password and select “OK”. - You will be directed to the Android settings screen. Select the WiFi option. - A list of available WiFi networks will appear. Select one of the networks that you have access to. - Enter your WiFi password and select “CONNECT”. - Upon successful authentication, the terminal is connected to the WiFi network. <p><u>Steps to enable cellular SIM card on the PAX A920 and PAX A920 Pro hardware terminal</u></p> <ul style="list-style-type: none"> - Remove the terminal’s back cover - Slide battery out, there are two SIM card slots at the terminal’s base - Load the cellular SIM card into any one of the two SIM card slots <p>After loading the cellular SIM card, check for mobile data connectivity by verifying if the mobile data icon is active, as shown in the example image below:</p>  <p><u>Steps to enable Ethernet connectivity on the PAX A80 hardware terminal</u></p> <ul style="list-style-type: none"> - Connect the PAX A80 hardware terminal to an Ethernet port available at the location using an Ethernet cable - From the PAX terminal home screen, select the “Settings” icon. - You will be prompted for a password. Enter either 9876 or pax9876@@ as the password and select “OK”.

	<ul style="list-style-type: none"> - You will be directed to the Android settings screen. Select the Ethernet option. - Select the “Enable Ethernet” button to enable the Ethernet connection - If connection is successful, you will see the below Icon on the top of the PAX A80 terminal’s home screen 
2	Once connected to a communications data source, select the PAXSTORE application icon on the PAX hardware terminal. The PAX hardware terminal will now start to automatically download applications placed in the “Push Queue” of the corresponding terminal entry in PAXSTORE
3	<p>Monitor the download of applications on the PAX hardware terminal by reviewing download status on the PAXSTORE Application. Steps to access and observe the status of application downloads are listed below:</p> <ul style="list-style-type: none"> • Select the PAXSTORE Application icon on the PAX hardware terminal • Select the Menu icon () at the top left hand corner of the screen • Select the “Download list” icon to view the list of applications being downloaded and the status of their downloads <p>After successful download, the BroadPOS payment application icon & the SwipeSimple icon will appear on the home screen of the PAX hardware terminal</p>
4	Select the BroadPOS payment application by tapping the icon. A user interface to conduct a transaction will appear. This step is required so that BroadPOS is running in the background and SwipeSimple can communicate with it. Merchants should not use the BroadPOS payment user interface for conducting transactions.
5	<p>Set device time zone to local time zone of the merchant by following the steps outlined below. Local time zone of the merchant is mentioned in the merchant’s VAR sheet</p> <ul style="list-style-type: none"> - Select the Android “Settings” icon - Enter either 9876 or pax9876@@ as the password (default password for all PAX Android devices) - Once password is accepted, scroll down and select “Date & time” - In the Date & time menu, deactivate the “Automatic time zone” option - Select the “Select time zone” option and choose the merchant’s local time zone from the available list of time zones - After local time zone is chosen, select the back button to go back to the settings - Exit settings to view the terminal’s home screen
6	<p>Change sleep settings for the device by following the steps outlined below:</p> <ul style="list-style-type: none"> - Select the Android “Settings” icon

	<ul style="list-style-type: none"> - Enter either 9876 or pax9876@@ as the password (default password for all PAX Android devices) - Once password is accepted, scroll down and select "Display" - In the Display menu, scroll down and select "Sleep" - A new window opens - select the "Sleep after 30 minutes" radio button - After sleep settings are chosen, select the back button to go back to the settings - Exit settings to view the terminal's home screen
7	Optional: Conduct test transaction sequence, as outlined in the Appendix of this document
8	Power down the PAX hardware terminal
9	Box and ship the PAX hardware terminal to Merchant location

If the the PAXSTORE app does not log in and displays an error indicating the same, contact the Paxstore support team by sending an email to Paxstore support : PAXSTORE.support@pax.us

Appendix

Appendix A: List of compatible BroadPOS payment application versions as of July 16, 2024

For TSYS merchant processor accounts	BroadPOS TSYS Sierra V1.03.36E_20230815
For First Data merchant processor accounts	BroadPOS Omaha V1.04.17E_20211015
For Worldpay merchant processor accounts	BroadPOS Vantiv V1.02.18E_20220519
For Fiserv Rapid Connect Nashville merchant processor accounts	BroadPOS Rapid Connect V1.05.16E_20231208 BroadPOS Manager V1.01.71E_20231116

This information is also found at SwipeSimple Support Center linked [here](#).

CardFlight has tested SwipeSimple Terminal to work end-to-end only with this list of BroadPOS applications specific versions. If you would like to use a different BroadPOS payment application with SwipeSimple Terminal, please contact your CardFlight Account Manager.

Appendix B: Steps for configuring parameters for processor-specific payment applications

SwipeSimple uses the semi-integration method enabled by PAX to process transactions on the PAX hardware terminal. To process a transaction, the SwipeSimple Terminal app communicates with the processor specific BroadPOS payment application downloaded and configured on the PAX hardware terminal. While a merchant user will rarely interact directly with BroadPOS, having the application installed and configured correctly is critical to transaction processing.

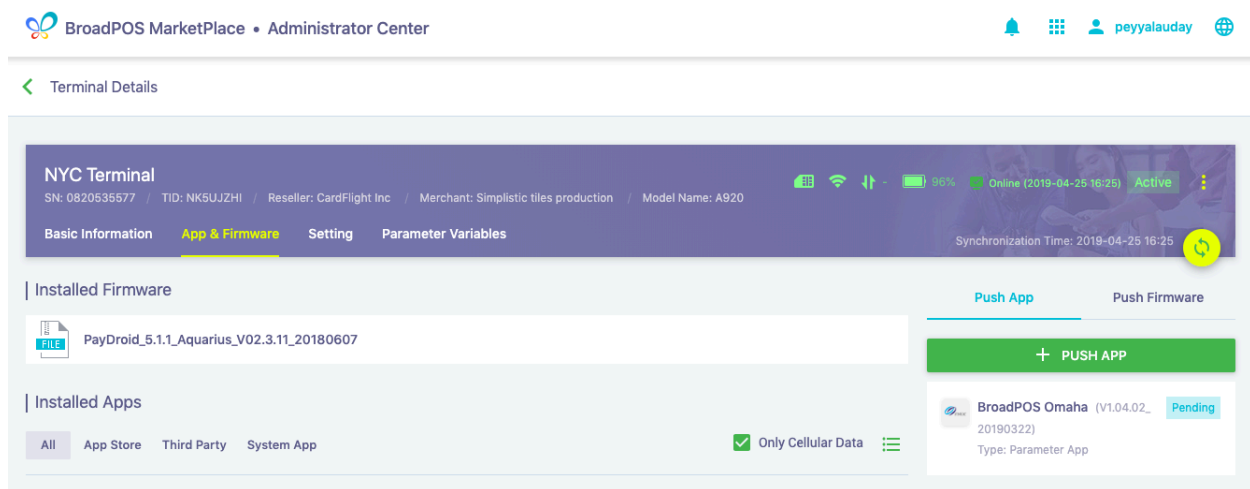
There are specific naming conventions used by PAX for distinguishing the different processor specific payment applications that are present on the PAXSTORE. Every payment application will start with the phrase “BroadPOS” and will be followed by a reference to the specific processor.

- If the Merchant has a First Data Omaha account, search for “BroadPOS Omaha”
- If the Merchant has a TSYS Sierra processor account, search for “BroadPOS Sierra” application
- If the Merchant has a Worldpay processor account, search for “BroadPOS Vantiv”
- If the Merchant has a Fiserv Rapid Connect Nashville processor account, search for "BroadPOS Rapid Connect"

Ensure that the version of the BroadPOS payment application being downloaded is compatible with SwipeSimple.

You will need to configure parameters for the BroadPOS payment application before it can be fully used to process a transaction. The parameters are configured on the PAXSTORE website.

Once pushed, the BroadPOS payment application appears on the “Push Queue”, below the “+PUSH button”

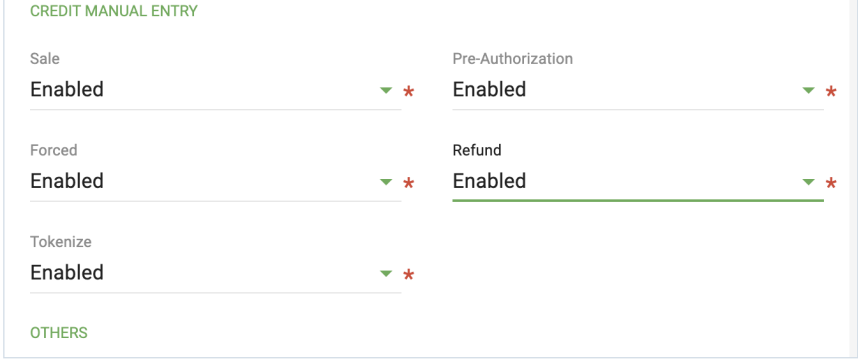


Select the BroadPOS application from the Push Queue and select the parameters tab to configure parameters

The screenshot displays the 'Push Task Configuration' interface. On the left, the 'App Detail' section shows the app is 'Online', with version 'V1.04.02_20190322', model 'A60', and size '9.9 MB'. The 'Push Templates' section on the right shows a 'Select Parameter Template' dropdown with 'retail.zip' selected. Below this is an 'Edit Parameter' section with tabs for 'INDUSTRY', 'EDC', 'RECEIPT', 'TIP', 'MISC', 'OMAHA' (selected), and 'COMMUNICATION'. The 'OMAHA' tab shows 'CARD TYPE' and 'EMV' options. At the bottom, the 'HOST FEATURES' section shows 'Capture Type' set to 'Terminal Based' and a 'Start Batch Time' field.

In the table below, we list out steps to configure merchant parameters for each payment application

<p>Steps for configuring merchant parameters on a BroadPOS Omaha payment application</p>	<p>Pework: Register the Device ID mentioned in the merchant's VAR sheet on the Datawire portal prior to beginning any of the steps listed in this document.</p> <p>URL for the portal is: https://support.datawire.net/provisioning/servlet/net.datawire.mas.servlet.Login?action=doGetLogin&successJsp=/jsp/login.jsp&failureJsp=/jsp/login.jsp</p> <p>Select the parameter template to be used in the "Select Parameter Template" box</p> <ul style="list-style-type: none"> Enter and select the "Restaurant" template. The "Restaurant" template should be selected even for retail merchants accepting tips, such as beauty salons and barber shops <p>Select the "OMAHA" Tab</p> <p>Select the "Merchant parameters" dropdown to configure</p> <ul style="list-style-type: none"> Merchant Number (Merchant ID in VAR sheet) Device ID If the merchant does not require end to end encryption, set "P2PE Mode to "Disabled" If the merchant requires end to end encryption via Transarmor, please contact your PAX representative to enable this functionality <p>Note that if the BroadPOS payment application is uninstalled & re-installed for any reason, the Device ID mentioned in the merchant's VAR sheet should be</p>
--	--

	<p>re-registered on Datawire</p> <p>Select the “MISC” Tab</p> <p>Identify the variable named “Contactless module”. The default value should be set to “Internal” by default. If not, change option from “Disabled” to “Internal”</p> <p>Select the “EDC” Tab</p> <p>When configuring BroadPOS Omaha V1.04.17E_20211015, set all Credit Manual Entry Features to “Enabled”</p>  <p>If merchant requires tipping functionality, conduct the following checks:</p> <ul style="list-style-type: none"> • Ensure that Parameter template chosen is “Restaurant” • Ensure that the TIP functionality within the EDC tab is set to “Enabled” <p>Guidance for other Tabs</p> <ul style="list-style-type: none"> • Industry: No requirement for any parameters within this tab to be updated • Receipt: No requirement for any parameters within this tab to be updated. Receipt settings in the BroadPOS payment application do not impact receipt settings in SwipeSimple • Tip: No action required for any parameters within this tab to be updated. Tip settings will be enabled in SwipeSimple • Communication: No requirement for any parameters within this tab to be updated • Card Type: No requirement for any parameters within this tab to be updated • EMV: No requirement for any parameters within this tab to be updated
<p>Steps for configuring merchant parameters on a BroadPOS Sierra payment application</p>	<p>Select the parameter template to be used in the “Select Parameter Template” box</p> <ul style="list-style-type: none"> • Enter and select the “Restaurant” template. The “Restaurant” template should be selected even for retail merchants accepting tips, such as beauty salons and barber shops

	<p>Select the “TSYS” Tab</p> <p>Select the “Merchant parameters” dropdown to configure</p> <ul style="list-style-type: none"> - Bank Identification Number - Agent Bank Number - Agent Chain Number - Merchant Number - Store Number - Terminal Number - Merchant Name - Merchant City - Merchant State - City Code - Country Code - Currency Code - Merchant ABA Number - Merchant Category Code - Merchant Settlement Agent Number - Sharing group - Time zone differential - Set the "Support Partial Approval" flag to "Disabled" - to prevent partial authorizations/approvals - Under the “P2PE dropdown, set to “Disabled”. If processor requires P2PE, select “Voltage E2EE” from dropdown and enter Gen2 Auth code received from processor <p>Select the “MISC” Tab</p> <p>Identify the variable named “Contactless module” and change option from “Disabled” to “Internal”</p> <p>Guidance for other Tabs</p> <ul style="list-style-type: none"> ● Industry: No requirement for any parameters within this tab to be updated ● EDC: No action required if merchant does not require tipping functionality. If merchant requires tipping functionality, conduct the following checks: <ul style="list-style-type: none"> ○ Ensure that Parameter template chosen is “Restaurant” ○ Ensure that the TIP functionality within the EDC tab is set to “Enabled” ● Receipt: No requirement for any parameters within this tab to be updated. Receipt settings in the BroadPOS payment application do not impact receipt settings in SwipeSimple ● Tip: No action required for any parameters within this tab to be updated. Tip settings will be enabled in SwipeSimple ● Communication: No requirement for any parameters within this tab to be updated ● Card Type: No requirement for any parameters within this tab to be updated ● BIN file: No requirement for any parameters within this tab to be updated
--	--

	<p>updated</p> <ul style="list-style-type: none"> ● EMV: No requirement for any parameters within this tab to be updated
Steps for configuring merchant parameters on a BroadPOS Vantiv payment application	<p>Select the parameter template to be used in the “Select Parameter Template” box</p> <ul style="list-style-type: none"> ● Enter and select the “Restaurant” template. The “Restaurant” template should be selected even for retail merchants accepting tips, such as beauty salons and barber shops <p>Select the “VANTIV” Tab</p> <p>Select the “Merchant parameters” dropdown to configure</p> <ul style="list-style-type: none"> - Bank ID - Merchant ID - Terminal ID - Locator ID <p>Select the “MISC” Tab</p> <p>Set the "Support Partial Approval" flag to "Disabled" - to prevent partial authorizations/approvals</p> <ul style="list-style-type: none"> ● Industry: No requirement for any parameters within this tab to be updated ● EDC: No action required if merchant does not require tipping functionality. If merchant requires tipping functionality, conduct the following checks: <ul style="list-style-type: none"> ○ Ensure that Parameter template chosen is “Restaurant” ○ Ensure that the TIP functionality within the EDC tab is set to “Enabled” ● Receipt: No requirement for any parameters within this tab to be updated. Receipt settings in the BroadPOS payment application do not impact receipt settings in SwipeSimple ● Tip: No action required for any parameters within this tab to be updated. Tip settings will be enabled in SwipeSimple ● Communication: No requirement for any parameters within this tab to be updated ● Card Type: No requirement for any parameters within this tab to be updated ● EMV: No requirement for any parameters within this tab to be updated
Steps for configuring merchant parameters on a BroadPOS Rapid Connect application	<p>Step 1: Prework -: BroadPOS Rapid Connect application will work only if another PAX application, called "BroadPOS Manager" is installed on the terminal</p> <p>Prior to using BroadPOS Rapid Connect on the terminal, please install the recommended version of BroadPOS Manager app. Details on installing BroadPOS Manager app is available in Appendix P of this document</p>

Step 2: Configuring BroadPOS Rapid Connect payment application

Select the **Restaurant.zip** parameter template from the "Select Parameter Template" box

Note: Restaurant.zip is the only template that must be used while configuring the BroadPOS Rapid Connect app, irrespective of merchant type

Select the "RAPIDCONNECT" Tab

Select the "Merchant parameters" dropdown to configure

- Merchant ID
- Alternate Merchant ID
- Terminal ID
- TPP ID for Credit (Overwrite default value to RPA097)
- TPP ID for Debit (Overwrite default value to RPA097)
- Group ID (Enter value 10001)
- Merchant Category Code
- Set "Support Partial Approval" to *Disabled*
- Set "Auto Batch Mode" to *OFF*

Guidance for other Tabs

- **EMV:** Under "EMV Features" Section, change "**Contactless Retry Attempts**" value to **2**
- **Misc:** Under "General Settings" Section, change "**Support Print**" to **Disabled**
- **Industry:** No requirement for any parameters within this tab to be updated
- **EDC:** No requirement for any parameters within this tab to be updated
- **Receipt:** No requirement for any parameters within this tab to be updated. Receipt settings in the BroadPOS payment application do not impact receipt settings in SwipeSimple
- **Tip:** No action required for any parameters within this tab to be updated. Tip settings will be enabled in SwipeSimple
- **Misc:** No requirement for any parameters within this tab to be updated
- **Communication:** No requirement for any parameters within this tab to be updated
- **Card Type:** No requirement for any parameters within this tab to be updated
- **Card BIN:** No requirement for any parameters within this tab to be updated
- **BroadPOS:** No requirement for any parameters within this tab to be updated
- **Multi Merchant:** No requirement for any parameters within this tab to be updated
- **POS:** No requirement for any parameters within this tab to be updated
- **Installment:** No requirement for any parameters within this tab to be updated

	<p>updated</p> <ul style="list-style-type: none">• Uptrillion: No requirement for any parameters within this tab to be updated
--	---

Appendix C: Steps to enable Debit Routing for SwipeSimple Terminal

This appendix details the steps required to enable Debit routing or “PIN Debit” on SwipeSimple Terminal

When deploying a SwipeSimple Terminal, you have the option to enable debit routing for the merchant. If enabled, this feature gives merchants the option to route transactions via debit networks (e.g., Interlink, Maestro, Pulse, etc.) in addition to routing of credit networks (e.g., Visa, Mastercard, American Express, etc.) Merchants familiar with traditional terminals and payment processing may require that their merchant acquirer support for this feature, also known as “PIN Debit”. Additionally, in certain scenarios, Debit Routing can lower the transaction expense for merchants.

Once enabled, merchants will be prompted for “Credit”, “Debit” or “Cash” as options in the sales flow, after the merchant presses the “Charge” button. If a PIN is required, the merchant or user will be asked for the PIN at the time of sale.

Enabling Debit Routing when onboarding new SwipeSimple Terminal merchant accounts for TSYS, VANTIV (WORLDPAY), and FIRST DATA OMAHA:

	On PAXSTORE Step 2 for both Methods 1 and 2	On SwipeSimple RAMP Method 1 Step 4 / Method 2 Step 5
For TSYS & VANTIV (WORLDPAY) merchant accounts	<ul style="list-style-type: none">• Create the new terminal entry on PAXSTORE• Push and configure the corresponding BroadPOS payment application• While configuring the BroadPOS payment application, under the EDC Tab - ensure that DEBIT EDC SUPPORT” flag is enabled	<ul style="list-style-type: none">• Create the new SwipeSimple Terminal merchant account on SwipeSimple Ramp• Under “General Information” then “Debit Transactions” option, check the “Enable debit routing” box
For FIRST DATA OMAHA merchant accounts	<ul style="list-style-type: none">• Create the new terminal entry on PAXSTORE• Push and configure the corresponding BroadPOS payment application• While configuring the BroadPOS payment application, under the EDC Tab - ensure that DEBIT EDC SUPPORT” flag is enabled	<ul style="list-style-type: none">• NO Configuration required for Omaha accounts on SwipeSimple RAMP

Steps to enable Debit routing for existing SwipeSimple Terminal merchant accounts for TSYS, VANTIV (WORLDPAY), AND FIRST DATA OMAHA:

	On PAXSTORE	On SwipeSimple RAMP
For TSYS & VANTIV (WORLDPAY) merchant accounts	<ul style="list-style-type: none"> • View the parameters for the BroadPOS payment application • Check if under the EDC Tab - “DEBIT EDC SUPPORT” flag is enabled • If the “DEBIT EDC SUPPORT” flag is disabled, reset the parameters and update the BroadPOS payment application 	<ul style="list-style-type: none"> • Log into SwipeSimple RAMP • Search for the SwipeSimple Terminal merchant account to be updated to enable Debit Routing • Under “General Information”, then “Debit Transactions” option, check the “Enable debit routing” box
For FIRST DATA OMAHA merchant accounts	<ul style="list-style-type: none"> • View the parameters for the BroadPOS payment application • Check if under the EDC Tab - “DEBIT EDC SUPPORT” flag is enabled • If the “DEBIT EDC SUPPORT” flag is disabled, reset the parameters and update the BroadPOS payment application 	<ul style="list-style-type: none"> • NO Configuration required for Omaha accounts on SwipeSimple RAMP

SwipeSimple Terminal does not support tipping over debit rails. If a merchant is enabled for debit routing and would like to accept a tip on a transaction, they will need to process the transaction as credit.

If Debit Routing is not enabled at deployment or edited post-deployment, the merchant:

- Will not be prompted for “Debit” “Credit” or “Cash” in the sales flow
- Will be able to accept debit card transactions, however, these transactions will be routed via the credit networks. It will not be treated as a debit transaction.

Appendix D.1: Steps for SwipeSimple Initiated Auto-Batching at SwipeSimple RAMP

When **onboarding or editing** a SwipeSimple Terminal Merchant Account in SwipeSimple RAMP, the reseller has the option to select the *Type of Batching* desired for the merchant. If *Automatic* is selected, you will have the option for SwipeSimple or BroadPOS.

To have SwipeSimple initiate the auto-batch:

- Select SwipeSimple and then designate a desired time for the batch to run.
- Ensure the BroadPOS auto-batch settings are set to manual so the BroadPOS auto-batch feature doesn't interfere with SwipeSimple's auto-batch initiation.
- Ensure that the merchant keeps their terminal turned on and online.

Steps to enable SwipeSimple Initiated Auto-Batch around found in this Guide:

- Deployment Method 1: Step 2 and Step 4.7.4
- Deployment Method 2: Step 2 and Step 5.7.4

Additional information and FAQs regarding SwipeSimple Initiated Auto-Batch:

Why should I select SwipeSimple Initiated Auto-Batch over BroadPOS?

- Through field-testing, we've encountered issues in which the BroadPOS app fails to execute the auto-batch at the expected time, and the merchant isn't notified.
- To make the SwipeSimple Terminal merchant experience better, we have enhanced SwipeSimple to initiate the auto-batch in place of BroadPOS, if configured to do so.

Why should I select BroadPOS Auto-Batch over SwipeSimple Initiated Auto-Batch?

- There are two scenarios where selecting BroadPOS over SwipeSimple Initiated Auto-Batch would make sense for merchants:
 - The merchant prefers to have a physical receipt printed every time the batch successfully closes as an indication that it was indeed successful.
 - The merchant requires minute precision batch closure, since SwipeSimple Initiated Auto-Batch only allows 30-minute precision.

Is manual batching supported if I don't want SwipeSimple or BroadPOS Auto-Batch for my merchant?

- Yes. For merchants that prefer to manually batch out, simply indicate manual batching on the SwipeSimple Terminal onboarding form and do not configure BroadPOS to autobatch. The merchant will need to open the BroadPOS app on the terminal to manually close their batch.

What is required for SwipeSimple Initiated Auto-Batch to execute successfully?

- The terminal device must be powered on
- Device must be connected to the internet
- SwipeSimple v5.10.0 or later must be installed on the Terminal

- A SwipeSimple User with access to the Merchant Account must have previously logged into this Terminal.

What happens if one of the requirements for a successful auto-batch isn't met?

- The next time all four (4) requirements are met, the auto-batch will retry within 30 minutes.
- At this point, as long as the merchant isn't in the middle of a transaction, there will be a full screen take over indicating that the batch is being closed. After it is done, SwipeSimple will present a message indicating whether the batching was successful or not.

Will the merchant be notified if the batch fails?

- CardFlight has implemented monitoring tools that our team uses to ensure that all batches we manage are closed correctly. If we detect that a merchant using SwipeSimple Initiated Auto-Batching did not have a batch close at the expected time, we will notify the corresponding merchant service provider to alert them of the situation. The merchant service provider will then be in contact with the merchant if help is needed to settle the batch.
- If the merchant notices that their batch didn't close as expected and they haven't heard from their merchant service provider, the merchant should reach out to their merchant service provider directly about the situation.

How does the merchant know that the batch successfully closed on SwipeSimple Terminal with SwipeSimple Initiated Auto-Batch?

- Currently, with SwipeSimple Initiated Auto-Batch the only way to tell that the batch closed successfully is by the merchant confirming in their bank statement that they've received the money they expected.
- We plan to add this feature at a later time where you will be able to physically tell whether the batch closed or not. We will allow the merchant to decide whether they want to print a receipt after a successful batching or not.

Appendix D.2: Steps for SwipeSimple Initiated Manual batching within the SwipeSimple app

Below are steps merchants can take to manually close the batch through the SwipeSimple Terminal application:

- Open the SwipeSimple application
- Navigate to the Current Batch screen
- Tap on the Close Batch button at the bottom of the screen

If the account is enabled for Manual Batching:

Tapping the Close Batch button is the only way that merchants can close their batch in SwipeSimple. They can tap Close Batch at any time.

If the account is enabled for Automatic Batching with SwipeSimple:

Merchants can choose to close their batch before their scheduled batch time by tapping Close Batch at the bottom of the Current Batch screen.

If the merchant closes their batch early, SwipeSimple will attempt to close the batch again at the scheduled batch time. If they have taken additional transactions since manually closing the batch, those will settle at the set automatic batch time.

Appendix D.3: Steps for BroadPOS Initiated Auto-batching at BroadPOS payment app in PAXSTORE

THIS STEP TAKES PLACE IN THE BroadPOS PAYMENT APP AT PAXSTORE

Auto batching functionality provided within the PAX BroadPOS payment application may be used to close any open batches on the terminal, at a predefined time during the day.

It is important to note that, for auto batching functionality to work:

- The PAX hardware terminal needs to be powered up and running at the pre-defined time of auto batching
- The PAX hardware terminal needs to be connected to a data communication source at the pre-defined time of auto batching

Steps for configuring auto batching on a BroadPOS Omaha payment application	<p>Select the “OMAHA” Tab</p> <p>Select the “Host features” dropdown and configure the following variables:</p> <ul style="list-style-type: none">- Start Batch time: Enter time when the auto batching activity needs to start (in 24 hour format)- End Batch time: Enter time when the auto batching activity needs to end (in 24 hour format). Suggested value is 30 minutes after Start Batch Time- Batch interval in minutes - PAX developer support recommends entering a value of 3 for this variable
Steps for configuring auto batching on a BroadPOS Sierra payment application	<p>Select the “TSYS” Tab</p> <p>Select the “Host features” dropdown and configure the following variables:</p> <ul style="list-style-type: none">- Within the “Auto Batch Mode” dropdown, select “Auto Batch Close”- Start Batch time: Enter time when the auto batching activity needs to start (in 24 hour format)- End Batch time: Enter time when the auto batching activity needs to end (in 24 hour format). Suggested value is 30 minutes after Start Batch Time- Batch interval in minutes - PAX developer support recommends entering a value of 3 for this variable
Steps for configuring auto batching on a BroadPOS Vantiv payment application	<p>Select the “MISC PARAMETERS” Tab</p> <p>Configure the following variables:</p> <ul style="list-style-type: none">- Within the “Auto Batch Mode” dropdown, select “Auto Batch Close”- Start Batch time: Enter time when the auto batching activity needs to start (in 24 hour format)- End Batch time: Enter time when the auto batching activity needs to

	<p>end (in 24 hour format). Suggested value is 30 minutes after Start Batch Time</p> <ul style="list-style-type: none">- Batch interval in minutes - PAX developer support recommends entering a value of 3 for this variable
--	--

Appendix D.4: Steps for BroadPOS Initiated Manual Batching within BroadPOS payment app

Below are steps merchants can take to manually close the batch through the BroadPOS application:

- Tap on the circle button at the bottom of the screen to go to the device's home screen
- Tap on the BroadPOS app (processor dependent)
- Tap on FUNC
- Tap on Batch
- Tap on Batch Close
- If prompted with "Close w/ Untipped" tap Yes
- Wait for the batch to fully close and settle
- Once a receipt is printed and/or you get a "Batch close success" message, the batch has successfully closed
- Tap on the circle button at the bottom of the screen to go to the device's home screen
- Tap on SwipeSimple to resume transacting

Appendix E: Steps to enable data communication on the PAX hardware terminals

Communication options for SwipeSimple Terminal on the PAX A80 hardware terminal are:

- WiFi
- Ethernet connectivity

Communication options for SwipeSimple Terminal on the PAX A920 and PAX A920 Pro hardware terminal are:

- WiFi
- 4G data provided through a data SIM card

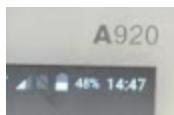
Steps to connect to WiFi on the PAX A920, PAX A920 Pro and A80 hardware terminal

- From the PAX terminal home screen, select the “Settings” icon.
- You will be prompted for a password. Enter either 9876 or pax9876@@ as the password and select “OK”.
- You will be directed to the Android settings screen. Select the WiFi option.
- A list of available WiFi networks will appear. Select one of the networks that you have access to.
- Enter your WiFi password and select “CONNECT”.
- Upon successful authentication, the terminal is connected to the WiFi network.

Steps to enable cellular SIM card on the PAX A920 and PAX A920 Pro hardware terminal

- Remove the terminal's back cover
- Slide battery out, there are two SIM card slots at the terminal's base
- Load the cellular SIM card into any one of the two SIM card slots

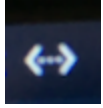
After loading the cellular SIM card, check for mobile data connectivity by verifying if the mobile data icon is active, as shown in the example image below:



Note: SwipeSimple Terminal on the PAX A920 and PAX A920 Pro supports normal SIM cards. To use a locked down SIM card with an existing secure network, contact support@swipesimple.com for assistance.

Steps to enable Ethernet connectivity on the PAX A80 hardware terminal

- Connect the PAX A80 hardware terminal to an Ethernet port available at the location using an Ethernet cable
- From the PAX terminal home screen, select the “Settings” icon.
- You will be prompted for a password. Enter either 9876 or pax9876@@ as the password and select “OK”.
- You will be directed to the Android settings screen. Select the Ethernet option.
- Select the “Enable Ethernet” button to enable the Ethernet connection
- If connection is successful, you will see the below Icon on the top of the PAX A80 terminal's home screen



Appendix F: How to remotely push a SwipeSimple app update to Terminals

Creating a group of terminals (to mass update)

1. On the side menu in the PAX Store website go to Group Management under Management
2. Press on the Plus sign next to "Group List"
3. Select General Group
4. Add the information for the group, including the name, and device
5. Checkmark "Activate group"
6. Click OK

Adding terminals to a group

1. Go to Terminal Management under Management
2. Go to Terminal List
3. Select the terminals you would add to the group by checkmarking each one
4. Press on Add To Group at the bottom
5. Find the previously created group, checkmark it
6. Press OK

Note: You can only group the same type of terminals together. You will need a group for PAX A920s, a group for PAX A920 Pros, and a separate group for PAX A80s.

Pushing app update to all terminals

1. Go to Group Management under Management
2. Go to Push Task
3. Press Push App
4. Search for SwipeSimple
5. Checkmark it
6. Press OK
7. Turn on "Force Update"
8. Press Activate
9. Press OK

Frequently Asked Questions about updates

Does the device need to be powered on to perform an update?

Yes, for the update to be successful, the terminal should be powered on and with the screen on. Because of the force update it doesn't matter if the app is present on the screen or running in the background since the force update will force the app into the background and close it to allow the update to go through.

How do I know if a terminal received the update?

By going to Group Management > Push Task you can click on the latest app that was pushed. This will show a status of Success / Pending / Failed and a count for each one. Clicking on each status brings up which terminals belong to which status.

What does “App downloaded, pending install” mean?

This happens when the app is pushed, if the device is on but the screen is turned off. In order to resolve, you will need to ask the merchant to turn on their device’s screen and the app should automatically install. This might take anywhere from 5-10 seconds. You can verify remotely from PAX if the app was installed by going to Group Management > Push Task and ensuring they are under the Success group.

Note: We’ve noticed instances where if the screen isn’t turned on in a certain amount of time to resolve this issue, the install will fail and you will need to push the app update again.

What does “App installation has been delayed as it was busy” mean?

This happens when the app is in the foreground and the screen is on. This should only happen if the “force update” isn’t toggled on when performing the app push. To fix, cancel the installation and retry with the force update toggled on, or call the merchant and ask them to move the app to the background by pressing on the home button (the circle in the middle at the bottom of the screen).

Does the "Force Update" option for pushing SwipeSimple app interrupt a merchant's activities on the app?

Yes, the "Force Update" option for pushing the SwipeSimple app definitely interrupts a merchant's activities on the app. The SwipeSimple app will forcefully shut down and reopen only after a successful update. The Merchant will also have to re-log into the newly updated app. Merchant may not view details of the interrupted transaction after they log back into SwipeSimple after the force update

Appendix G: Steps to silence audio cues

When using a PAX A80 terminal, merchants will hear the keyboard beep when selecting a button. To turn this off:

1. Navigate to the device Settings
2. Input password: either 9876 or pax9876@@
3. Select **Sound & Notification**
4. Turn **Keyboard Music** OFF

When using SwipeSimple Terminal on the PAX A920 and A80 terminals, merchants will hear certain audio cues (or beeps) within the transaction flow. These audio cues are initiated by the PAX BroadPOS payment application and not by SwipeSimple.

Below are the audio cues that are initiated by the BroadPOS payment application on the PAX A920 and A80 terminals:

- **Host response beep:** audio cue initiated by the BroadPOS payment application after receiving a transaction response from the processor host
 - 3 beeps are made for an approved response
 - 1 beep is made for a declined response
- **EMV card remove beep:** audio cue initiated by the BroadPOS payment application, prompting merchant or customer to remove an EMV card that has been inserted in the EMV card reader slot after transaction has been processed

Deployment teams can elect to remove these audio cues from within the transaction flow, by changing parameters within the BroadPOS payment application.

Below are details on removing the audio cues, specific to the BroadPOS payment application installed on the PAX A920, PAX A920 Pro, or the PAX A80 terminal. Note that these changes must be made on the BroadPOS payment application through the PAXSTORE and not through the BroadPOS payment application on the terminal

For the BroadPOS Omaha payment application

1. To remove the Host response beep

Tab name where the parameter exists	Parameter name	Change to be made
MISC	Buzzer Sound	Change to “DISABLED”
MISC	Host Response Beep	Changed to “DISABLED”

2. To remove the EMV card remove beep

Tab name where the parameter exists	Parameter name	Change to be made
EMV	EMV Card Remove Beep	Change to “No Beep”

For the BroadPOS TSYS Sierra payment application

1. To remove the Host response beep

Tab name where the parameter exists	Parameter name	Change to be made
MISC	Under “Buzzer Settings” section, look for “Host Response Beep” parameter	Change to “DISABLED”

2. To remove the EMV card remove beep

Tab name where the parameter exists	Parameter name	Change to be made
EMV	EMV Card Remove Beep	Change to “No Beep”

For the BroadPOS Vantiv payment application

1. To remove the Host response beep

Tab name where the parameter exists	Parameter name	Change to be made
MISC	Buzzer Sound	Change to “DISABLED”
MISC	Host Response Beep	Changed to “DISABLED”

2. To remove the EMV card remove beep

Tab name where the parameter exists	Parameter name	Change to be made
EMV	EMV Card Remove Beep	Change to “No Beep”

Appendix H: Steps to conduct test transactions in SwipeSimple with Automatic Test Accounts

With Automatic Test Accounts, the Reseller can test a SwipeSimple Terminal before shipping the terminal device to the merchant without manually creating a test account.

To use Automatic Test Accounts:

1. Follow the normal onboarding steps you do today
 - a. *Note: This feature is available on the SwipeSimple Terminal application v5.12.0 and higher*
2. Once the account has been onboarded, open SwipeSimple on the terminal device
3. Log in with [serialnumber]@cardflight.com with the reversed serial number as the password.
 - a. **Example:** if the terminal serial number is 12345 you would log in with 12345@cardflight.com as the email and 54321 as the password.
4. Once logged in, a test account will automatically be created.

Once the test account has been created, you will be able to take a transaction to ensure the account has been onboarded properly. **This is a real transaction that you would have to void or refund if you don't want the actual money to move.** You can also close the batch and see that everything is working as expected.

Approximately 24 hours after the test account is created, it is automatically deleted.

Appendix I: Steps you may conduct for Quality Assurance

This section is **optional**. Implement this section only if you want to test your SwipeSimple Terminal for Quality Assurance

Detail	Responsibility
Power up terminal and connect to data communication through Wifi or Ethernet or 4G SIM Card, based on the terminal (A80 or A920) and the data communication method chosen by the merchant	Hardware department
Log into Paxstore and check if Terminal Serial Number mapped to the merchant in Paxstore corresponds to Terminal Serial Number printed on the back of the terminal	Operations department
Check if PAXSTORE app, BroadPOS Payment app and SwipeSimple app are available on the terminal. Make sure that there is only one Broadpos Payment app present on the terminal	Operations department
Verify if the Broadpos payment application name corresponds to the merchant's acquirer processor	Operations department
Log into SwipeSimple.com and check if Terminal Serial Number mapped to the SwipeSimple merchant account corresponds to Terminal Serial Number printed on the back of the terminal	Operations department
Ensure device time is set to merchant's time zone. Charge terminal for at least 50% of battery. Once charged, Power down and box device	Deployment department

In the case of failure in conducting transactions on the BroadPOS payment applications, contact the Paxstore support team by sending an email to Paxstore support : PAXSTORE.support@pax.us

In the case of failure in connecting to PAXSTORE, contact the Paxstore support team by sending an email to Paxstore support : PAXSTORE.support@pax.us

Appendix J.1: SwipeSimple Merchant Account Type Definitions

When creating new SwipeSimple merchant accounts, deployment teams need to select an Account Type from two available radio button options: **“Gateway”** and **“Terminal”**

	“Gateway” merchant account type	“Terminal” merchant account type
Definition	SwipeSimple merchant accounts for <u>SwipeSimple Mobile App</u> and <u>SwipeSimple for payments via the web</u> (Virtual Terminal, Invoices, scheduled and recurring payments)	SwipeSimple merchant accounts for <u>SwipeSimple Terminal App</u> on the PAX A920, PAX A920 Pro and PAX A80
Transaction Routing	Transaction is routed through CardFlight to the Reseller or Merchant’s chosen payment processor	Transaction is routed through PAX BroadPOS to the Reseller or Merchant’s chosen payment processor
SwipeSimple Dashboard Access	Full access to the <u>transaction capabilities</u> AND to the <u>business reporting and insight features</u>	Access to <u>business reporting and insight features</u> . Merchant cannot accept or scheduled payments at the Dashboard, or issue Invoices.

Appendix J.2: Selling and Selecting SwipeSimple Merchant Account Types

If a merchant wants to...	Run a transaction on their mobile phones with a mobile card reader..	<p>Reseller should select a SwipeSimple Gateway merchant account to be used with a customer's own device, and provide other hardware such as card readers, cash drawers, printers, etc. as needed.</p> <p>Visit SwipeSimple.com for more information on ways to pay solutions.</p>
	Take customer payment in a retail setting using their own device..	
	Use their own device as a Virtual Terminal for back-office transactions...	
	Create Invoices, schedule subscriptions, recurring payments, or installments using customer information on file...	
	Store customer details..	
	Process offline transactions in mobile settings..	
If a merchant wants to...	Use the PAX A920, PAX A920 Pro or A80 to process transactions...	Reseller should select a SwipeSimple Terminal merchant account with a specific hardware terminal and a unique VAR sheet
	Use a PAX A920, PAX A920 Pro or A80 terminal device with an inbuilt receipt printer to print receipts..	
If a merchant wants to..	Use the PAX A920, PAX A920 Pro or A80 to process transactions...	Reseller should set up two SwipeSimple merchant accounts
		<p>SwipeSimple Terminal merchant account to process transactions on PAX A920</p> <p>AND</p> <p>SwipeSimple Gateway merchant account to enable use of Virtual Terminal</p>

Appendix K: Post-Auth Tip Setting in SwipeSimple

When **onboarding or editing** a SwipeSimple Terminal Merchant Account in SwipeSimple RAMP, the reseller has the option to set the *Post-Auth Tip Setting* for the merchant and choose whether a merchant be enabled for “On Receipt”, “In Sales Flow” or “No Tips”.

“On Receipt”

- Merchant will be enabled for Post-Auth Tip Adjust
- This will allow merchants to add tip to a transaction at a later time up to the point that the terminal batches out
- The tip and signature line will be printed on the receipt
- This option should be selected for merchants that place an order but don’t take the tip payment until a later time (e.g. food & beverage merchants)

“In Sales Flow”

- Merchant will be prompted to select tip amount during a transaction
- This is the same flow that has always been used for tipping in SwipeSimple
- This option should be selected for merchants that accept tips at the moment of sale. Typically applies to merchants that are taking the order and payment at the same time (e.g. at checkout time or at a counter)

“No Tips”

- Merchant will never be prompted to add a tip to a transaction
- Company level Prompt for Tip setting will still appear for merchant in Account Settings on SwipeSimple Dashboard, however if the merchant turns this setting on there will be no change on the SST device
- Tip setting on the SwipeSimple application will not be present
- This option should be selected for merchants who don’t require tipping

Appendix L: Automatic Adjustment Setting in SwipeSimple

When onboarding or editing a SwipeSimple Company account for new merchants or existing merchants in SwipeSimple RAMP, the reseller has the option to enable Automatic Adjustment for the merchant. If enabled, the reseller will configure the merchant's Automatic Adjustment settings when onboarding the Terminal Merchant Account information.

Automatic Adjustment settings in SwipeSimple RAMP include:

- Adjustment Name
 - Max 26 characters
- Adjustment Tender Type
 - Cash, Card, or Both
- Adjustment Type
 - Decrease or Increase
- Adjustment Calculation
 - Percentage or Dollar Amount
- Adjustment Amount
 - Percentage or dollar amount based on the Adjustment Calculation settings
 - Percentage adjustment allows for two decimal places
 - The minimum amount for percentage adjustment is 0.10%
 - The maximum amount for percentage adjustment is 10.00%
 - There are no restrictions to adjustment amount for cash tender
- Adjustment Bypass
 - Choose whether the merchant has the **option** to apply the adjustment on all applicable transactions, or
 - Choose whether the adjustment will **always** be applied on applicable transactions

Appendix M: Variable provisioning Cheat Sheet For TSYS merchant accounts

Below is a table showing key variables that should be provisioned for SwipeSimple Terminal, the location where these variables should be provisioned (Whether in PAXSTORE and/or SwipeSimple RAMP) and details of how these variables are controlled

	Data entry points			Variable controlled by
Variable name	SwipeSimple RAMP	PAXSTORE	BroadPOS app	
Merchant Name	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Merchant Address	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Merchant email ID	✓	✓	✓	SwipeSimple RAMP
Merchant Phone #	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Terminal Serial Number	✓	✓	✗	SwipeSimple RAMP & PAXSTORE
Terminal Model	✓	✓	✗	SwipeSimple RAMP & PAXSTORE
Template (choose between Retail/Restaurant)	✗	✗	✓	BroadPOS app
Merchant ID	✓	✗	✓	BroadPOS app
Terminal #	✓	✗	✓	BroadPOS app
V# (or) Terminal ID #	✗	✗	✓	BroadPOS app

Bank ID	✓	✗	✓	BroadPOS app
Agent bank #	✓	✗	✓	BroadPOS app
Agent chain #	✓	✗	✓	BroadPOS app
Store #	✓	✗	✓	BroadPOS app
City code	✗	✗	✓	BroadPOS app
Country code	✗	✗	✓	BroadPOS app
Currency code	✗	✗	✓	BroadPOS app
MCC	✗	✗	✓	BroadPOS app
Voltage P2PE	✗	✗	✓	BroadPOS app
Gen2 Auth Code (only if Voltage P2PE is enabled)	✗	✗	✓	BroadPOS app
Type of batching	✓	✗	✓	SwipeSimple RAMP and BroadPOS app
Batch closure initiated by	✓	✗	✓	SwipeSimple RAMP and BroadPOS app
Batch time	✓	✗	✓	SwipeSimple RAMP and BroadPOS app
Time Zone	✓	✗	✓	SwipeSimple RAMP and BroadPOS app
Post-Auth Tip Setting	✓	✗	✗	SwipeSimple RAMP
Debit Transactions	✓	✗	✓	SwipeSimple RAMP & BroadPOS app

Appendix N: Variable provisioning Cheat Sheet For First Data Omaha merchant accounts

Below is a table showing key variables that should be provisioned for SwipeSimple Terminal, the location where these variables should be provisioned (Whether in PAXSTORE or in SwipeSimple RAMP) and details of how these variables are controlled

	Data entry points			Variable controlled by
Variable name	SwipeSimple RAMP	PAXSTORE	BroadPOS app	
Merchant Name	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Merchant Address	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Merchant email ID	✓	✓	✓	SwipeSimple RAMP
Merchant Phone #	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Terminal Serial Number	✓	✓	✗	SwipeSimple RAMP & PAXSTORE
Terminal Model	✓	✓	✗	SwipeSimple RAMP & PAXSTORE
Template (choose between Retail/Restaurant)	✗	✗	✓	BroadPOS app
Merchant ID (or) Merchant #	✓	✗	✓	BroadPOS app
Device ID	✓	✗	✓	BroadPOS app

P2PE Mode	X	X	✓	BroadPOS app
Auth Code (only if P2PE is enabled)	X	X	✓	BroadPOS app
Type of batching	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Batch closure initiated by	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Batch time	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Time Zone	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Post-Auth Tip Setting	✓	X	X	SwipeSimple RAMP
Debit Transactions	✓	X	✓	SwipeSimple RAMP

Appendix O: Variable provisioning Cheat Sheet For Vantiv(Worldpay/FIS) merchant accounts

Below is a table showing key variables that should be provisioned for SwipeSimple Terminal, the location where these variables should be provisioned (Whether in PAXSTORE or in SwipeSimple RAMP) and details of how these variables are controlled

	Data entry points			Variable controlled by
Variable name	SwipeSimple RAMP	PAXSTORE	BroadPOS app	
Merchant Name	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Merchant Address	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Merchant email ID	✓	✓	✓	SwipeSimple RAMP
Merchant Phone #	✓	✓	✓	SwipeSimple RAMP & BroadPOS app
Terminal Serial Number	✓	✓	✗	SwipeSimple RAMP & PAXSTORE
Terminal Model	✓	✓	✗	SwipeSimple RAMP & PAXSTORE
Template (choose between Retail/Restaurant)	✗	✗	✓	BroadPOS app
Bank ID	✗	✗	✓	BroadPOS app
Merchant ID	✓	✗	✓	BroadPOS app
Terminal ID	✓	✗	✓	BroadPOS app

Network Routing Code	X	X	✓	BroadPOS app
P2PE Mode	X	X	✓	BroadPOS app
Type of batching	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Batch closure initiated by	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Batch time	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Time Zone	✓	X	✓	SwipeSimple RAMP and BroadPOS app
Post-Auth Tip Setting	✓	X	X	SwipeSimple RAMP
Debit Transactions	✓	X	X	SwipeSimple RAMP

Appendix P: Installing PAX BroadPOS Manager application

BroadPOS Rapid Connect application will work only if another PAX application, called "BroadPOS Manager" is installed on the terminal

Prior to using BroadPOS Rapid Connect on the terminal, please install the latest version of BroadPOS Manager application. Below are the steps

Step Number	Details
1	Select the terminal account that has to be loaded with the BroadPOS Manager application
2	Select the "+Push application" on the right of the screen
3	<p>Search for "BroadPOS Manager" in the list of applications. The corresponding entry for BroadPOS Manager application appears.</p> <p>By default, the most recent version of BroadPOS Manager will be selected within the "Version" drop down box, you need to change this to the supported version instead.</p> <p>Always select the supported version of BroadPOS Manager for downloading onto the PAX hardware terminal, unless informed otherwise by the SwipeSimple team</p>
4	The next screen has "Push immediately" option, select it and select "activate" for the application to be pushed onto the terminal

Appendix Q: List of BroadPOS application features that are compatible with SwipeSimple

Below are a list of BroadPOS application features that have been validated to be compatible with the SwipeSimple application

1. Magstripe card swipe transactions
2. EMV card dip transactions
3. Tapped transactions
4. Debit routing (Only for BroadPOS TSYS Sierra and BroadPOS Vantiv applications)
5. Tipping (Initiated via SwipeSimple app and requires BroadPOS Restaurant template)
6. Auto batching (Initiated via SwipeSimple app)

Appendix R: List of BroadPOS application features that are not compatible with SwipeSimple

Below are a list of BroadPOS application features that not compatible with the SwipeSimple application

1. Partial authorization
2. Multi merchant support
3. Surcharging
4. Installment
5. Fleet card acceptance
6. EBT card acceptance
7. Gift card acceptance