PAX S300 EMV Certified PINpad with Heartland Payment Processing

CRE/RPE now supports payment processing with EMV chip enabled cards through the **PAX S300** EMV PINpad device. This document provides step-by-step instructions on set up and usage of the **PAX S300** with Cash Register Express.

Note: **The PAX S300 requires Cash Register Express version 13.xxxxx or higher to work with all features in this document.** The device must have settings pre-configured and installed by your payment processor prior to integration with CRE.

NOTE: Settlements MUST be completed through CRE/RPE. If you receive an error when attempting to settle through CRE/RPE please contact technical support at 1-800-342-5729. DO NOT attempt any other form of settlement (either on the PAX device or through the Payment Processor).

TABLE OF CONTENTS

Important Notes – Please Read!

- CRE must be on version **12.70110 or higher** to use the PAX device and for serial interface support. To install the required version of CRE/RPE **Windows 7 or above** is required.
- Each PAX device needs its own wired internet connection (unique IP address). It cannot use the same internet cable connected to the PC. Prior to installation, make sure there are enough additional internet connections for each PAX device you will be installing.
- Each register running card transactions must have its own PAX device; PAX devices may not be shared among registers.
- Credit card settlements must be done in CRE on every station where a PAX device is connected.
- The PAX device must have settings pre-configured and installed by your payment processor prior to integration with CRE.
- Auto-settlement is NOT recommended if taking tips on the PAX.

- Newer versions of the PAX may require you to press the **BLUE** Function key and the **1** key at the same time to access the **Menu** instead pressing the on screen **Menu** button.
- If the **PAX S300** has been updated to **Version 23E or higher,** locations of certain options such as LAN parameters have changed.
- If the **PAX S300** has been updated to **Version 1.01.00E** and having the POS Prompt for Credit/Debit. You will have the ability to use Contactless, and EMV as well as Swipe to process with any type of Debit Card.
- **CRE must be on version 13.xxxx or higher to use all features in this document.**

Revision History

Document Version	Date	Author	Description of Changes
1.0	NA	MP	1st Release
1.1	April 24, 2019	JC	Adding Table of contents, revision history and EMV Debit
1.2	August 15, 2019	JC	Adding new feature prompt for tip immediately after sale and Updating header
1.3	October 8, 2019	JC	Updating instructions and screenshots.
1.4	May 7, 2020	BG	Updated screenshots, added SAF and Surcharge

Installing the PAX hardware connections - 3 configuration options supported

Important: Every register processing card transactions **MUST** have its own PAX unit. Also, settlements need to be run through CRE on each register a PAX unit is connected and processing card transactions.

Standalone TCP/IP connection – Option 1

	1. Remove the back cover from the PAX and locate the 14-pin connector.
	2. Locate the included data/power cable and attach the single end to the 14-pin connector to the PAX device. 3. Here is what the connection should look like.

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	4. Locate the included DC power adapter.
	5. Connect one end to your outlet/surge protector and connect the other end to the data/power cable.
	6. Connect an Ethernet cable (with internet) to the port on the data/power cable that says "**LAN**". (On the color tipped cables it will be RED.)
	7. This is what your set up should look like when everything is properly connected.

8. Replace the back cover making sure to properly align the cable grommet into the channel.

Location of the built-in stylus

The stylus can be found inserted horizontally on the top right of the PAX.

TCP/IP connection and 9-pin serial interface (COM1 or COM2 only) – Option 2
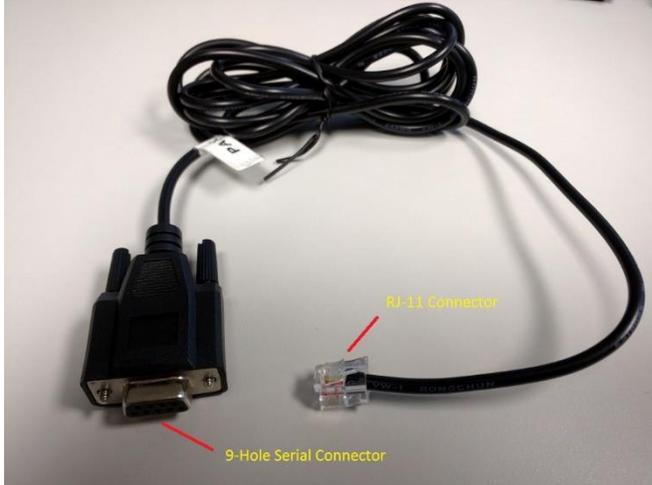
	1. Locate the cable with a 9-hole serial connector and an RJ-11 connector that was included with the PAX device.
	2. Attach the RJ-11 connector to the COM1 RS232 port. If you have an interface cable with colored tips it is the BLUE connector, otherwise attach it to the RS232 port that is closest to the power adapter input. Note: If COM1 is not available on the PC, use COM2 – middle connector, Yellow (if colored).
	3. This is what your connections should look like when everything is properly installed.

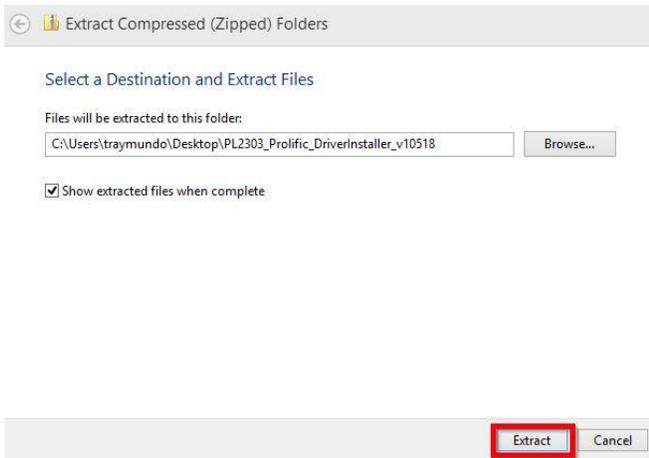|	
	1. Locate the **Cables to Go serial to USB adapter**; **Model: 26886**; **UPC-A: 757120268864**.
	2. Connect the 9-pin adapter to the 9-hole adapter on the Serial cable.
	3. This is what your set up should look like when everything is properly connected. Make sure to install the PL2303 Prolific Driver prior to connecting the USB interface to the PC.

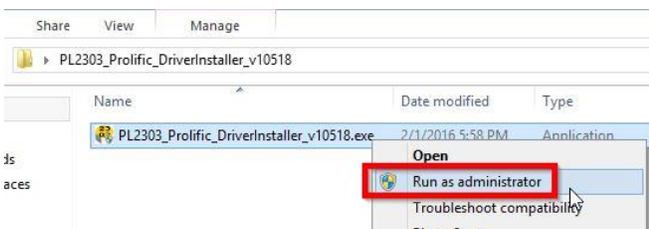**Download the serial to USB adapter from the link below:**

http://download2.pcamerica.com/drivers/Pinpad/PAX/PL2303_Prolific_DriverInstaller_v10518.zip
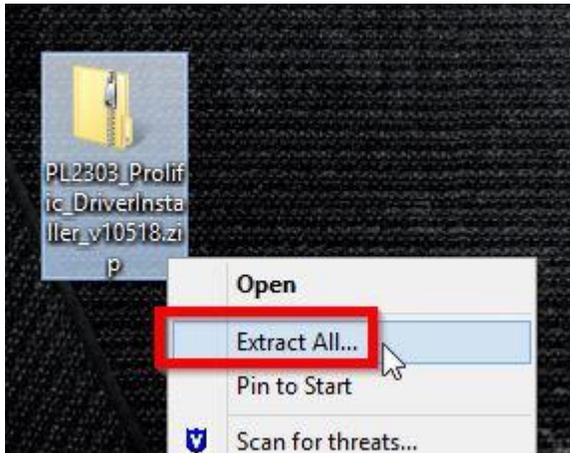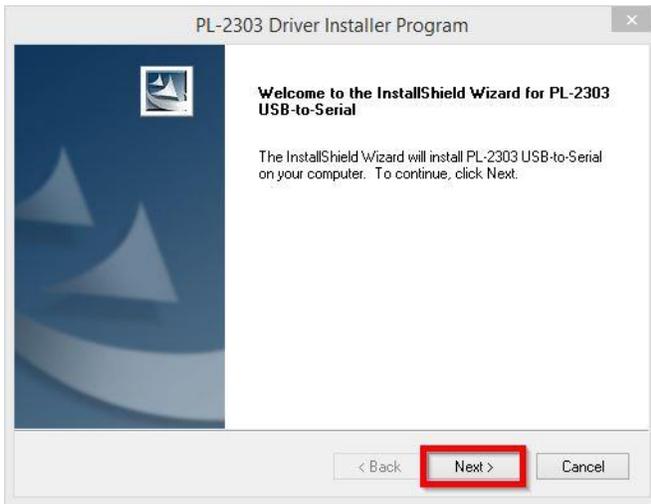
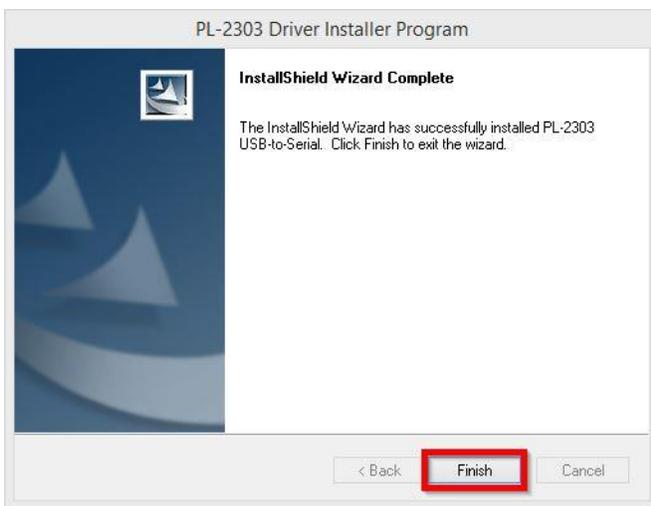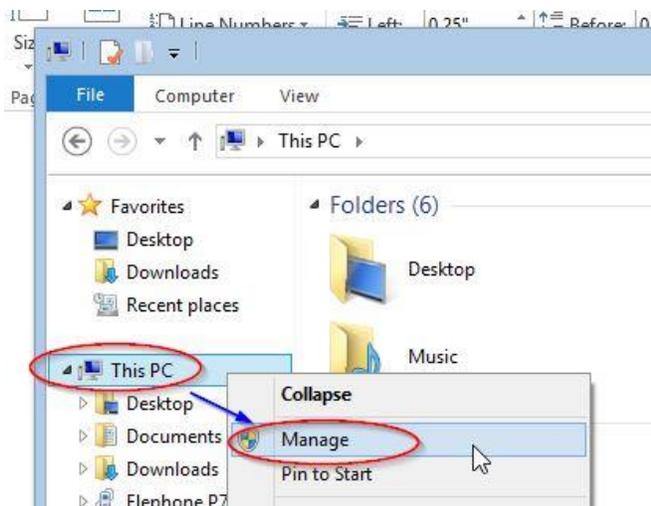|	
	1. Right-click on the **PL2303_Prolific_DriverInstaller_v10518.zip** file you downloaded and select the option to **Extract All...**.
	2. Click on **Extract**.
	3. Right click on the **PL2303_Prolific_DriverInstaller_v10518.exe** and select **Run as administrator**.

|	
PL-2303 Driver Installer Program ✕ **Welcome to the InstallShield Wizard for PL-2303 USB-to-Serial** The InstallShield Wizard will install PL-2303 USB-to-Serial on your computer. To continue, click Next. < Back **Next >** Cancel	4. Click on Next.
PL-2303 Driver Installer Program **InstallShield Wizard Complete** The InstallShield Wizard has successfully installed PL-2303 USB-to-Serial. Click Finish to exit the wizard. < Back **Finish** Cancel	5. Click on **Finish**.

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  Desktop   **Collapse**
  Documents   **Manage**
  Downloads   **Pin to Start**
  Elephone P7
	6. In Windows Explorer, right-click on **This PC** and select **Manage**.
	
	(On older versions of Windows it may be called **Computer** or **My Computer**.)
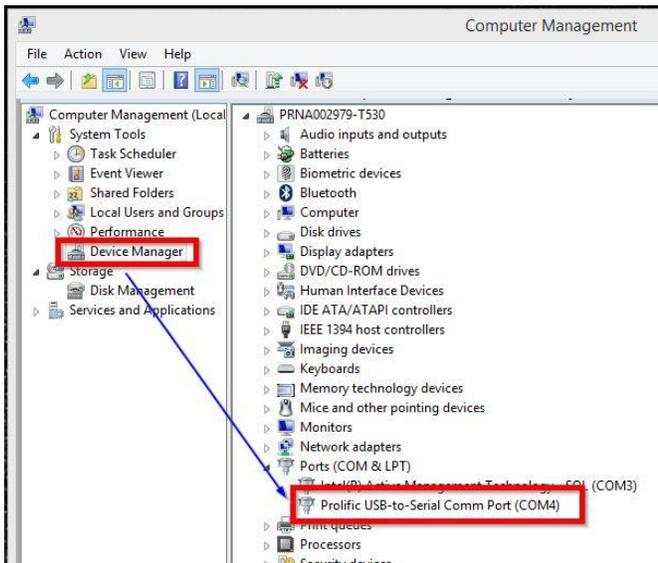
7. Click on **Device Manager**, expand the **Ports (COM & LPT)** branch, then right-click on **Prolific USB-to-Serial Comm Port (COM*)** and select **Properties**.
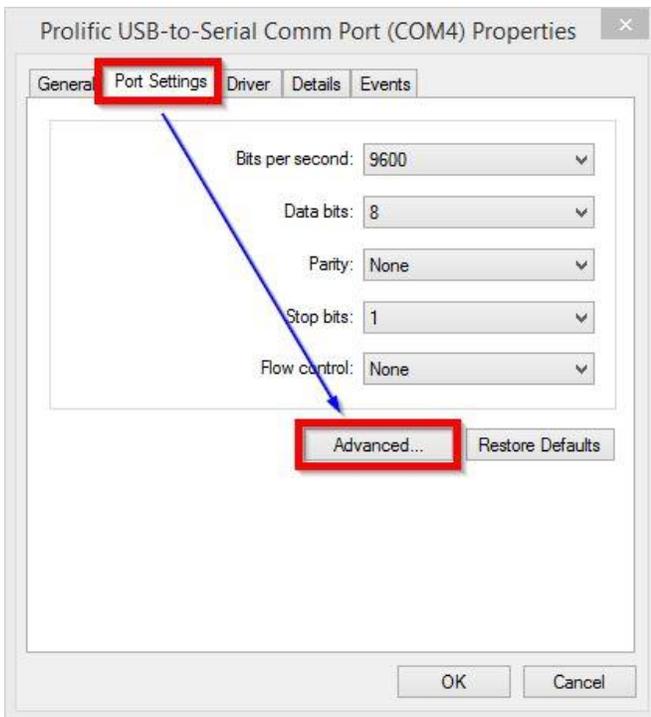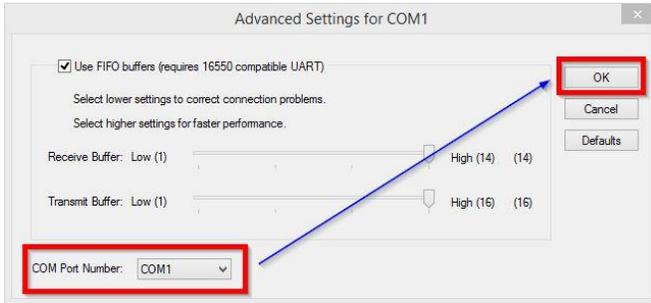

8. The PAX only supports serial communications on COM1 or COM2, so you will need to change the port to match.

   Select the **Port Settings** tab, then click on **Advanced…** .
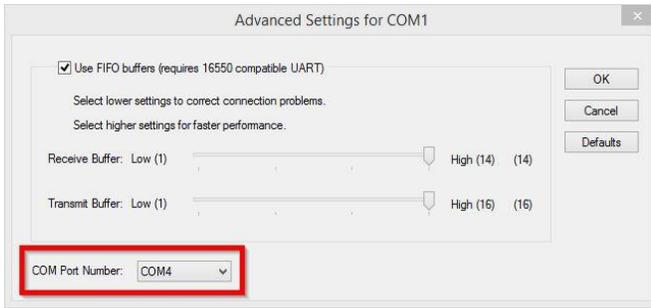
9. Click on the **COM Port Number** drop down

10. and change the setting to **COM1** (or COM2); click **OK** to save the changes, then close the **Computer Management** window.

Configuring the PAX communication port for TCP/IP only (no serial interface)

Communication between the PAX, PC, and payment processing done over TCP/IP.

	1. Tap on the onscreen **Menu** button or press the blue **FUNC** button and the **1 key** at the same time.
	2. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.

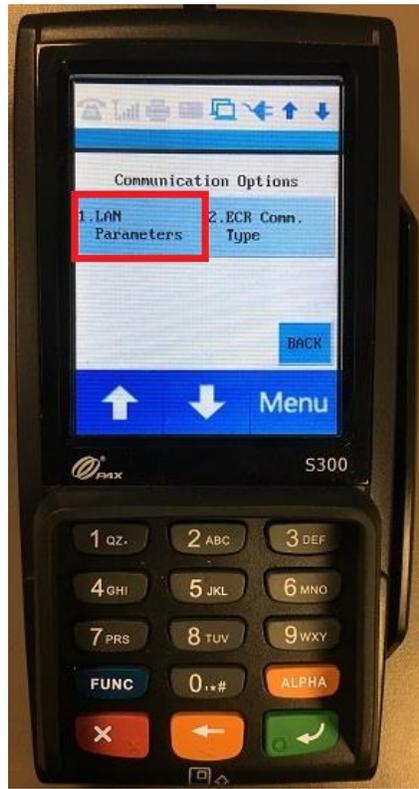|	
	3. Tap on the down arrow to access additional selections.
	4. Tap on **Communication** or press **2** on the keypad.

|	
f	5. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
	6. Tap on the down arrow to access additional selections. **NOTE**: If you are on version **23E or higher**, press the down arrow **twice.**

Version 23E or higher

7. Tap on **ECR Comm. Type** or press **4** on the keypad.

NOTE: If you are on version **23E or higher**, **ECR Comm** type will be option **2.**
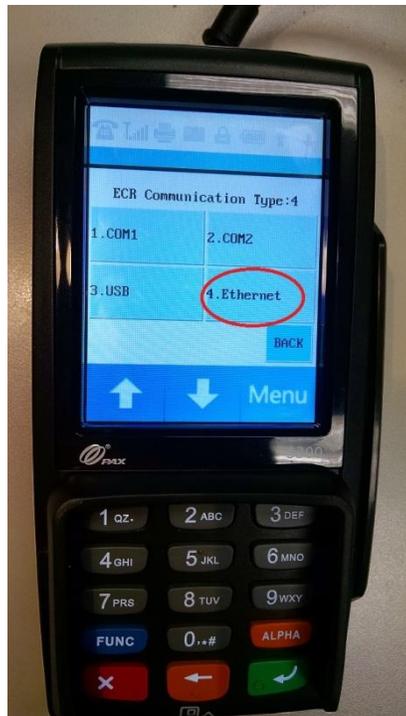
8. Tap on **Ethernet** or press **4** on the keypad.

9. Confirm the Communication Port is set to **10009** and make a note of this. We will need to enter this information into CRE later on.

   Press the green key with the arrow.
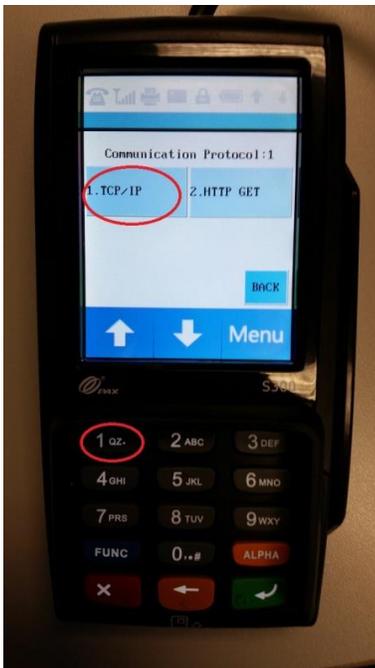
Version 23E or Higher

10. Tap on **TCP/IP** or press **1** on the keypad.

    Tap the **BACK** button or hit the red key until you are back at the INSERT/SWIPE ANYTIME screen.

NOTE: If you are on version **23E or higher**, you may have additional options for the communication protocol. Select **TCP/IP.**

Configuring the PAX with a Static IP Address (Standalone TCP/IP Interface only)

The PAX S300 will come with DHCP configured so it can pull an IP address from your network automatically. We will need to set the device with a static IP which will then be used when configuring settings in CRE.

1. Tap on the on screen **Menu** button or press the blue **FUNC** button and the **1** key at the same time.

2. Enter the default password "**916860**" then press the green key on the key pad.

   If the default password does not work, you will need to contact your payment processor for assistance.

	3. Tap on the down arrow to access additional selections.
	4. Tap on **Communication** or press **2** on the keypad.

	5. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
	6. Tap on the down arrow to access additional selections. **NOTE**: If you are on version **23E or higher**, press the down arrow **twice.**

Version 23E or Higher

7. Tap on **LAN Parameters** or press **3** on the keypad.

NOTE: If you are on version **23E or higher**, press option **1.**
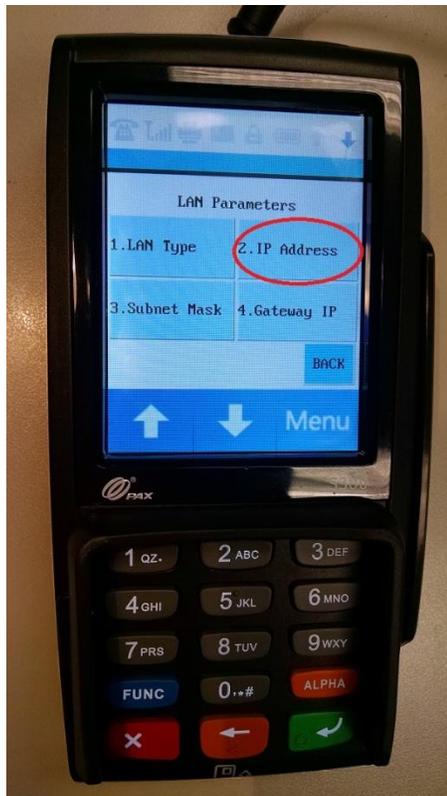
8. Tap on **IP Address** or press **2** on the keypad.
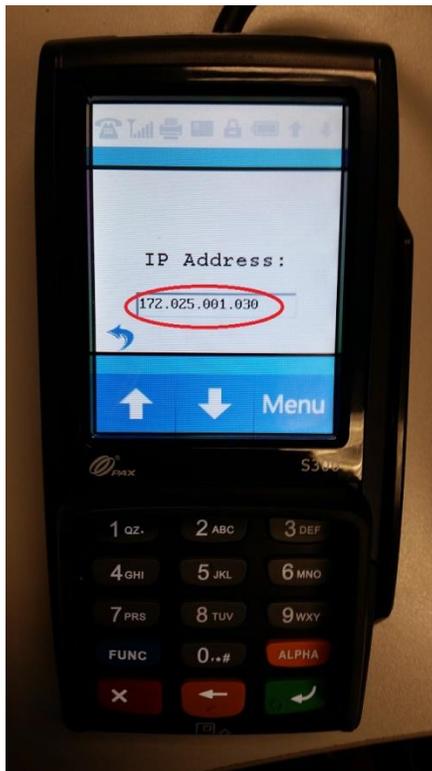
	9. Make a note of the **IP Address** that is displayed in the box. We will need to enter this information into CRE later on. Tap twice on the blue arrow on the screen or press the red button with the X twice to go back to the previous menu.
	10. Tap on **LAN Type** or press **1** on the keypad.
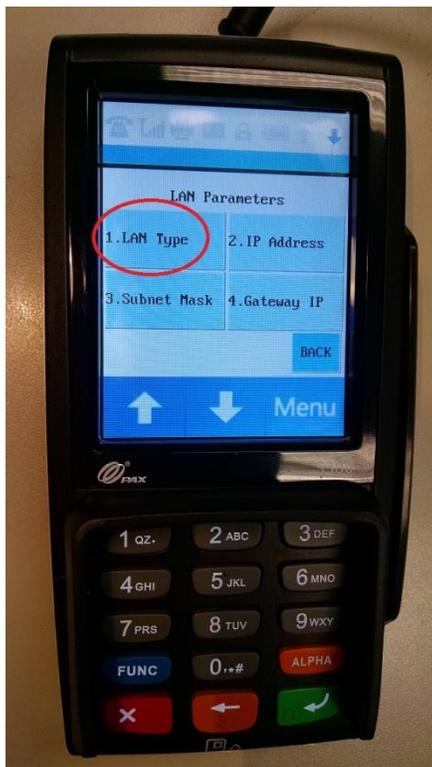
	11. Tap on **Static** or press **2** on the keypad.
	12. Tap on **IP Address** or press **2** on the keypad.
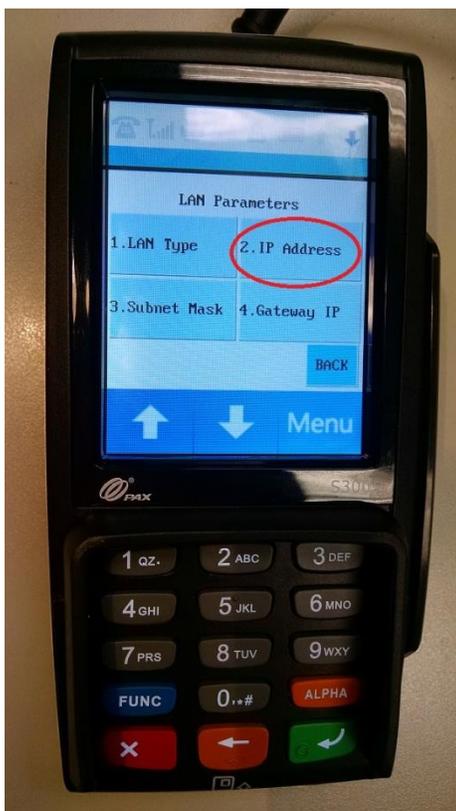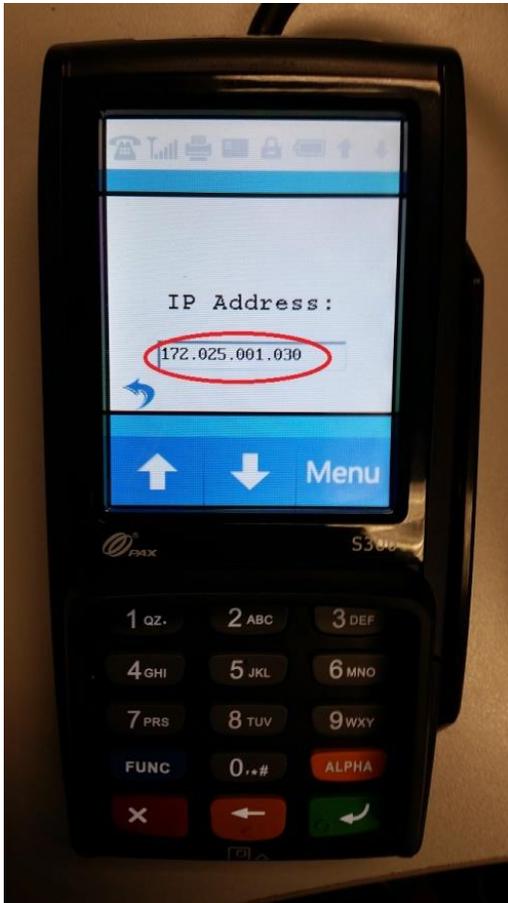
13. Confirm the **IP Address** displayed is the same as what you noted in step 9.

    Alternatively, you may assign a different IP address by tapping on the blue arrow once or pressing the red key with the X, then using the number pad to enter a new IP address; hit the green key to save your changes.

    You will need to enter the **IP Address** as 12 digits, e.g. if the IP Address you are entering is 172.25.1.30, this will have to be keyed in as 172.025.001.030.

    Take note of the new IP address then press the green key with the arrow to save your changes.

    Press the red button with the X repeatedly until you are back at the **INSERT/SWIPE ANYTIME** screen.

Note: If you do not know how to obtain an IP address, you may need to contact your network administrator.

Configuring the communication port for a Serial Interface (COM1 or COM2 only)

Communication between the PAX and PC are done through a serial connection, while payment processing is over TCP/IP. This configuration helps alleviate network traffic, since communications between the PAX and PC are not over the network. TCP/IP is dynamically assigned by the router automatically.

|	1. Tap on the on screen **Menu** button or press the blue **FUNC** button and the **1** key at the same time.
	2. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
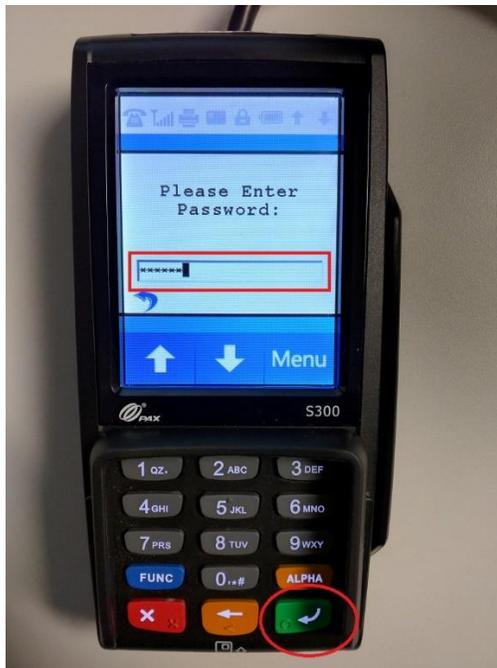
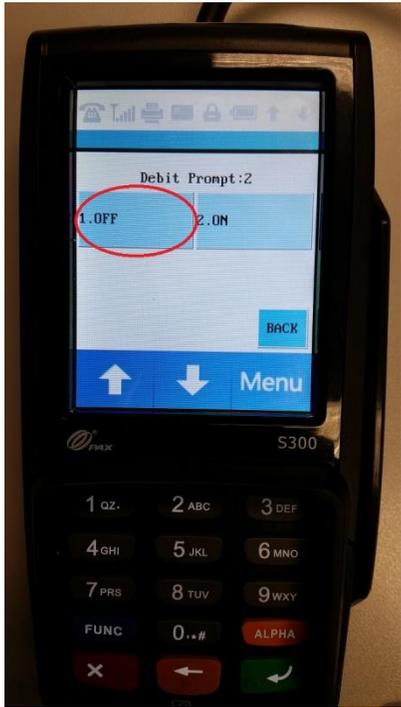|	
	3. Tap on the down arrow.
	4. Tap on **Communication** or press **2** on the keypad.
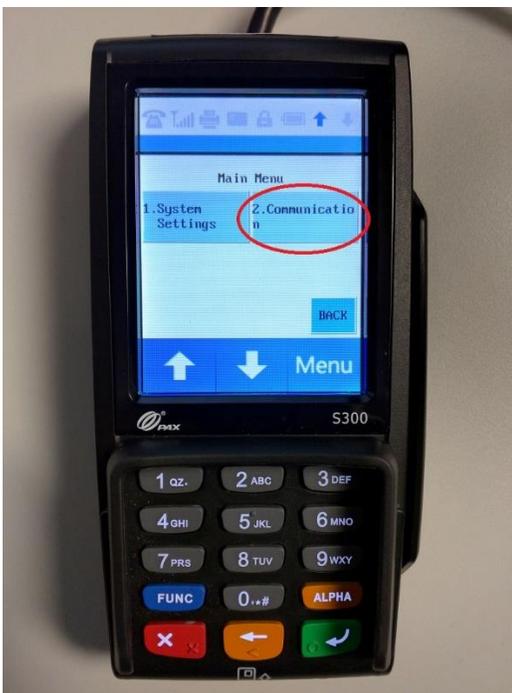
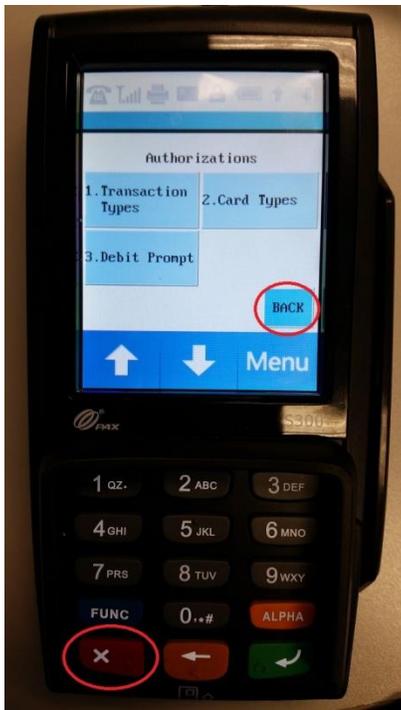5. Enter the default password "**916860**" then press the green key on the key pad.

   If the default password does not work, you will need to contact your payment processor for assistance.
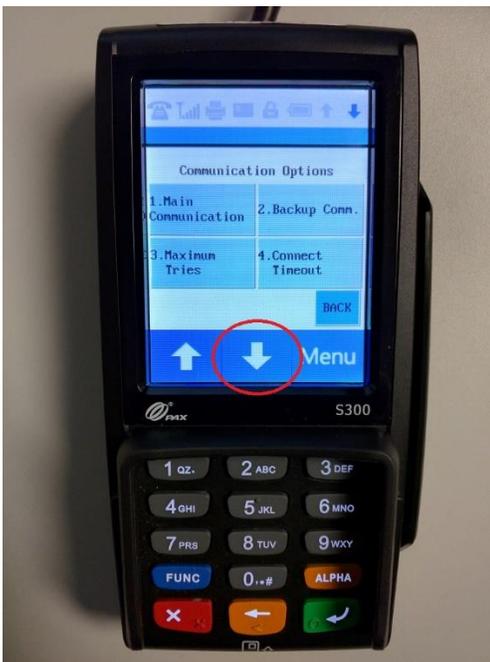
6. Tap on the down arrow.

NOTE: If you are on version **23E or higher**, press the down arrow **twice.**

	  Version 23E or higher	7. Tap on **ECR Comm. Type** or hit the **4** on the keypad. **NOTE**: If you are on version **23E or higher**, press option **2** for **ECR Comm** type.
		8. Tap on **COM1** or press the **1** on the keypad.

9. Tap on **9600** or press **1** on the keypad.
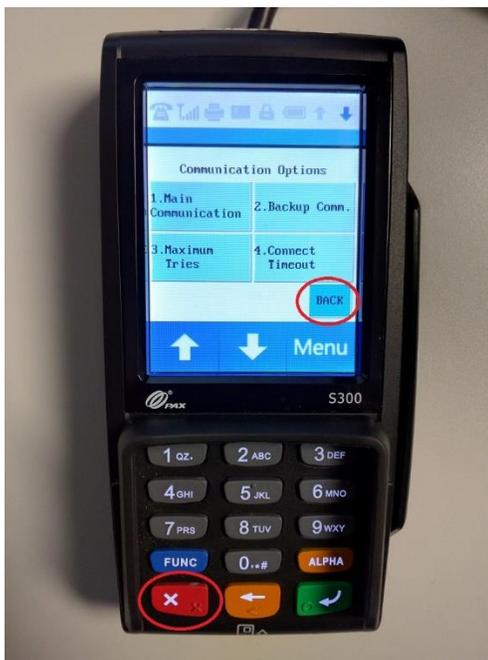
10. Tap on the **BACK** button, or press the red key on the keypad until you are back at the main screen.

Setting the Debit prompt to OFF

If this step is not performed, when you select Credit in CRE and swipe the card on the PAX unit, the PAX unit itself prompt again whether this a Credit or Debit sale.

|	
	1. Tap on the onscreen **Menu** button or press the blue **FUNC** button and the **1** key at the same time. .
	2. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
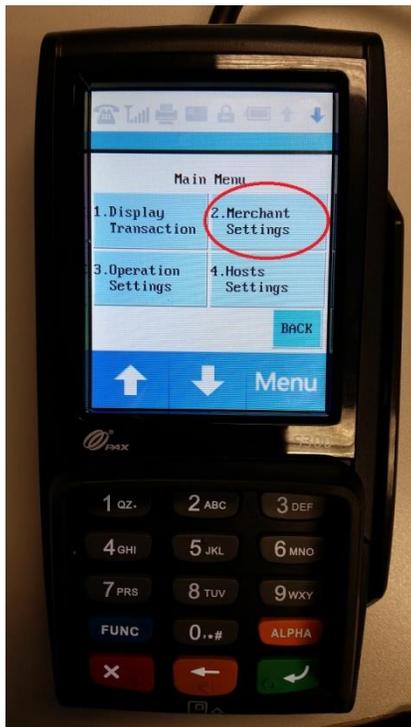
3. Tap on **Merchant Settings** or press **2** on the keypad.
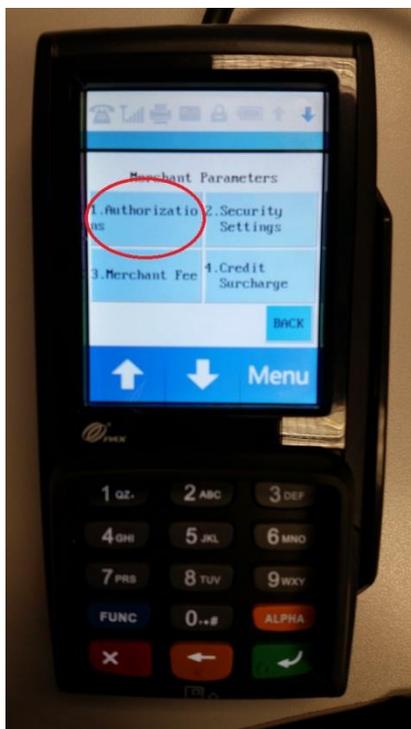
4. Tap on **Authorizations** or press **1** on the keypad.

5. Enter the default password "**916860**" then press the green key on the key pad.

   If the default password does not work, you will need to contact your payment processor for assistance.
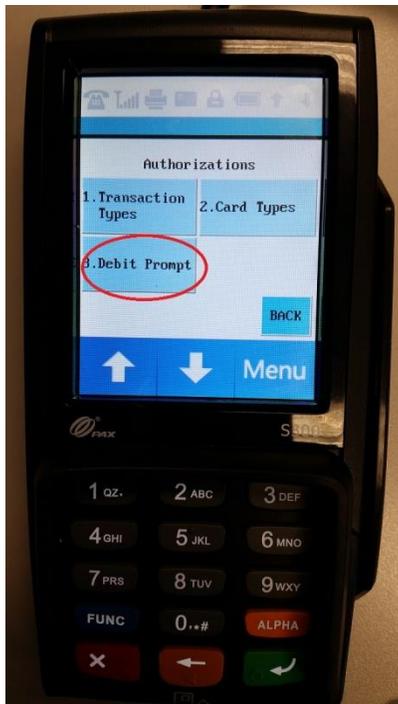
6. Tap on **Debit Prompt** or press **3** on the keypad.
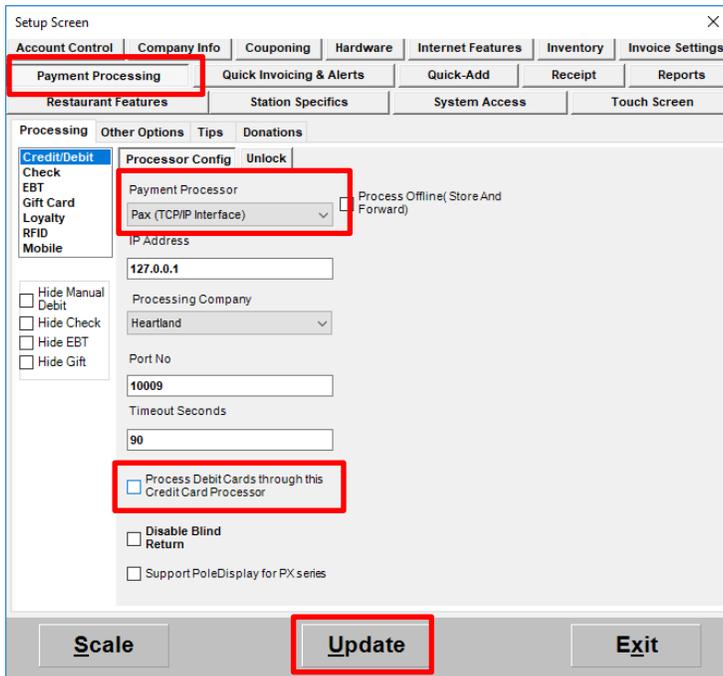
	7. Tap on **OFF** or press **1** on the keypad.
	8. Tap the **BACK** button or hit the red key until you are back at the INSERT/SWIPE ANYTIME screen.

Configuring the PAX S300 to prompt for Credit or Debit (Optional)

If you want the customer to choose credit or debit on the pinpad follow the steps below.***NOTE: If the PAX is configured to prompt for Debit, then cashback with a debit sale cannot be performed regardless if cashback is enabled in the pinpad.***

	1. Tap on the onscreen **Menu** button or press the blue **FUNC** button and the **1** key at the same time. .
	2. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
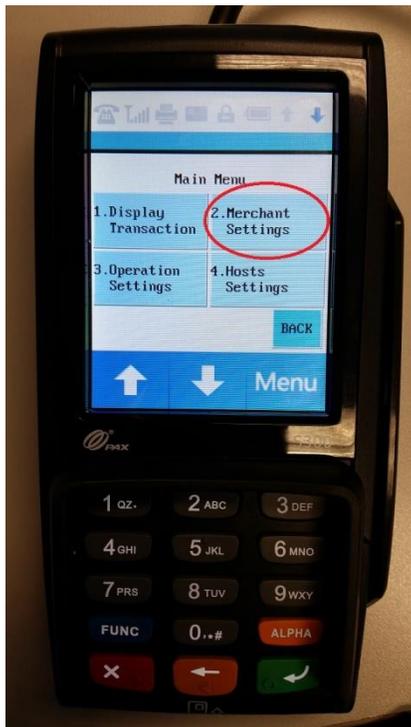
3. Tap on **Merchant Settings** or press **2** on the keypad.
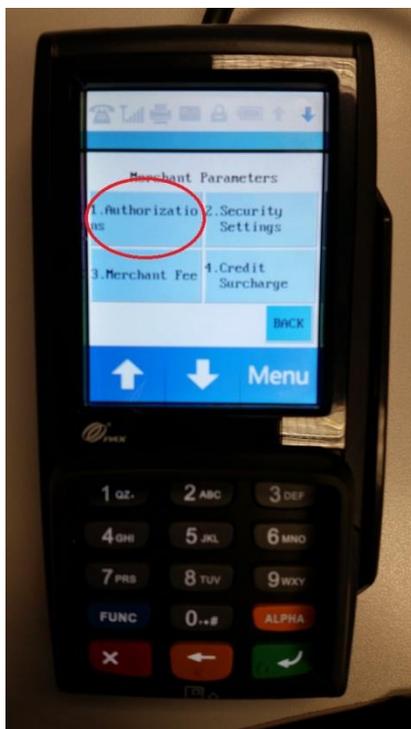
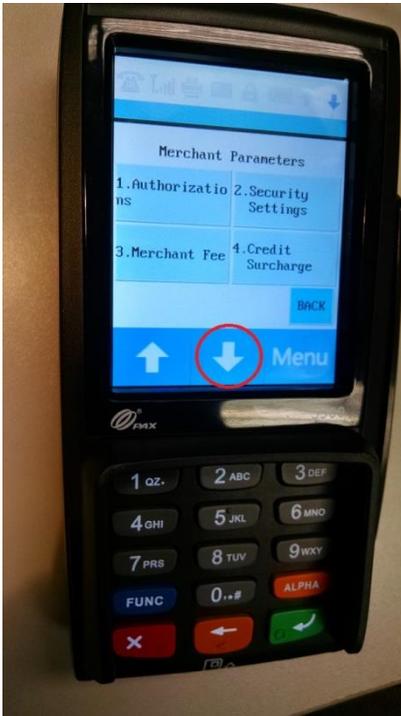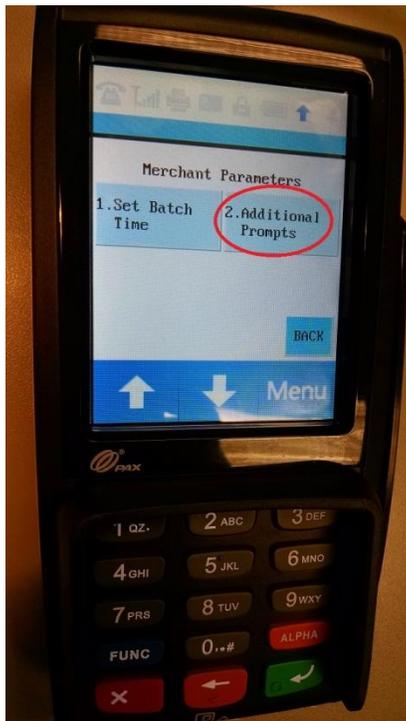4. Tap on **Authorizations** or press **1** on the keypad.

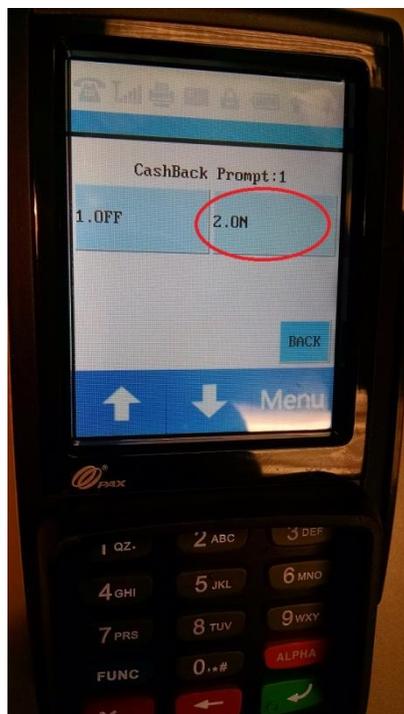5. Enter the default password "**916860**" then press the green key on the key pad.

   If the default password does not work, you will need to contact your payment processor for assistance.
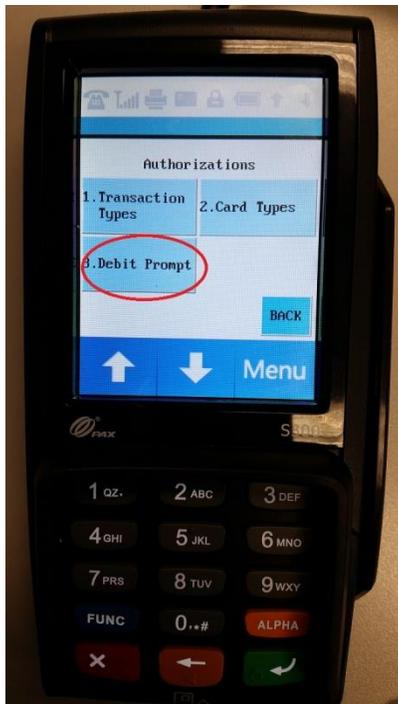
6. Tap on **Debit Prompt** or press **3** on the keypad.
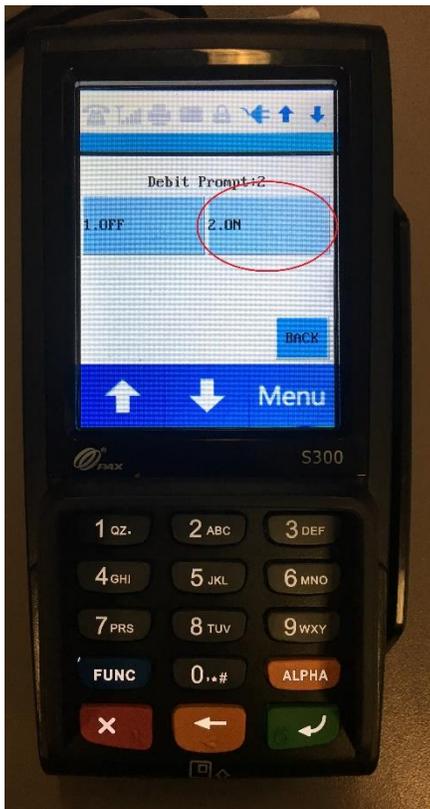
7. Tap on **ON** or press **1** on the keypad.
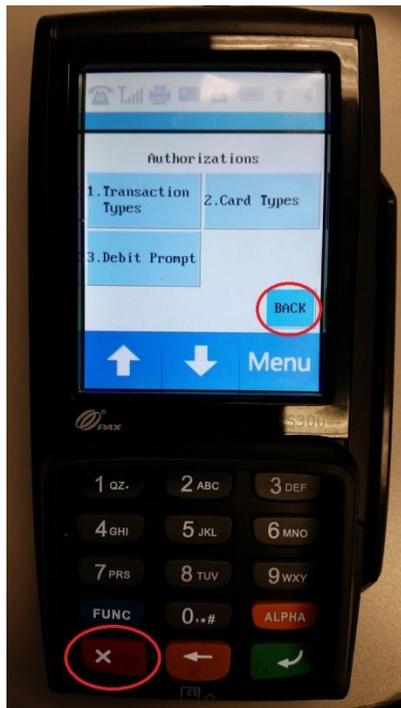
8. Tap the **BACK** button or hit the red key until you are back at the INSERT/SWIPE ANYTIME screen.

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	9. Disconnect the power from the adapter, wait 10 seconds, then reconnect the power cable to restart the pinpad.
	10. Start CRE, select the **Options/Manager** button, select **Setup > Setup Screen**.
	11. Under the **Payment Processing** > **Processing tab** select **Credit/Debit**. From the dropdown select **Pax (TCP/IP Interface)** or **PAX (Serial Interface)** depending on which interface you use. 12. Remove the check from the option **Process Debit Cards through this Credit Card Processor** 13. Hit **Update** to save your changes.

Enabling Cash Back

|	
	1. Tap on the onscreen **Menu** button or press the blue **FUNC** button and the **1** key at the same time. .
	2. Enter the default password "916860" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
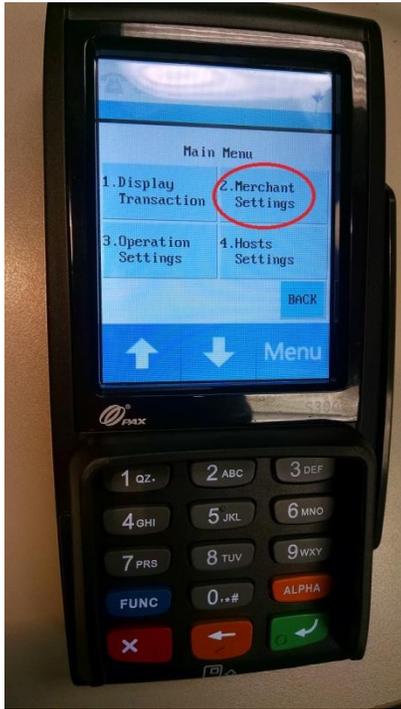
	3. Tap on **Merchant Settings** or press **2** on the keypad.
	4. Tap on the down arrow to access additional selections.

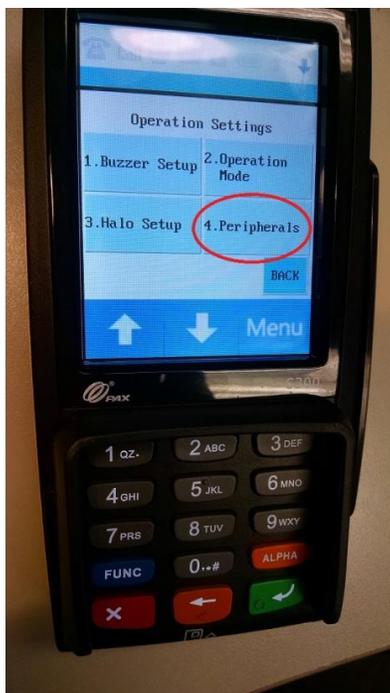5. Tap on **Additional Prompts** or press **2** on the keypad.

6. Enter the default password "**916860**" then press the green key on the key pad.

   If the default password does not work, you will need to contact your payment processor for assistance.
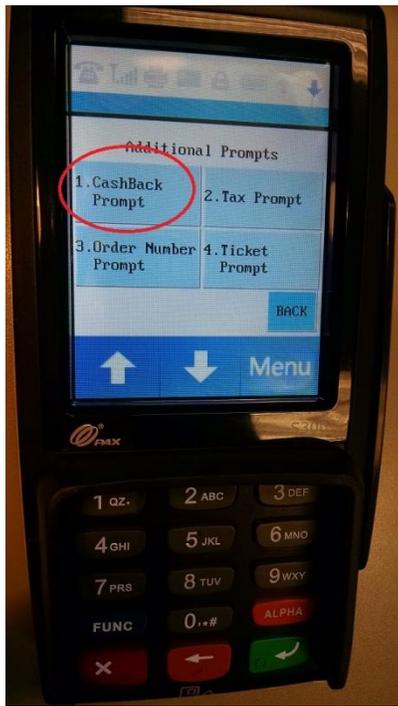
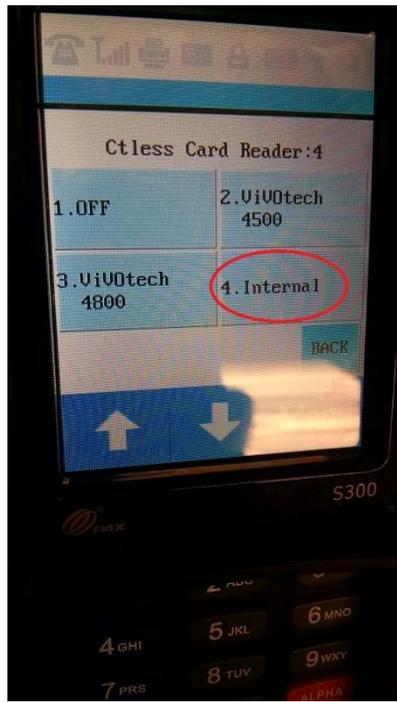7. Tap on **CashBack Prompt** or press **1** on the keypad.

8. Tap on **ON** or press **2** on the keypad. Tap the **BACK** button or hit the red key until you are back at the INSERT/SWIPE ANYTIME screen.

   CashBack is now enabled.

Enabling Contactless Payments

The PAX S300 supports Contactless Payment via contactless enabled cards, Apple Pay, and Google Wallet. For more information on setting this up, contact your payment processor or visit the following links: https://www.apple.com/apple-pay/, https://www.google.com/wallet/.

	1. Tap on the onscreen **Menu** button or press the blue **FUNC** button and the **1** key at the same time. .
	11. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
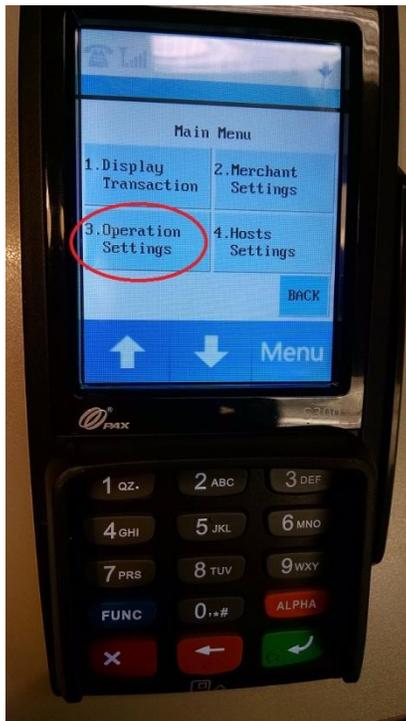
12. Tap on **Operation Settings** or press **3** on the keypad.
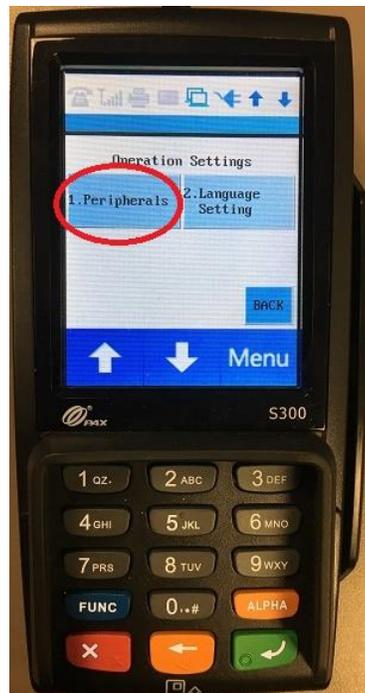
Version 23E or higher

13. Tap on **Peripherals** or press **4** on the keypad.

NOTE: If you are on version **23E or higher**, press the down arrow & then select option 1 for Peripherals**.**

	14. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
	15. Tap on **CTless Card Reader** or press **1** on the keypad.
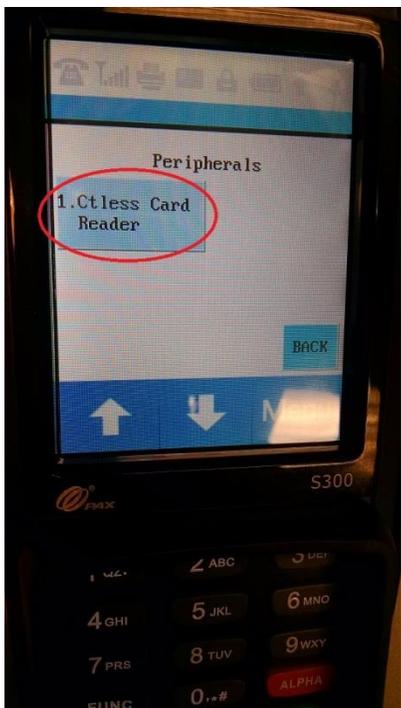
16. Tap on **Internal** or press **4** on the keypad. Tap the **BACK** button or hit the red key until you are back at the INSERT/SWIPE ANYTIME screen.

    Contactless payments are now enabled.

NOTE: If you are on version **23E or higher**, press **2** for the Internal Option. Then select **Ctless Card Reader.**

Configuring the PAX S300 in CRE to accept Credit/Debit payments - TCP/IP Interface

1. From the **Options/Manager** screen, select **Setup > Setup Screen**.
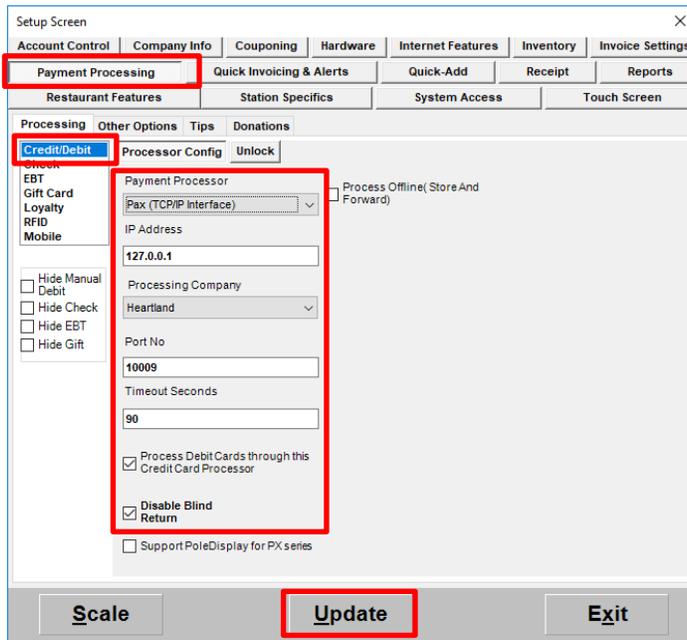
2. Under the **Payment Processing > Processing tab** select **Credit/Debit**.

3. From the Payment Processor dropdown:
   Select **Pax (TCP/IP Interface)**

4. Enter the Static **IP Address** you assigned to the PAX

5. From the Processing Company dropdown:
   Select **Heartland**

6. For **Port No**. enter **10009**.

Optional:

Put a check in the box next to **Process Debit Cards**, if you have the ability to process Debit cards with the processor.

Put a check in the box next to **Disable Blind Return. Must enter original receipt information to return an item.**

7. Hit **Update** to save your changes.

Configuring CRE to process EBT– TCP/IP Interface

1. From the **Options/Manager** screen, select **Setup > Setup Screen**.

2. Under the **Payment Processing > Processing tab** select **EBT**.
3. From the Payment Processor dropdown:
   Select **Pax (TCP/IP Interface)**

4. Enter the Static **IP Address** you assigned to the PAX
5. From the Processing Company dropdown:
   Select **Heartland**

6. For **Port No**. enter **10009**.
   Enable which EBT payment methods you wish to accept.

7. Hit **Update** save your changes.

Enabling **Process EBT Foodstamp** voucher determines if **FoodstampVoucher** is an option in the EBT Payment type prompt in CRE.

Enabling **Process EBT Cash Benefit** determines if Cash Benefit is an option in the EBT Payment type prompt in CRE.

Configuring the PAX S300 in CRE to accept Credit/Debit payments – Serial Interface
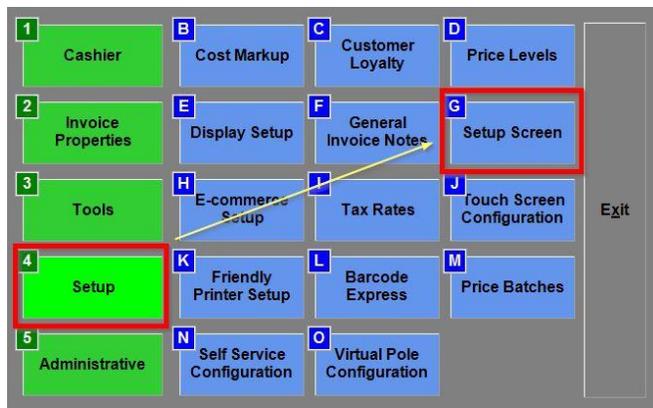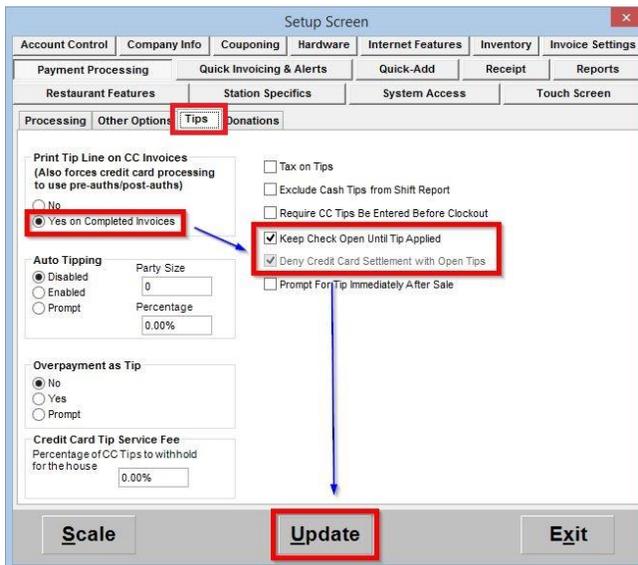

1. From the **Options/Manager** screen, select **Setup > Setup Screen**.

2. Under the **Payment Processing > Processing tab** select **Credit/Debit**.
3. From the Payment Processor dropdown:
   Select **Pax (Serial Interface)**

4. From the Processing Company dropdown:
   Select **Heartland**

5. Under Serial COM Port Number, enter 1 (or 2 if you are using COM2).

Optional:

- **Put a check** in the box next to **Process Debit Cards**.
- **Put a check** in the box next to **Disable Blind Return.**

6. Hit **Update** save your changes

Configuring the PAX S300 in CRE to accept EBT payments – Serial Interface

1. From the **Options/Manager** screen, select **Setup > Setup Screen**.
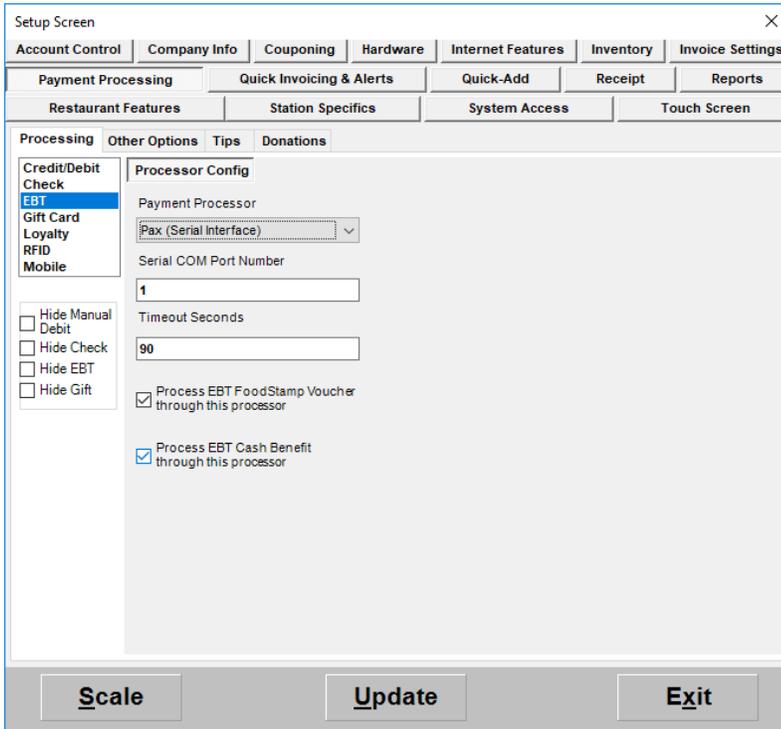
2. Under the **Payment Processing > Processing tab** select **EBT**.

7. From the dropdown select **Pax (Serial Interface)**. Under Serial COM Port Number, enter 1 (or 2 if you are using COM2).

    Enable which EBT payment methods you wish to accept.

3. Hit **Update** save your changes.
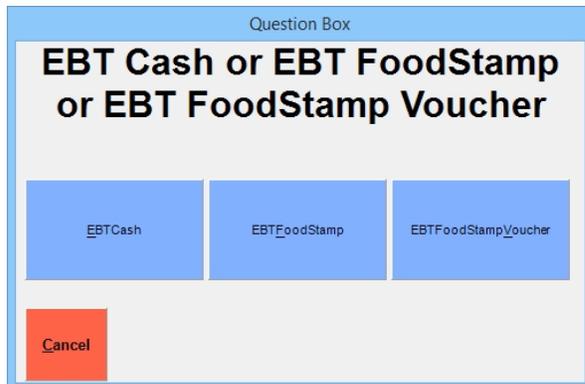
Enabling **Process EBT Foodstamp** voucher determines if **FoodstampVoucher** is an option in the EBT Payment type prompt in CRE.

Enabling **Process EBT Cash Benefit** determines if Cash Benefit is an option in the EBT Payment type prompt in CRE.

Configuring the PAX S300 in CRE/RPE to accept tips

Note: You cannot process Debit Card sales when tips are enabled.
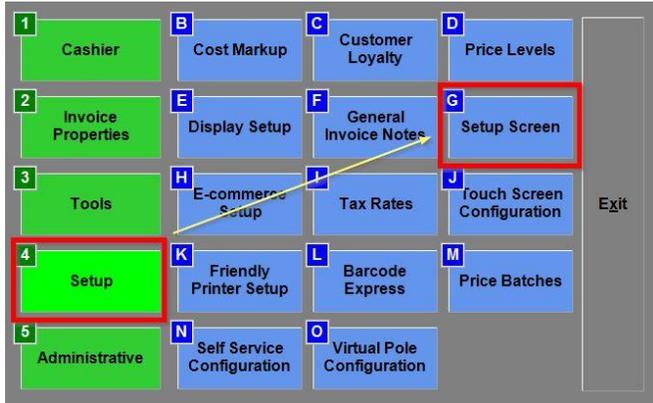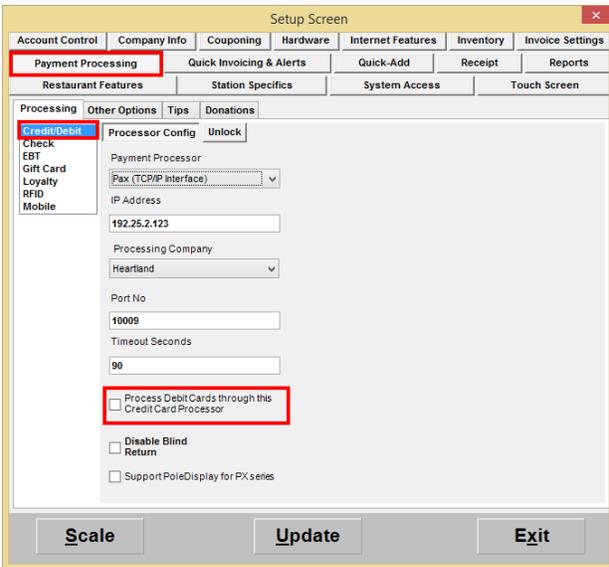
	1. From the **Options/Manager** screen, select **Setup > Setup Screen**.
	2. Under the **Payment Processing** > **Processing tab** select **Credit/Debit**. Make sure the box for **Process Debit Cards through this Credit Card Processor** is **unchecked**.
	3. Select the **Tips** sub-tab. Under **Print Tip Line…**, select **Yes on Completed Invoices**; put a check next to **Keep Check Open Until Tip Applied** (Optional). Hit **Update** to save your changes.

Configuring CRE to Prompt for Tip Immediately After Sale

Note: The PAX S300 device will prompt for Tip during the sale. **Prompt tip feature must be enabled on the processor's side as well.** **This feature is only available for CRE version 13.xxx and higher. You must configure this feature when there aren't any invoices open. (Perform a settlement before configuring).** *Can't be combine with the Bar Tab feature.*
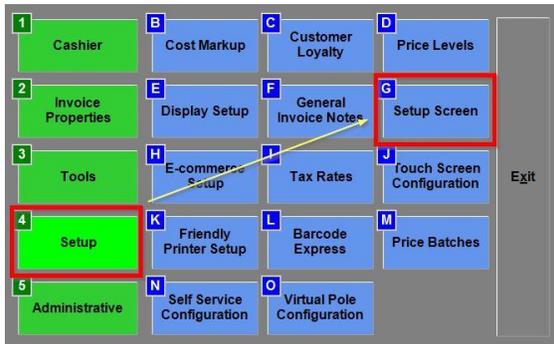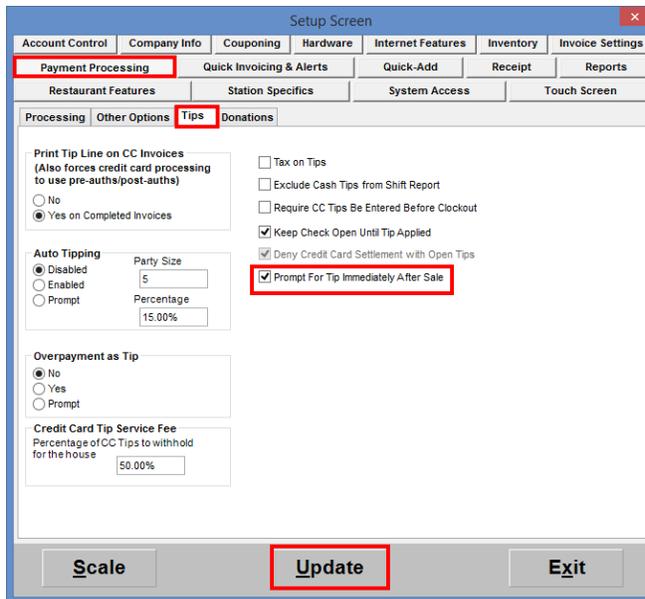
<table>
<tr>
<td>

</td>
<td>

1. From the **Options/Manager** screen, select **Setup > Setup Screen**.

</td>
</tr>
<tr>
<td>

</td>
<td>

2. **Select Payment Processing**
3. **Select** the **Tips** Tab. Make sure tips on Completed invoices is selected.
4. **Select** the **Prompt For Tip Immediately After Sale feature.**
5. **Select Update.**

Note: Restart CRE after changes are saved. Option only available when Bar Tab options are turned off.

</td>
</tr>
</table>

Performing a Credit Card sale using EMV
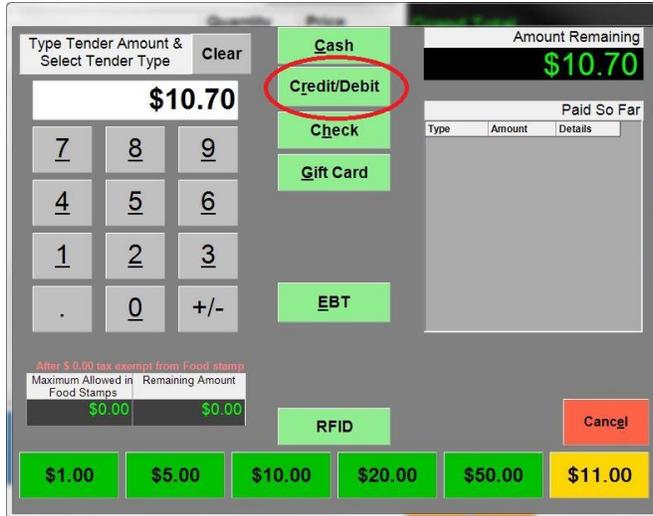
	4. Ring up a sale in CRE then hit the **PAY** button. From the amount tendered screen, select **Credit/Debit**.
	5. Select **Credit**.

6. Insert the EMV Chip card into the slot on the bottom of the S300.

7. Wait while the transaction is processed. **Do Not Remove** the card at this time.

	8. Remove the card once the **Transaction Approved** message is displayed.
	9. Remove the card when prompted. If the EMV card is left in the S300, it will beep and a reminder will appear to **Remove Your Card**.

Performing a Credit Card sale and adding tip using EMV (Fine Dining with tips enabled)
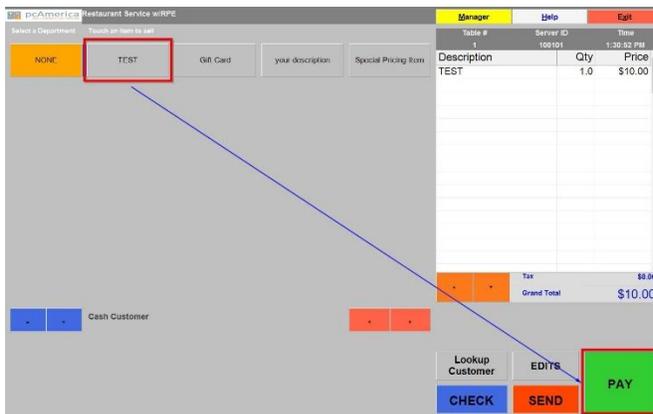
	1. Open a table.
	2. Ring up an item, then select PAY.
	3. At the Amount Tendered screen, select **Credit Card**.
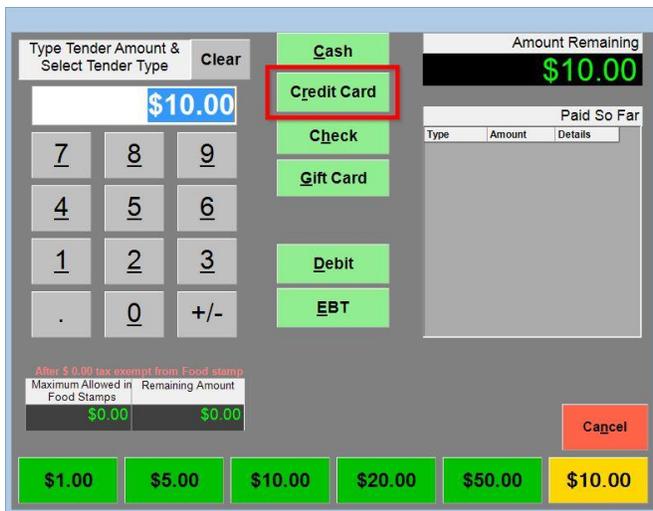
Credit Card Information Credit Card Transaction Type FORCE **SALE** Credit Card Number # Expiration Month Expiration Year # # **Swipe card now or type in credit card number** Reference Code # Manual Entry OK Cancel	4. The Credit Card Information screen will be grayed out while the transaction is processing though the PAX.
	5. The subtotal will appear along with instructions to **Insert/Tap/Swipe Your Card/Device**.
	6. Insert the EMV card into the slot.
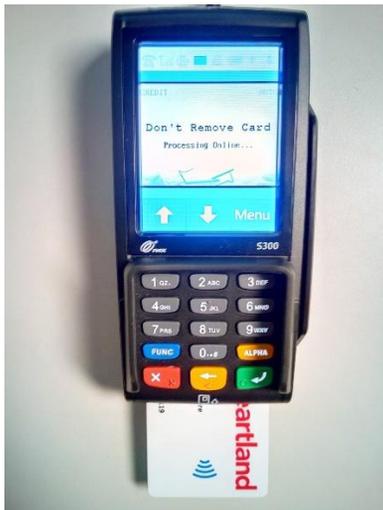
	7. Wait for the **Transaction Approved!** message.
	8. Remove the card when prompted. The PAX will beep if the card is left in the slot.
``` ----------- RESTAURANT COPY ---------- Restaurant Service w/RPE www.PCA.com 1-800-722-6374 TABLE # 1 CHECK# 49.1 Closed to Credit Card DATE/TIME: 2/17/2016 5:14:46 PM CASHIER: 100101 STATION: 01 Item Count: 0 CREDIT CARD PURCHASE $10.00 Card Type: Visa ************0119 XX/XX Name: DI Test, C. Transaction Type: PRE-AUTH Ref Num: 1 Auth Code: 27318A Card Entry Method : CHIP App Name: Visa Credit AID: A0000000031010 TSI: F800 TC ACC: A2E266C189EF55B3 Amount Charged : $10.00 Tip amount: _____ Grand total: _____ Signature: _____ ```	9. Here is what the restaurant copy receipt should look like.

```
                Restaurant Service w/RPE
                      www.PCA.com
                     1-800-722-6374

TABLE # 1
CHECK# 49.1
Closed to Credit Card

DATE/TIME: 2/17/2016 5:14:46 PM
CASHIER: 100101
STATION: 01

Item Count: 0
==========================================
1 TEST                            $10.00
==========================================
Subtotal                         $10.00

Tip amount:              _____

Grand total:             _____

▶

Credit                           $10.00

CREDIT CARD PURCHASE      $10.00
Card Type: Visa
   ************0119 XX/XX
Name: DI Test, C.
Transaction Type: PRE-AUTH
Ref Num: 1
Auth Code: 27318A
Card Entry Method : CHIP

App Name: Visa Credit
AID: A0000000031010
TSI: F800
TC ACC: A2E266C189EF55B3


Opened: 2/17/2016 5:14:13 PM
```

10. Here is what the customer copy receipt should look like.

11. Click on the open table.
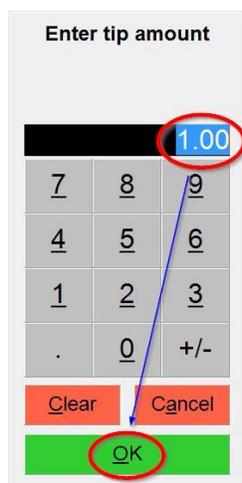
12. Enter tip amount, then click on **OK**.
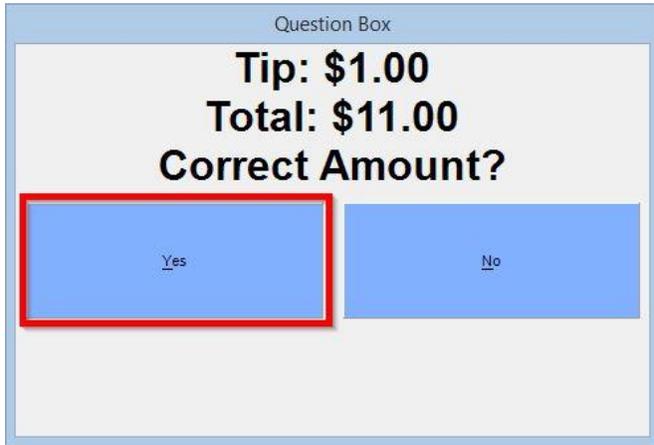
13. Click on **Yes** to confirm the tip amount.

14. The PAX should display a processing screen while the tip is being added.
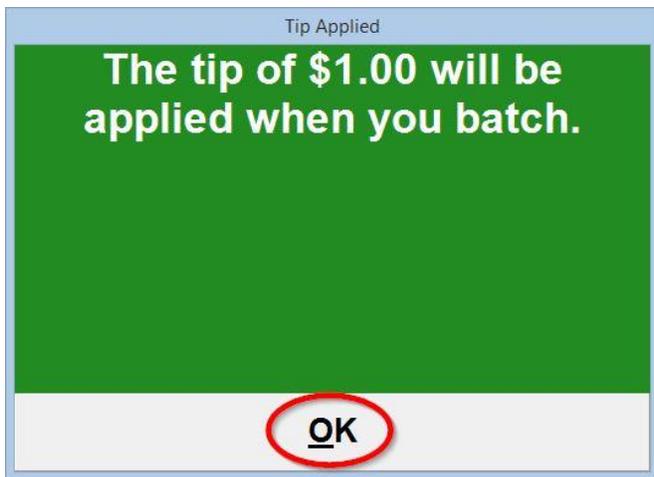
15. A confirmation of the tip applied should appear in RPE. Click **OK** to clear the screen.
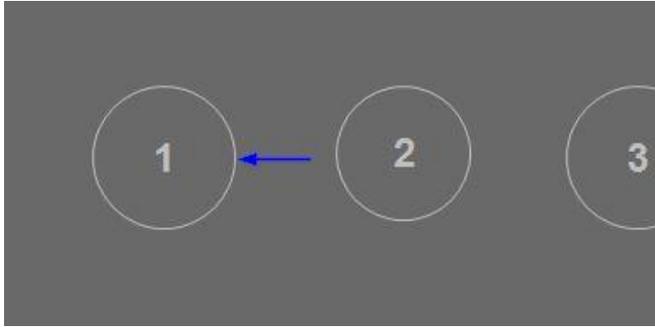
	16. The table should now be open.
	1. Alternatively, you can also apply the tip by going directly to **Administrative** > **Credit Card Settlement**. Note: This is the same procedure for adding tips in **Quick Service** and **Retail**.
	2. Click on **Add Tip**.
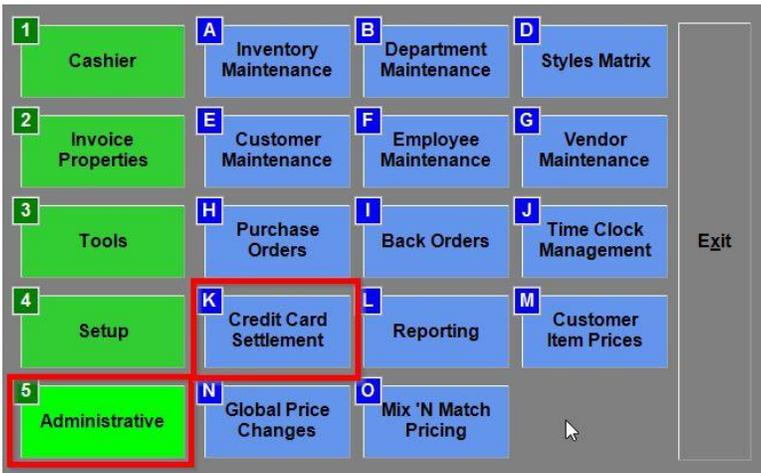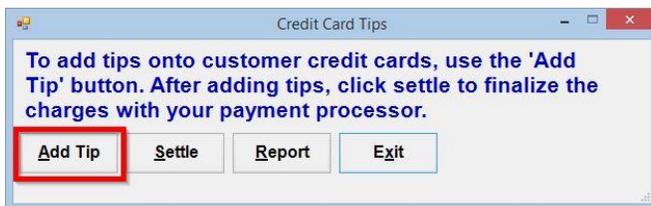
Enter invoice # 0 7 8 9 4 5 6 1 2 3 . 0 +/- Clear Cancel OK	3. Enter the invoice number and click **OK**.
Enter tip amount 1.00 7 8 9 4 5 6 1 2 3 . 0 +/- Clear Cancel OK	4. Enter tip amount and click **OK**.
Question Box **Tip: $1.00** **Total: $11.00** **Correct Amount?** Yes No	5. Click on **Yes** to confirm the tip amount.
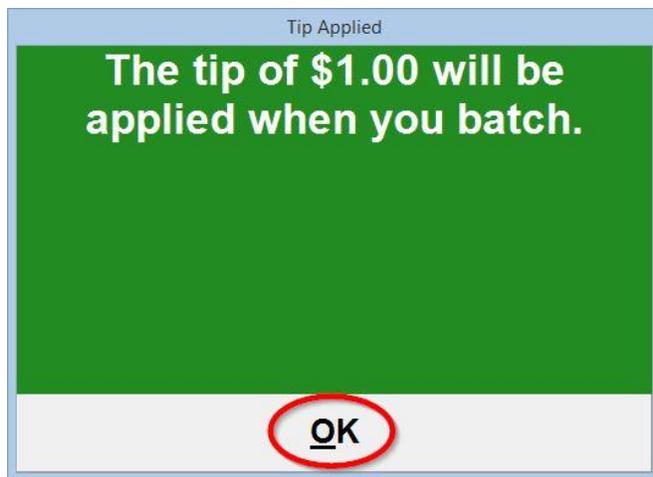
	6. The PAX should display a processing screen while the tip is being added.
Tip Applied The tip of $1.00 will be applied when you batch. **OK**	7. A confirmation of the tip applied should appear in RPE. Click **OK** to clear the screen.

Perform a Credit Card Sale with Feature Prompt for tip immediately after sale
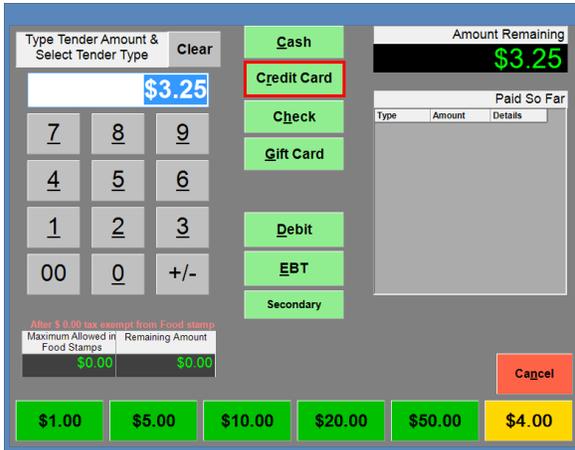
1. Open any invoice.
2. Add an item to the invoice
3. Select PAY
4. **Select Credit Card**
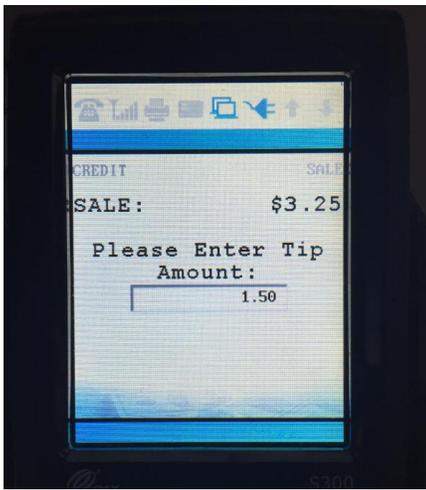
5. On the PAX Device:

Enter a tip amount. Select the green button on the PAX device to submit the amount.

Note: To Enter a tip amount of zero. Leave it at zero then select green button.
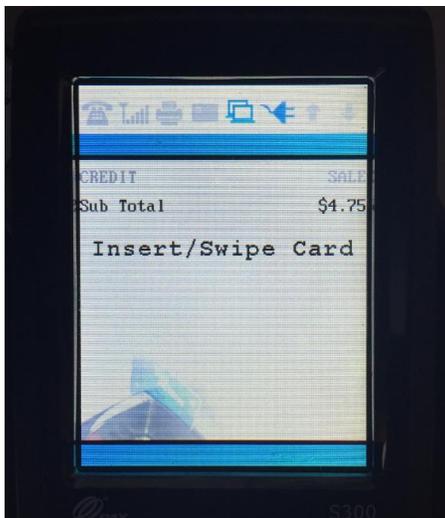
6. **Insert or Swipe Credit Card**
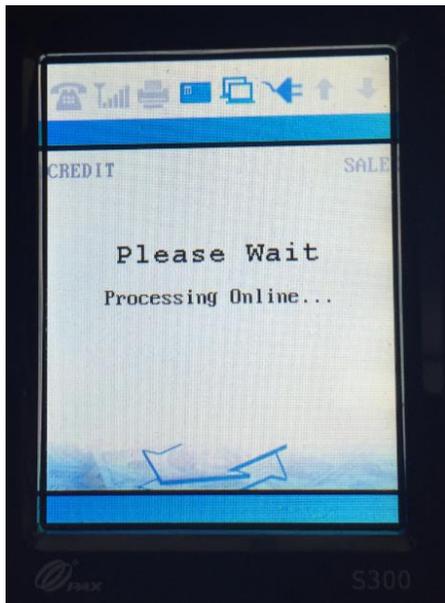
	7. Device will display. While processing
	8. Remove the card when prompted. The PAX will beep if the card is left in the slot.
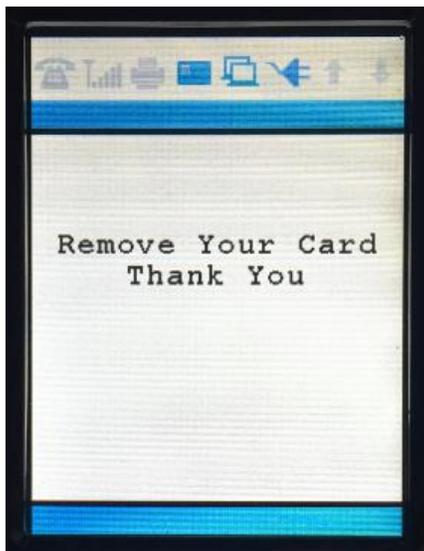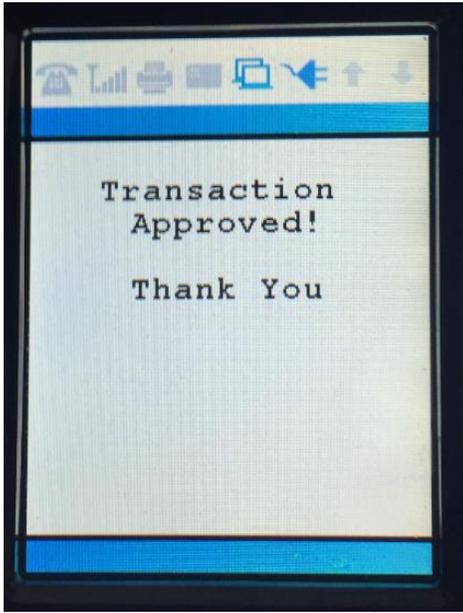
9. **Transaction Approved!** Message.


```
ORDER # CC4
INVOICE# 4.1
Closed to Credit Card Purchase

DATE/TIME: 8/15/2019 5:14:45 PM
CASHIER: 100101
STATION: 01

Item Count: 1
========================================
1 STANDARD ITEM 3*          $3.00
========================================
Subtotal                $3.00
Tip amount:             $1.50
Tax                     $0.25
Subtotal            $4.75

Additional Tip:     _____

Grand total:        _____


Credit              $3.25

CREDIT CARD PURCHASE    $4.75
Card Type: Visa
  ************0119 XX/XX
Name: DI Test, Card 03
Transaction Type: PRE-AUTH COMPLETION
Ref Num: 16
Auth Code: 43470A
Gateway Txn ID: 1204074754
Card Entry Method : CHIP

App Name: Visa Credit
AID: A0000000031010
TSI: E800
TC ACC: 128C17DA2E7371BE
```

10. Customer Receipt

ORDER # CC4
INVOICE# 4.1
Closed to Credit Card Purchase

DATE/TIME: 8/15/2019 5:14:45 PM
CASHIER: 100101
STATION: 01

Item Count: 1

CREDIT CARD PURCHASE $4.75
Card Type: Visa
    ************0119 XX/XX
Name: DI Test, Card 03
Transaction Type: PRE-AUTH COMPLETION
Ref Num: 16
Auth Code: 43470A
Gateway Txn ID: 1204074754
Card Entry Method : CHIP

App Name: Visa Credit
AID: A0000000031010
TSI: E800
TC ACC: 128C17DA2E7371BE

    Amount Charged : $4.75

Additional Tip: _____

Grand total: _____

Signature: _____

11. Store Receipt.

Note: When adding an additional tip to the invoice, be sure to enter the total tip amount.

Performing a Credit Card sale using the Contactless enabled card

1. Ring up a sale in CRE then hit the **PAY** button. From the amount tendered screen, select **Credit/Debit**.

2. Select **Credit**.

	3. Tap the contactless enabled credit card on the front of the S300.
	4. Wait while the transaction processes.

5. Sign on the screen using a finger or the S300 stylus then hit the **ACCEPT** button.

6. The transaction is now completed.

Performing a Debit Card sale (EMV Debit)

PAX S300 must be on Version 1.01.00E to be able to perform an EMV Debit Sale.
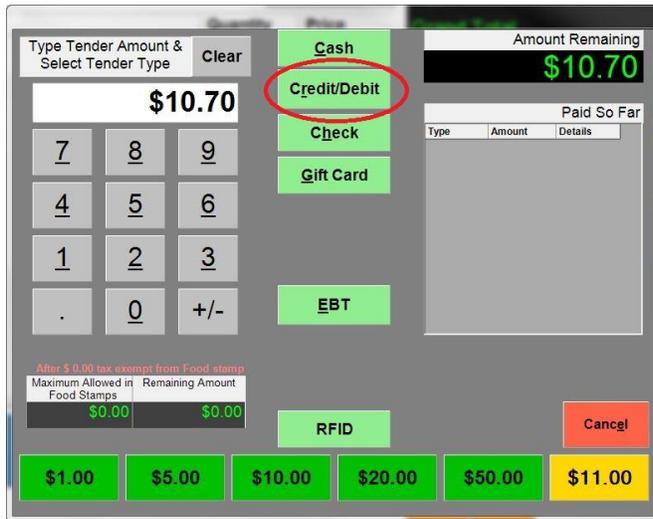
1. Ring up a sale in CRE then hit the **PAY** button. From the amount tendered screen, select **Credit/Debit**.

2. Select **Debit**.
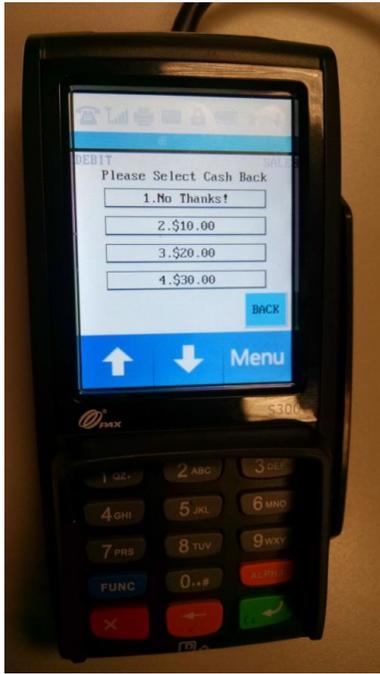
|	
	3. On the S300, select **No Thanks!** To Cash Back, select a Cash Back amount, or tap on the down arrow for additional options.
	4. Select a Cash Back amount, **Other Amount**, or hit **BACK** and then **No Thanks**! To continue.
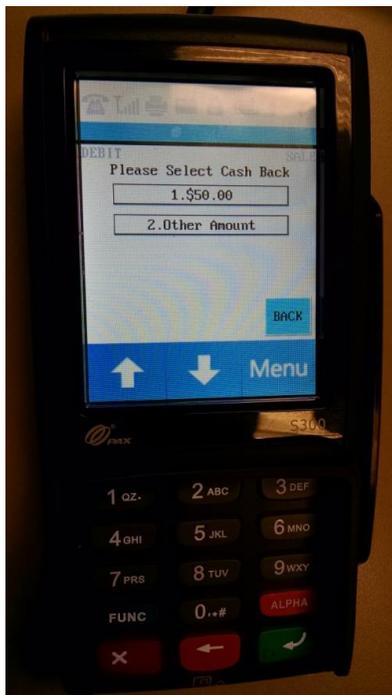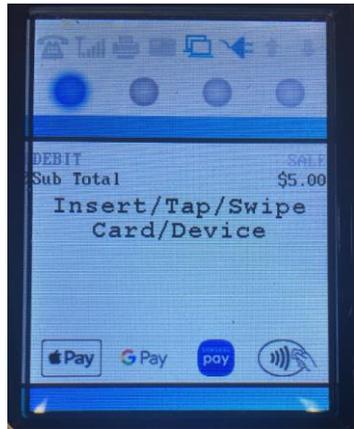
	5. If your **PAX S300 has Version 1.01.00E,** You will have the option to Insert/Tap/Swipe your debit card. **Note: In older PAX Versions, debit is swipe only** Swipe the debit card on the right side of the S300 with the stripe facing down and towards the device.
	6. Enter the PIN number for the debit card.

7. Once the approval message appears the transaction is completed.

Performing a Debit Card Sale with the Pax S300 prompt for Credit or Debit

1. Ring up a sale in CRE then hit the **PAY** button. From the amount tendered screen, select **Credit/Debit**.

2. Swipe the debit card on the right side of the S300 with the stripe facing down and towards the device.
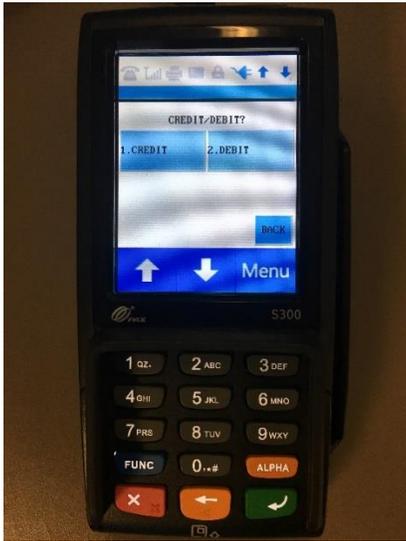
	3. Select **Debit** on the pinpad.
	4. Enter the PIN number for the debit card.

5. Once the approval message appears the transaction is completed.

Performing an EBT Food Stamp sale

1. Ring up a sale in CRE then hit the **PAY** button. From the amount tendered screen, select **EBT**.

2. Select **EBTFoodStamp**.

	3. Swipe the EBT card on the right side of the S300 with the stripe facing down and towards the device.
	4. Enter the EBT Card PIN then press the green key with the arrow.
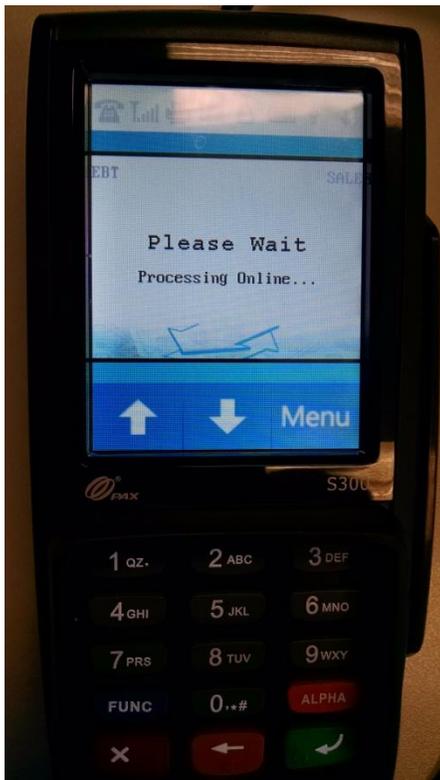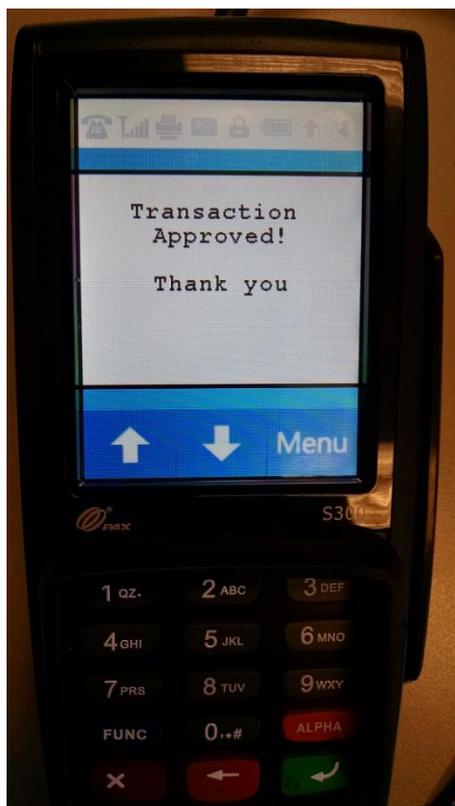
	5. Wait while the transaction processes.
	6. You should receive a **"Transaction Approved!"** message once completed.

Performing an EBT Cash sale with Cash Back

1. Ring up a sale in CRE then hit the **PAY** button. From the amount tendered screen, select **EBT**.

2. Select **EBTCash**.
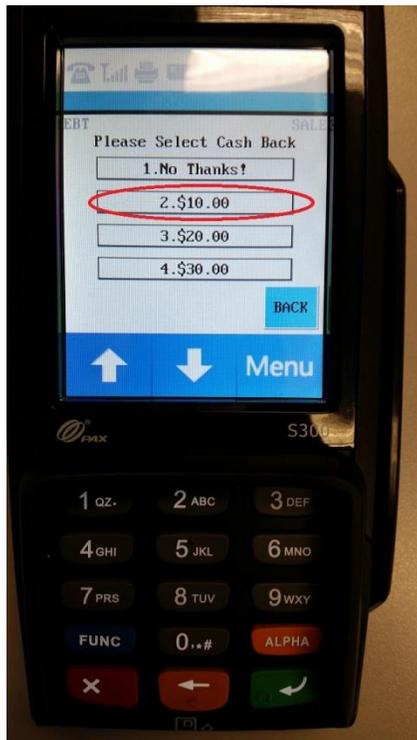
3. On the S300, you may select No Thanks! To Cash Back, select a Cash Back amount, or tap on the down arrow for additional options.

   In our example, we will select **$10.00** as Cash Back.
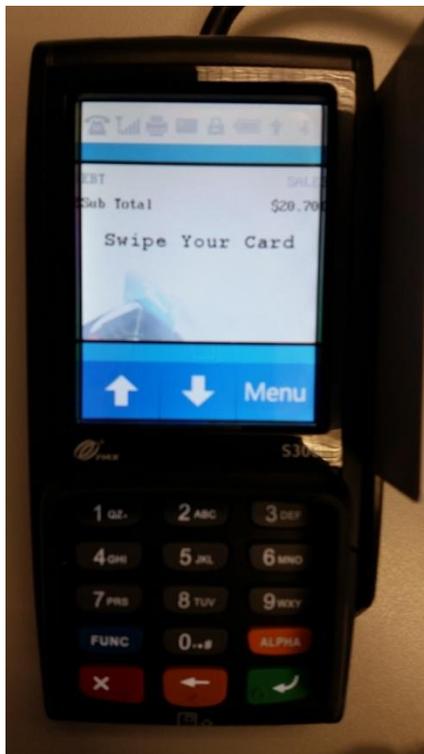
4. Swipe the EBT card on the right side of the S300 with the stripe facing down and towards the device.
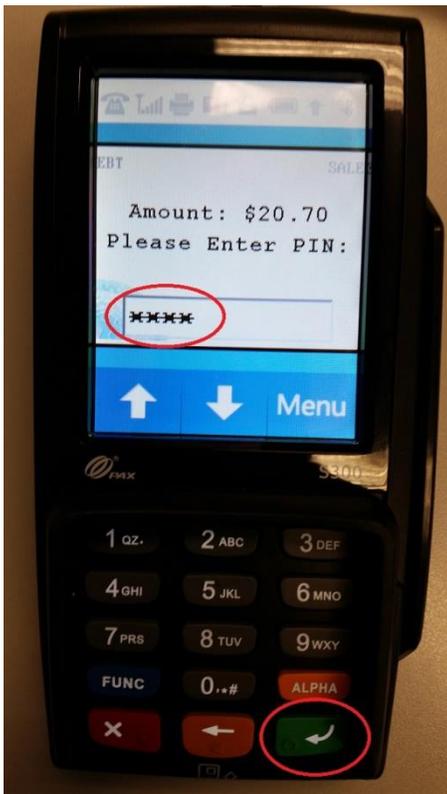
5. Enter the EBT Card PIN then press the green key with the arrow.
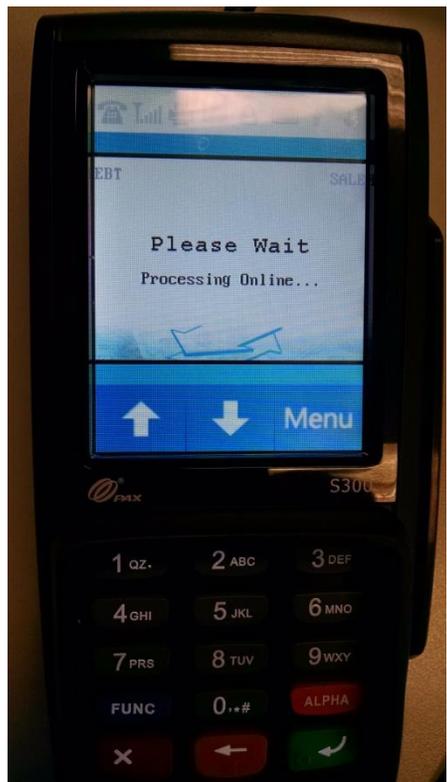
6. Wait while the transaction processes.
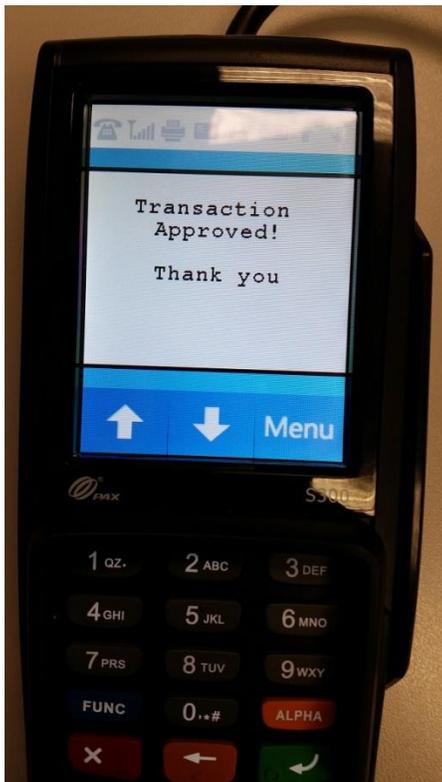
7. You should receive a **"Transaction Approved!"** message once completed.


```
          Retail Checkout w/CRE
               www.PCA.com
             1-800-722-6374


INVOICE# 1
Closed to Cash Benefit Purchase

DATE/TIME: 7/7/2015 5:11:28 PM
CASHIER: 100101
STATION: 01

Item Count: 1
==========================================
1 INVENTORY ITEM*               $10.00
==========================================
Subtotal                        $10.00
Tax                              $0.70
GRAND TOTAL                     $10.70

Cash                           ($10.00)
EBTCashBenefit                  $20.70
Amt Tendered                    $20.70
Change                          $10.00

Cash Benefit PURCHASE     $10.70
Foodstamplable EBT balance   $0.00
Cash EBT Ending balance   $123.45
Cashback Amount: $10.00
  ************1355 XX/XX
Transaction Type: PURCHASE
Ref Num: 17
Auth Code: SIM012

Card Entry Method :  Swiped
```

8. Here is what the receipt for the above transaction looks like. The Change should be equal to the Cash back Amount of $10.00.

Performing a manual entry sale using the keypad
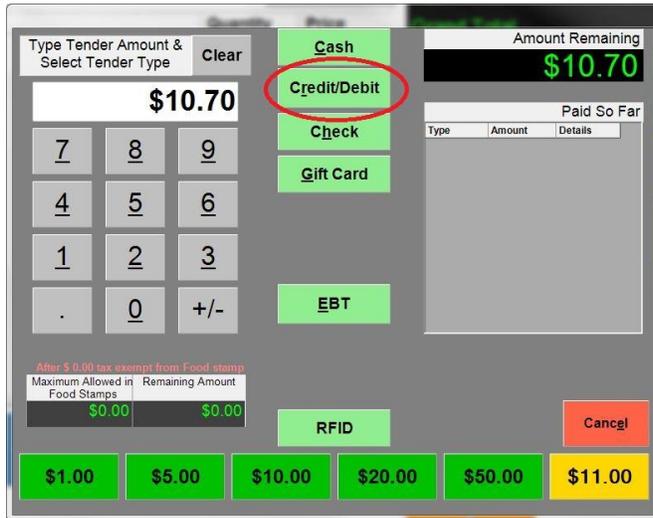
1. Ring up a sale in CRE then hit the **PAY** button. From the amount tendered screen, select **Credit/Debit**.

2. Select **Credit**.

	3. On the PAX, wait for the screen prompt pictured on the left.
	4. Using the PAX keypad, enter the complete credit card number.
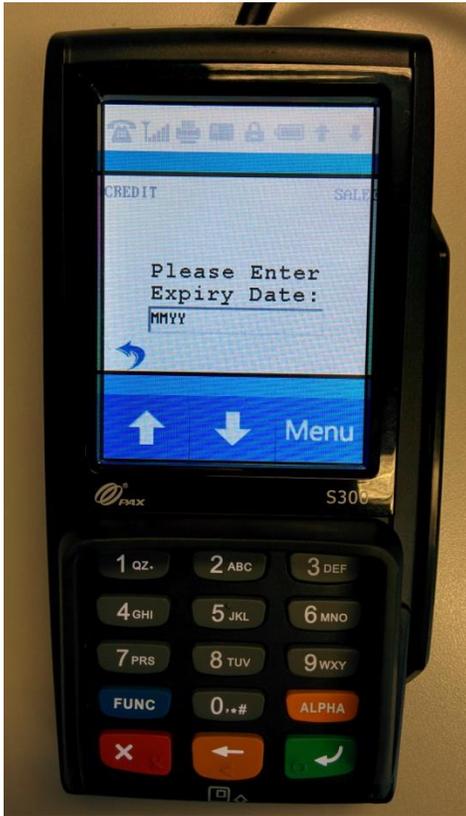
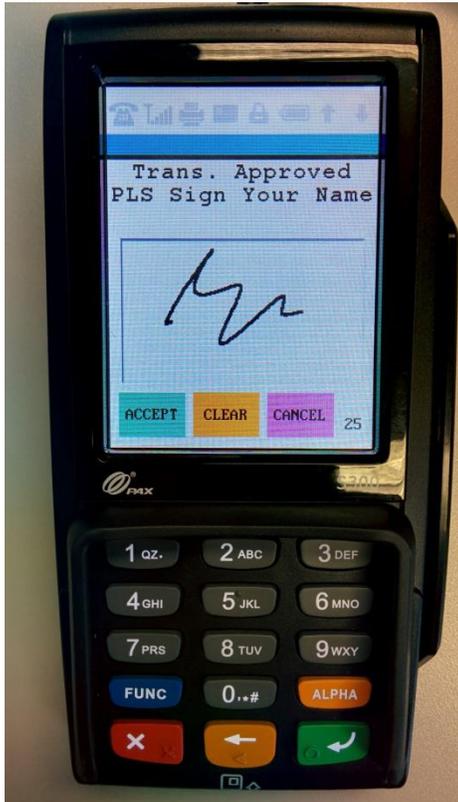|	
	5. Enter the credit card expiry date using the keypad, as a 2 digit month and last 2 digits of the year.
	6. Enter the **CVV2** code on the back of the card.

	7. The **Address** is optional (enter "0" to bypass this field).
	8. Enter the billing **Zip Code** for the card.
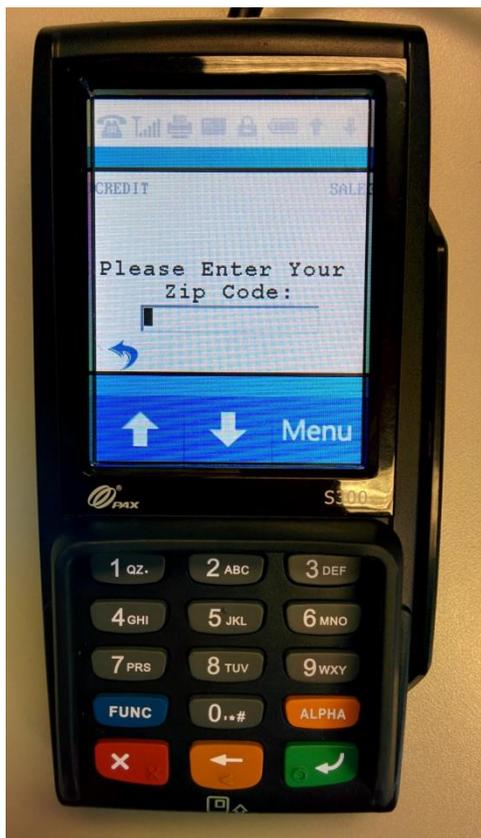
	9. Sign on the screen using the device's stylus or your finger then hit **ACCEPT**. Alternatively, you can hit **CANCEL**; the receipt will then print with a signature line where the customer can sign.
	10. You should receive a **"Transaction Approved!"** message once completed.
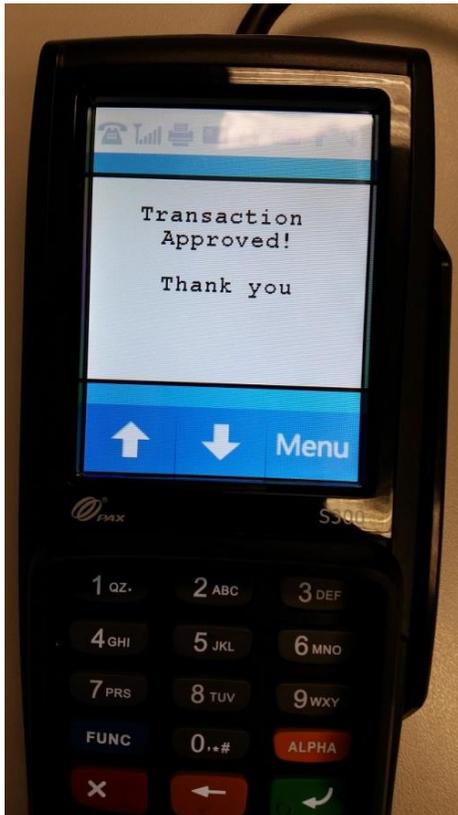
Performing a settlement/batch close and Setting up Auto Settlement

If performing Manual Settlements, settling must be done on each station that has a PAX device. Alternatively, if setting up Auto Settlement, this must be enabled on each station that has a PAX device. NOTE: using Auto Settlement is NOT recommended if you are set up to take tips.

NOTE: Settlements MUST be completed through CRE/RPE. If you receive an error when attempting to settle through CRE/RPE please contact technical support at 1-800-342-5729. DO NOT attempt any other form of settlement (either on the PAX device or through the Payment Processor).
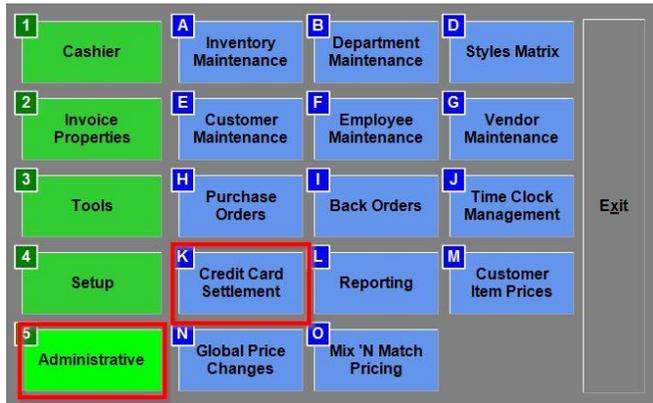
	1. **To Manually Settle:** From the **Manager/Option** screen, click/tap on **Administrative** > **Credit Card Settlement**.
	2. Click/tap on **Settle**.
	3. The PAX should briefly display "Processing…".

|	
	4. It will then return to the main screen.
	5. In CRE, you should see a screen similar to the one pictured on the left. Click/tap on **OK**.
	6. Click/tap on **OK** again.
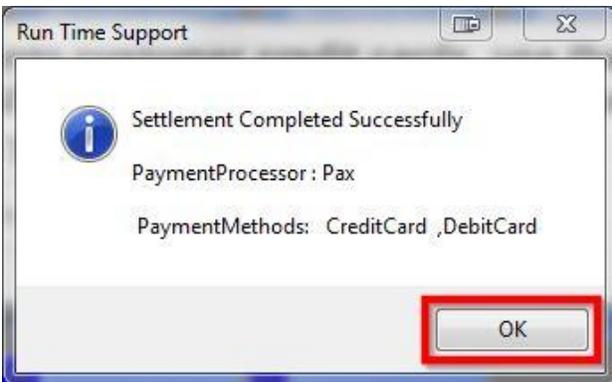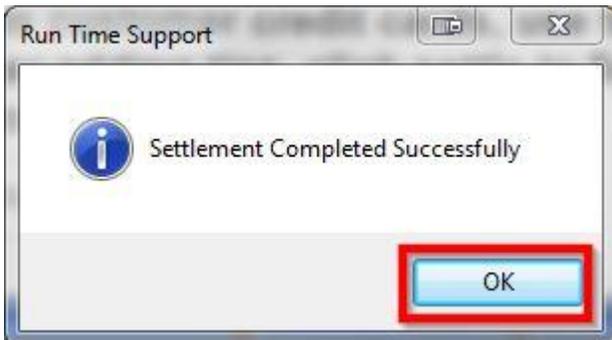
7. Auto Settlement can be setup by going to **Manager/Options** then selecting **Setup>Setup Screen.** Under the **Payment Processing>Other Options tab,** enable **Perform Auto Settlement.** Enter the time that the settlement will occur each day.

Auto Settlement **MUST be enabled on each station that has a PAX device enabled.

Receiving Software Updates on the PAX S300

The PAX unit receives updates directly from the payment processor. To manually trigger an update, all transactions performed through the unit must be settled and the device must be power cycled by detaching and reconnecting the power cable connection.

Here is an example of what the S300 will display during an update:
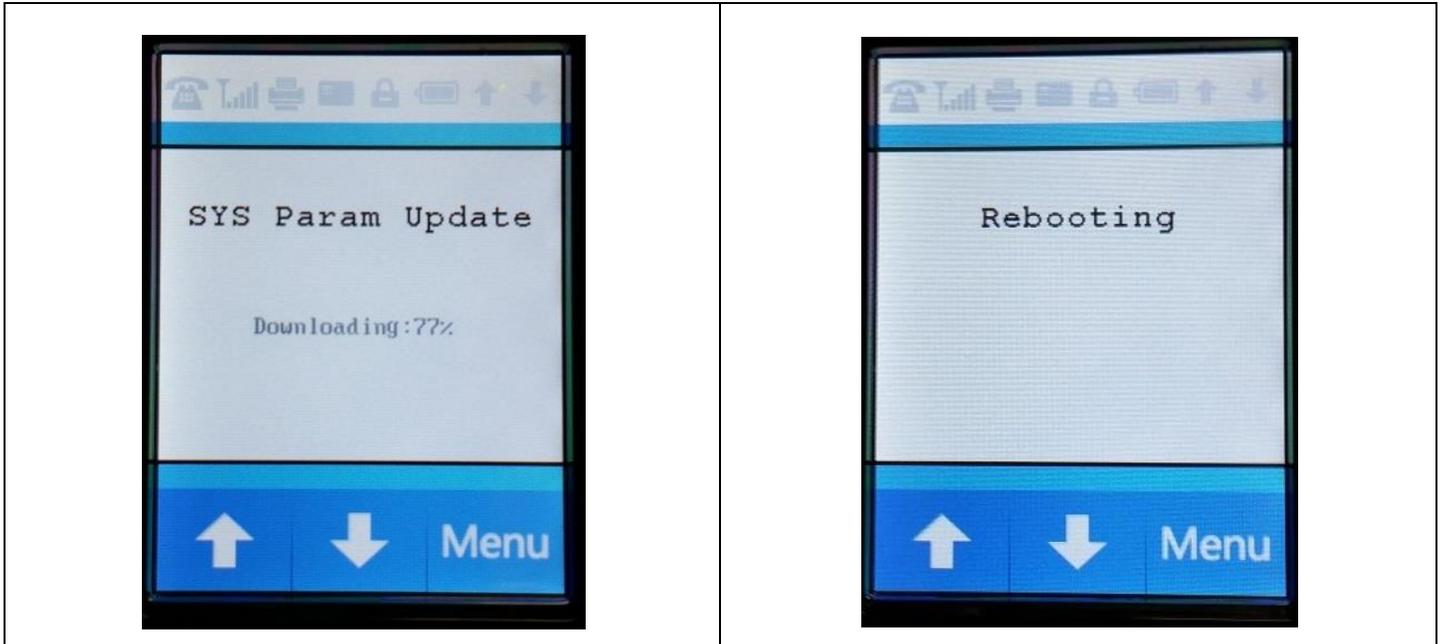
Additional notes:

- Applying an update may reset the LAN type to DHCP. Please confirm your settings are still set to static after an update, by going through the [Configuring the PINpad with a Static IP Address](#) steps on page 11 of this document.
- Alternatively, you may contact your payment processor and supply them with the following information from the PAX device:
  - **IP Address (Static)**
  - **Subnet Mask**
  - **Gateway IP**
  - **DNS IP**

You can then request they send all future updates with this information pre-configured.

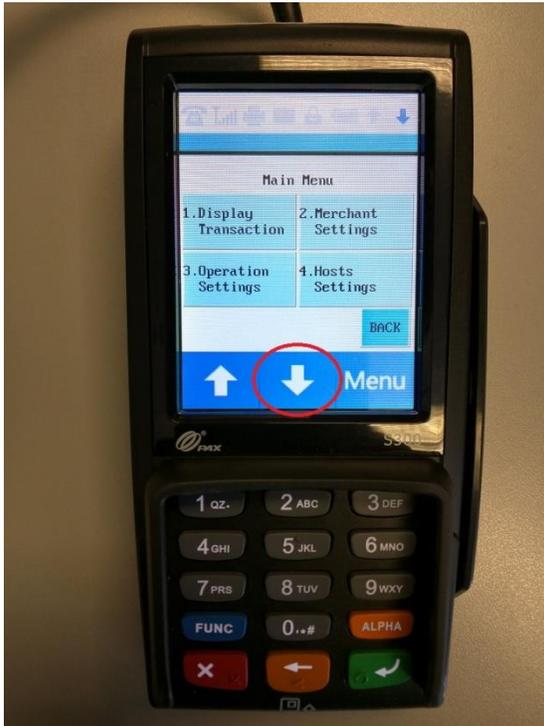# Pulling up the IP Address, Subnet Mask, Gateway IP, and DNS IP (miscellaneous)

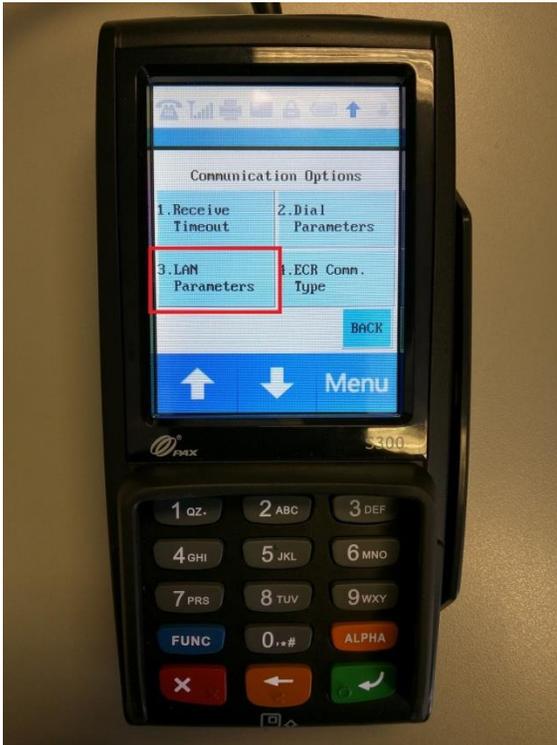|	
	1. Tap on the on screen **Menu** button or press the blue **FUNC** button and the **1** key at the same time. .
	2. Enter the default password "**916860**" then press the green key on the key pad. If the default password does not work, you will need to contact your payment processor for assistance.
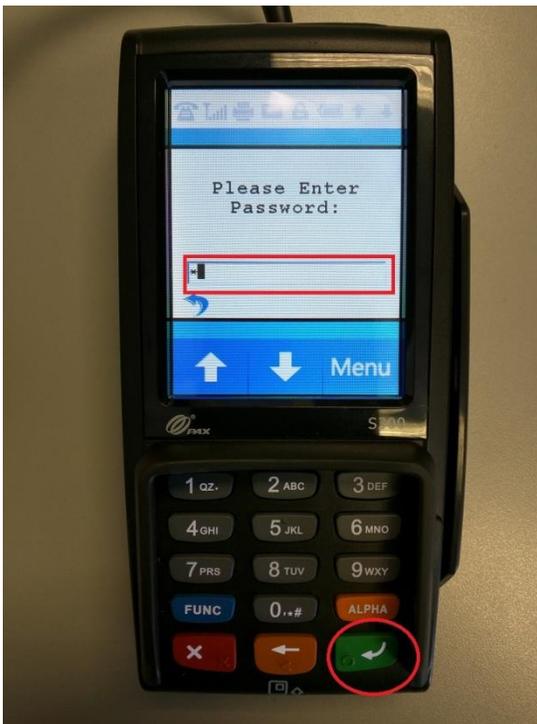
	3. Tap on the down arrow to access additional selections.
	4. Tap on **Communication** or press **2** on the keypad.
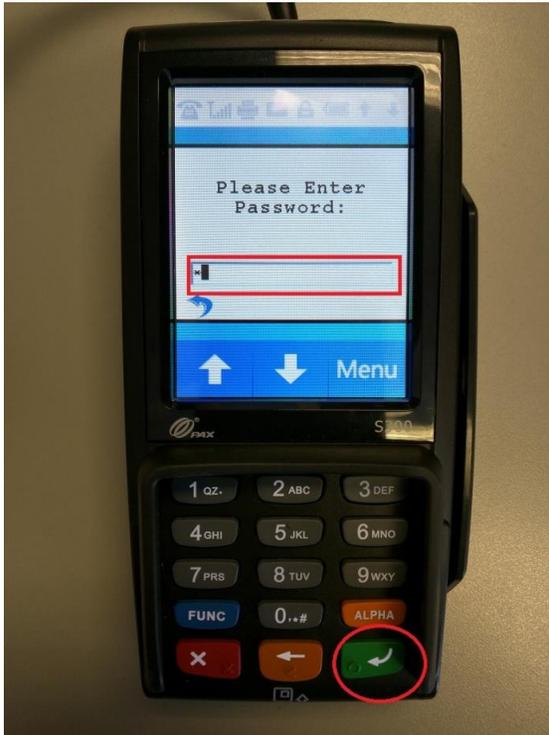
5. Enter the default password "**916860**" then press the green key on the key pad.

   If the default password does not work, you will need to contact your payment processor for assistance.

6. Tap on the down arrow to access additional selections.

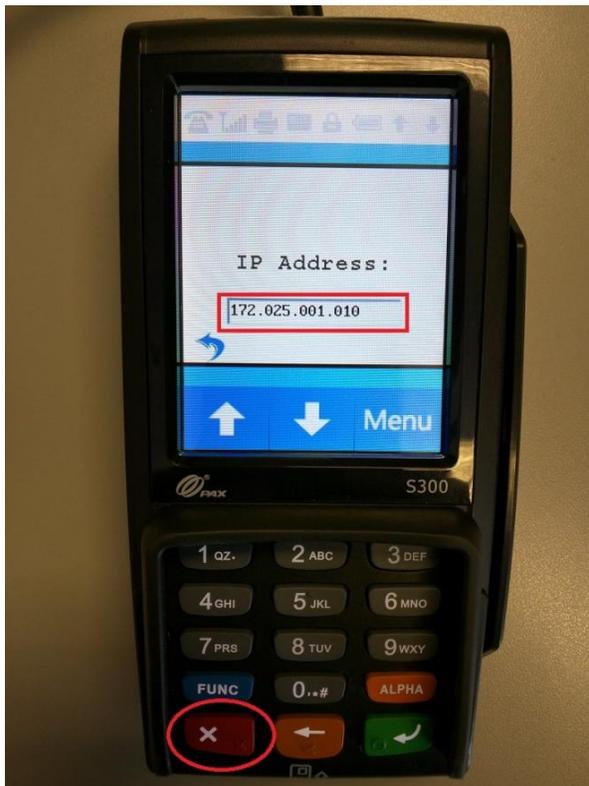**NOTE**: If you are on version **23E or higher**, press the down arrow **twice.**

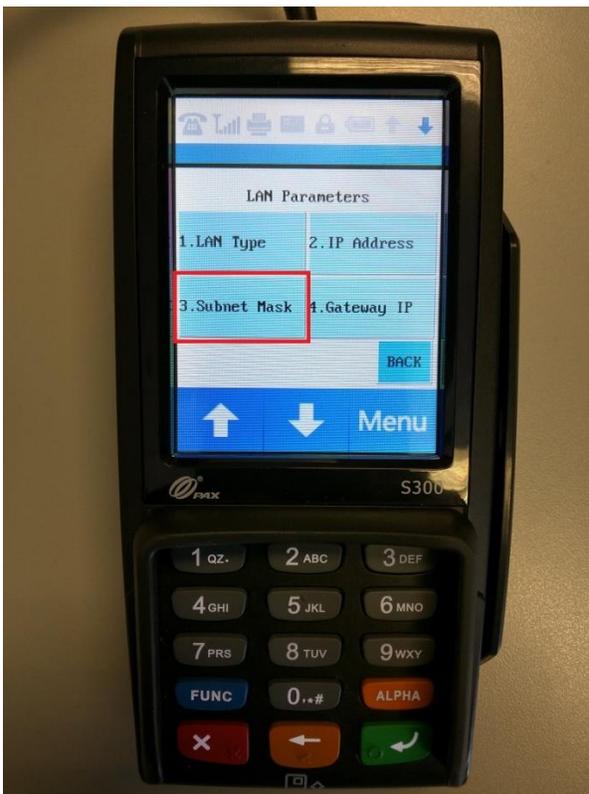7. Tap on **LAN Parameters** or press **3** on the keypad.

NOTE: If you are on version **23E or higher**, press option **1** for LAN Parameters**.**
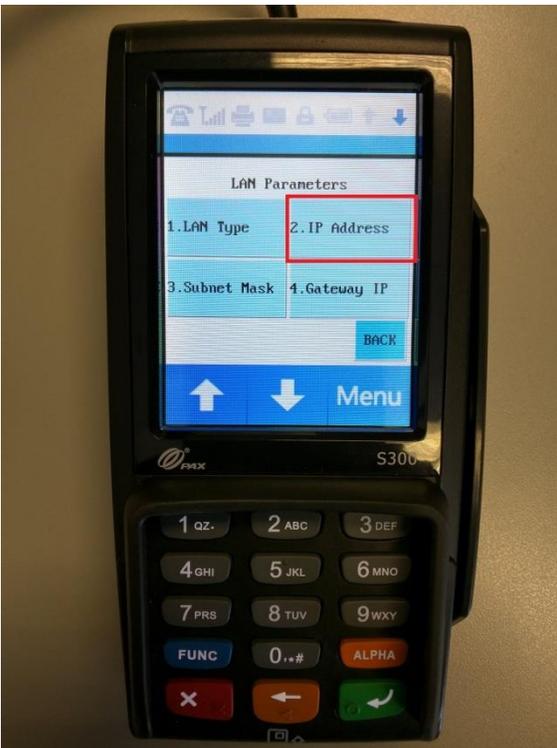
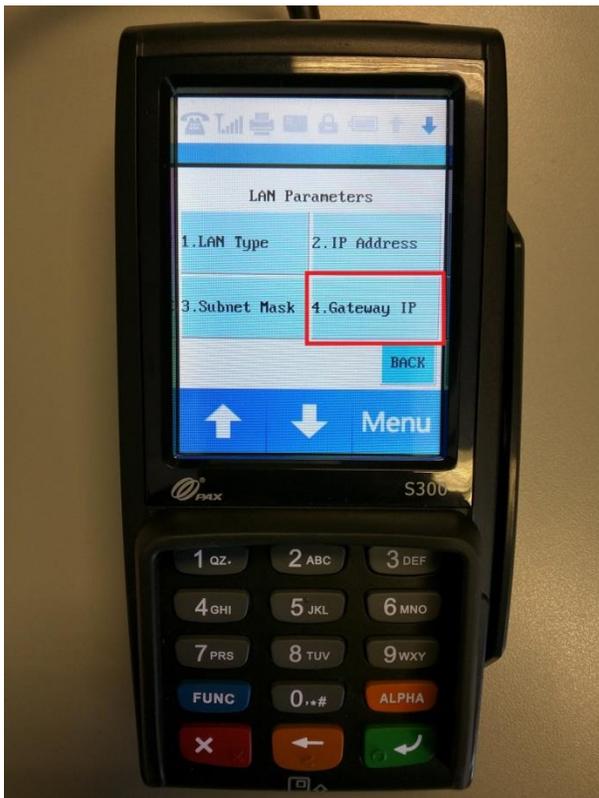8. Tap on **IP Address** or press **2** on the keypad.

8. Make a note of the **IP Address** then hit the red X key twice to return to the **LAN Parameters** screen.

9. Tap on **Subnet Mask** or press **3** on the keypad.

10. Make a note of the **Subnet Mask** then hit the red X key twice to return to the **LAN Parameters** screen.
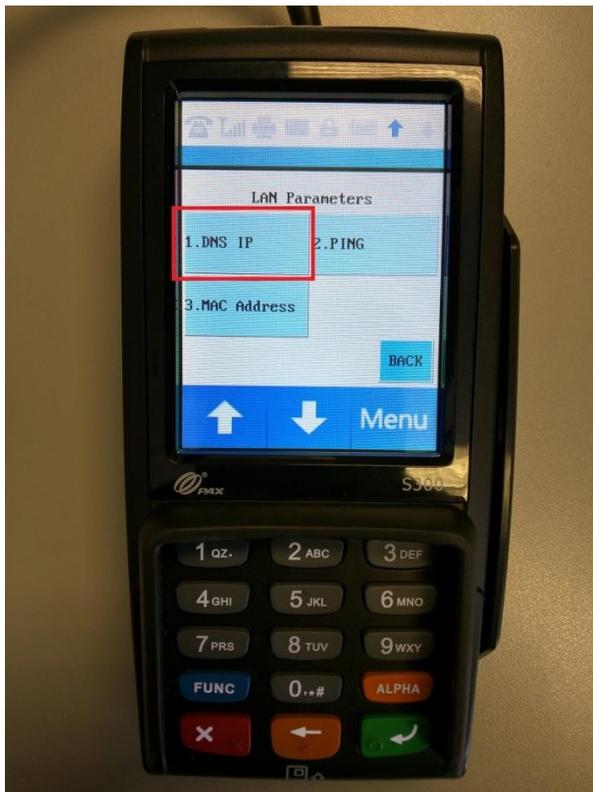

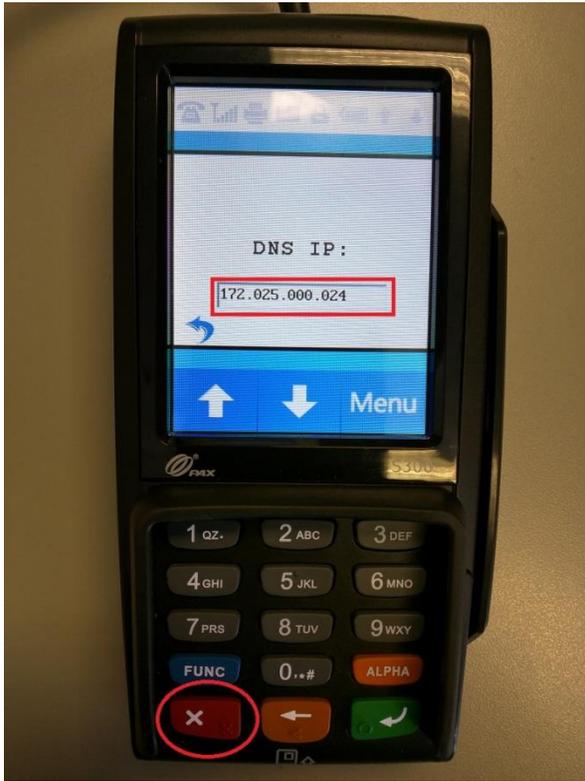11. Tap on **Gateway IP** or press **4** on the keypad.

	12. Make a note of the **Gateway IP** then hit the red X key twice to return to the **LAN Parameters** screen. At the **LAN Parameters** screen hit the down arrow.
	13. Tap on **DNS IP** or press **1** on the keypad. **NOTE**: If you are on version **23E or higher**, press option **2** for **DNS IP.**

14. Make a note of the **DNS IP** then hit the red X key 5 times to return to the **INSERT/SWIPE ANYTIME** screen.

Surcharge Setup

In the interest of helping merchants collect more revenue, CRE now allows you to impose and collect a surcharge on qualifying credit card transactions processed through PAX S300 and PAX PX7 pinpads.

‣ All **chip-enabled credit** card transactions, with or without PIN, are **eligible** for surcharge.

‣ All **debit** and **prepaid** card transactions are **ineligible** for surcharge.

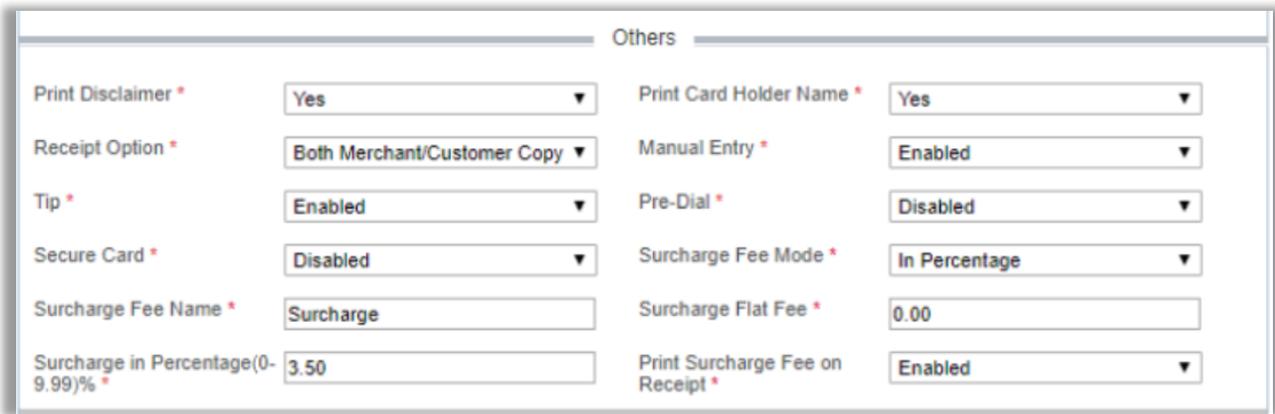‣ Surcharge is not available in all states, and should only be implemented where permitted by law.

Requirements

‣ Must be running CRE 13.1015 or higher

‣ Must be using a PAX S300 or PAX PX7

‣ Must process credit cards via Heartland

Setup Instructions

PAX BroadPOS Configuration

To use the Credit Surcharge feature, you must ensure that the **Others** section of **Credit Features** in BroadPOS are configured as pictured:


If you have any questions about this, or require assistance verifying settings, please contact PAX Support or Product Ops Integration.

CRE RECEIPT CONFIGURATION

Although it is not required, if you are using Credit Surcharge, we strongly recommend that you configure CRE to print a disclaimer on all unpaid checks or dockets informing customers of the policy.

1 Select **Manager** or **Options** and enter credentials if prompted.
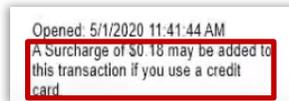
2 Select **Setup | Setup Screen**.
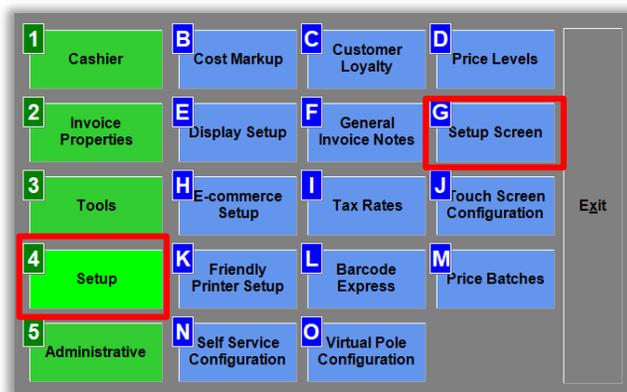
3 Go to the **Receipt** tab, check the **Print surcharge disclaimer on check** box, and click **Update**.
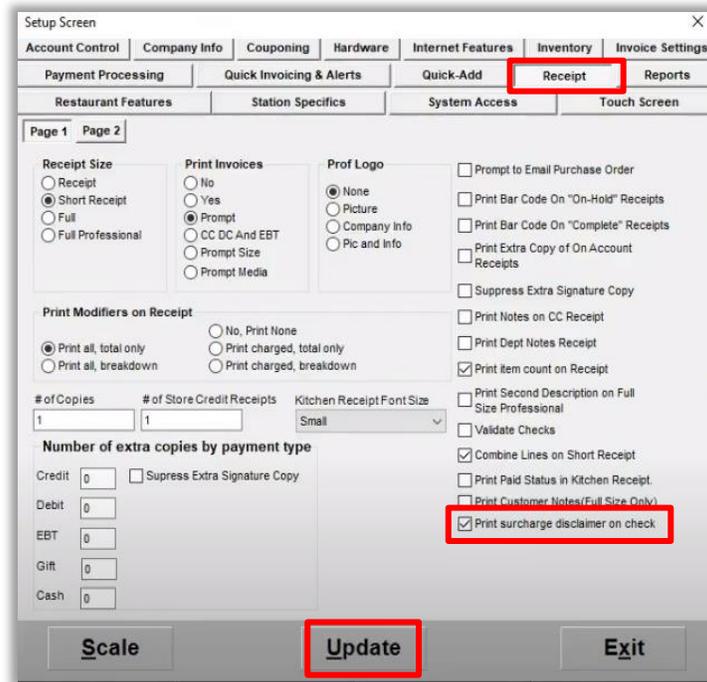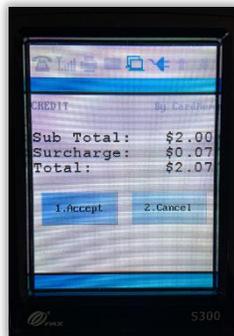

Credit Surcharge Transaction Example

Here, we detail the steps of a transaction rung in CRE with Credit Surcharge enabled.

Add item(s) to your invoice. If appropriate, print the invoice. If configured to do so, the printed invoice will include the surcharge clause as pictured here:

Opened: 5/1/2020 11:41:44 AM
A Surcharge of $0.18 may be added to this transaction if you use a credit card.

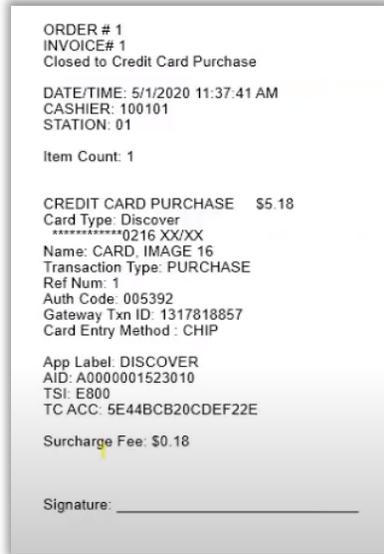The same clause will also print on any dockets.

1 When you are ready to pay the invoice, select **Pay**, then select **Credit**. CRE will display a message to follow instructions on pinpad.

2 When prompted by PAX device, insert card. If the transaction is deemed surcharge-eligible, the PAX device will display the following:
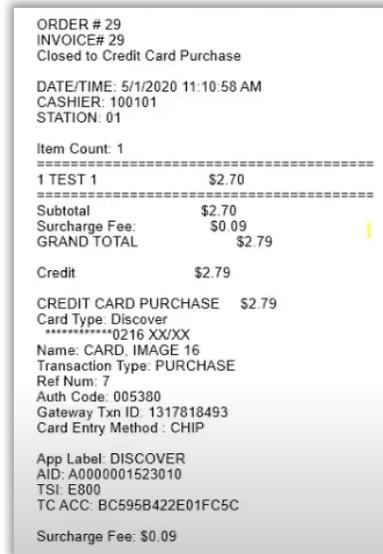

3 Select **Accept** to process the transaction. Otherwise, select **Cancel** to abort.

Here are examples of completed invoices reflecting surcharge:

Store Copy Example

Customer Copy Example

Store Copy receipt:

```
ORDER # 1
INVOICE# 1
Closed to Credit Card Purchase

DATE/TIME: 5/1/2020 11:37:41 AM
CASHIER: 100101
STATION: 01

Item Count: 1


CREDIT CARD PURCHASE    $5.18
Card Type: Discover
   ************0216 XX/XX
Name: CARD, IMAGE 16
Transaction Type: PURCHASE
Ref Num: 1
Auth Code: 005392
Gateway Txn ID: 1317818857
Card Entry Method : CHIP

App Label: DISCOVER
AID: A0000001523010
TSI: E800
TC ACC: 5E44BCB20CDEF22E

Surcharge Fee: $0.18


Signature: _____
```

Customer Copy receipt:

```
ORDER # 29
INVOICE# 29
Closed to Credit Card Purchase

DATE/TIME: 5/1/2020 11:10:58 AM
CASHIER: 100101
STATION: 01

Item Count: 1
=====================================
1 TEST 1              $2.70
=====================================
Subtotal             $2.70
Surcharge Fee:       $0.09
GRAND TOTAL          $2.79

Credit               $2.79

CREDIT CARD PURCHASE    $2.79
Card Type: Discover
   ************0216 XX/XX
Name: CARD, IMAGE 16
Transaction Type: PURCHASE
Ref Num: 7
Auth Code: 005380
Gateway Txn ID: 1317818493
Card Entry Method : CHIP

App Label: DISCOVER
AID: A0000001523010
TSI: E800
TC ACC: BC595B422E01FC5C

Surcharge Fee: $0.09
```

Credit Surcharge in Reports

We have added surcharge to reports so that merchants may easily see how much they have collected. The following reports reflect surcharge amounts:

- ‣ Financial Summary
- ‣ Detailed Daily Report
- ‣ Shift Report
- ‣ Flash Report
- ‣ EOD Report

PAX Store and Forward Setup

Configure SAF in PAX BroadPOS

In order to process offline, PAX devices must be configured as described here:

- ‣ **Allow Store&Forward**: Enabled
- ‣ **SAF Mode**: Offline On Demand
- ‣ **SAF Upload Mode**: Silent Auto Upload
- ‣ **Delete SAF Confirmation**: with Prompt
- ‣ **Auto Upload Interval Time**: 100

Other settings such as **Ceiling** amounts and **HALO** amounts can be set based on the merchant's requirements. These controls will allow a cap to be put on offline sales, either per transaction, or total for the day.

If you have any questions about this process, or require assistance verifying settings, please contact PAX Support or Product Ops Integration.

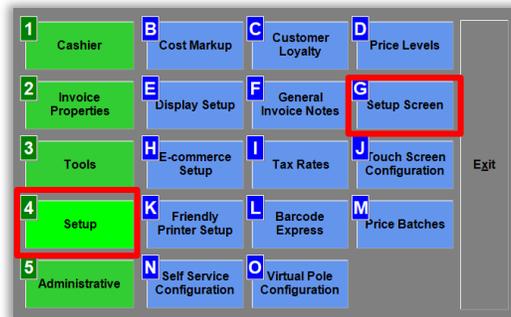Enable / Disable SAF in CRE
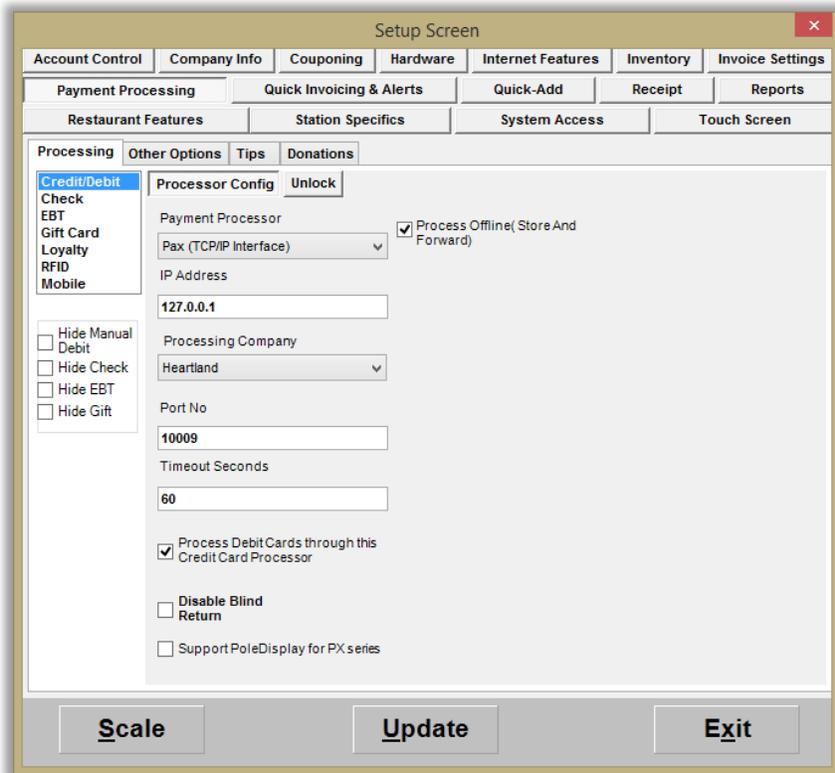
4 Select **Manager** or **Options** and enter credentials if prompted.

5 Select **Setup** | **Setup Screen**.

6 Go to the **Payment Processing** tab. Under **Payment Processor**, you should have either **PAX (TCP/IP Interface)** or **PAX (Serial Interface)**, depending on your setup.

7 Check the **Process Offline (Store and Forward)** box and click **Update**.
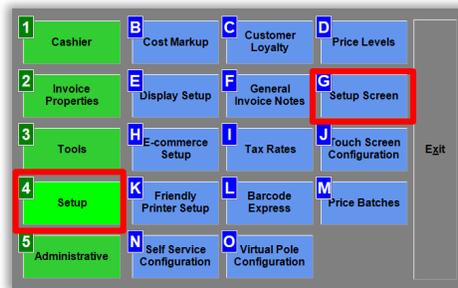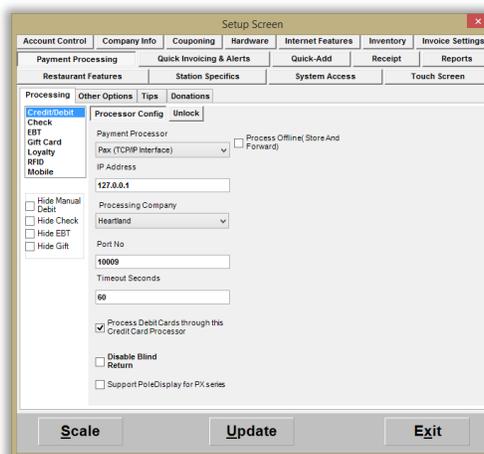
8 Close and restart CRE at **ALL STATIONS** to effect the change.

While in offline mode, CRE will display a red banner with an offline notification and transaction count, as pictured here:

Switch to Online

9   Select **Manager** or **Options** and enter credentials if prompted.

10   Select **Setup** | **Setup Screen**.

11   Go to the **Payment Processing** tab. Under **Payment Processor**, you should have either **PAX (TCP/IP Interface)** or **PAX (Serial Interface)**, depending on your setup.

12   Uncheck the **Process Offline (Store and Forward)** box and click **Update**.

13   Close and restart CRE at **ALL STATIONS** to effect the change.

As CRE processes stored transactions, it will display an orange banner indicating the status and the number of transactions as pictured here:
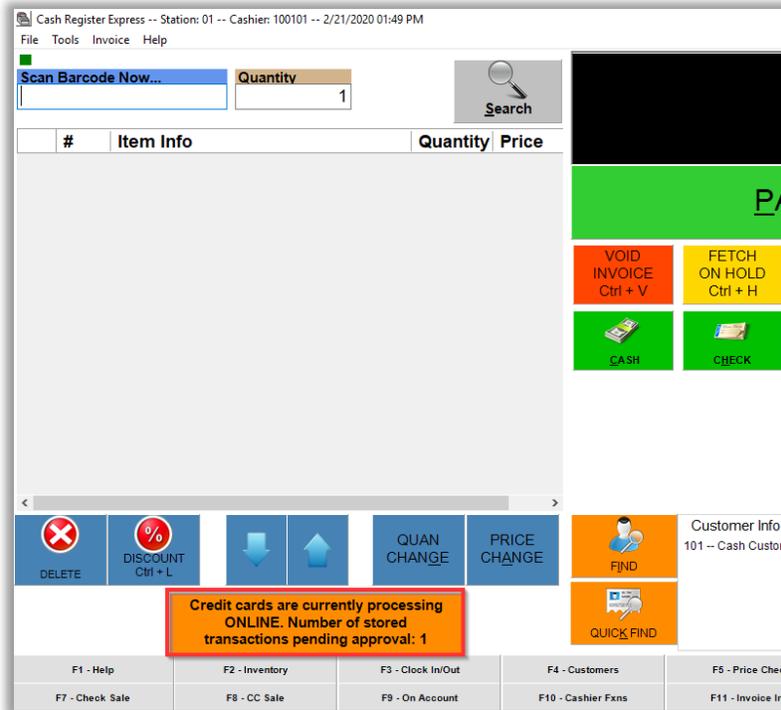
During the process, the PAX device will also display the activity, as shown here:
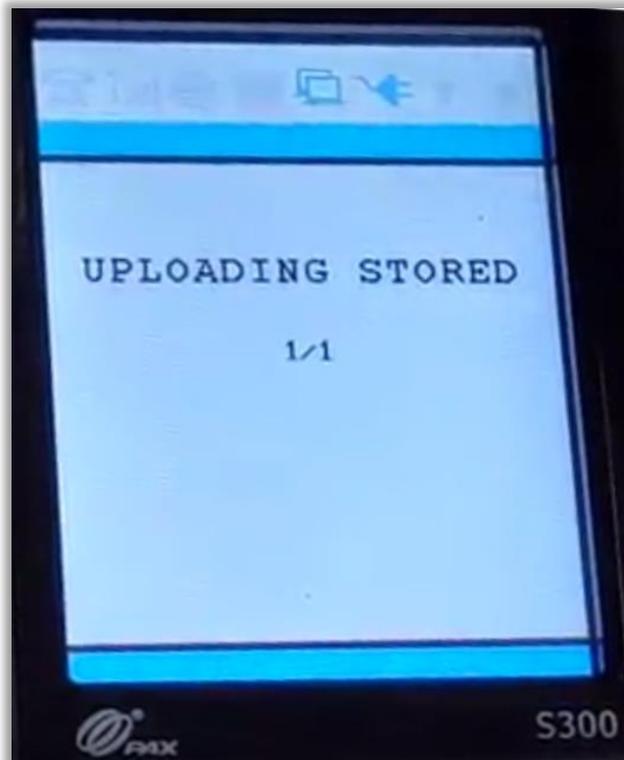
In our example, only one transaction was processed in offline mode.

Settlement Reports and Bad Debt

As mentioned in the overview, using offline mode introduces risk of financial loss. In order to account for cases where transactions processed in offline mode are not approved when online mode is restored, CRE has added a **Bad Debt** category to reports, and it assigns this category to failed transactions. Any such amounts will be clearly reflected in settlement reports.

Here are some examples of reports that include **Bad Debt**: