Heartland | Cash Register Express

PAX A35 Setup Guide

Rev 10/2022

Table of Contents

Date	Product Version	Author	Summary
05/06/2022	15.1008	BG	Original document introduced.
09/02/2022	15.10091	BG	Added serial/USB option.

Date	Product Version	Author	Summary
10/03/2022	15.10091	BG	Added Wi-Fi Connection section.

Overview

This article describes how to configure Cash Register Express to use the PAX A35 device to process payments. The A35 terminal is an Android based, multilane transaction processing and mobile smart terminal. This service is only supported by Heartland Payment processing.

To function properly, the device must be loaded with a Special PAXStore template for CRE.

We recommend you make any adjustments to the device at the PAXStore level to ensure that, if the device's firmware is ever updated or changed, those updates will include the site-specific settings. If you do not set them at the PAXStore level, your settings will be overwritten by any downloads.

Prerequisites

‣ You must add an A35 SKU to an opportunity in Salesforce.

‣ The merchant account must have a Heartland Processing MID in Salesforce to complete the order.

‣ The merchant must be processing with Heartland Payments Systems.

‣ The merchant must be using CRE version 15.10091 or later.

If you have any questions or concerns regarding the PAX A35 device, please email them to paxsupport@e-hps.com, or call 1.888.909.8498.

Connecting & Powering the PAX A35

1 Remove back cover of PAX device.

2 Connect the USB end of the communication cable as shown.

3 Connect the USB end of the power cable to the USB slot on the other end of the communication cable.
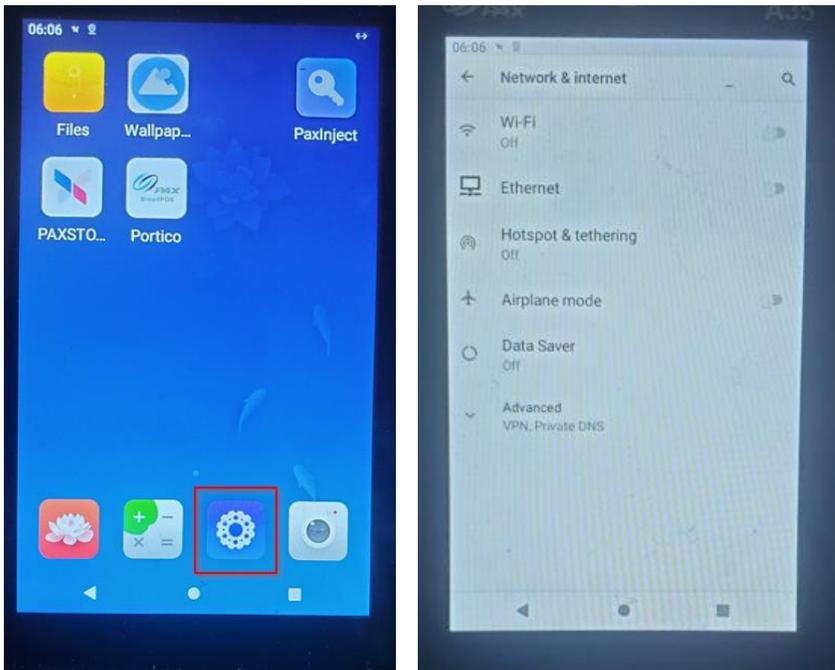

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4 Connect the power cable to an outlet.
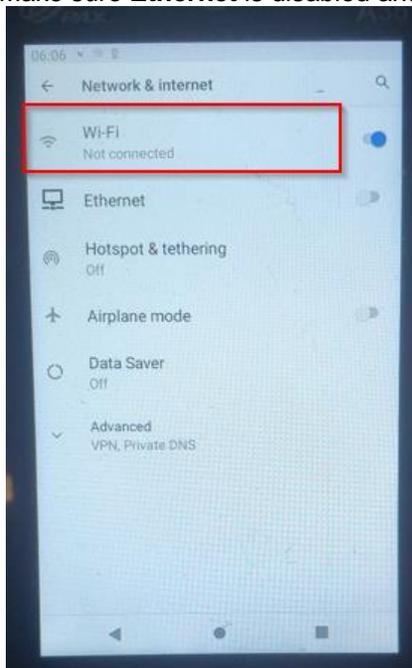
Connecting the PAX A35 to Your Network

Wi-Fi Connection

Please note: If you are connecting via Ethernet, please skip this section and proceed to the Ethernet Connection section.

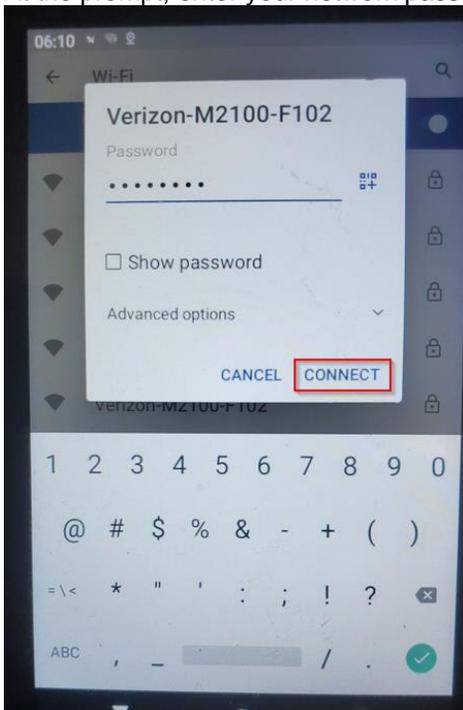**1** From the home screen, tap the settings icon, select **Network & Internet.**

2 Make sure **Ethernet** is disabled and then enable **Wi-Fi**.

3 If **Use Wi-Fi** is disabled, enable it and, after it scans for available wireless networks, select your network from the list.
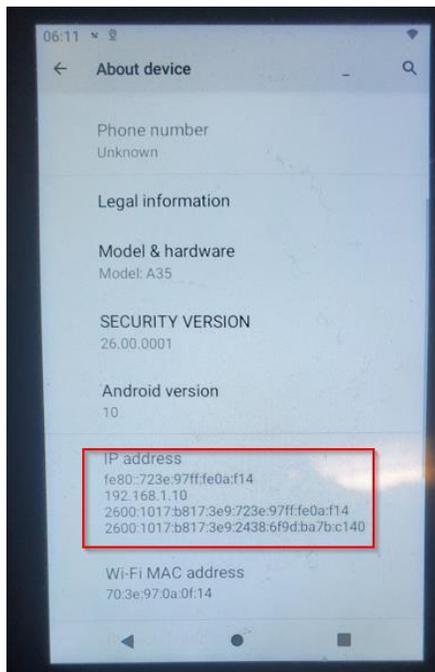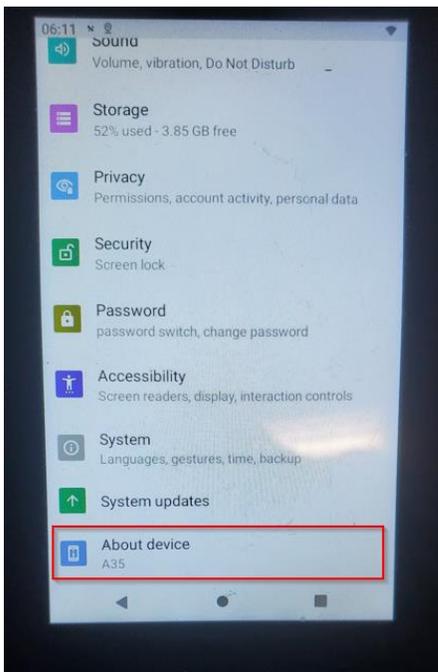

4 At the prompt, enter your network password and select **Connect**.

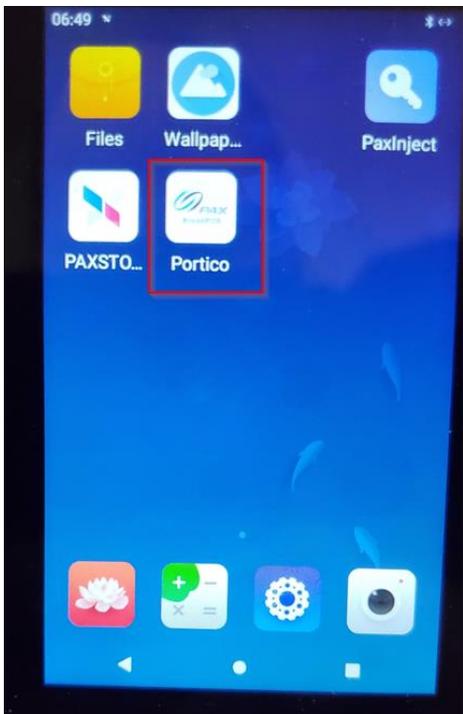**5** Press the red button on the device two times.

6 Scroll down, select **About device**, and record the IP address for CRE TCP/IP configuration.

7 Press the red button on the device to exit settings.

**8** From the home screen, select **Portico** to launch the Portico app.

9 Make sure the portico app is running and then proceed to the Configuring the A35 in CRE for TCP/IP section.

Ethernet Connection

1 Connect the Ethernet cable to the red Ethernet port on the communication cable.

2 Reset the PAX device by holding down the red X button the green **O** button for five to ten seconds.

3 Find the PAX device IP address:

▸ From the home screen, select the settings icon.

▸ Select **About device** and scroll down to the IP address.

▸ Make a note of the address for CRE TCP/IP configuration.
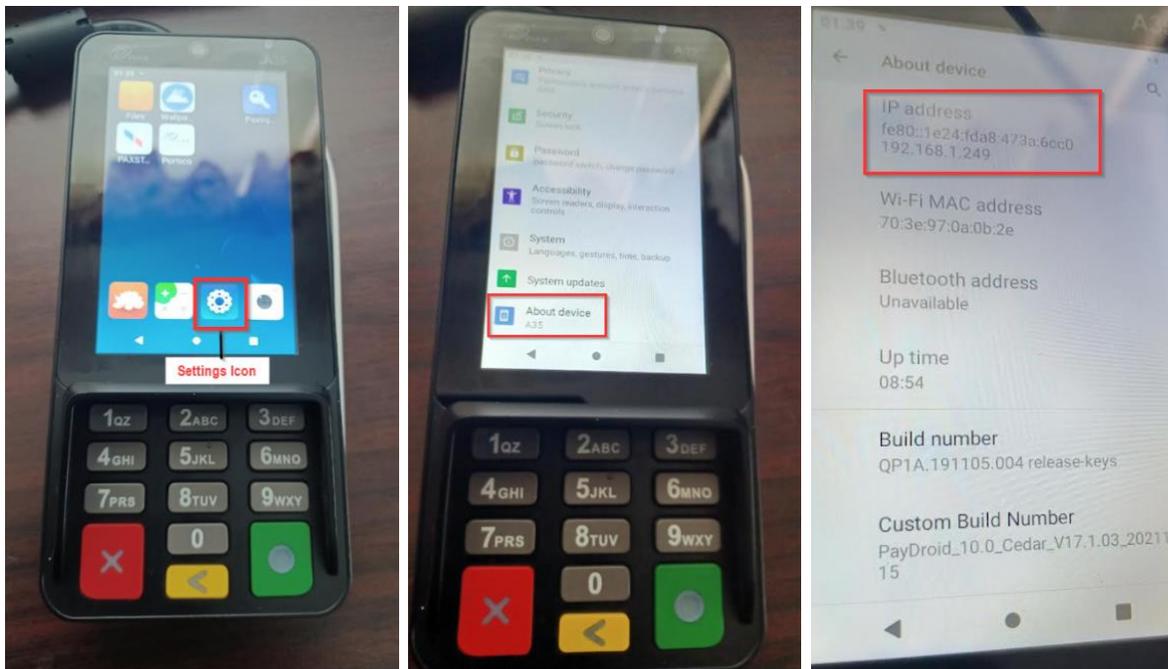
4 Tap the **Portico** icon to open the Portico app.

Serial / USB Connection

1   Ensure the Ethernet cable is connected.

2   Select the **Portico** app from your PAX device and, once the app opens, tap the select icon in the upper right corner.
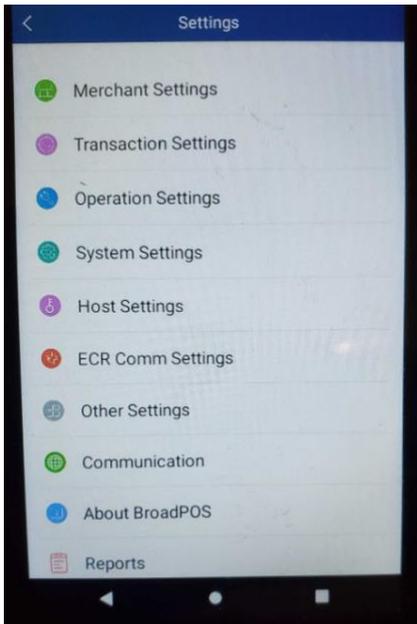

Please note: If you are using the latest version 1.01.30E of Portico, tap each of the four corners of the screen to log in. Tap the corners in this order:
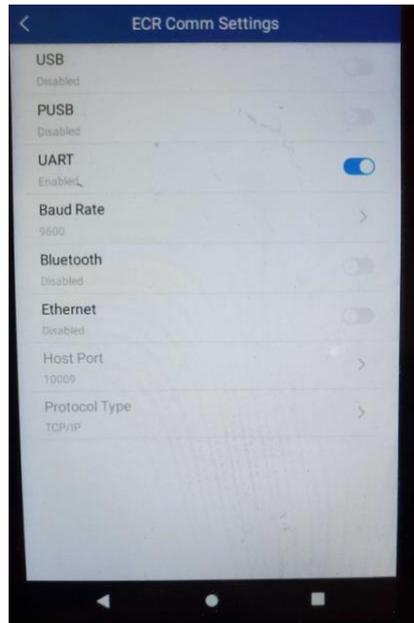
▸ Top left

▸ Top right

▸ Bottom right

▸ Bottom left

3 Enter password at the prompt and then select **ECR Comm Settings**.

4 Enable either **UART** for serial cable connection, or **USB** for USB cable connection.
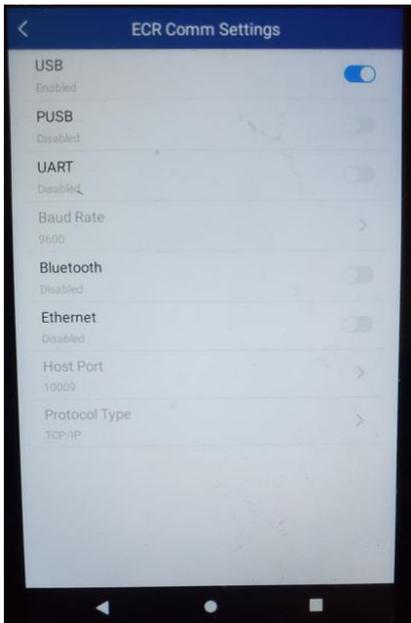
5 Tap the red button to return to the home screen of the Portico app.

Basic Troubleshooting

▸ To restart the device, disconnect and reconnect the power cord from the device or from its power source.

▸ Ensure that the device is connected via a powered USB cable to a reliable power source at all times.

Configuring the A35 in CRE for TCP/IP

Credit/Debit Payment Setup

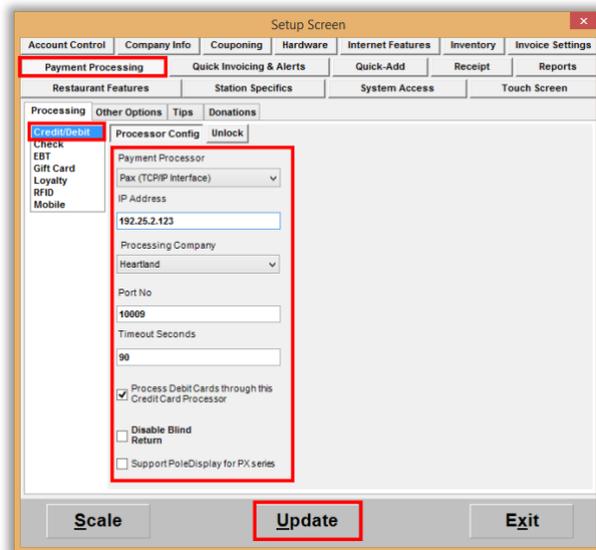**1**   From the **Options/Manager** screen, select **Setup,** then **Setup Screen**.

2   From the **Payment Processing** tab, select the **Processing** subtab, and then select **Credit/Debit**.

3   From the **Payment Processor** list, select **PAX (TCP/IP Interface)**.

4   Enter the device IP address.

5   From the **Processing Company** list, select Heartland.

6   Enter 10009 for **Port No.**

   Optional:

- If you are set up with Heartland to process debit cards, put a check in the box next to **Process Debit Cards**.

- Put a check in the box next to **Disable Blind Return** if you wish to require original receipt information when processing a return.
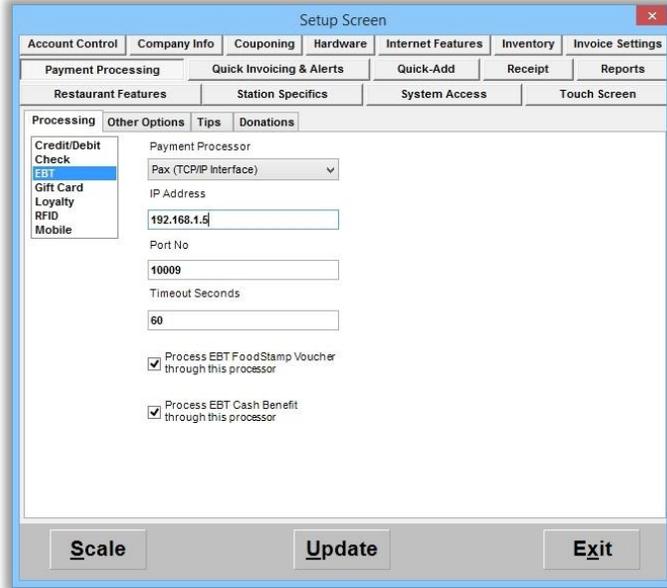
7   Select **Update** to save your changes.

EBT Payment Setup

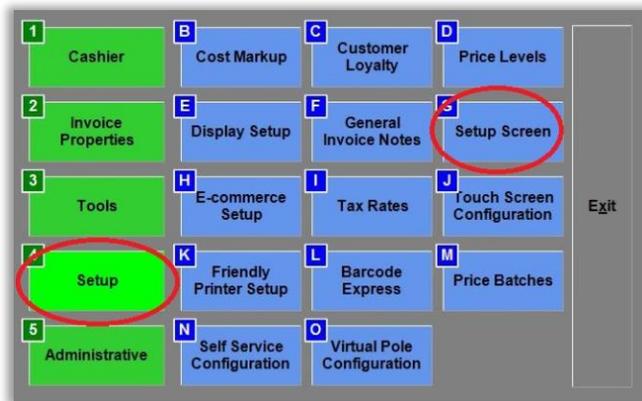**1** From the **Options/Manager** screen, select **Setup**, then **Setup Screen**.

2 From the **Payment Processing** tab, select the **Processing** subtab, and then select **EBT**.

3 From the **Payment Processor** list, select **PAX (TCP/IP Interface)**.

4 Enter the static IP address assigned to the PAX.

5 From the **Processing Company** list, select Heartland.

6 Enter 10009 for **Port No.** and check appropriate boxes to indicate accepted EBT payment types.

- 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.

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

Gift Card Setup

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

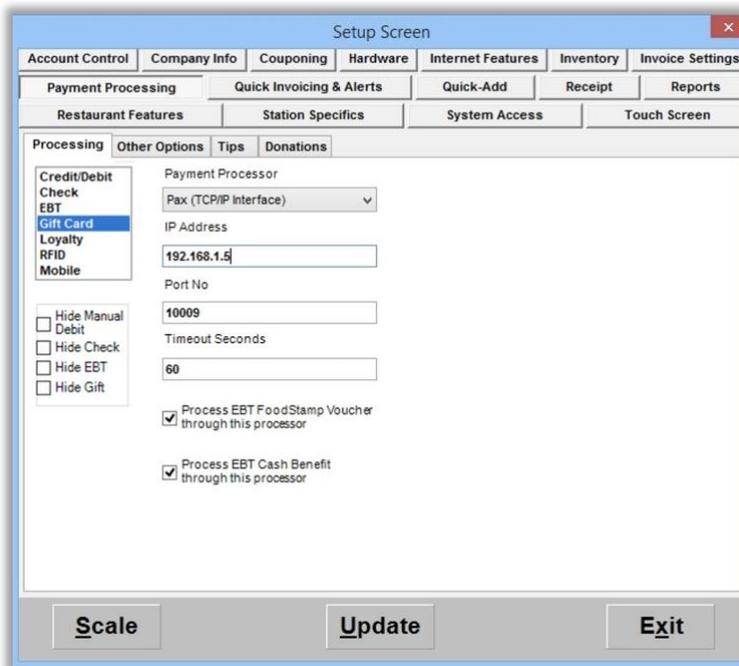**2**   From the **Payment Processing** tab, select the **Processing** subtab, and then select **Gift Card**.

3   From the **Payment Processor** list, select **PAX (TCP/IP Interface)**.

4   From the **Processing Company** list, select Heartland.

5   Enter the device IP address.

6   Enter 10009 for **Port No.**

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

Configuring the A35 in CRE for Serial/USB Connection

Credit/Debit Payment Setup

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

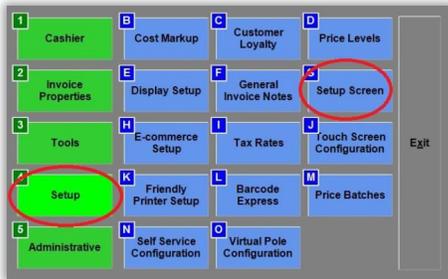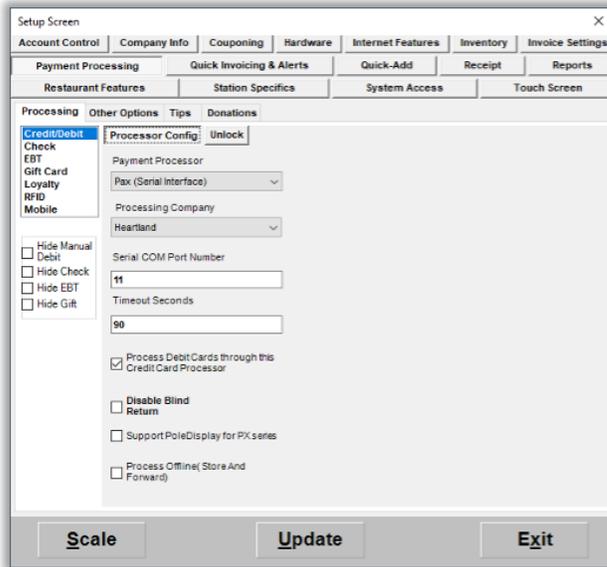**2** From the **Payment Processing** tab, select the **Processing** subtab, and then select **Credit/Debit**.

3 From the **Payment Processor** list, select **PAX (Serial Interface)**.

4 From the **Processing Company** list, select Heartland.

5 Enter the **Serial COM Port Number**.
- ▸ If connected to a serial port, use the physical port number.
- ▸ If connected to a USB port, use the virtual COM port number from device manager. Always choose the lower number.

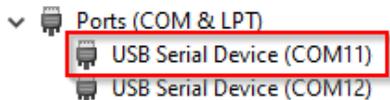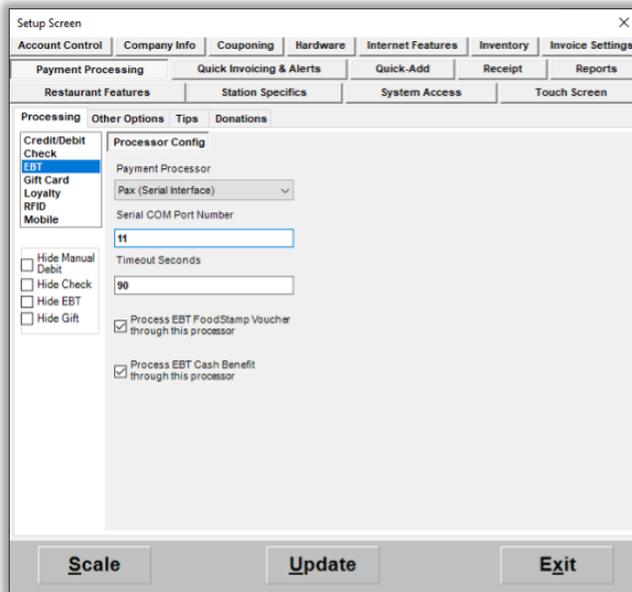**6** Select **Update** to save your changes.

EBT Payment Setup

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

2 From the **Payment Processing** tab, select the **Processing** subtab, and then select **EBT**.

3 From the **Payment Processor** list, select **PAX (Serial Interface)**.

4 From the **Processing Company** list, select Heartland.

5 Enter the **Serial COM Port Number** as in the previous section.

6 Check appropriate boxes to indicate accepted EBT payment types.

- 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.

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

Gift Card Setup

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

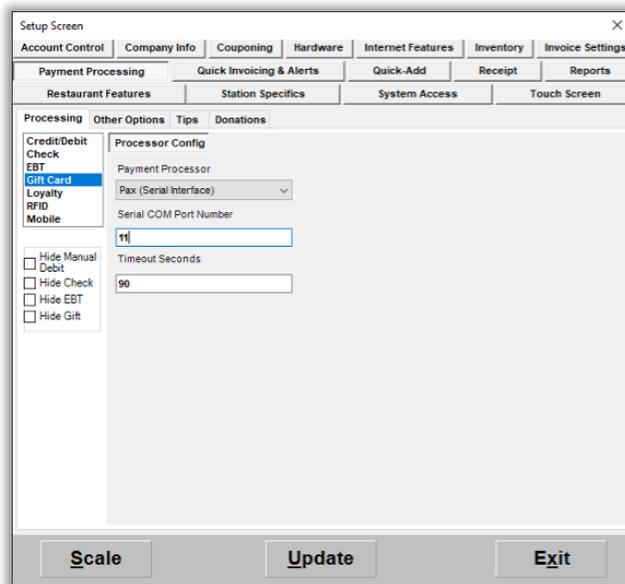**2**   From the **Payment Processing** tab, select the **Processing** subtab, and then select **Gift Card**.

3   From the **Payment Processor** list, select **PAX (Serial Interface)**.

4   From the **Processing Company** list, select Heartland.

5   Enter the **Serial COM Port Number** as in previous section.

6   Select **Update** to save your changes.
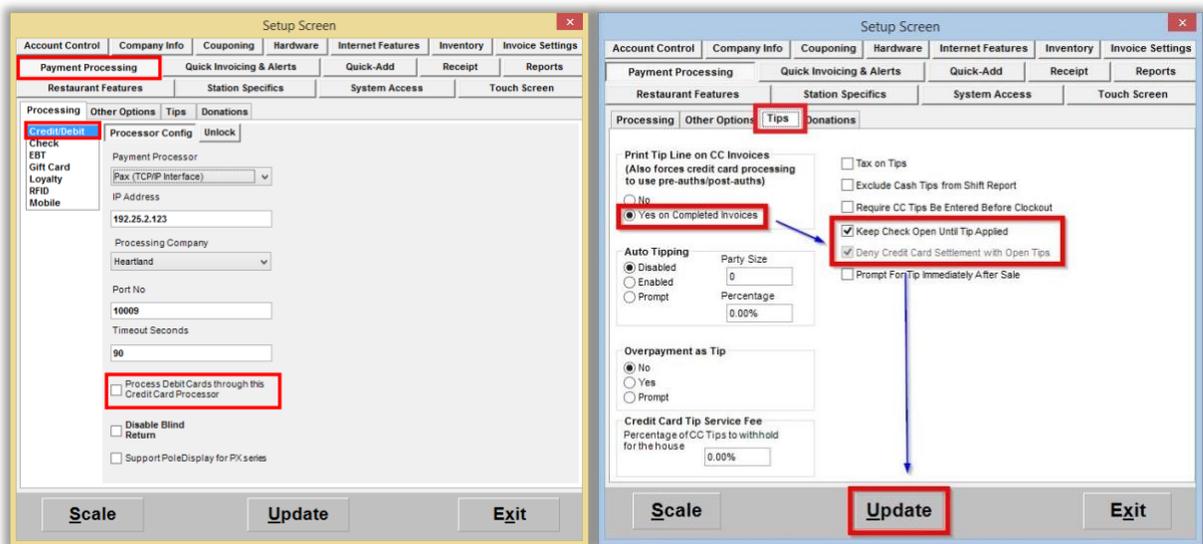
Tip Configuration

Tip Line Setup

Note: You cannot process debit card sales when tips are enabled.

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

From the **Payment Processing** tab, select the **Processing** subtab, and then select **Credit/Debit**. Make sure the box for **Process Debit Cards through this Credit Card Processor** is **unchecked**.
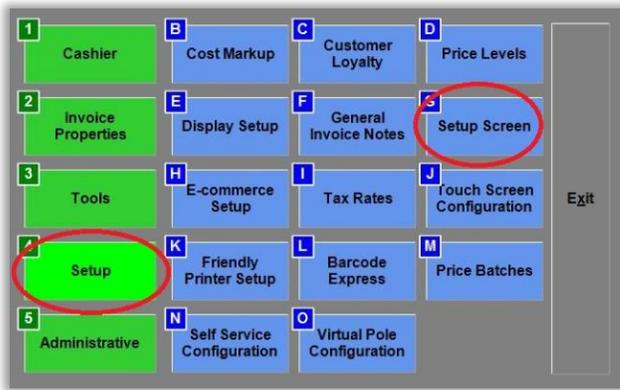

2   Select the **Tips** subtab and verify that **Yes on Completed Invoices** is enabled.

3   Check the box next to **Keep Check Open Until Tip Applied** (Optional).

4   Select **Update** to save your changes.

Tip Prompt Setup

The PAX A35 device can be configured to prompt for tip during the sale. If you wish to use this feature, please be advised of the following:

▸ The prompt tip feature must be enabled on the processor's side as well.

▸ This feature is only available for CRE version 13.1017 and higher.

▸ You must configure this feature when there aren't any invoices open. (Perform a settlement before configuring).

▸ This cannot be used with the **Bar Tab** feature.

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

2 From the **Payment Processing** tab, select the **Tips** subtab.

3 Verify that **Yes to Completed invoices** is selected.
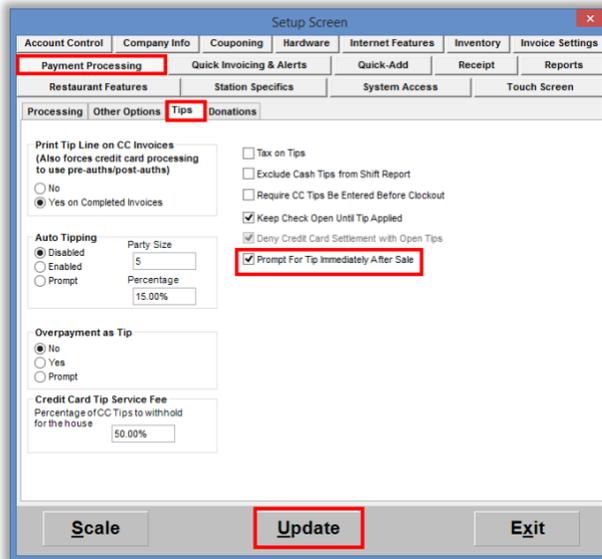
4 Check the **Prompt For Tip Immediately After Sale** checkbox.

5 Select **Update.**

Note: You must restart CRE at all stations after saving changes.

Using the A35 Payment Terminal

Launching Portico Application

The following procedures launch the Portico application on the A35 device, allowing transactions to be processed. The device should remain in this mode for the POS to complete credit card transactions.

1   From the main screen, find the Portico application.

2   Double tap to launch the application.

Completing Payment Transactions

The following procedures describe how to process a credit card transaction with the A35 device.

1   In the POS, select an invoice to pay and then select a credit card payment.

    If the app is set to prompt for a tip, it will do so.

2   If prompted for a tip, enter a tip amount, then tap **Submit**.

3   When the app displays the **Please Enter Account** prompt, enter the card's number.

- If the card has an EMV chip, you can dip the card or tap it against the front sensor.
- If the card has no EMV chip, you can swipe it.
- If these methods are unsuccessful, you can type the card number into the **Please Enter Account** box, then tap **Confirm**.

4   If the site uses surcharges, the device may display a notification prompt.

5   If the device displays the surcharge prompt, tap **OK**.

    If you have dipped the card, the app will prompt you to remove the card.

6   If prompted, remove the dipped card.

The device will process the payment.

In the app's settings, you can also configure the payment screen to include Apple Pay, Google Pay, and Samsung Pay as payment options.