PAXSTORE



# PAXSTORE MARKETPLACE ADMIN GUIDE

Date: 2019-07-31

Version: 1.00

## PREFACE

PAXSTORE – Marketplace Admin Guide
Version: 20190731 v1.00
Status: [ ] Draft [★] Release [ ] Modify
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Technical Support

If you encounter a problem while installing, registering or operating this product, please make sure that you have read the documentation. If you cannot resolve the Issue, please contact us.

PAX support operates from 9 AM to 1 AM (Eastern) on Monday-Friday, from 10 AM to 7 PM on Saturday and is closed on Sunday. Your level of access to this Service is governed by the support plan arrangements made between PAX and your Organization. Please consult this support plan for further information about your entitlements, including the hours when telephone support is available to you.

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Email: support@pax.us
URL: www.pax.us

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## REVISION HISTORY

| Date | Version | By | Description |
| --- | --- | --- | --- |
| 2019-07-31 | v1.00 | Shoap | Initial release |
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# 1   Introduction

This document provides users with a PAXSTORE Marketplace-level administrator guide.

## 1.1   Document Conventions

- **Administrator Center** – The administrator portal where Marketplace Admins manage their accounts.
- **Application Marketplace** – The PAXSTORE marketplace where applications are located and available for download.

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**NOTE:**   The PAX Technology® payment applications are not directly visible in the Application Marketplace or from the terminal PAXSTORE client application.

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- **Developer** – A person or team of programmers that create applications supporting PAX terminals used on the PAXSTORE. The Developer registers to obtain login privilege as a Developer. The Developer submits an app and once it's signed, the application can be added to the Reseller store.
- **Developer Center** – The developer portal where developers register and create apps for distribution in the marketplace. This section will not be covered in this guide.
- **Global Marketplace** – The online marketplace for application developers to upload applications.
- **PAXSTORE** – An online marketplace for terminal applications and terminal management solutions. The PAXSTORE allows merchants to download applications using their PAX terminals.
- **Marketplace Administrator** – A user level within the PAXSTORE that configures and manages all settings for a white labelled marketplace, including the top-level reseller. These settings are normally performed by PAX but are now performed by the owning organization. This includes editing the top-level reseller account and adding, editing and deleting reseller and sub-reseller accounts. The Marketplace Admin can also manage applications, users and user permissions, reports, terminals and merchants.
- **Reseller** – A company that resells credit card terminals and peripherals and may also offer credit card processing services with merchants and sub-resellers.
- **Reseller Administrator** – A user level within the PAXSTORE that manages their main reseller and its sub-resellers.
- **Store Client App** – The PAXStore app on the physical terminal.
- **Sub-Reseller Administrator** – A user level within the PAXSTORE that manages their main sub-reseller and its sub-resellers.
- **[White Labelled] Marketplace** – The administrator portal where administrators manage sub-resellers, merchants, and terminals.

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## 1.2    Document Acronyms

- **API** – Application Programming Interface
- **APN** – Access Point Name
- **CPU** – Central Processing Unit
- **EMV** – Europay, Mastercard, and Visa
- **GPS** – Global Positioning System
- **ID** – Identification
- **IMEI** – International Mobile Equipment Identity
- **IP** – Internet Protocol
- **MAC** – Media Access Control
- **PED** – PIN Entry Device
- **PIN** – Personal Identification Number
- **PN** – Part Number
- **POS** – Point of Sale
- **PUK** – PIN Unblocking Key
- **OS** – Operating System
- **RAM** – Random Access Memory
- **RKI** – Remote Key Injection
- **SN** – Serial Number
- **TID** – Terminal Identification

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## 1.3    Intended Audience

This PAXSTORE document is intended to provide admin instructions and store descriptive information. There are various levels of users and features available within the store. Each user level includes user instructions and feature information.

The following audiences should read this document:

- Administrator of company operations
- Administrator of company business development
- Administrator of company and sub-reseller accounts
- Administrator of company and sub-reseller marketing
- Administrator of company merchant accounts
- Administrator of company terminals
- Administrator of terminal applications
- Administrator and team for terminal application development
- Administrator and team for application quality assurance
- Administrator and team for terminal deployment
- Administrator and team for customer support

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# 2   Overall Description

The PAXSTORE provides an online marketplace for terminal applications and terminal management solutions. It provides application developers a way to upload applications and provides the merchants and their PAX terminals the opportunity to purchase and download applications.

## 2.1   Communication Method

The terminals communicate with the PAXSTORE through the internet.

## 2.2   Product Features

The PAXSTORE provides the following:

- A marketplace for application developers to upload applications exclusively for their store or available to everyone,
- A marketplace for resellers and merchants to purchase and download applications for their terminals, and
- A management solution for marketplace owners to manage sub-resellers, merchants, terminals, terminal applications, terminal parameters and downloads.

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# 3 The PAXSTORE Application Marketplace

The PAXSTORE Application Marketplace contains applications available for purchase and download, such as ID verification, time and attendance, or POS applications.
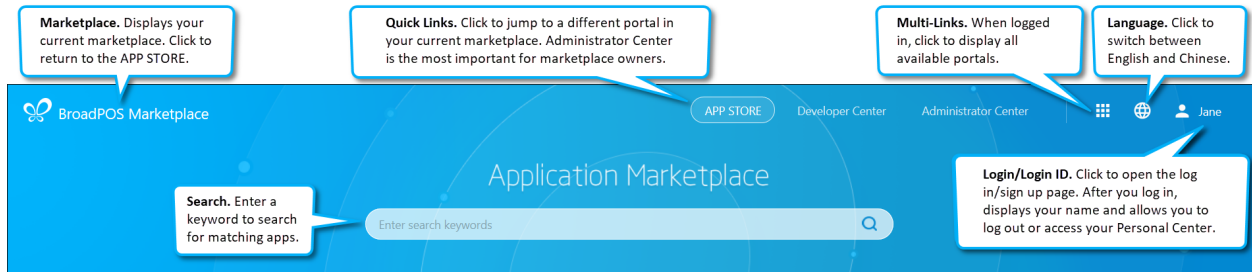
Some applications are not directly visible in the APP STORE, such as a payment application, firmware update, or applications that the reseller configured to be pushed out to select terminals.

The following image shows the Application Marketplace:



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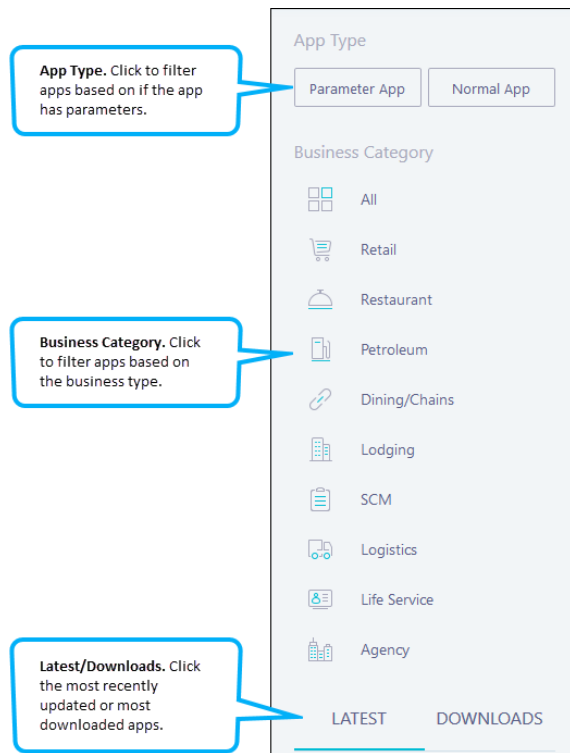(877) 859-0099
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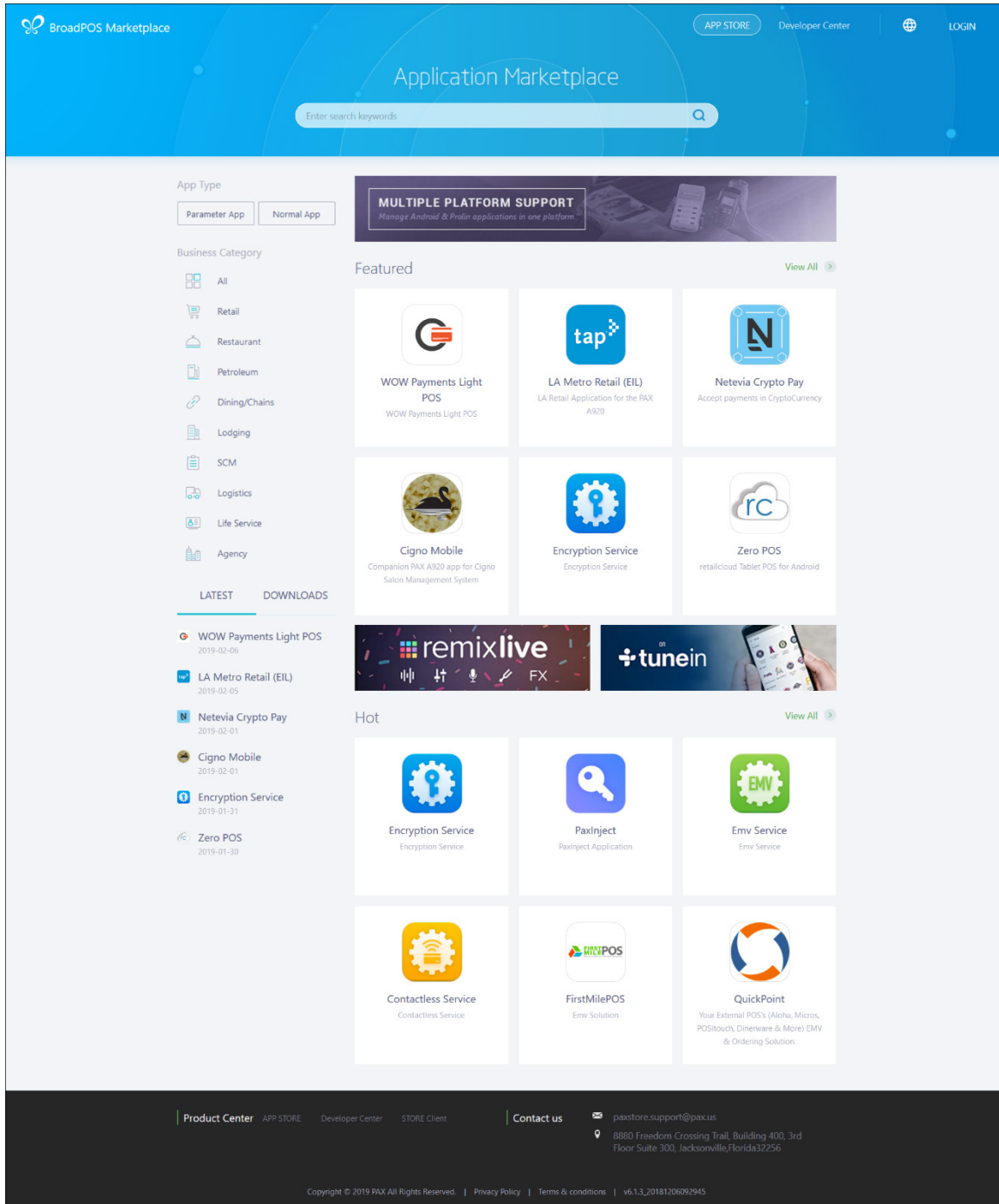
The APP STORE contains *Featured* and *Hot* sections to highlight applications and provides the ability to display the most recently updated applications, most downloaded applications, or applications by application category, such as retail, restaurant and lodging.
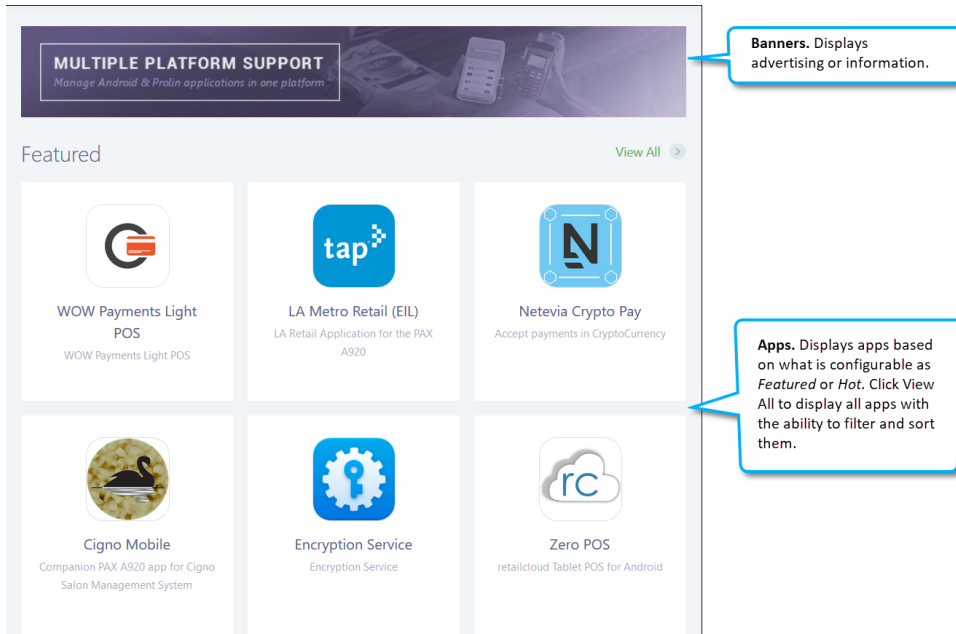
On the Marketplace home page there are navigation links, various application search options and application listings. The following image describes the Application Marketplace header:



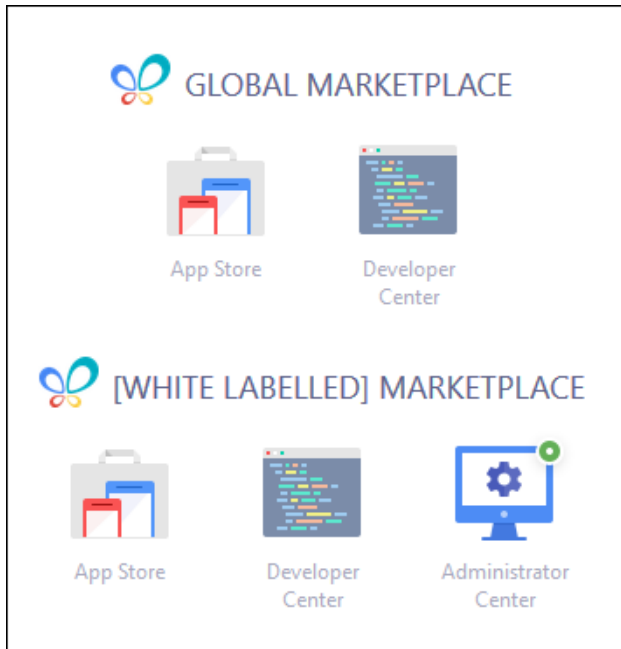The following image describes the Application Marketplace filter:



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The following image describes the Application Marketplace app content:



Clicking the Multi-Link icon displays a pop-up window containing the marketplaces and portals the admin's access privileges allow. A green circle in the upper right marks the current portal. The following image shows the Multi-Link window:



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Within the APP STORE, the applications display as thumbnails. Hovering over a thumbnail displays the price of the app and its last updated date. Clicking a thumbnail opens the app's detail page. The following image shows the app thumbnail:

## 3.1 Application Detail Page

The app's detail page contains the app's icon, information and rating and provides the ability to purchase/push the app to a terminal. It also displays applications that might be related by type to the current application or created by the same developer. If an application is selected from this section, it opens the selected app's detail page.

The following image shows the app's details:

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The left sidebar on the application detail page contains the app's technical details, including:

**App Icon:** The app's icon taken directly from the application file. The icon image must be a png, jpg or jpeg. The icon size for this section is fixed, and the image changes to support the size requirements.

**App Name:** The name of the application.

**Downloads:** The number of successful downloads for the application.

**Price:** The cost of the application.

**Size:** The size of the application file.

**Version:** The current version of the application.

**Updated Time:** The date of the application's last build.

**Package Name:** The actual file name for the application.

**Android OS Authorization:** The permissions the app requires access to in the Android OS, such as WRITE_EXTERNAL_STORAGE and READ_EXTERNAL_STORAGE.

**Paydroid Authorization:** The permissions the app requires access to in the PayDroid OS, a customized version of the Android OS designed for PAX terminals.

The rest of the page contains the app's marketing details, including:

**App Icon:** The app's icon taken directly from the application file. The icon image must be a png, jpg, or jpeg. The icon size for this section is fixed, and the image changes to support the size requirements.

**App Name:** The name of the application.

**Rating:** The app's rating, using a value of 0-5 stars. Currently, this option is still in development.

**Tagline:** A brief summary of the app.

**Type:** The type of app, such as Normal App or Parameter App.

**Model:** The type of terminal the app is compatible with, such as A80 or A920.

**Supported OS:** The operating system the app is compatible with, such as Android.

**Business Category:** The type of business the app is designed to work with, such as retail, restaurant, petroleum or chain.

**Developer:** The programmer for the app.

**Screenshots:** Images showcasing the app or its features.

**Description:** A more detailed description of the application.

**Release Notes:** A summary of the changes made during the app's most recent release. This section may include the release date.
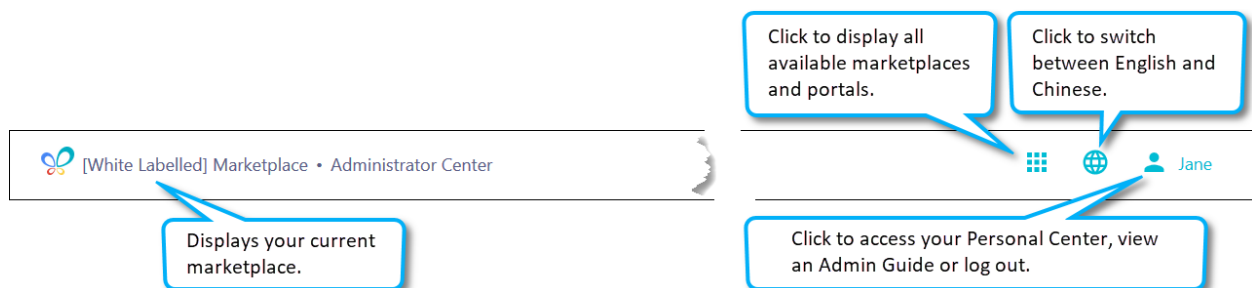
**Comments:** Additional comments, product description information or announcements.

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## 4 Administrator Center

The Administrator Center contains the Marketplace Admin's management options. You will always start on the Dashboard when you enter the Administrator Center.

Throughout the Administrator Center sections, this guide refers to the administrator in charge of the entire marketplace as the Marketplace Admin and its account as the top-level reseller. The administrators for the resellers of the marketplace will be referred to as Reseller Admin and their accounts as resellers. The administrators for the sub-resellers in the marketplace will be referred to as Sub-reseller Admins and their reseller accounts as sub-resellers.

The top navigation throughout the Administrator Center allows you to change marketplaces and portals, change languages, and access your personal options. The following image describes the top navigation bar:

Click to display all available marketplaces and portals.

Click to switch between English and Chinese.

[White Labelled] Marketplace • Administrator Center          ▦   ⊕   👤 Jane

Displays your current marketplace.

Click to access your Personal Center, view an Admin Guide or log out.

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The most important navigation feature of the Administrator Center is the left sidebar, which contains management options. The following image describes the left sidebar:



As a Marketplace Admin, you can control your entire marketplace. You can:

- Specify apps and firmware available in your marketplace
- Manage resellers, sub-resellers, merchants, and terminals
- Create terminal groups and push templates
- Set up global settings for your marketplace
- Manage users and roles
- Run reports and check audit logs

Refer to the following sections for details on the Management options.

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# 5   Dashboard

The Dashboard is configurable so that you can view different types of terminal and app statistics. It is also the main landing page for the Administrator Center. The following image shows the Dashboard:

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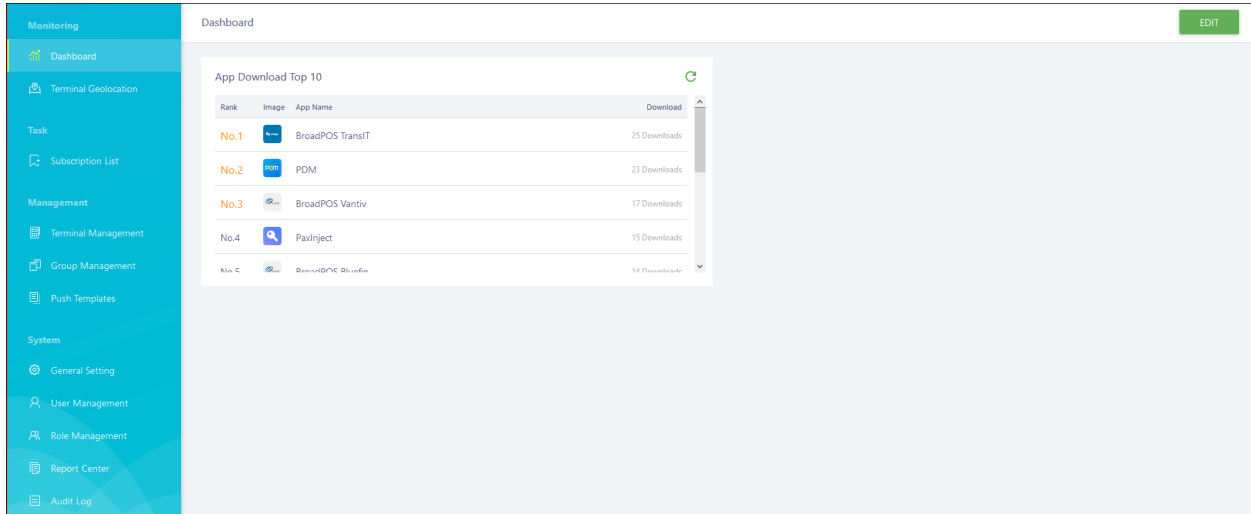
# 6    Subscription List

The Subscription List shows all apps and firmware that can be added to your marketplace. This controls the apps and firmware that show when resellers and sub-reseller admins view the App List and Firmware List in their Administrator Center. You can switch between viewing apps and firmware using the tabs at the top.

The following image shows the marketplace's initial Subscription List page:
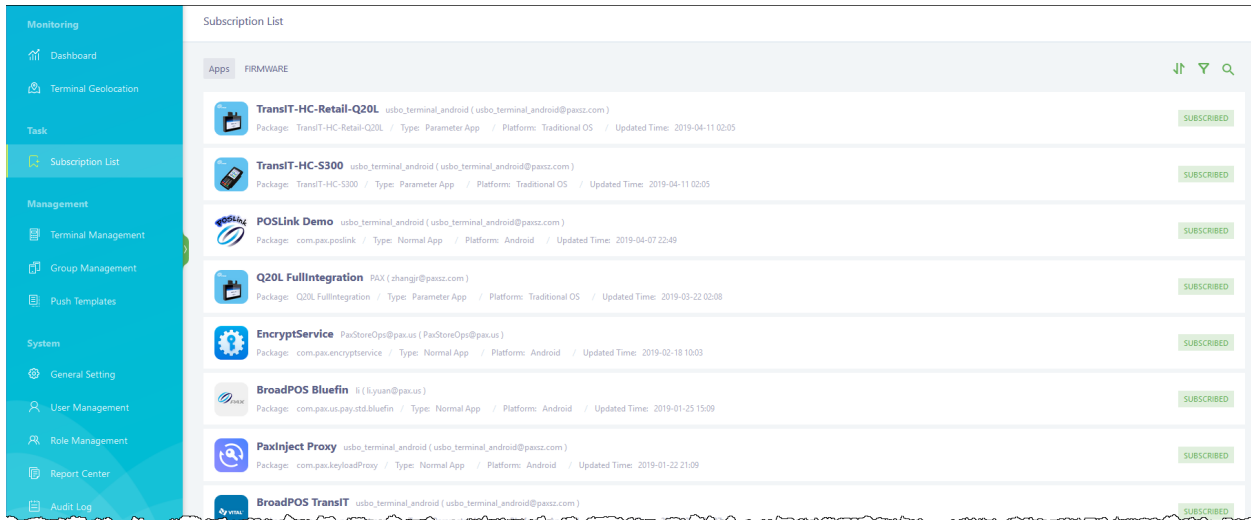


The status SUBSCRIBED means it is viewable for all resellers and sub-resellers; UNSUBSCRIBED means it is not viewable at all. You can change this status by hovering over the row and clicking SUBSCRIBE or UNSUBSCRIBE. If you want the app or firmware to be viewable for select resellers, sub-resellers or merchants instead of allowing everyone to see it, you can set up specified distribution. Apps and firmware with specified distribution have an additional indicator. The following image shows the specified distribution indicator:
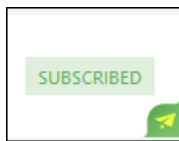


## 6.1    App

All new apps come in with the status UNSUBSCRIBED. To add the app to your marketplace for your resellers and sub-resellers to view and download, you must subscribe to the app. You can quickly subscribe from the Apps page. You can also subscribe from within the App Detail by clicking the ⋮ (more) icon.

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You can access App Detail by clicking on the app's row. The following image shows the App Detail page:
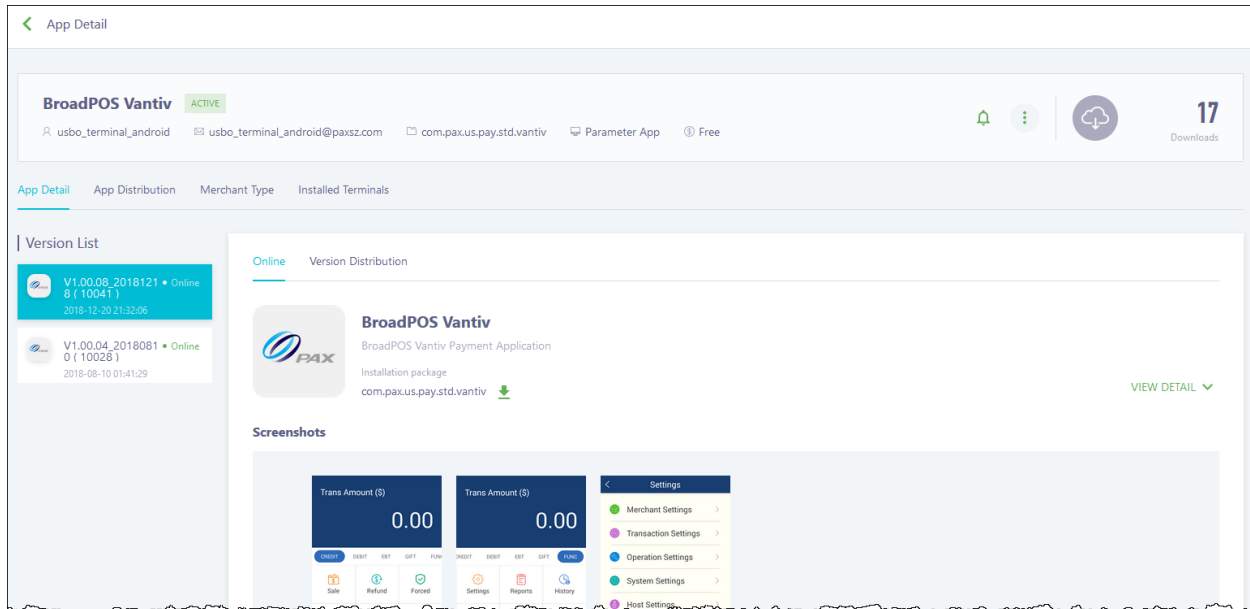


The initial App Detail page starts with the app's details along the top, including:

**Developer:** The programmer for the app.

**Email:** The programmer's email address.

**Package Name:** The actual file name for the application.

**Type:** The type of app, such as Normal App or Parameter App.

**Price:** The cost of the application.

**Watch/Unwatch:** Adds or removes the application from your watch list. Watched applications send you a notification when changes are made to the app.

**⋮ (more) icon:** Subscribe or unsubscribe to the app.

**Downloads:** The number of successful downloads for the application.

The App Detail page contains several sections, including:

**App Detail:** View all versions of the app and the app's details or set up version distribution.

**App Distribution:** Set up specific app distribution by reseller or view a list of all resellers and sub-resellers the app is visible for if specific distribution is enabled.
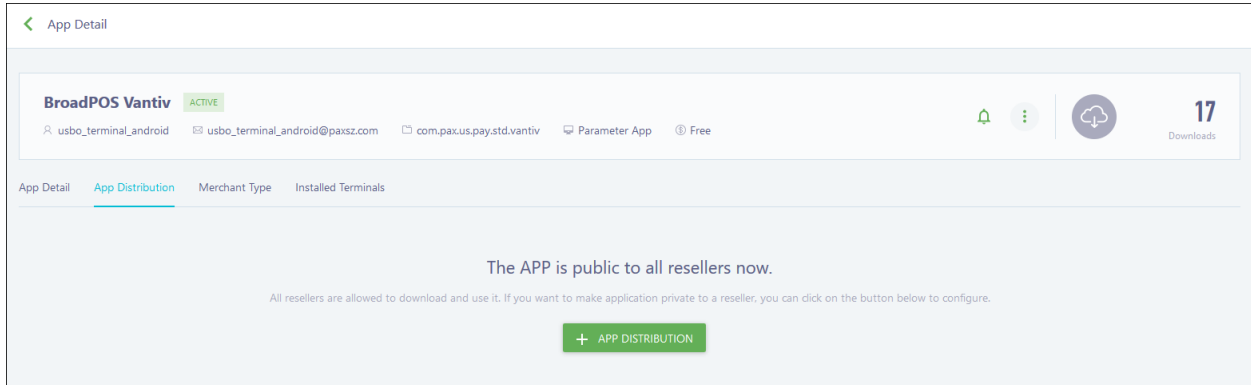
**Merchant Distribution:** Set up specific app distribution by merchant type or view a list of all merchant types the app is visible for if specific distribution is enabled.

**Installed Terminals:** View all terminals the app is currently installed on.

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Once you've subscribed to an app, you can distribute the app in two ways:

The first method is using public or specific app distribution.

In public app distribution, anyone in your marketplace can see and download the app. When you subscribe, public distribution is set up by default. The following image shows the App Distribution page with public distribution:
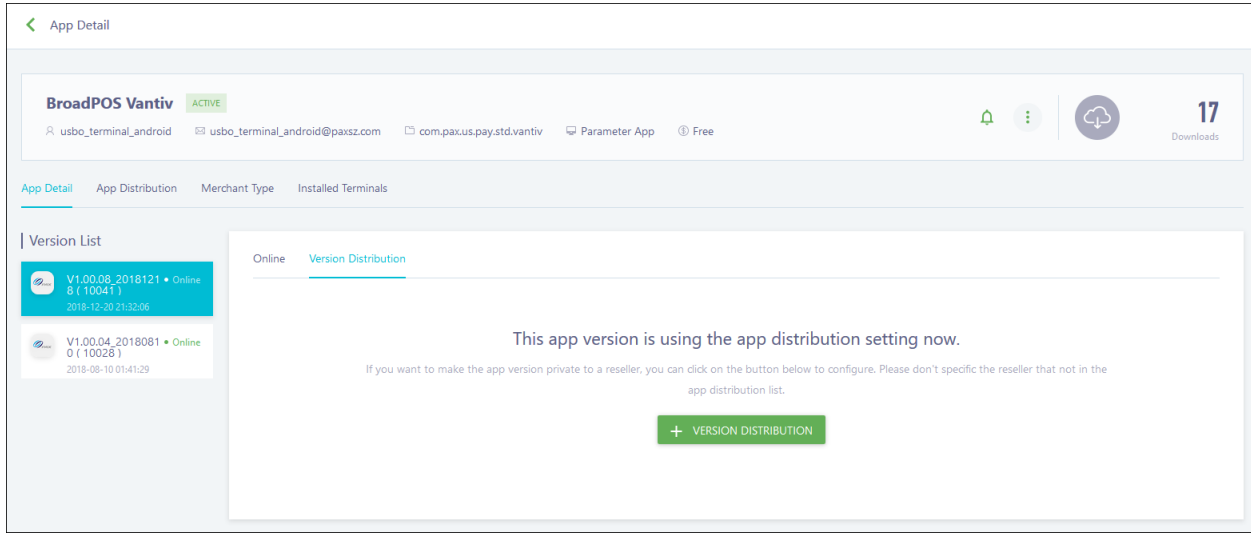


In specific app distribution, you must select the resellers and sub-resellers manually from the list and only those you selected can see the app. To set up app distribution, click **+ APP DISTRIBUTION** and select the resellers and sub-resellers from the list. The following image shows the select reseller window:
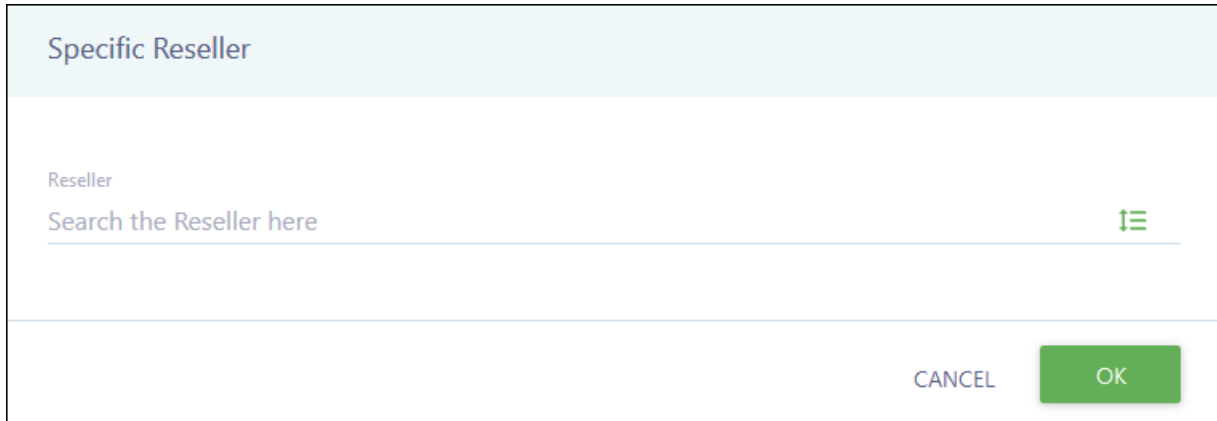


You can also set the app to be visible to specific merchant types, such as only visible to retail merchants by clicking **+ SET APP MERCHANT TYPE** in the Merchant Type tab.

The second method is to set up version distribution for the app. If you use version distribution, you must assign each version to your resellers and sub-resellers. If you plan to implement version control, contact your PAX rep for more detailed information on how to set it up.

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The following image shows Version Distribution for the App Detail page:



## 6.2   Firmware

All new firmware comes in with the status UNSUBSCRIBED. To add the firmware to your marketplace for your resellers and sub-resellers to view and download, you must subscribe to it. You can subscribe using the Firmware page by hovering over the firmware's row and clicking SUBSCRIBE.

The following image shows the available firmware on the Subscription List page:
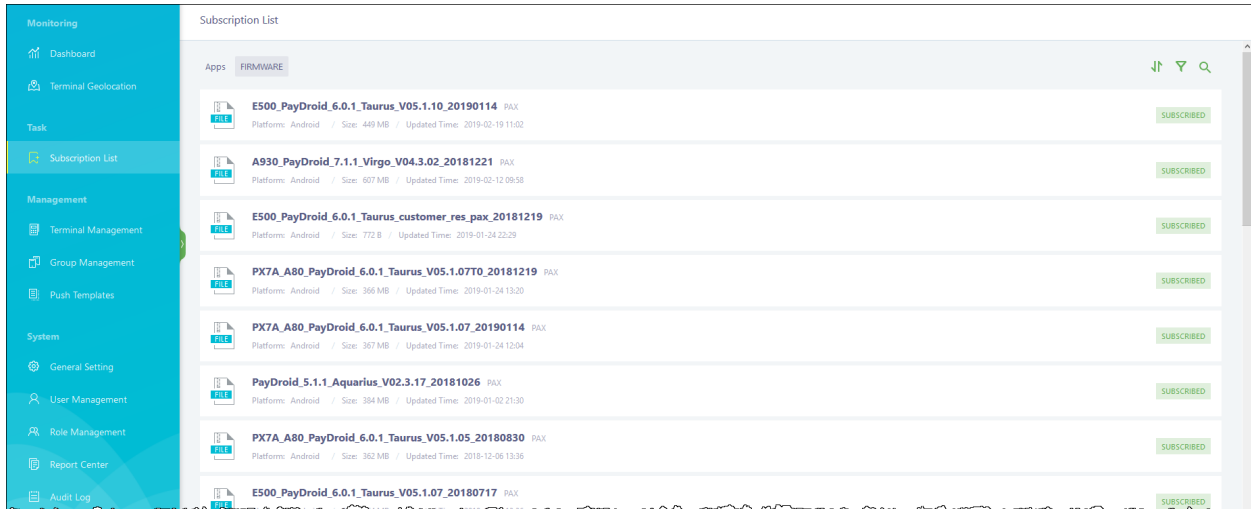
Once you've subscribed to the firmware, it is public to everyone in your marketplace. You can set up specific distribution for the firmware by using the Firmware Detail page. Firmware Detail allows you to view the firmware's information, including the available firmware packages. You can access the Firmware Detail by clicking on the firmware's row. The following image shows the Firmware Detail page:
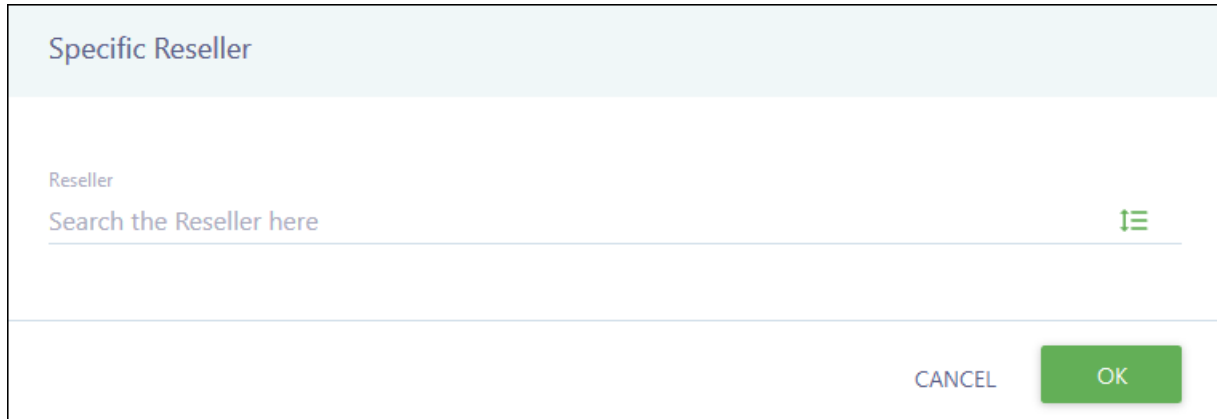
## Firmware Detail

### PayDroid_5.1.1_Aquarius_V02.3.11_20180607

| | |
|---|---|
| Manufacturer | PAX |
| Model | A920 ▼ |
| Specific Reseller | - |
| Force Update | Yes |
| Created By | PaxStoreOps |
| Created Time | 2018-06-08 11:51 |
| Updated Time | 2018-07-18 20:24 |
| Release Note | - |
| Firmware Package | PayDroid_5.1.1_Aquarius_V02.3.11_20180607_OTA.zip(391 MB) ⬇ |
| Firmware Incremental Package | PayDroid_5.1.1_Aquarius_V02.3.10_V02.3.11_OTA_DIFF.zip(19.4 MB) ⬇<br>File Size:19.4 MB<br><br>PayDroid_5.1.1_Aquarius_V02.3.09_V02.3.11_OTA_DIFF.zip(28.5 MB) ⬇<br>File Size:28.5 MB |

CANCEL          SPECIFIC DISTRIBUTION

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To set up firmware distribution, click **SPECIFIC DISTRIBUTION** and select the resellers and sub-resellers from the list. The following image shows the select reseller window:



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# 7   Terminal Management

Terminal Management allows you to manage resellers, sub-resellers, merchants and terminals. Only PAX can create a top-level Marketplace Admin user. You can create as many reseller and sub-reseller accounts as needed for your marketplace. Reseller Admins cannot add, edit or delete other reseller accounts on their level or sub-resellers under another reseller; however, they are able to create sub-resellers within their account and view and manage all their sub-resellers and any merchants or terminals within them. Sub-reseller Admins can add, edit and delete only their merchants and terminals. They cannot view other sub-resellers or the parent reseller information.

**NOTE:**    Anytime you create a reseller/sub-reseller, merchant or terminal, you must activate it.

The following image shows the Marketplace Admin's Reseller Detail page:
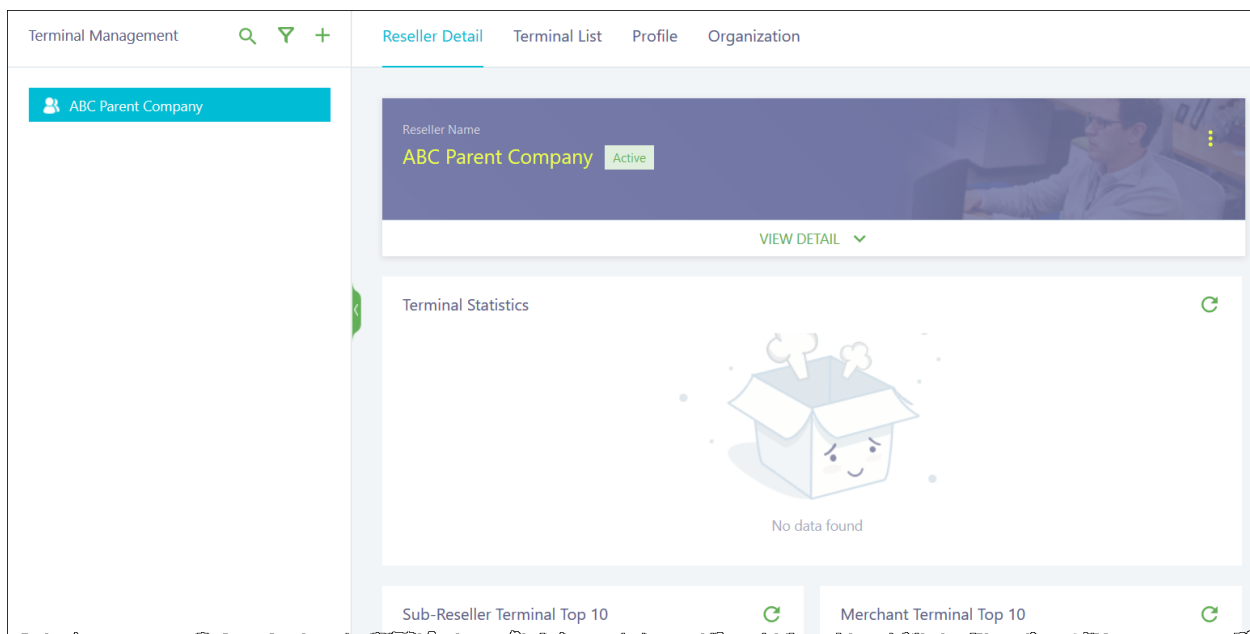


The initial Terminal Management page starts with the top-level reseller's details, including:

**Reseller Detail tab:** View your top-level reseller details and statistics.

**Terminal List tab:** Manage all terminals.

**Profile tab:** Manage the configuration for the terminals under your reseller.

**Organization tab:** Manage sub-resellers and merchants.

**⋮ (more) icon:** Edit your top-level reseller account information.

**VIEW DETAIL panel:** View the details of your top-level reseller account.

**Terminal Statistics:** View the statistics (Active, Inactive, Disabled, Online, Offline, Unknown) across all your reseller, sub-reseller and merchant accounts.

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**Sub-Reseller Terminal Top 10:** Displays the reseller/sub-resellers with the most terminals.

**Merchant Terminal Top 10:** Displays the merchants with the most terminals.

## 7.1   Create a Sub-Reseller

Initially, only your top-level reseller account exists in the Administrator Center. You need to add all the resellers in your marketplace and any sub-resellers for them as needed. The reseller and sub-reseller admins you create can also create these.

Before a merchant can be activated, it must be assigned to a reseller or sub-reseller. Sub-resellers must be assigned to a reseller.

To create a sub-reseller, navigate to the reseller or sub-reseller you want to add and choose one of the following methods:

Click the **+** icon and then **+ Sub-Reseller**. The following image shows the quick add menu:
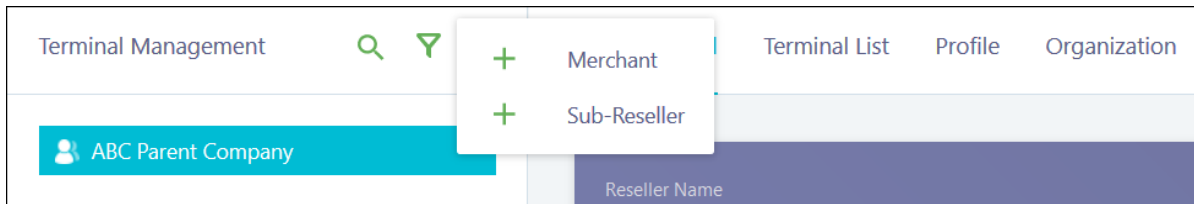


Click **Organization** > **Sub-Reseller** > **+ SUB-RESELLER**. The following image shows your top-level reseller's Organization page:

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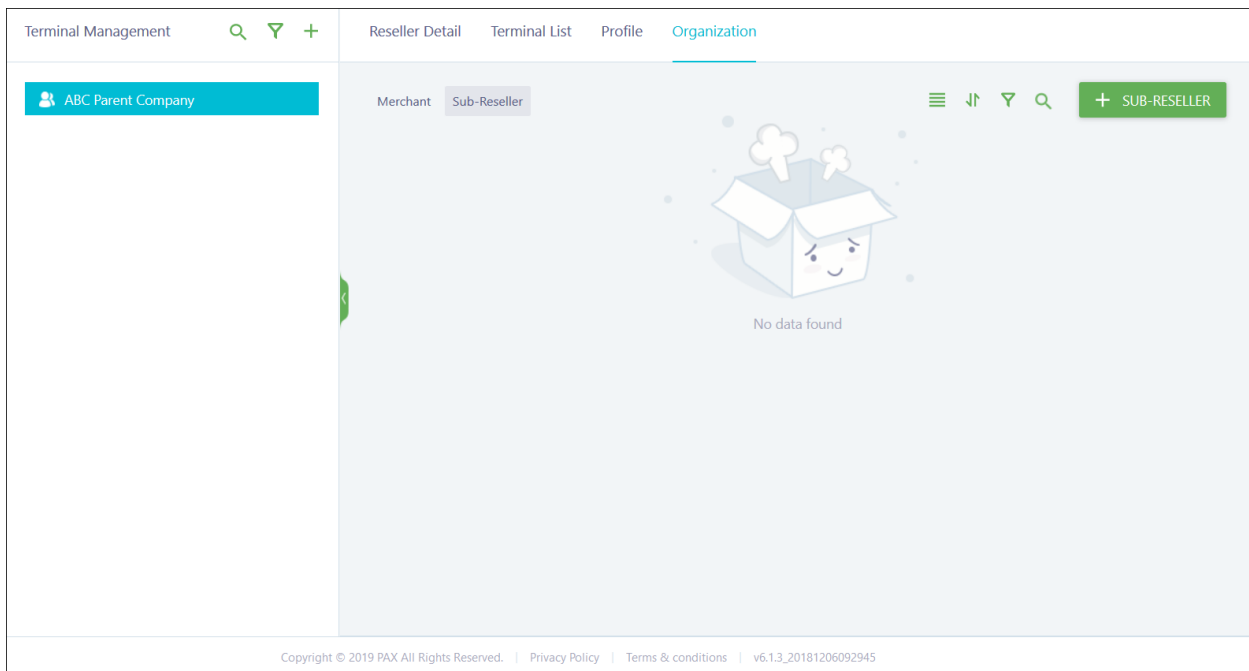
A pop-up window appears with the fields to complete to set up a new sub-reseller. A red asterisk (*) highlights the required fields. The following image shows the Create Sub-Reseller window:



Complete the following fields:

- **Login Name (Email Address)** – The sub-reseller admin's email address. This email receives the activation email and is also used to log in.
- **Contact Name** – The sub-reseller admin's full name.
- **Reseller Name** – The name of the sub-reseller account.
- **Country** – The country where the sub-reseller company is located.
- **Phone No.** – The sub-reseller admin's phone number.
- **State/Province** – The state or province where the sub-reseller company is located.
- **Company** – The name of the sub-reseller company.
- **City** – The city where the sub-reseller company is located.
- **Postal Code** – The zip code for the sub-reseller company.
- **Address** – The address for the sub-reseller company.
- **Activate reseller** – Automatically activates the sub-reseller after creation.

When you are done, click **OK** to save or **CANCEL** to quit without saving. Your Sub-Reseller list updates with the new sub-reseller with an Active status (if you activated automatically) or Inactive status (if you skipped activation).

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If you did not activate automatically, you must complete activation. Manual activation can be completed from the Organization page or the sub-reseller's Reseller Detail page. The following image shows the reseller's Organization page with an inactive sub-reseller:
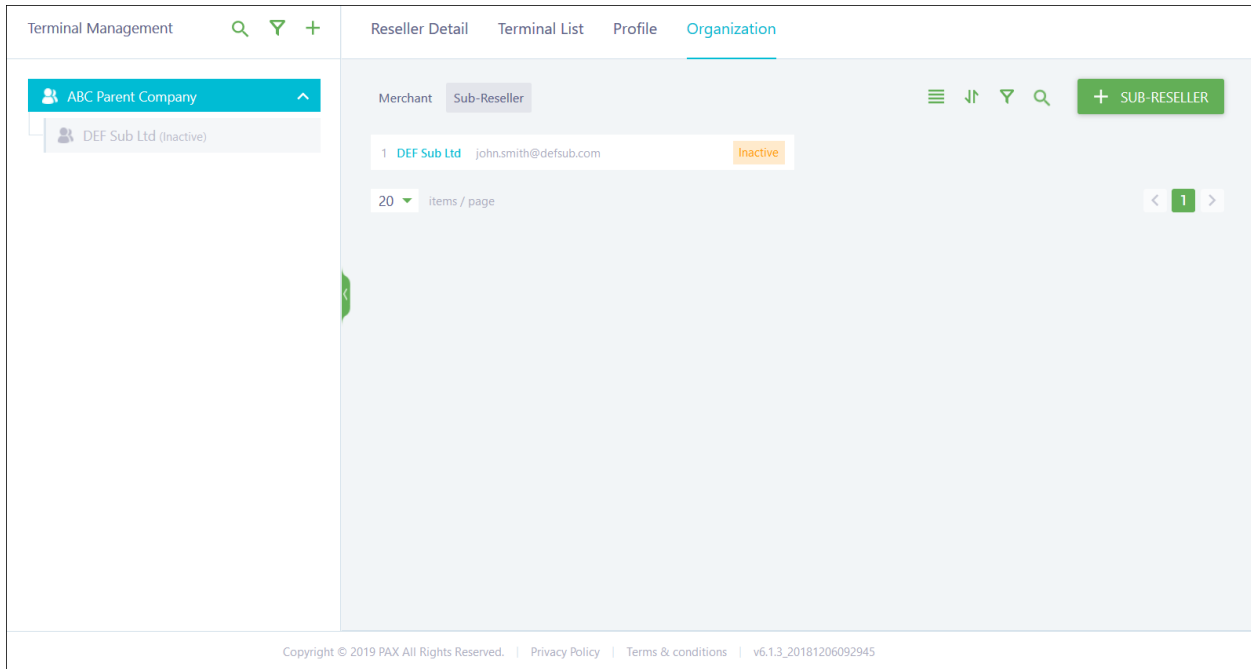


To activate the sub-reseller, hover over its row and click the activate icon. A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the sub-reseller's row:



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You can also click the sub-reseller to open its details and activate using the option within the more options icon (vertical ellipsis) on the Reseller Detail page. The following image shows the sub-reseller's Reseller Detail page:
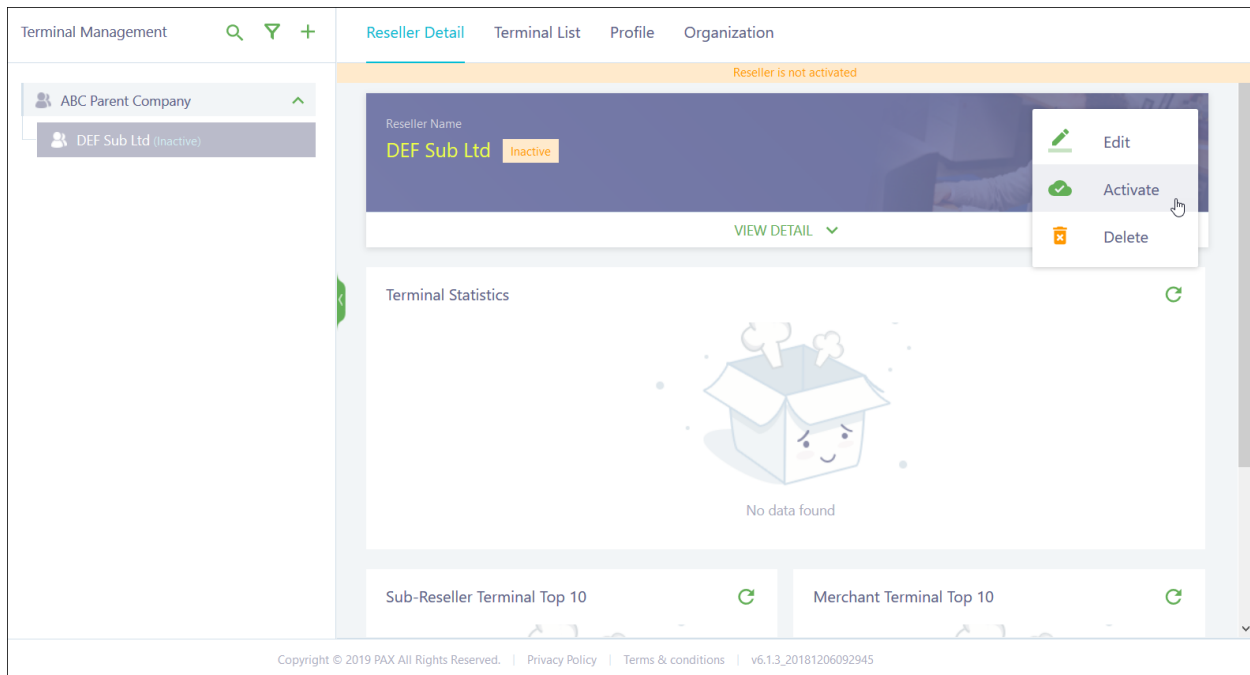


All available options in the more options menu are:

- **Edit** – Allows you to edit all sub-reseller fields except the Login Name (User Email).
- **Activate** – Switches the sub-reseller to Active status. Only available for inactive/disabled sub-resellers.
- **Resend Email** – Sends the Reseller Activate Notification email to the email address provided.
- **Change User** – Allows you to edit the Login Name (User Email) field.
- **Disable** – Switches the sub-reseller to Disabled status.
- **Delete** – Deletes the sub-reseller. Only available for inactive/disabled sub-resellers.

**NOTE:**     If the sub-reseller has active sub-resellers, merchants, or terminals, it is not possible to disable the sub-reseller.

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To view the sub-reseller's details, click **VIEW DETAIL**. Scroll down to view a mini-dashboard for this sub-reseller. The following image shows the sub-reseller's Reseller Detail page:
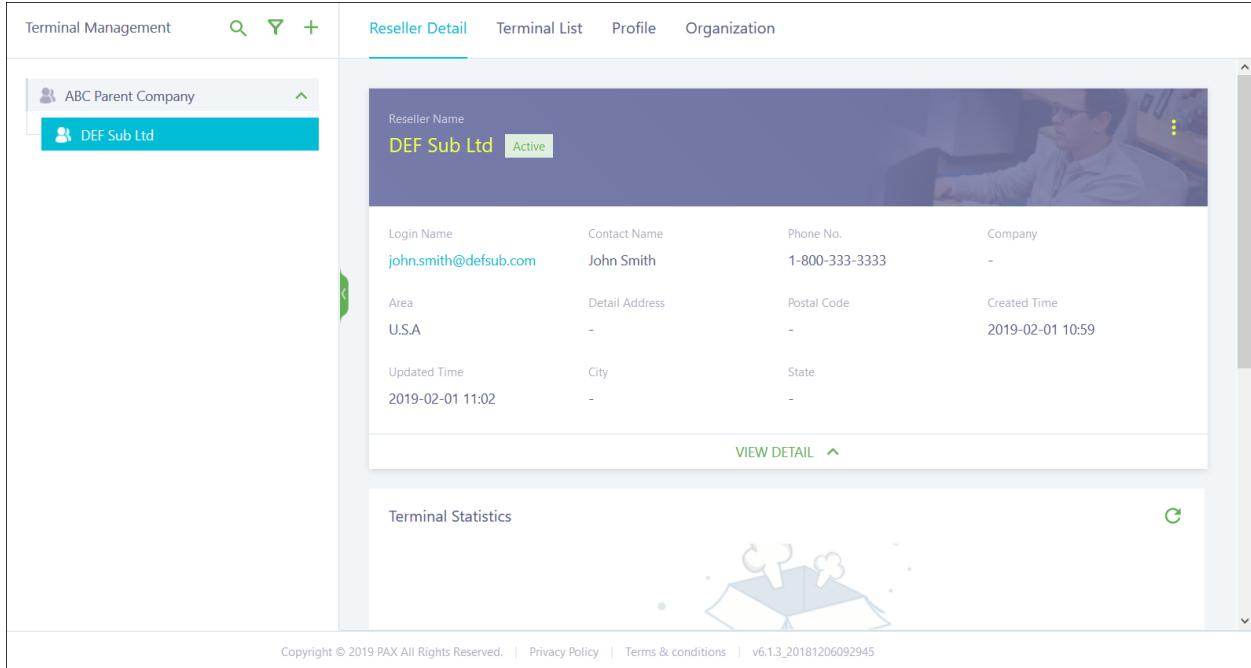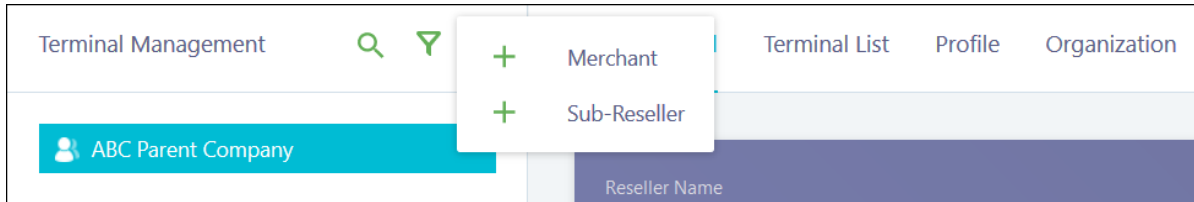


## 7.2   Create a Merchant

Before a terminal can be activated, it must be assigned to a merchant. Merchants must be assigned to a reseller or sub-reseller.

To create a merchant, navigate to the reseller or sub-reseller you want to add the new merchant to and choose one of the following methods:

Click the **+** icon and then **+ Sub-Reseller**. The following image shows the quick add menu:
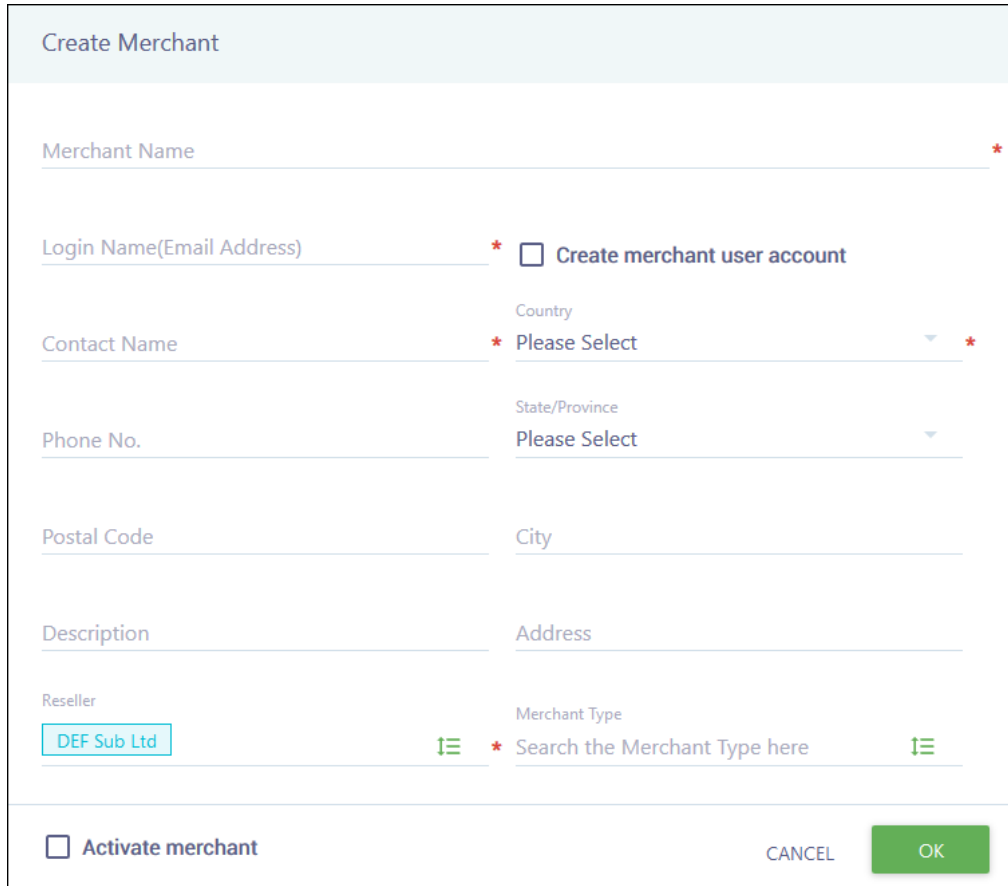


Click **Organization** > **Merchant** > **+ MERCHANT**.

To create multiple merchants at one time, click the **IMPORT MERCHANT** button at the bottom. A pop-up appears with the option to download or upload the merchant template. Download the template, enter the merchant information, and then upload the template to import your multiple merchant list. Otherwise, create a single merchant.

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After merchants are created, use the **EXPORT MERCHANT** button to export an Excel spreadsheet with your merchants' details. The following image shows the sub-reseller's Organization page:

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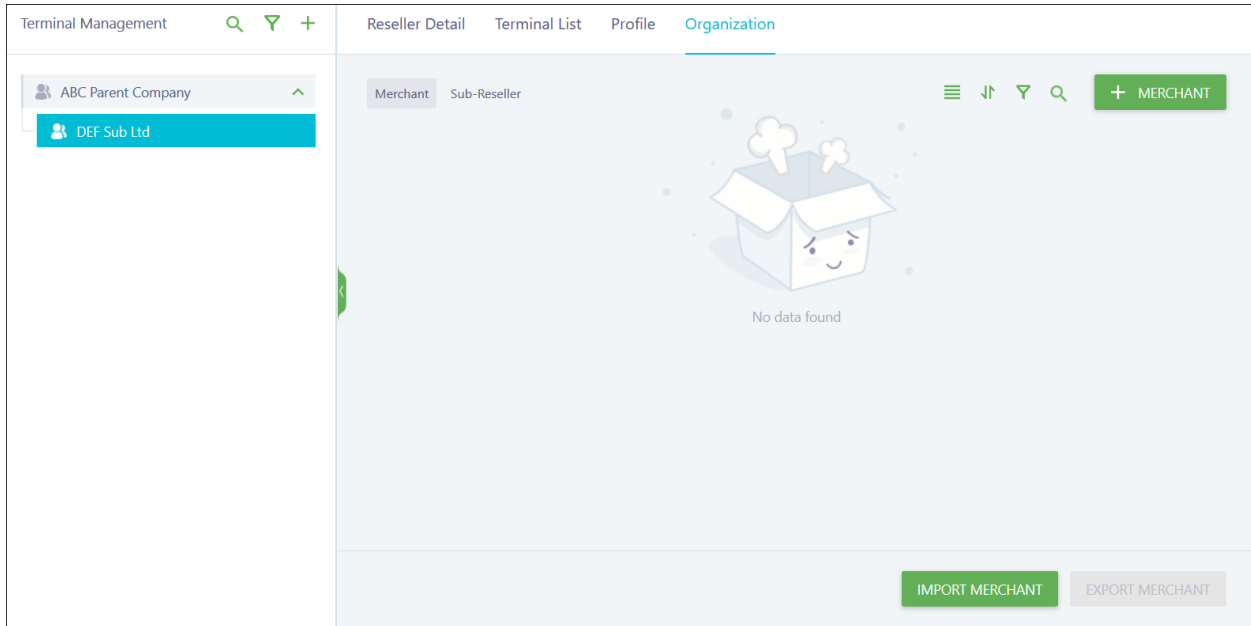
A pop-up window appears with the fields to complete to set up a new merchant. A red asterisk (*) highlights the required fields. The following image shows the Create Merchant window:



Complete the following fields:

- **Merchant Name** – The merchant company name.
- **Login Name (Email Address)** – The merchant admin's email address. This field is for reference only unless you create a merchant user account.
- **Create merchant user account** – (Optional) Checking this box would create a login for the merchant upon account creation. The merchant would receive a Merchant Activate Notification email. A merchant user account is only used if you want to require the merchant to log in before the terminal can download from PAXSTORE. Marketplace, reseller and sub-reseller admins for this merchant can still push apps to the terminal from the Administrator Center.

**NOTE:**   A merchant user cannot access the Administrator Center.

- **Contact Name** – The merchant admin's full name.
- **Country** – The country where the merchant company is located.
- **Phone No.**  – (Optional) The merchant admin's phone number.
- **State/Province** – (Optional) The state or province where the merchant company is located.

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- **Postal Code** – (Optional) The zip code for the merchant company.
- **City** – (Optional) The city where the merchant company is located.
- **Description** – (Optional) A short description of the company.
- **Address** – (Optional) The address for the merchant company.
- **Reseller** – The name of the reseller or sub-reseller account the merchant falls under. This is pre-populated based on the account used when creating a merchant. To change this field, click the list icon to the right and select a new reseller or sub-reseller.
- **Merchant Type** – (Optional) The type of business for the merchant company, such as retail, restaurant, etc. To change this field, click the list icon to the right and select a new reseller or sub-reseller.
- **Activate merchant** – Automatically activates the merchant after creation.

When you are done, click **OK** to save or **CANCEL** to quit without saving. Your Merchant list updates with the new merchant with an Active status (if you activated automatically) or Inactive status (if you skipped activation).
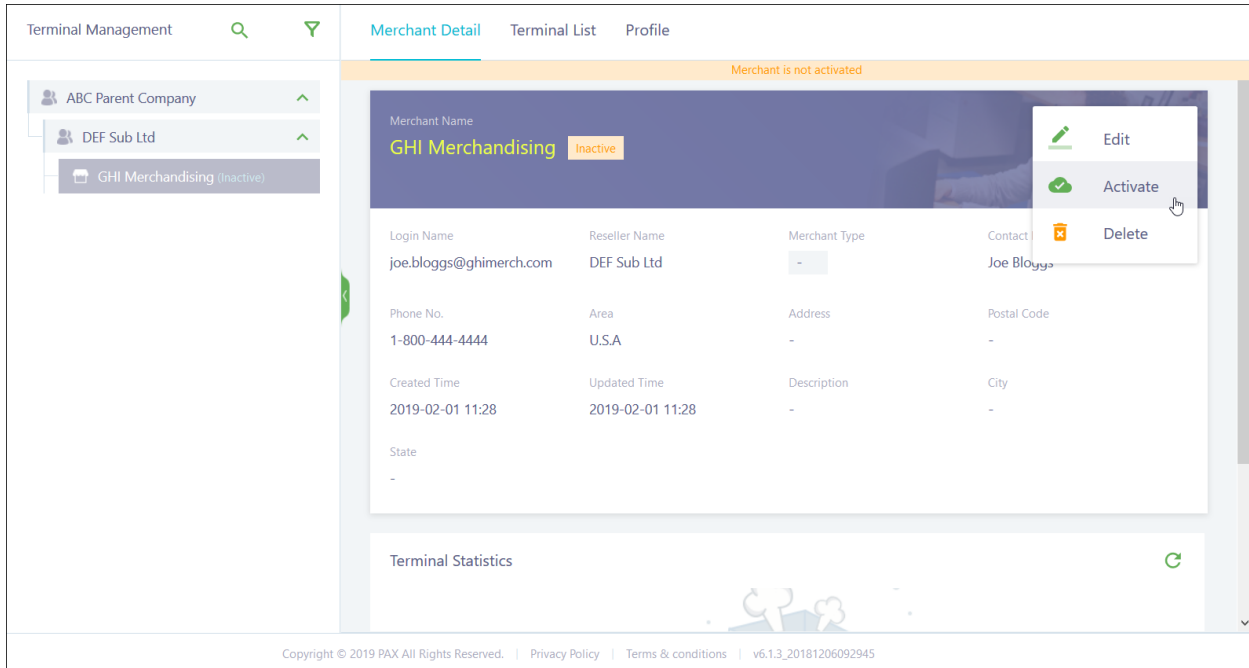
If you did not activate automatically, you must complete activation. Manual activation can be completed from the Organization page or the merchant's Merchant Detail page. The following image shows the sub-reseller's Organization page with an inactive merchant:
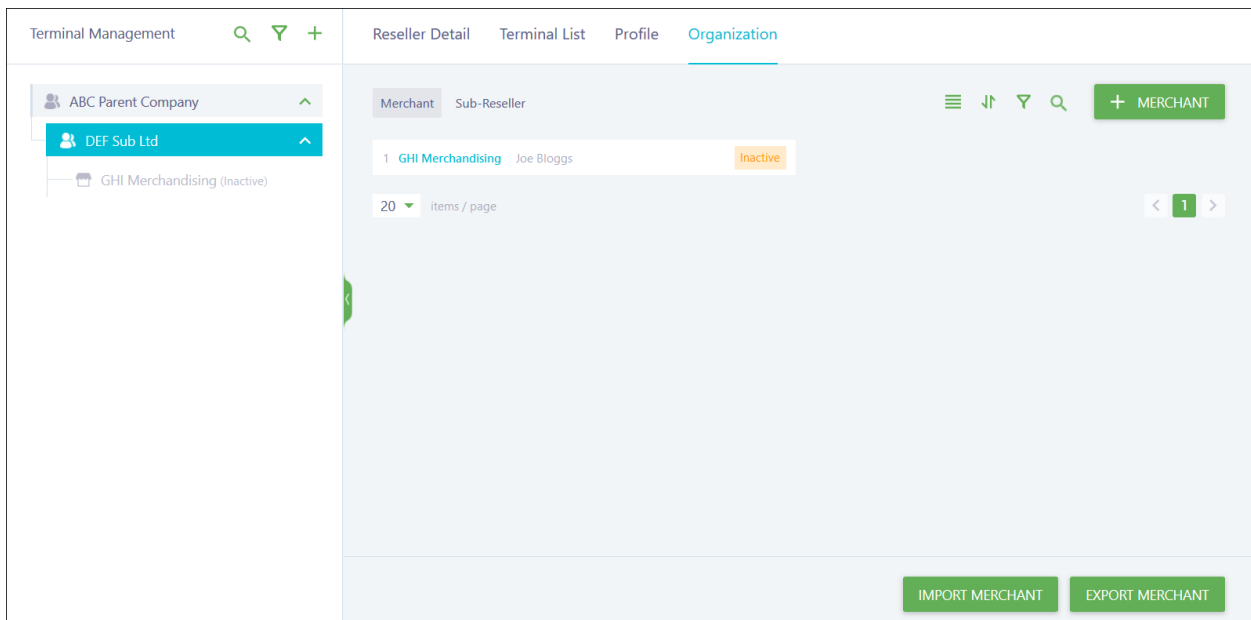


To activate the merchant, hover over its row and click the activate icon. A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the merchant's row:
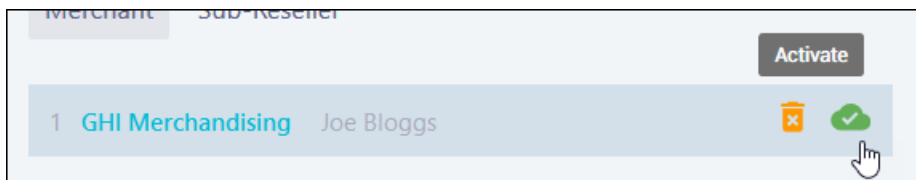
You can also click on the merchant to open its details and activate using the option within the more options icon (vertical ellipsis) on the Merchant Detail page. The following image shows the merchant's Merchant Detail page:



All available options in the more options menu are:

- **Edit** – Allows you to edit all merchant fields except the Email Address and Create merchant user account.
- **Activate** – Switches the merchant to Active status. Only available for inactive/disabled merchants.
- **Resend Email** – Sends the Merchant Activate Notification email to the email address provided. This option is only available if you created a merchant user account.
- **Change User** – Allows you to edit the Email Address and Create merchant user account fields.
- **Disable** – Switches the merchant to Disabled status.
- **Delete** – Deletes the merchant. Only available for inactive/disabled merchants.

**NOTE:**     If the merchant has active terminals, it is not possible to disable the merchant.

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The merchant's details automatically display in Merchant Detail. Scroll down to view a mini-dashboard for this merchant. The following image shows the merchant's Merchant Detail page:

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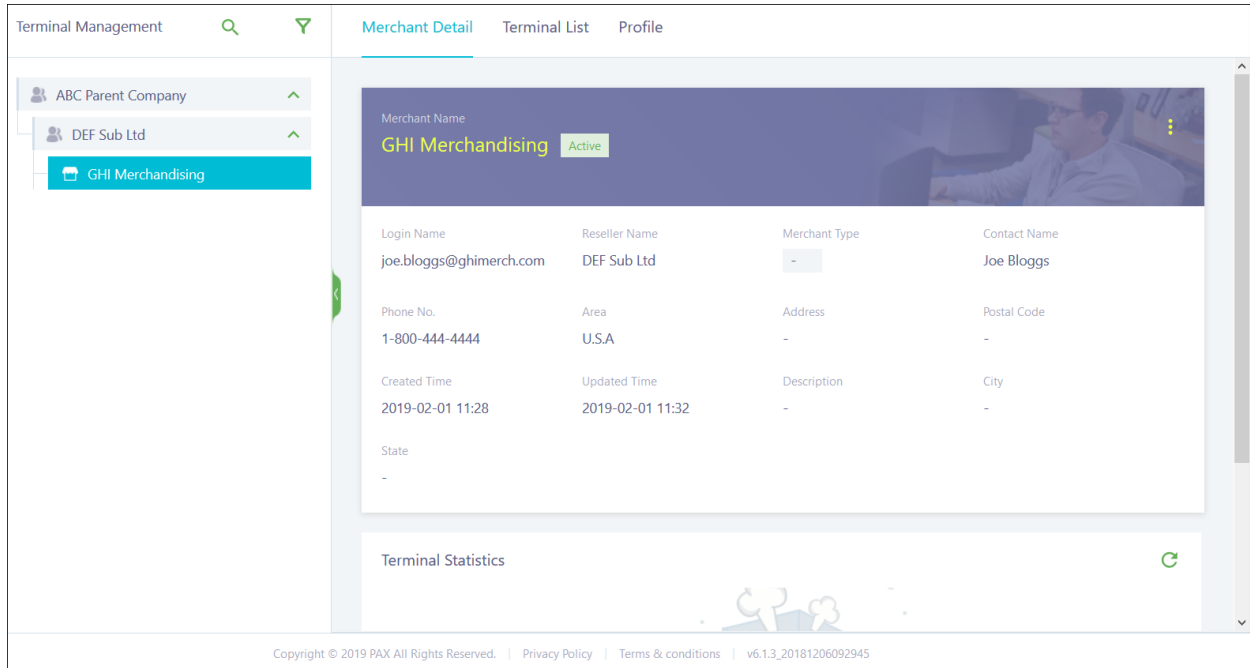
## 7.3   Create a Terminal

Before adding a terminal, it is best practice to create the proper reseller, sub-reseller and merchant accounts first. You can add a terminal to your top-level reseller account, resellers, or sub-resellers and move it to a merchant account later to be activated, but you will not be able to activate the terminal profile until it is assigned to a merchant. The terminal must be activated before attempting to download apps from the PAXSTORE.
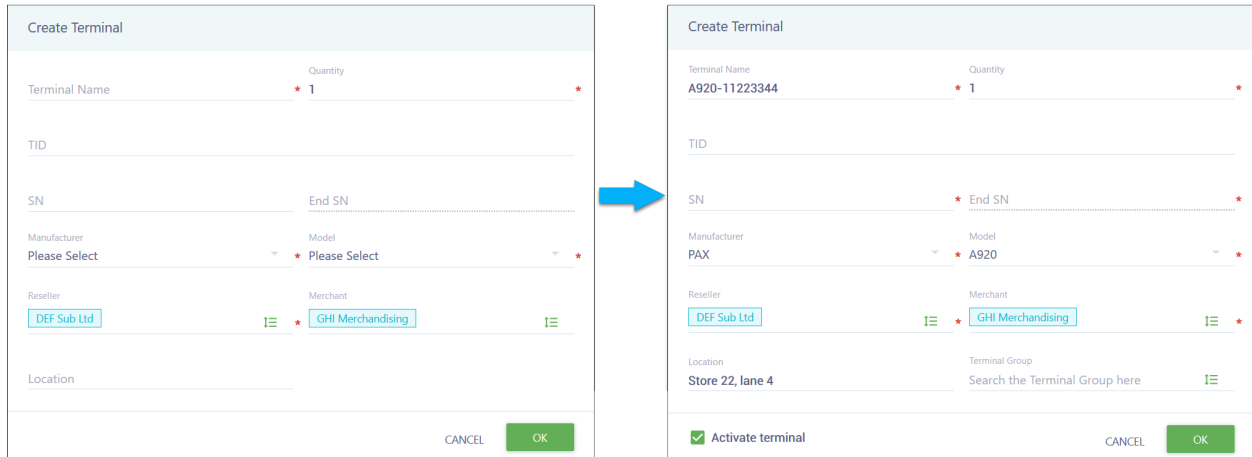
To create a terminal, navigate to the merchant you want to add the new terminal to and click **Terminal List** > **+ TERMINAL**.

To create multiple terminals at one time, click **IMPORT** > **Import Terminal** at the bottom. A pop-up appears with the option to download or upload the terminal templates. Download the template, enter the terminal information, and then upload the template to import your terminal list. Otherwise, create a single terminal.

After your terminals are created, you can select terminals from the list and use the buttons along the bottom to add the terminal to a group, delete, activate or disable terminals, or to export an Excel spreadsheet with your terminals' details, with or without the installed apps and firmware. The following image shows the merchant's Terminal List page:

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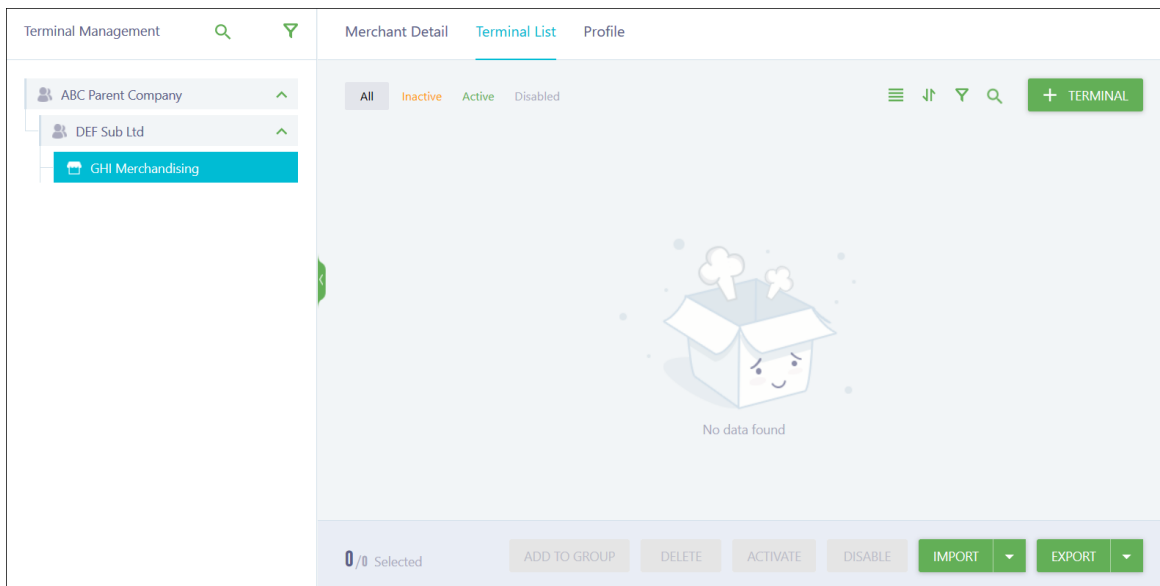
A pop-up window appears with the fields to complete to set up a new terminal. A red asterisk (*) highlights the required fields. The following image shows the Create Terminal window:
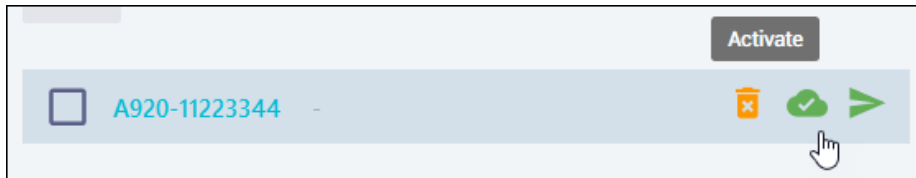


Complete the following fields:

- **Terminal Name** – The name assigned to the terminal.
- **Quantity** – The number of terminals being created. This is used only if you have several sequential terminals.
- **TID** – The identification number assigned to the terminal. If you do not enter a TID, one is automatically generated after creation using the rules of the Marketplace.
- **SN** – The serial number assigned to the terminal or the first serial number for a series of sequential terminals. This field is required if you attempt to activate the terminal during the creation process.
- **End SN** – The serial number assigned to the last sequential terminal. Otherwise, displays the SN. This field is required if you attempt to activate the terminal during the creation process.
- **Manufacturer** – The company that created the terminal. Currently, only PAX is available.
- **Model** – The model of the terminal, such as A80 or A920.
- **Reseller** – The name of the reseller or sub-reseller account the terminal or terminal's merchant falls under. This is pre-populated based on the account used when creating the terminal. To change this field, click the list icon to the right and select a new reseller or sub-reseller.
- **Merchant** – The name of the merchant the terminal belongs to. This may be pre-populated based on the account used when creating the terminal. To change this field, click the list icon to the right and select a new merchant.
- **Location** – The location of the terminal within the merchant's store.
- **Terminal Group** – The terminal group to add to the terminal during creation. The terminal group pushes applications to the terminal automatically during creation. To change this field, click the list icon to the right and select a terminal group. This field is only available if you are activating the terminal during the creation process.
- **Activate terminal** – Automatically activates the terminal after creation. This option is only visible after completing the Manufacturer and Model fields, but you are required to assign the terminal to a merchant in order to use it.

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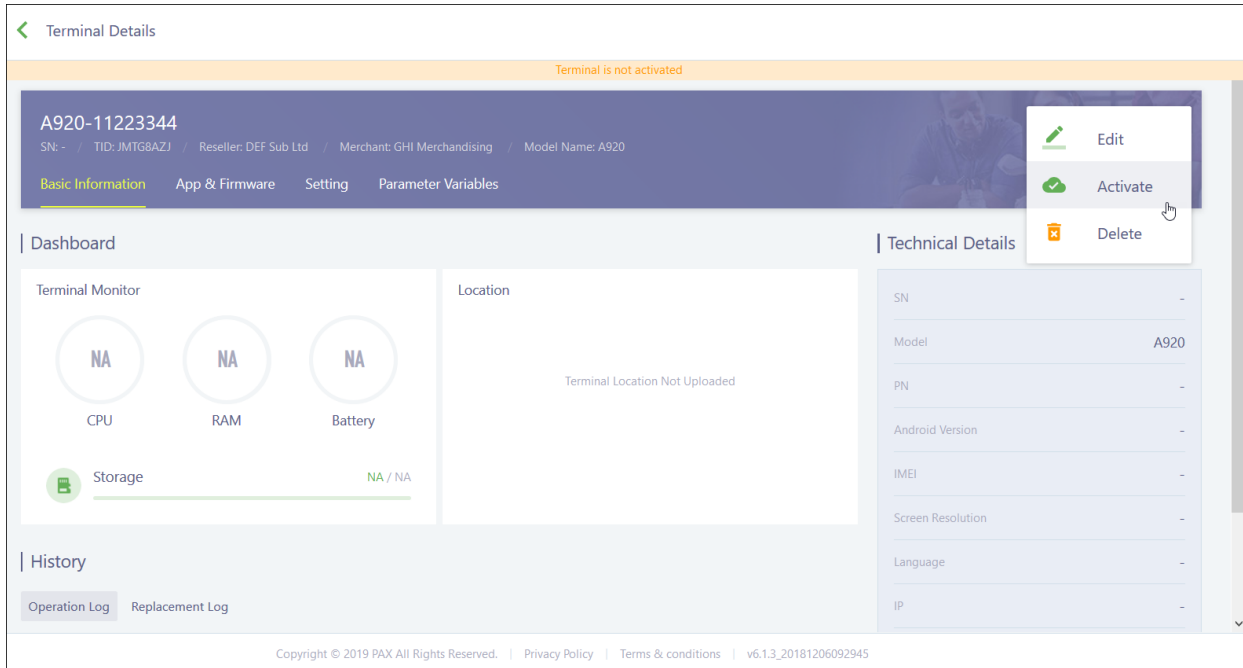paxstore.support@pax.us
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When you are done, click **OK** to save or **CANCEL** to quit without saving. Your Terminal List updates with the new terminal with an Active or Inactive status, determined by whether you activated the terminal during creation. The following image shows the merchant's Terminal List page:
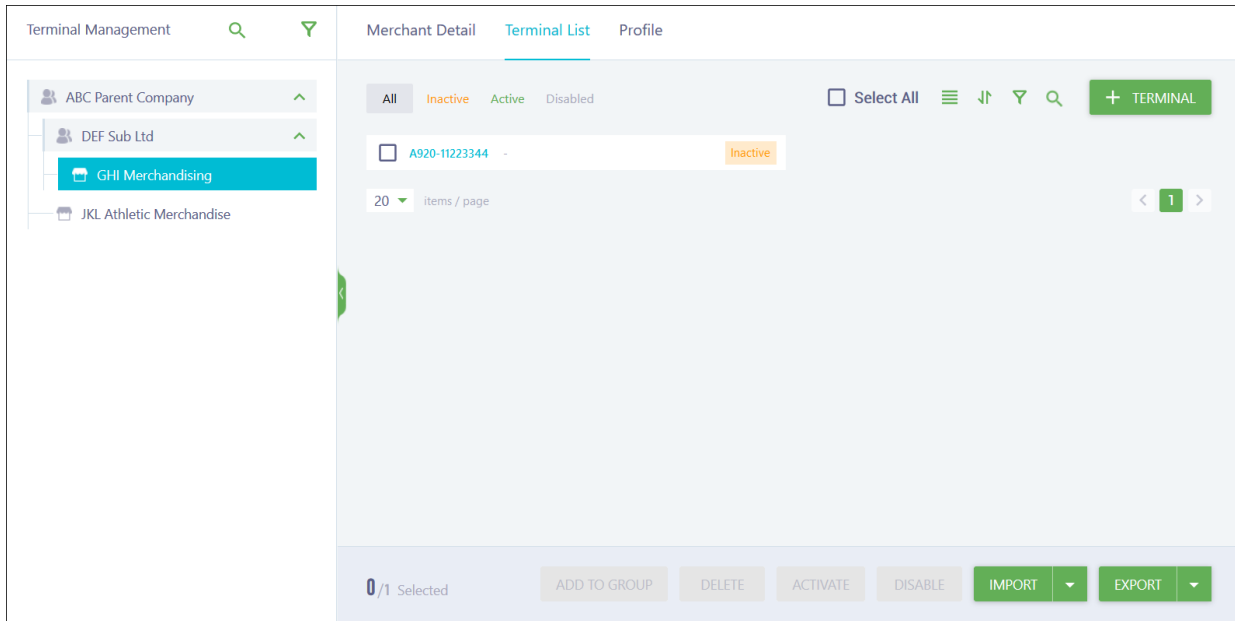


To activate the terminal, hover over its row and click the **Activate** icon. A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the terminal's row:



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You can also click the terminal to open its details and activate it using the option within the more options icon (vertical ellipsis) on the Terminal Details page. The following image shows the terminal's Terminal Details page:



All available options in the more options menu are:

- **Edit** – Allows you to edit all terminal fields except the TID, serial number, manufacturer and model.
- **Activate** – Switches the terminal to Active status. Only available for inactive/disabled terminals. You must assign the terminal to a merchant and have either the TID or SN to activate a terminal.
- **Copy** – Copies the installed apps and configuration of the current terminal and creates a new terminal with the same information. Operation history is not carried over.
- **Disable** – Switches the terminal to Disabled status.
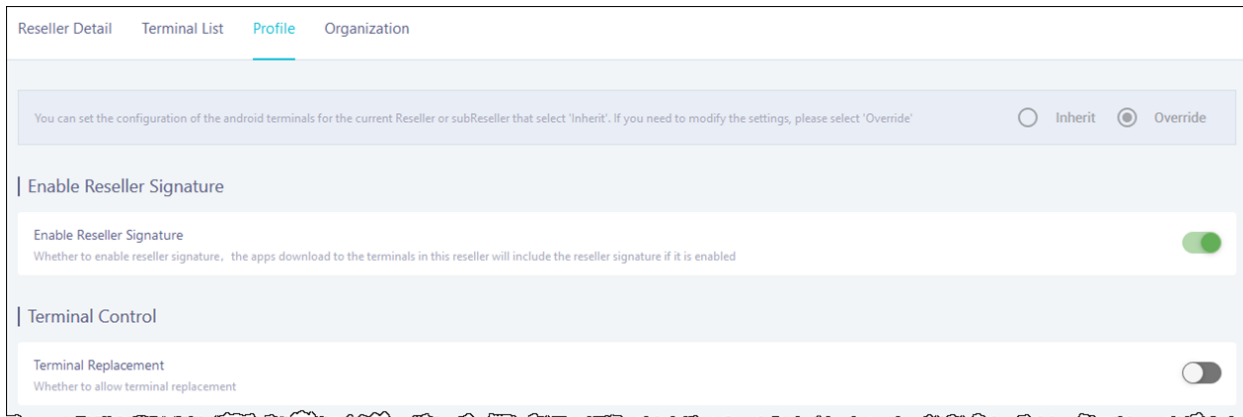- **Delete** – Deletes the terminal. Only available for inactive/disabled terminals.

Basic Information displays by default when you select a terminal. If the terminal has synced with PAXSTORE, then the terminal details populate; otherwise, the information does not display. The following image shows the terminal's Basic Information page:
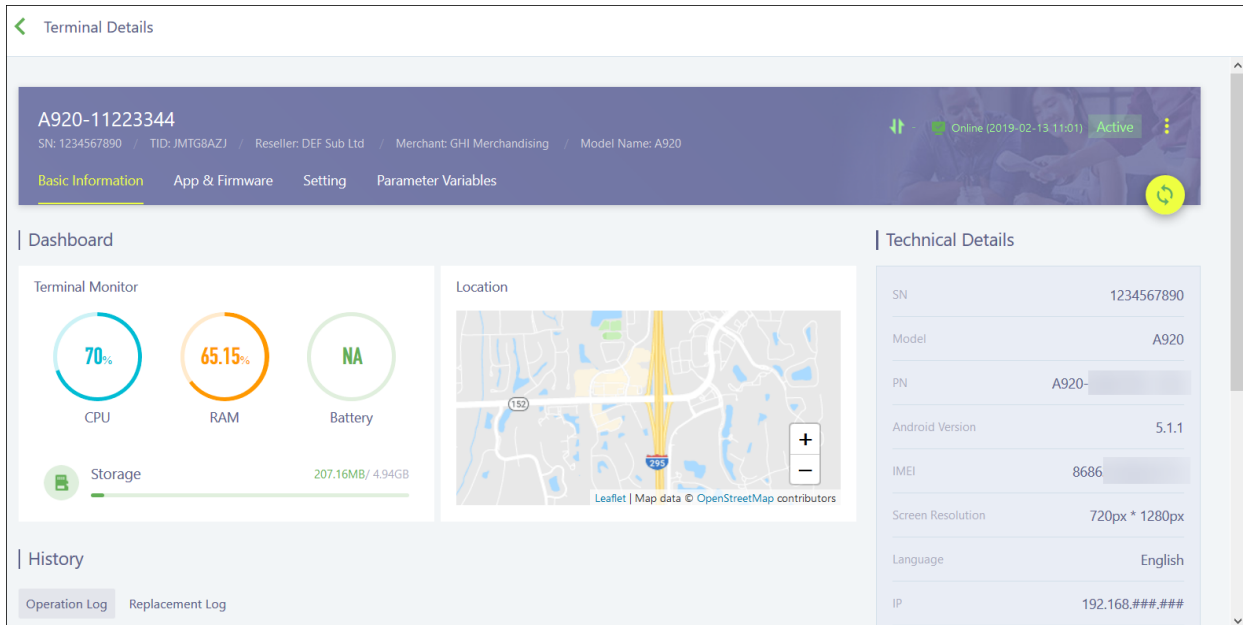


## 7.4   Manage a Profile

Your top-level reseller, reseller, sub-reseller and merchant accounts all contain a Profile tab which manages the configuration for the terminals they have access to. Each configuration option includes a brief description of what it does. There are two configuration profiles: Inherit and Override. Inherit is the default upon creation. Any reseller, sub-reseller or merchant with a profile set to **Inherit** automatically uses the configuration set by the reseller or sub-reseller they are a child of. Sub-resellers can select **Override** and change the configuration for themselves and any children with Inherit. They can also switch one of their child merchants to Override and edit it on its own without affecting themselves or other merchants.

The following image shows the top of the Profile page:



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### 7.4.1   Enable Reseller Signature

**Enable Reseller Signature** requires the reseller signature to

### 7.4.2   Terminal Control

**Terminal Replacement** allows you to replace one of your current terminals with another terminal's serial number. This automatically removes the original terminal from PAXSTORE and adds the new terminal. The terminal's operation history is carried over to the new terminal.

The following image shows the middle of the Profile page:



### 7.4.3   Terminal System Configuration

**GPS** sends the terminal location to PAXSTORE. If disabled, Geolocation data does not populate.

**APN** sets a non-standard APN as the default APN for all terminals.

**Wifi** sets a specific Wifi network as the default network for all terminals.

**Terminal Setting Password** configures the terminal to require a password before you can access the settings.

**Brightness** sets the standard screen brightness on the terminal.

**Volume** sets the default volume level on the terminal.

**Language** sets the default language of the terminal. This language only applies to the Android portion of the terminal and does not affect any applications on the terminal.

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### 7.4.4 EDIT TERMINAL SYSTEM CONFIGURATION

Click **EDIT TERMINAL SYSTEM CONFIGURATION** to change what fields show under Terminal System Configuration. This does not change the settings, just the display.

The following image shows the Terminal System Configuration window:
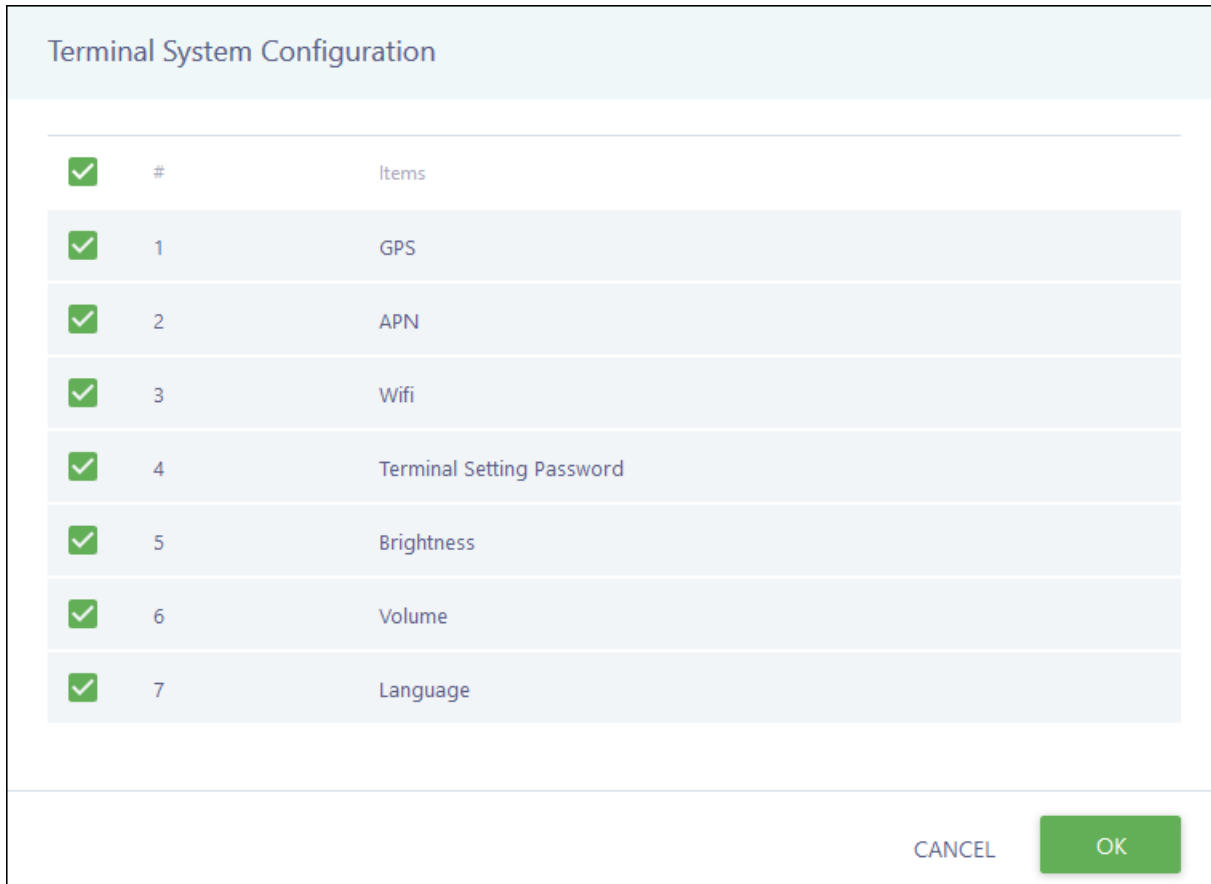


The following image shows the bottom of the Profile page:



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**Upload Information Interval (min)** controls how often the terminal uploads information to PAXSTORE in minutes. Longer delays lessen the network usage but reduce the effectiveness of your terminal dashboard.

**Polling Information Interval (min)** controls how often the terminal uploads polling information to PAXSTORE in minutes. Longer delays lessen the network usage but reduce the effectiveness of your terminal dashboard.

**Use Cellular To Download** configures the terminal to use a cellular connection to download its configuration settings and apps. Disabling this requires you to have a Wifi connection or other method to download the apps on the system.

**Location Data Upload** controls whether the terminals will collect location data from the GPS and send it to PAXSTORE.

**Location Offset (m)** controls how far a terminal must be moved in miles before the location data is re-uploaded to the terminal.

**Upload Diagnosis Report** controls whether diagnostic information is uploaded to PAXSTORE. If disabled, your dashboard and terminal information screens provide less effective information.

## 7.5   Manage a Terminal

Reseller, sub-reseller, and merchant all contain a Terminal List tab which manages the terminals they have access to. The Reseller Admin can see all terminals. Within the header of the Terminal Details page, you will always find the terminal name, serial number, terminal identification number, reseller, merchant and model, as well as the terminal's current location, status, the more options menu and a button to manually sync the terminal.

### 7.5.1   View the Terminal Information

The Basic Information tab provides the general terminal information and includes three sections:

- **Dashboard** – Displays information about the physical terminal. The Terminal Monitor displays the terminal's current CPU, RAM, Battery and Storage. Location displays a map with the terminal's current location.
- **History** – Displays a record of actions performed on the terminal, such as when it was created, activated, disabled, etc., in the Operation Log and when a replacement occurred in the Replacement Log.
- **Technical Details** – Displays the technical information for the terminal. Most of this information populates after syncing the terminal. It includes:
    - SN
    - Model
    - PN
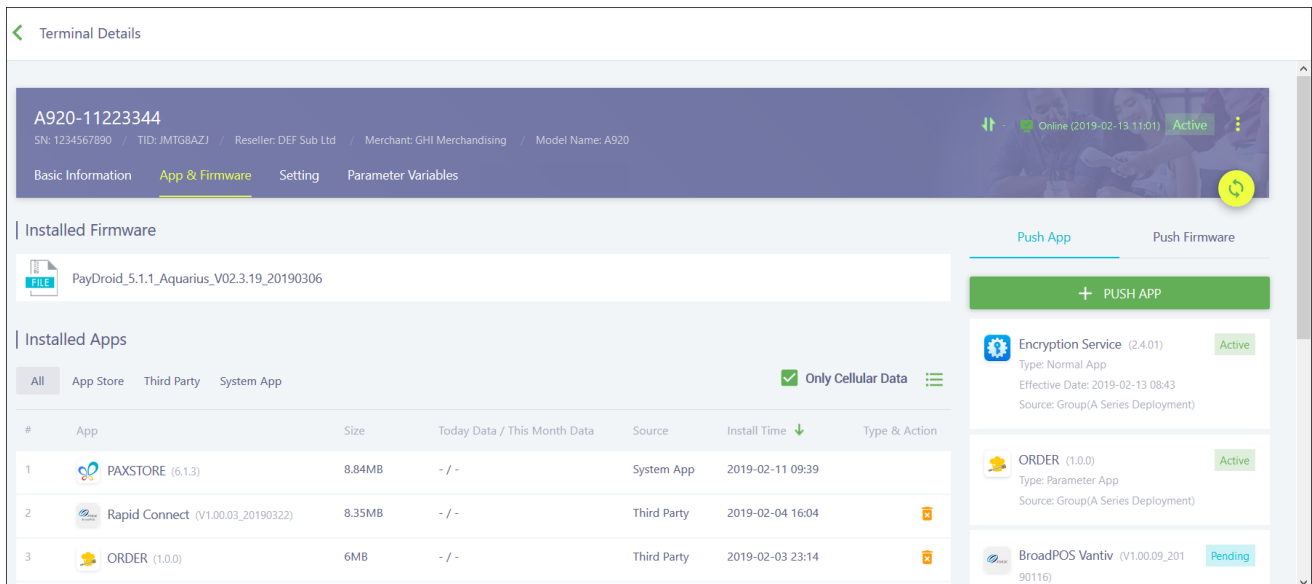    - Android Version
    - IMEI
    - Screen Resolution

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- o Language
- o IP
- o Time Zone
- o MAC Address

### 7.5.2   View the Terminal's App and Firmware

The App & Firmware tab provides information regarding currently installed firmware and apps and allows you to push apps and firmware to the terminal. It includes three sections:

- **Installed Firmware** – Displays the currently installed firmware files.
- **Installed Apps** – Displays the app name, version and size, the current day and month's data usage, the source of the app, the installation time, app type and available actions for the app, such as delete. You can sort this list by the amount of cellular data the app uses or the app's source:
  - o **App Store** – an EMV-certified payment app developed by PAX.
  - o **Third Party** – non-payment apps developed by third parties.
  - o **System App** – a system app added to the terminal, such as PAXSTORE.
- **Push App/Push Firmware** – Allows you to manually add apps and firmware to your terminal. Also displays the apps and firmware currently waiting to be installed on the terminal.

The following image shows the terminal's App & Firmware tab:



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### 7.5.2.1 Push an App

Click **+ PUSH APP** to view the list of all available apps or push templates you have created. You can select multiple apps to install on the terminal from the list or a push template. Apps are added to the Push App section. Apps added using a Terminal Group include their source (group name) and may be added with an Active status.

Search the list and check the box next to each app you want to add. Under Version, select the version for each app, if needed. Once you have selected all the apps and applicable versions, click **OK** to add the apps to the terminal and proceed to the app's push configuration settings.

## Add Push App

| App | Push Templates | | | | | | |
|---|---|---|---|---|---|---|---|
| | | App Name | Version | Size | Type | Developer | Updated Time |
| ☐ | | BroadPos EPIGift | V1.00.01 ▾ | 3.2 MB | Parameter App | pax technology inc | 2019-01-25 09:31 |
| ☐ | | BroadPos ValuelinkGift | V1.00.02 ▾ | 3.3 MB | Parameter App | pax technology inc | 2019-01-22 11:34 |
| ☐ | | BroadPOS ValutecGift | V1.00.04 ▾ | 3.2 MB | Parameter App | pax technology inc | 2019-01-18 14:59 |
| ☐ | | BroadPOS P2PE | V1.00.01_2019... ▾ | 9.4 MB | Parameter App | usbo_terminal_android | 2019-01-16 04:21 |
| ☐ | | BroadPOS Vantiv | V1.00.09_2019... ▾ | 9.5 MB | Parameter App | usbo_terminal_android | 2019-01-16 01:32 |
| ☐ | | BroadPOS Vantiv Sparkbase | V1.01.01_2019... ▾ | 9.7 MB | Parameter App | usbo_terminal_android | 2019-01-14 22:17 |
| | | | | 9.4 | Parameter | | |

CANCEL          OK

For parameter apps, the push configuration settings are where you edit any necessary parameters. To switch between the restaurant and retail versions of the app, click the list icon to the right under the Select Parameter Template section.
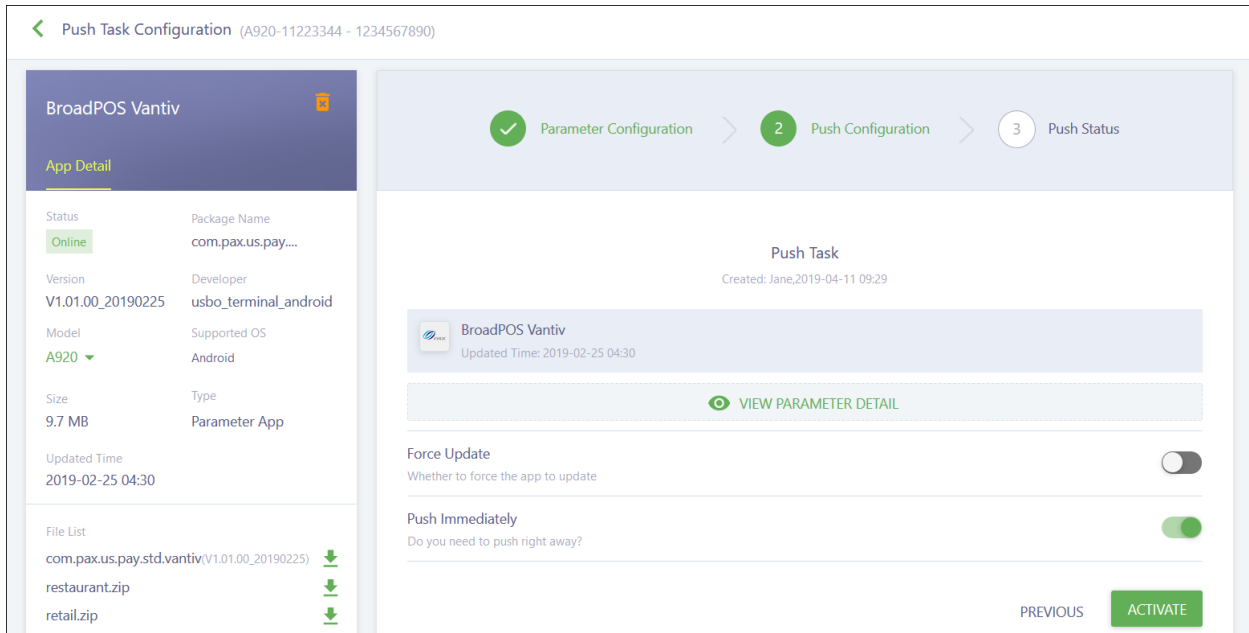
| Select Parameter Template | | |
|---|---|---|
| | | 🔍 |
| ☐ | Name | |
| ☑ | restaurant.zip | |
| ☐ | retail.zip | |
| | | CANCEL     OK |

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If you are installing an app across multiple terminals with similar parameters, it is recommended that you set up a push template by clicking **SAVE AS TEMPLATE**. The following image shows a parameter app's Push Configuration page:
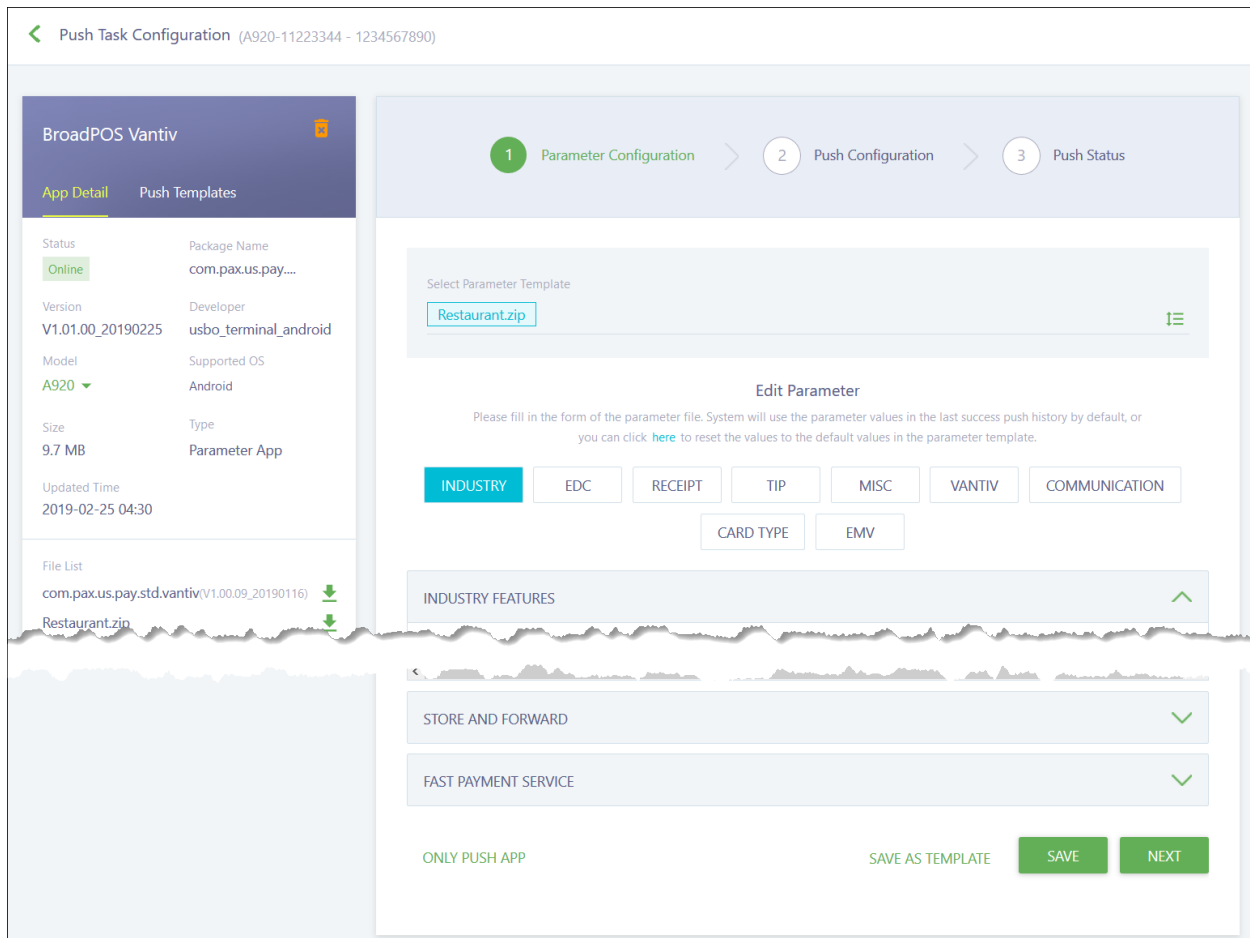


If you need to quit before you finish editing your parameters, click **SAVE** to save your progress before leaving. Use the **ONLY PUSH APP** option if you want to update the application version without the necessary parameters. You will have to edit the parameters later before you can use the app.

If you are setting up multiple terminals in a similar manner and using a push template for most parameters, you can enter variables for the parameter fields that will differ, such as Merchant Number or Username. The variable format for the parameter configuration should be #{variablekey}. Save and then download the variable template by clicking **IMPORT** > **Import Variable** > **VARIABLE TEMPLATE** from the Terminal List page. Fill out the template with the appropriate information and include the variablekey you set in the Variable Key (do not include the symbols). Save and import the file on the Terminal List page. All terminals using those variables will be updated accordingly.

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When you finish editing your parameters, click **NEXT** to continue to the Push Configuration step. For normal apps, this is the starting point after adding the app. The following image shows a parameter app's Push Configuration page:



The **Forced Update** feature is still in development and should be turned off. If you turn **Push Immediately** off, you will need to set the time zone, date and time to push the app to the terminal.

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When you are ready, click **ACTIVATE** to push the app and view the status of the push. The **PREVIOUS** button only appears for parameter apps and allows you to return to the Parameter Configuration step. The following image shows an app's Push Configuration page when it is part of a terminal group:
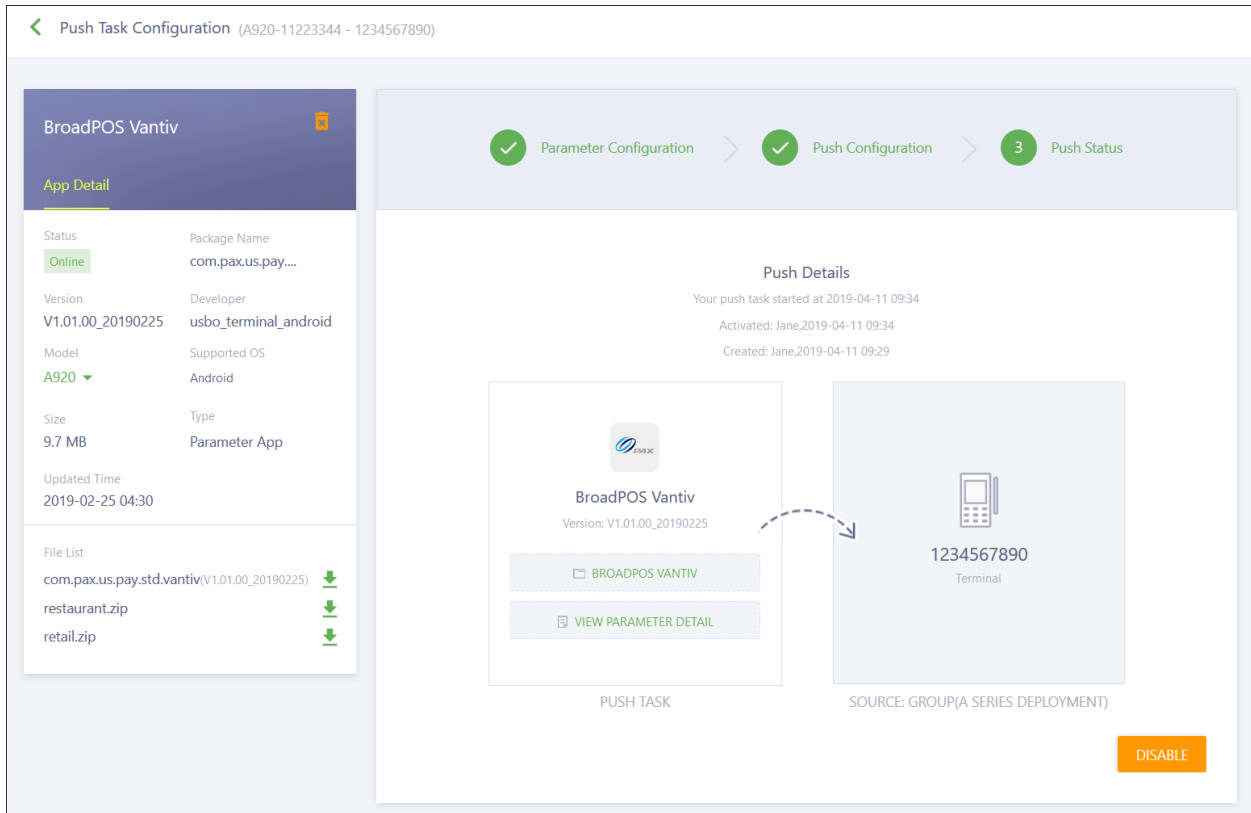


Apps display the Push Details section and option to disable the push. The SOURCE information is replaced by PUSH TERMINAL.

### 7.5.2.2    Push Firmware

Click **+ PUSH FIRMWARE** to view the list of all available firmware for your terminal. You can only select one firmware file from the list. The firmware file is added to the waiting list in the Push Firmware section with a Pending status. Click on the waiting firmware file to view its push configuration settings.

---

**IMPORTANT:**         Firmware can **NEVER** be downgraded once you have upgraded it. Be certain you want to upgrade the terminal's firmware before updating.

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The following image shows the firmware's Push Configuration page:
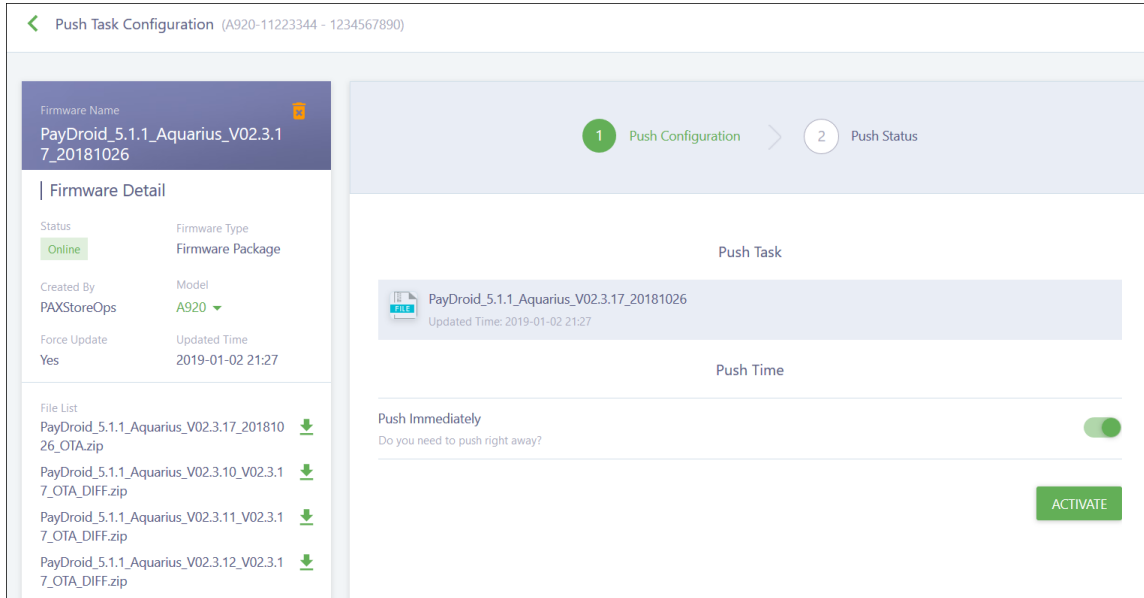


If you turn **Push Immediately** off, you will need to set the time zone, date and time to push the app to the terminal. When you are ready, click **ACTIVATE** to push the firmware and view the status of the push. The following image shows the firmware's Push Status page:

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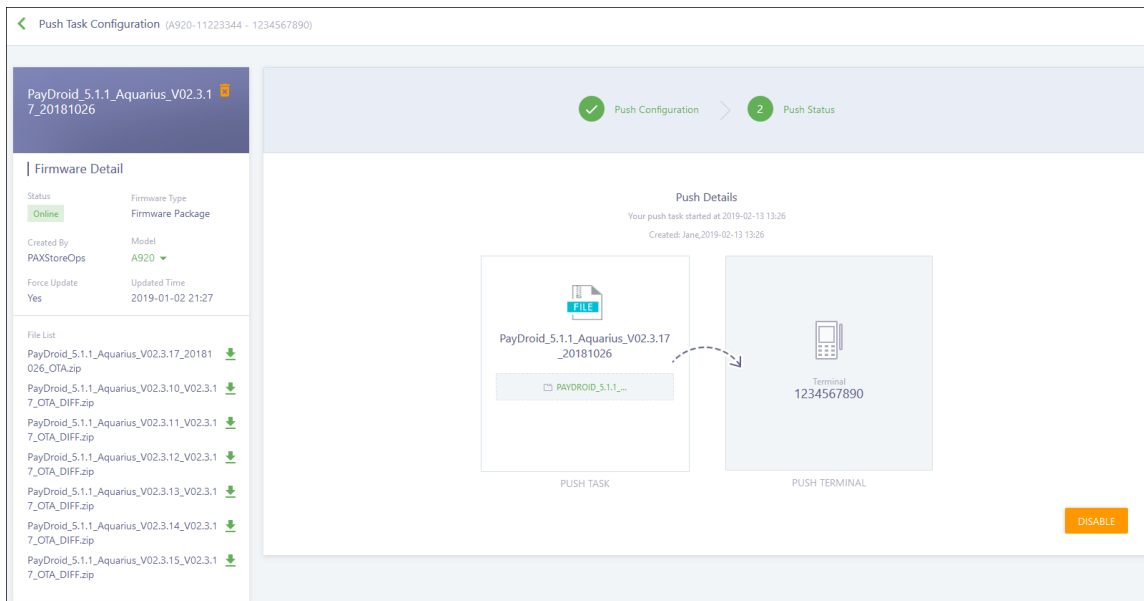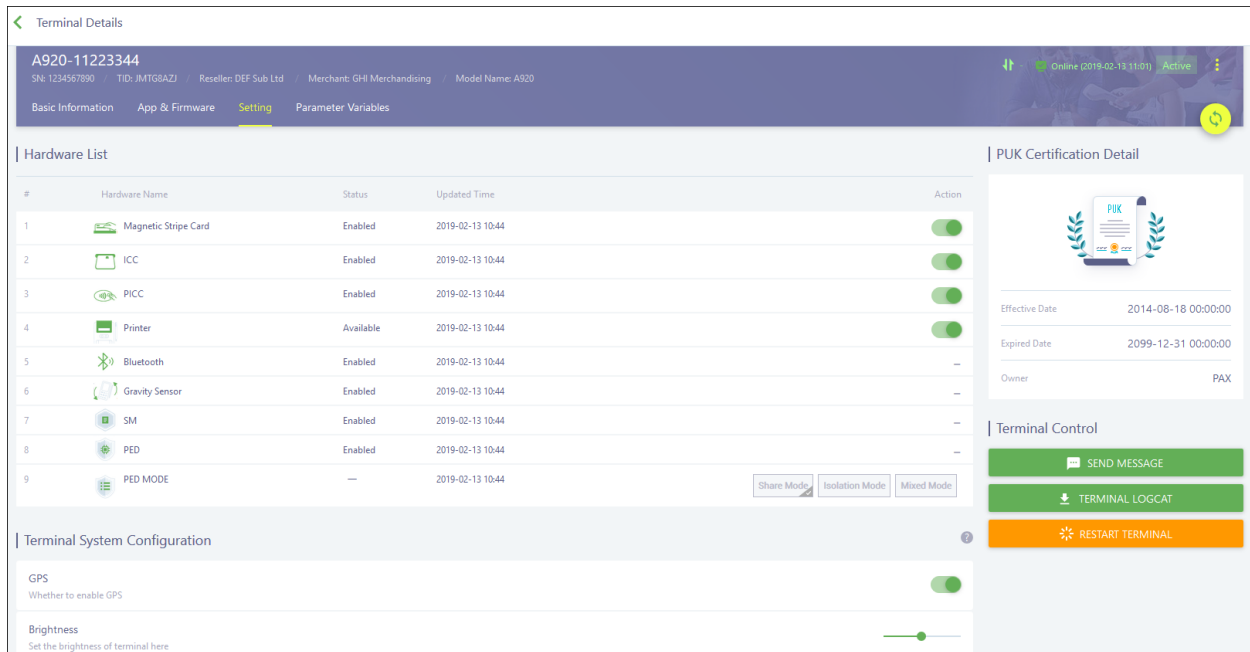
### 7.5.3   View the Terminal's Settings

The Setting tab provides the specific terminal information and includes three sections:

- **Hardware List** – Displays information about hardware currently available on your terminal, such as printer, Bluetooth, magnetic stripe card reader, ICC reader, PICC reader, etc. This information does not populate until after your terminal has been synced. The list populates with the Hardware Name, Status, Updated Time, and available Actions.
- **PUK Certificate Detail** – Displays information for the PUK certificate, such as effective date, expiration date, and the certificate owner. The PUK certificate allows you to perform actions like restarting the terminal remotely.
- **Terminal Center** – Allows you to perform the following actions:
  - **SEND MESSAGE** – Send a message to the terminal. The terminal is unable to respond to your message.
  - **TERMINAL LOGCAT** – View the communication log between PAXSTORE and the terminal.
  - **RESTART TERMINAL** – Remotely reboot the terminal.

The following image shows the terminal's Setting tab:
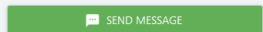


### 7.5.4   View the Terminal's Variables

The Parameter Variables tab provides the information on the parameter variables for the terminal. As you add parameter apps to your terminal, you can enter variables for parameter fields instead of a value. You can use this page to manually add variables to an app on this terminal; however, to add variables to an app across multiple terminals, you need to create a push template for an app with variables and then import the variable template.

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Save and then download the variable template by clicking **IMPORT** > **Import Variable** > **VARIABLE TEMPLATE** from the Terminal List page of the reseller, sub-reseller, or merchant. Fill out the template with the appropriate information and include the variablekey you set in the parameter field under the Variable Key (do not include the symbols) column of the spreadsheet. Save the file and after you have added the apps to the terminals using push templates, import the file on the Terminal List page. All terminals using those variables are updated accordingly.

The following image shows the terminal's Parameter Variables tab:

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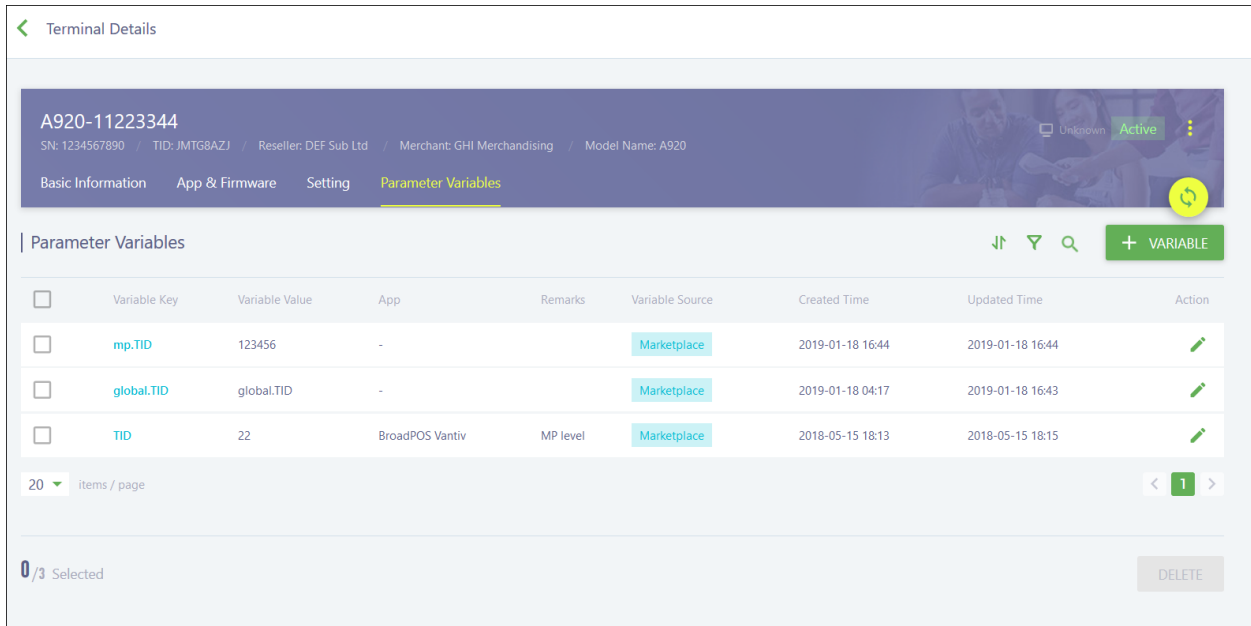
# 8   Group Management

Group Management allows you to set up model-specific terminal groups to quickly add apps across multiple terminals. Any action performed on the applications that are pushed using a terminal group on a single terminal will get pushed to ALL terminals in the group.

There are two types of terminal groups:

- **General Group** – A terminal group where you must specify the terminals for updating by manually adding each terminal.
- **Dynamic Group** – A terminal group where the terminals are automatically added to the group and updated after the terminal's creation. If a terminal has already been added and you create a dynamic group for that terminal's model, the terminal is automatically added upon group creation.

The following image shows the initial Group Management page:
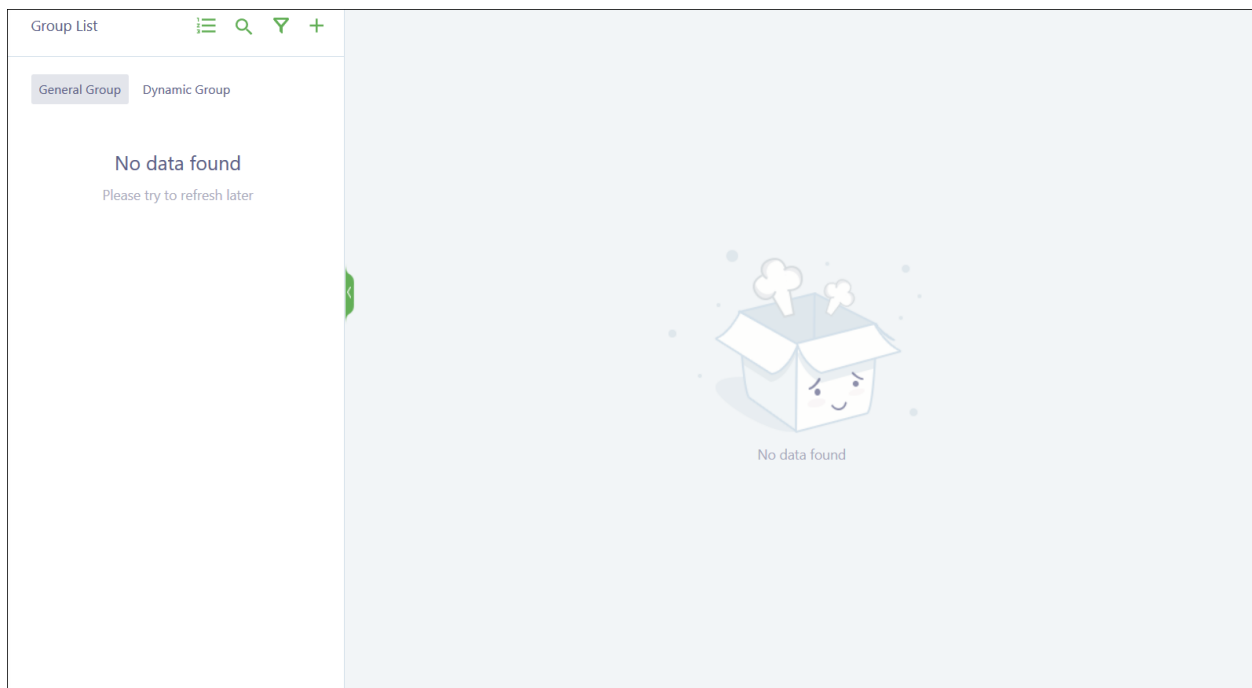


Click the **+** icon and then either **+ General Group** or **+ Dynamic Group**. The following image shows the quick add menu:



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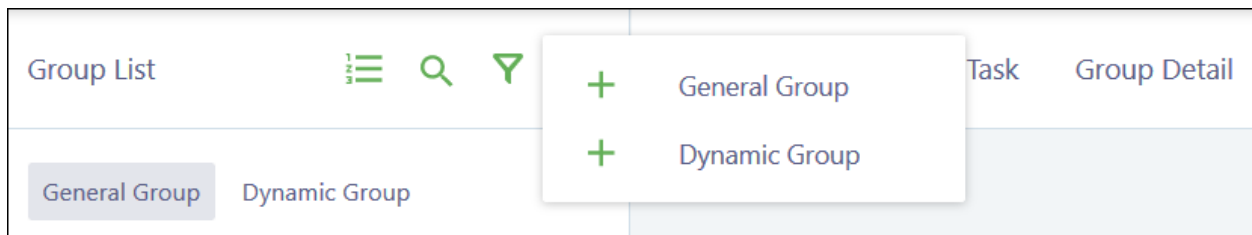
The following image shows the New General Group window:

**NOTE:** The New Dynamic Group window contains the same fields as the New General Group window. The following processes can be used for General or Dynamic groups.



Complete the following fields:

- **Group Name** – The name for the terminal group.
- **Manufacturer** – The company that created the terminal. Currently, only PAX is available.
- **Model** – The model of the terminals that will be added to the terminal group, such as A80 or A920.
- **Reseller** – The name of the reseller or sub-reseller the terminals will be located under. This is pre-populated with your reseller account. To change this field, click the list icon to the right and select a new reseller or sub-reseller.
- **Description** – A brief description, for example, the group's purpose.
- **Activate group** – Automatically activates the terminal group after creation.

When you are done, click **OK** to save or **CANCEL** to quit without saving. Your Group List updates with the new group with an Active status (if you activated automatically) or Inactive status (if you skipped activation). Inactive groups display the message: "Group is not activated."

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If you did not activate automatically, you must complete activation. Manual activation can be completed from the terminal group's Group Detail page.

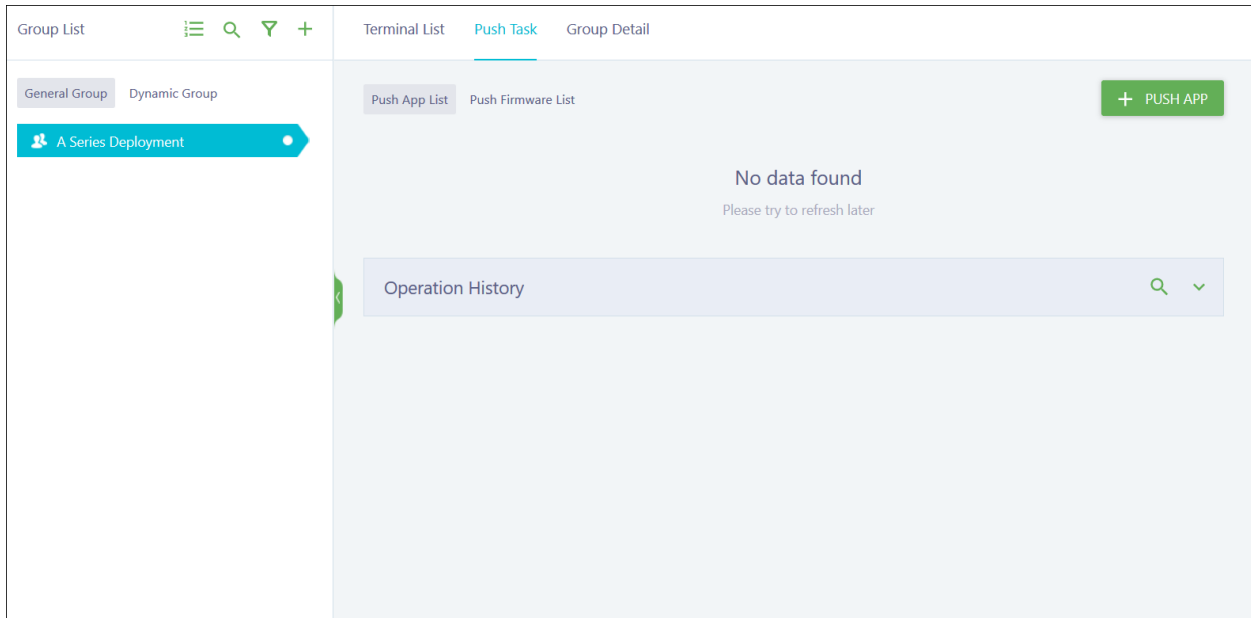The following image shows the general group's Terminal List page with an inactive group:
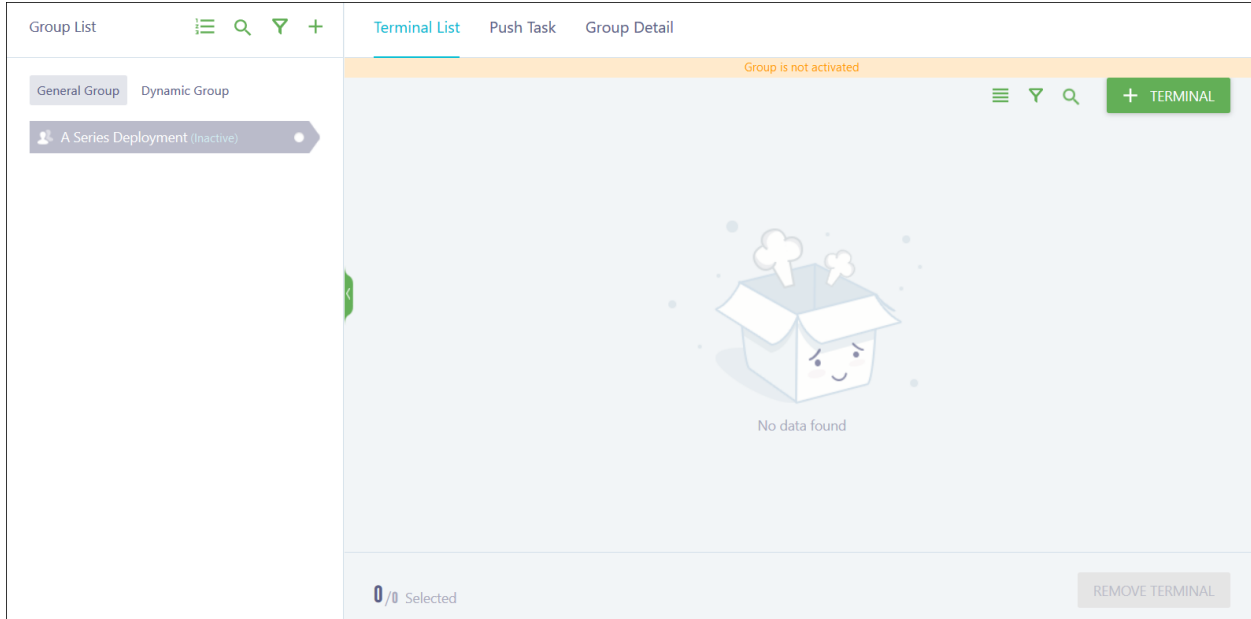


Immediately after creation, all terminals that fit the dynamic group criteria are added to the terminal group, regardless of Active or Inactive status. The following image shows the dynamic group's Terminal List page with an inactive group:



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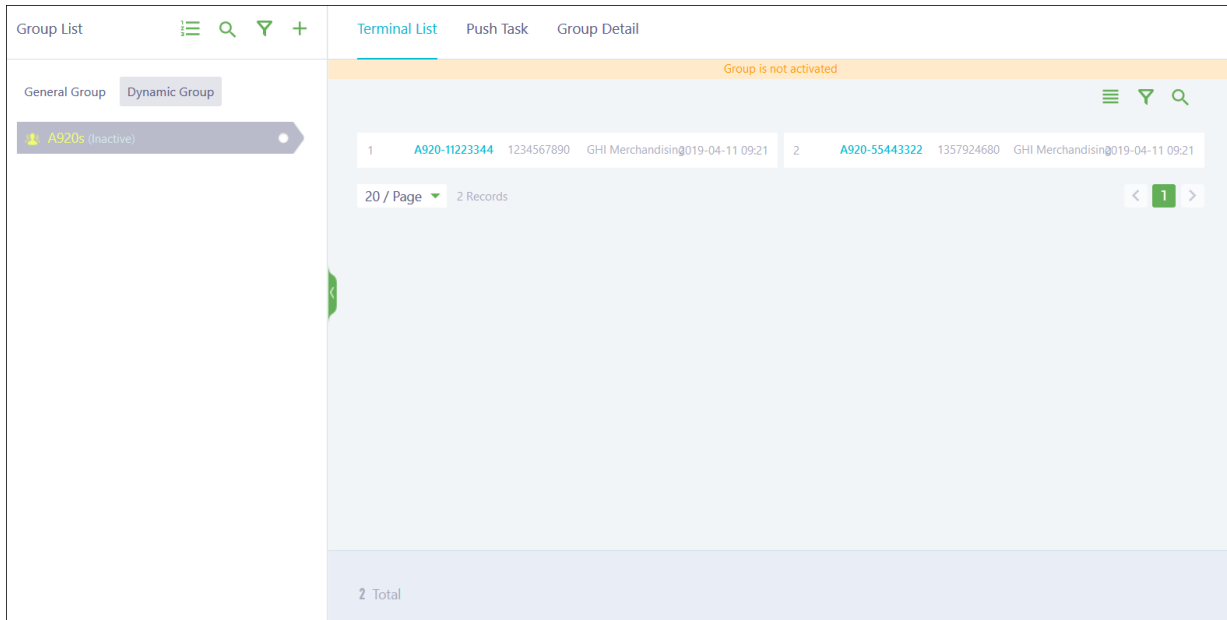
To manually activate the terminal group, click **Group Detail** and activate using the option within the more options icon (vertical ellipsis). A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the terminal group's Group Detail page:
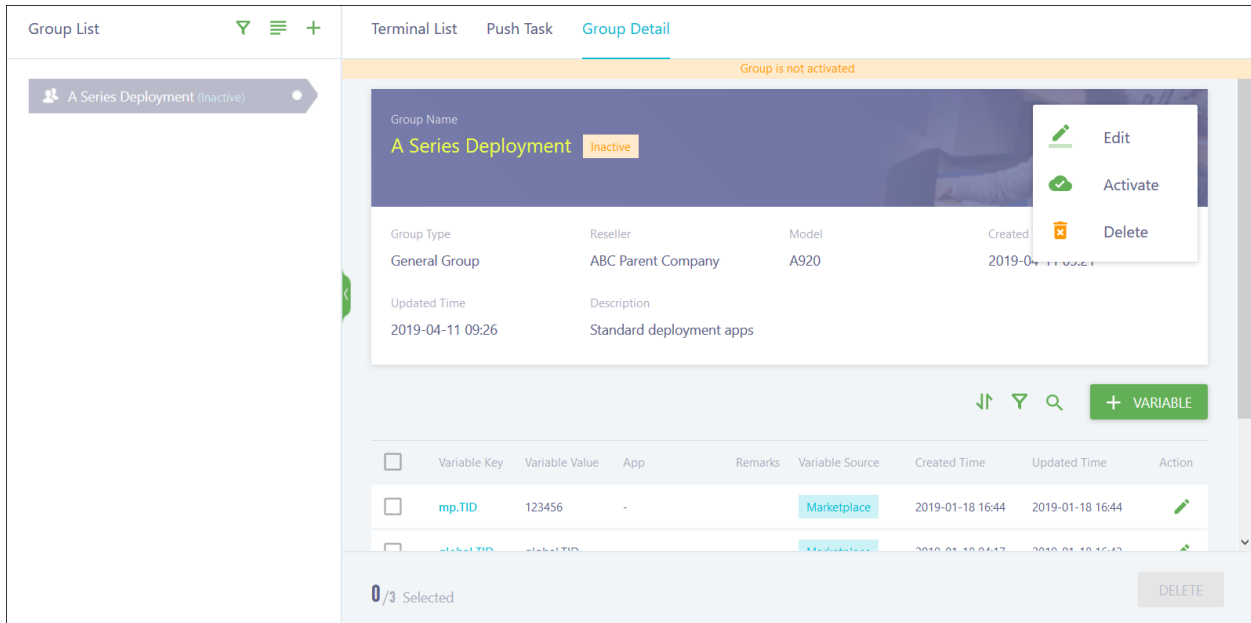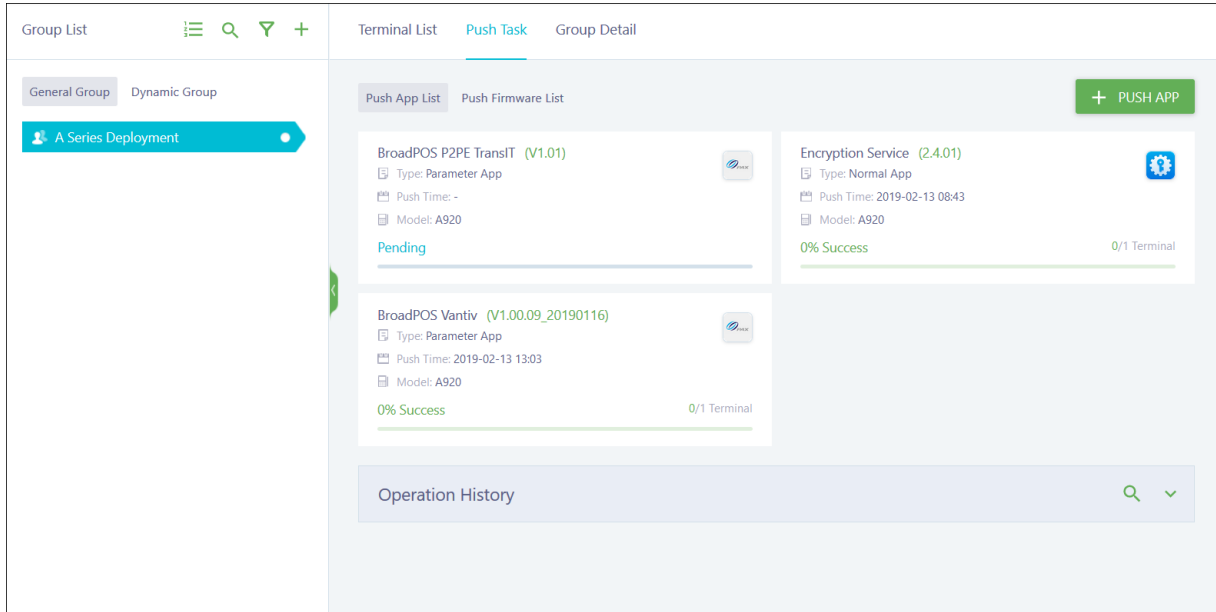


Once your terminal group is activated, you need to add the apps or firmware to the group. Click **Push Task** and then one of the push task lists: **Push App List**, **Push Firmware List**, **Push Package List**, or **Push Message List**. These tasks vary based on the terminal model selected. The following image shows the group's Push Task page:



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Click **+ PUSH MESSAGE** to send a message directly to all terminals in the terminal group.

Click **+ PUSH APP**, **+ PUSH FIRMWARE**, or **+ PUSH RESOURCE PACKAGE** to add the appropriate items to all terminals in the terminal group. All items are added in a Pending state. It is recommended that you leave any items that require parameters (parameter apps) in the Pending state. If you desire, you can activate apps without parameters (normal apps) or firmware at this time to have them automatically install when applied to a terminal. The following image shows the group's Push Task page:



For general groups, your terminal group is now ready to be added to terminals during creation (if automatically activating the terminal), or you can manually add a terminal to it using **+ TERMINAL** in the Terminal List.

**NOTE:**    Dynamic groups cannot be added to a terminal during creation. You also cannot add a terminal directly to a dynamic group in Group Management. Dynamic groups are populated with terminals automatically based on the criteria specified at creation. These terminals will automatically begin updating once you add push tasks.

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Terminals using your terminal group display in the Terminal List. The following image shows the general terminal group's Terminal List page:



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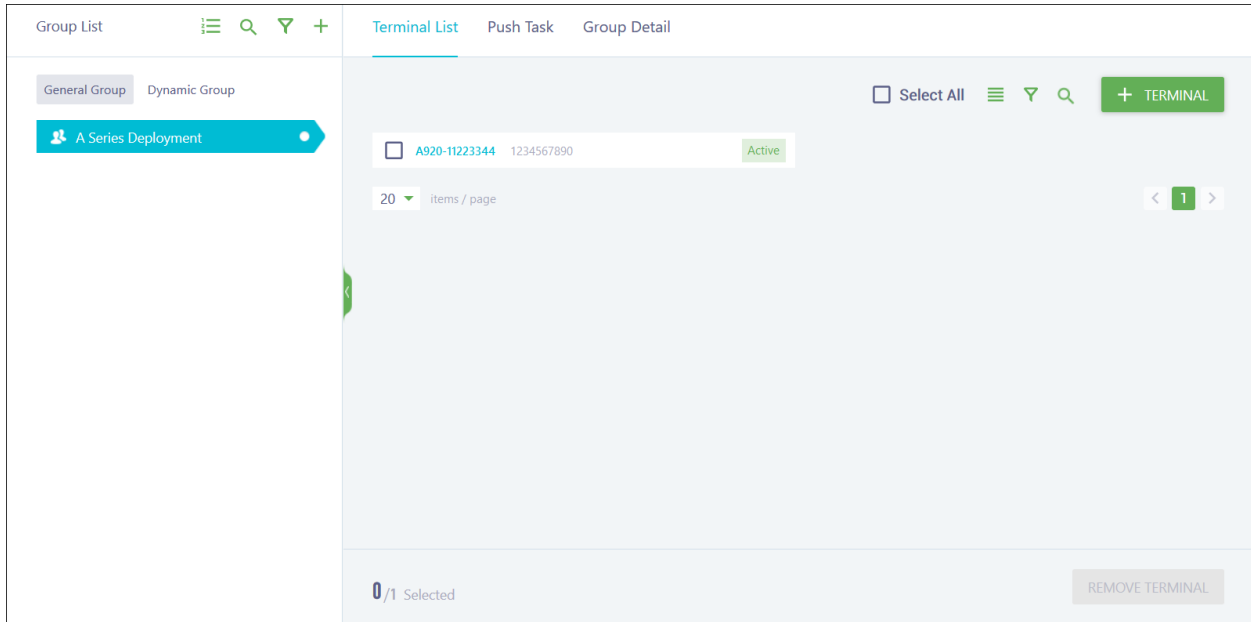
# 9   Push Templates

Push templates are designed to make it easier to add parameter apps to multiple terminals. The templates allow you to fill out your non-specific parameters one time and carry parameters over to another terminal. The templates are not restricted to the terminal model as they can be used on all models that the app can use.

If you are setting up multiple terminals in a similar manner and using a push template for most parameters, you can also enter variables for the parameter fields that would differ, such as Merchant Number or Username. The variable format for the parameter configuration should be #{variablekey}. Save and then download the variable template by clicking **IMPORT** > **Import Variable** > **VARIABLE TEMPLATE** from the Terminal List page. Fill out the template with the appropriate information and include the variablekey you set in the Variable Key (do not include the symbols). Save the file and after you have added the apps to the terminals using push templates, import the file on the Terminal List page. All terminals using those variables are updated accordingly.

---

**NOTE:**    You cannot add normal apps to push templates or activate a parameter app within a push template. The app can only be activated through the terminal in Terminal Management or through the app in Group Management, if the push template was added to a terminal group.

---

The following image shows the Push Templates page:

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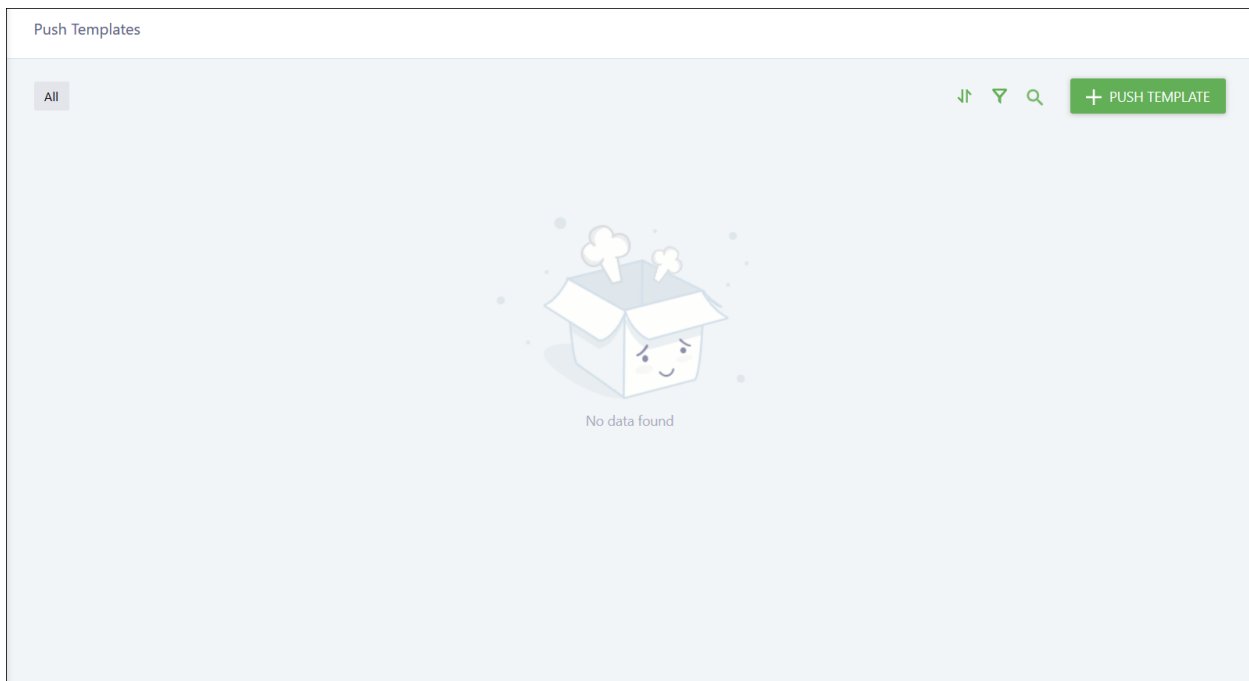
There are two ways to create a push template.

The first way is to click **+ PUSH TEMPLATE**. The following image shows the Push Template window:

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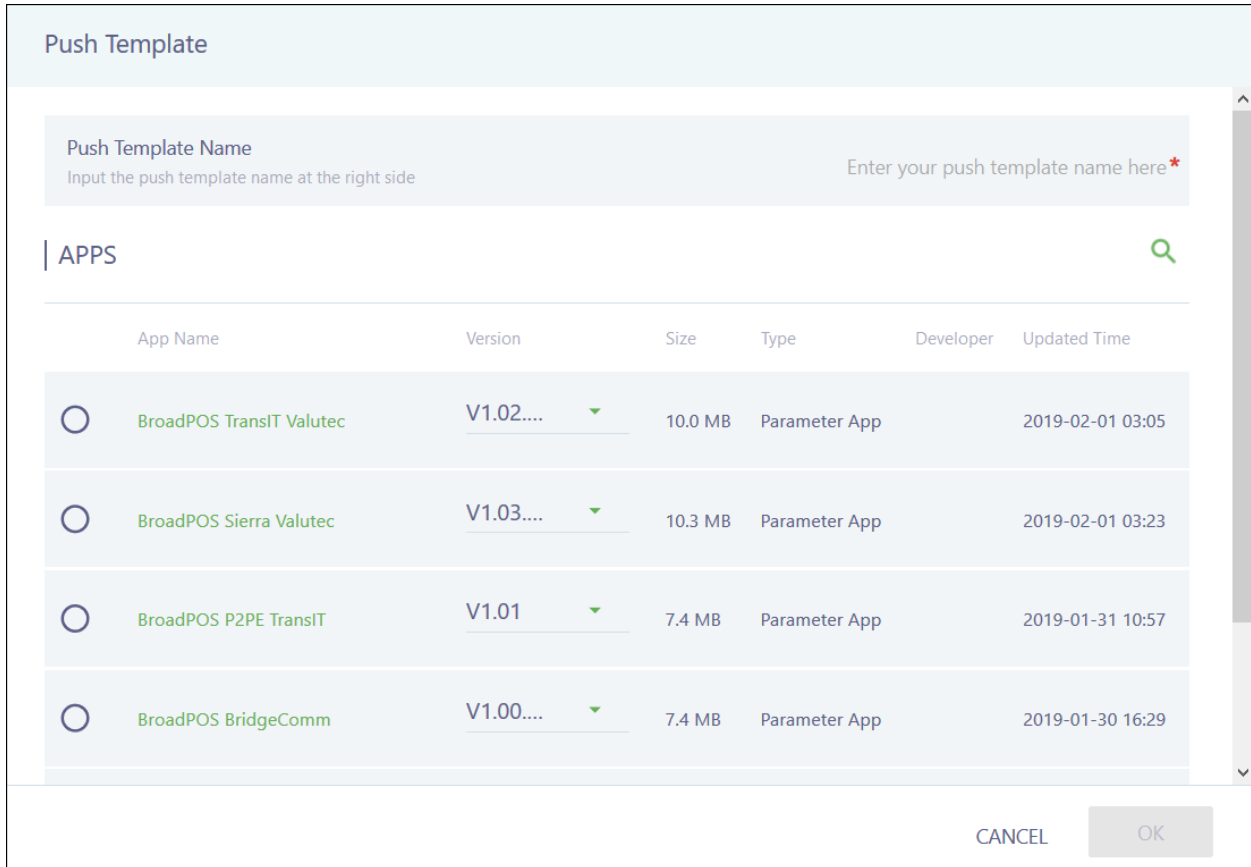
Enter the name for the push template and select a parameter app to add. Click **OK** to save or **CANCEL** to quit. Your app is added to your push template list. The following image shows the Push Templates page:
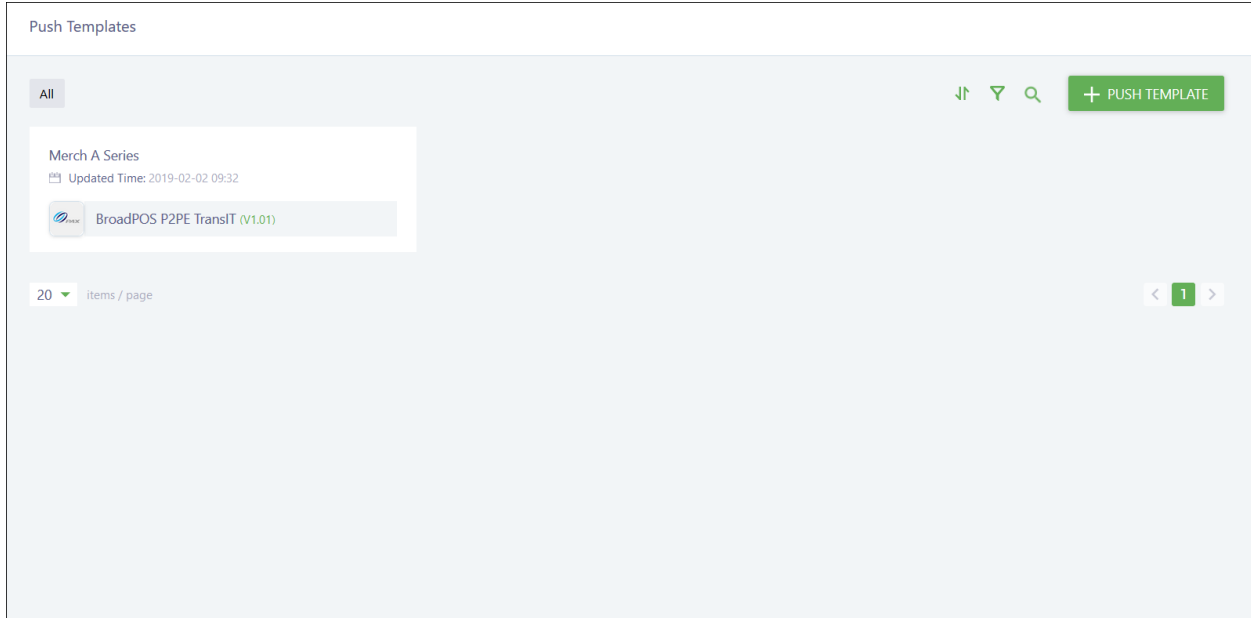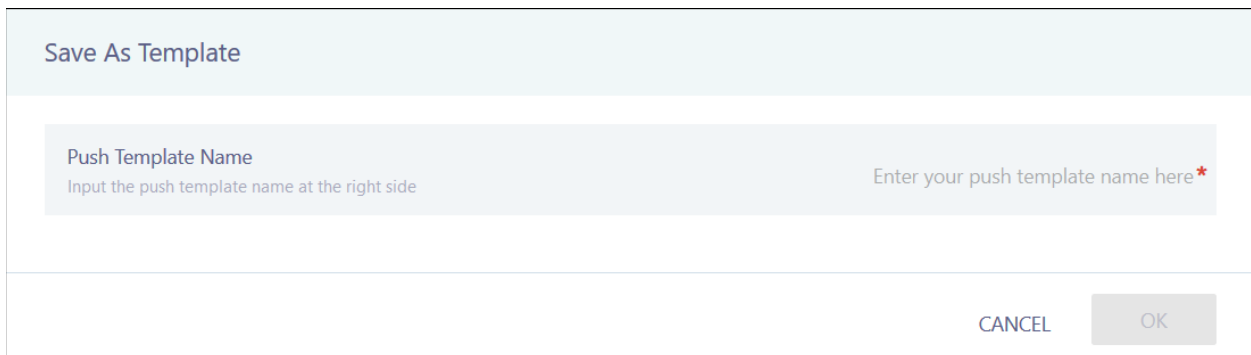


Next, you need to edit the parameters by clicking on the push template in your list to open the app parameters. After editing, click **SAVE** to save your updates. You can also delete the push template from this screen by clicking the trash can icon next to the app name. The following image shows the push template app's page:



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www.pax.us
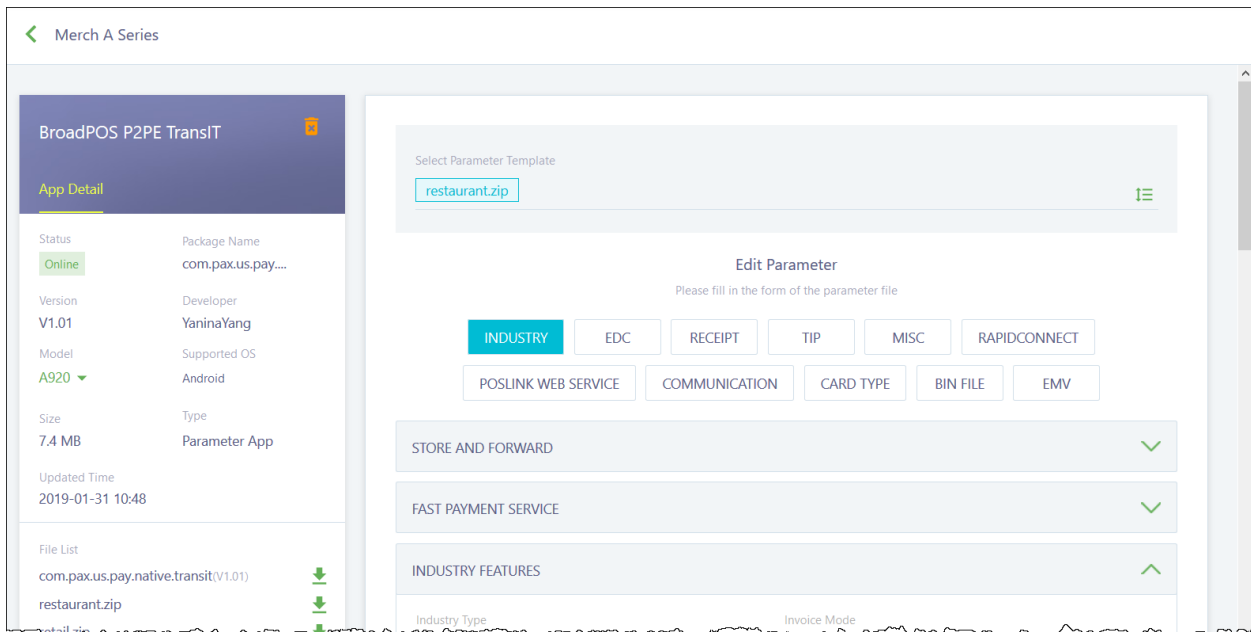
A second way to make a push template occurs when you activate an app on a terminal or terminal group. Click on a pending parameter app to view its push configuration settings. Edit any necessary parameters and set up a push template by clicking **SAVE AS TEMPLATE**. The following image shows the app's Push Configuration page:
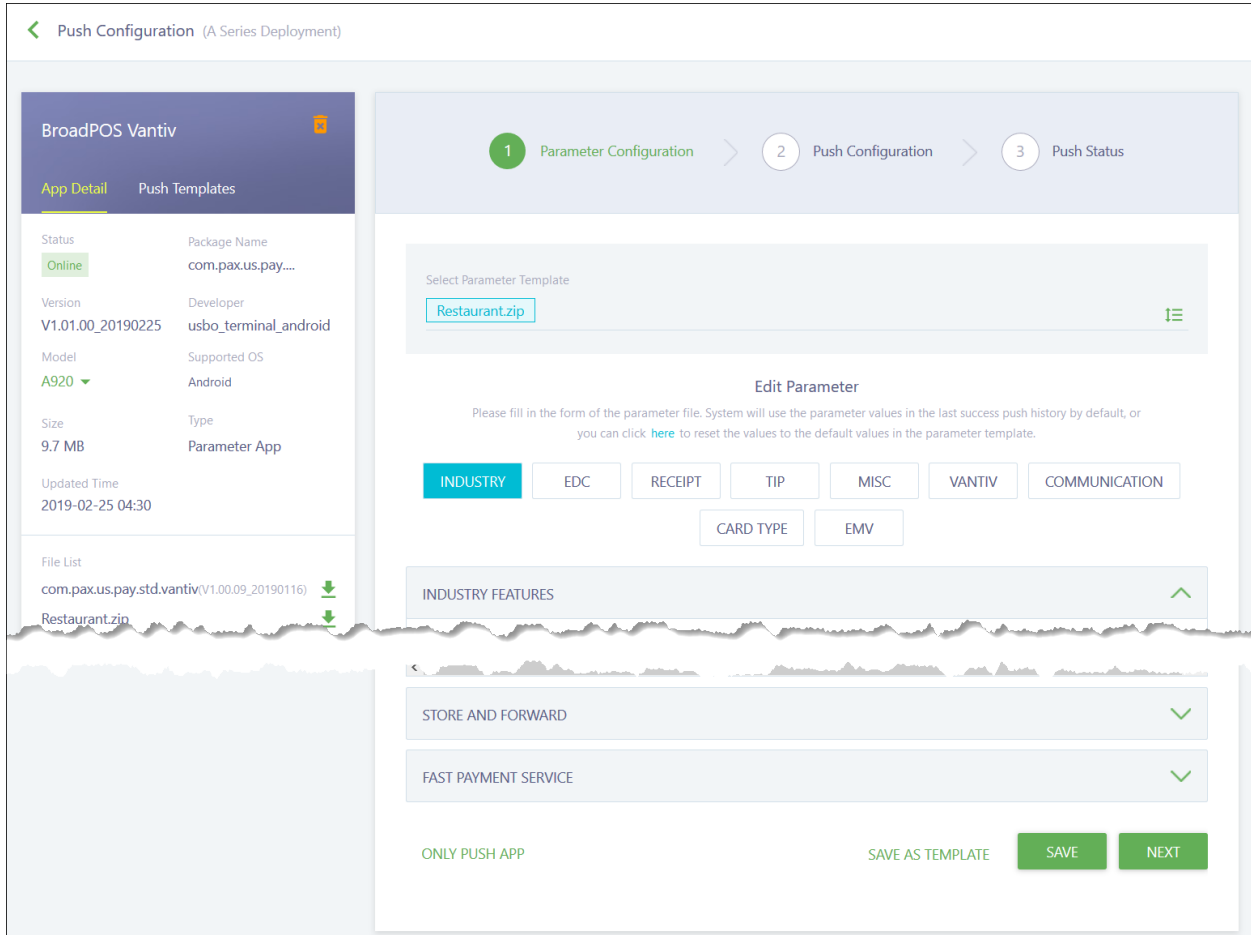


Enter the name for your push template and click **OK** to save or **CANCEL** to quit. Your new push template appears if you click **PUSH TEMPLATES** in the left sidebar. The following image shows the Save As Template window:



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# 10 General Settings

The bulk of your marketplace configuration takes place in General Settings.

## 10.1 Marketplace Information

Marketplace Information controls your base marketplace settings.

The following image shows the top of the Marketplace Information page:
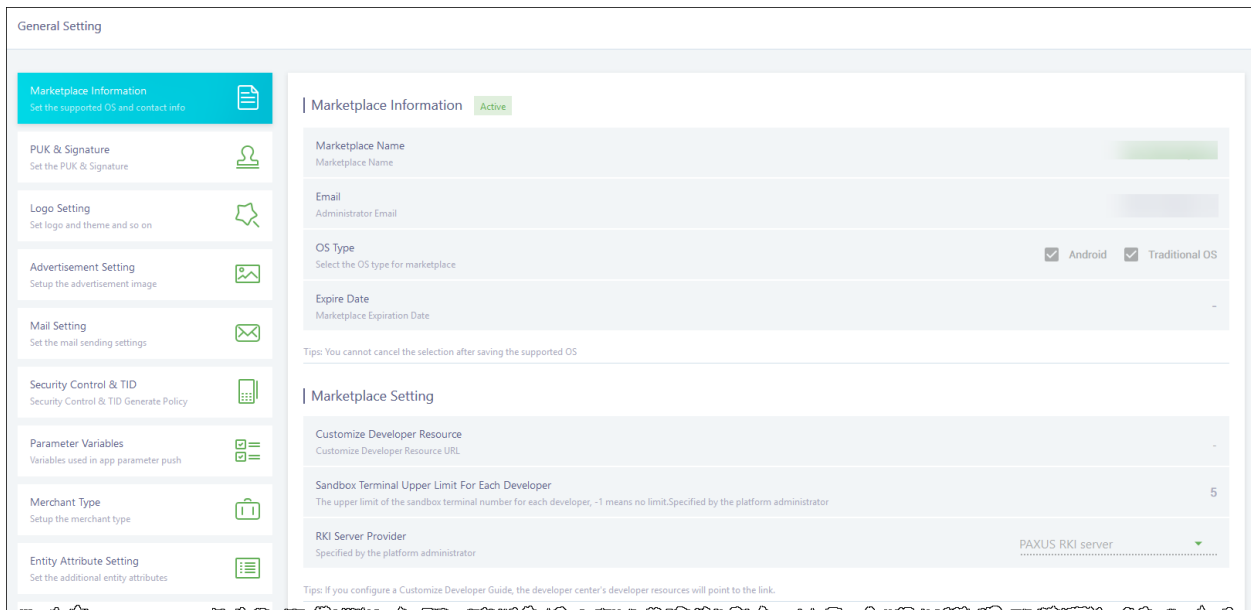


## 10.1.1 Marketplace Information

**Marketplace Name** controls the name of your marketplace.

**Email** shows the email for the Marketplace Admin. You cannot change this field.

**OS Type** shows the operating systems that your marketplace supports. You cannot change this field.

**Expire Date** shows the end date for your marketplace. After this date, your marketplace will no longer function. This field is currently not used and you cannot change it.

## 10.1.2 Marketplace Setting
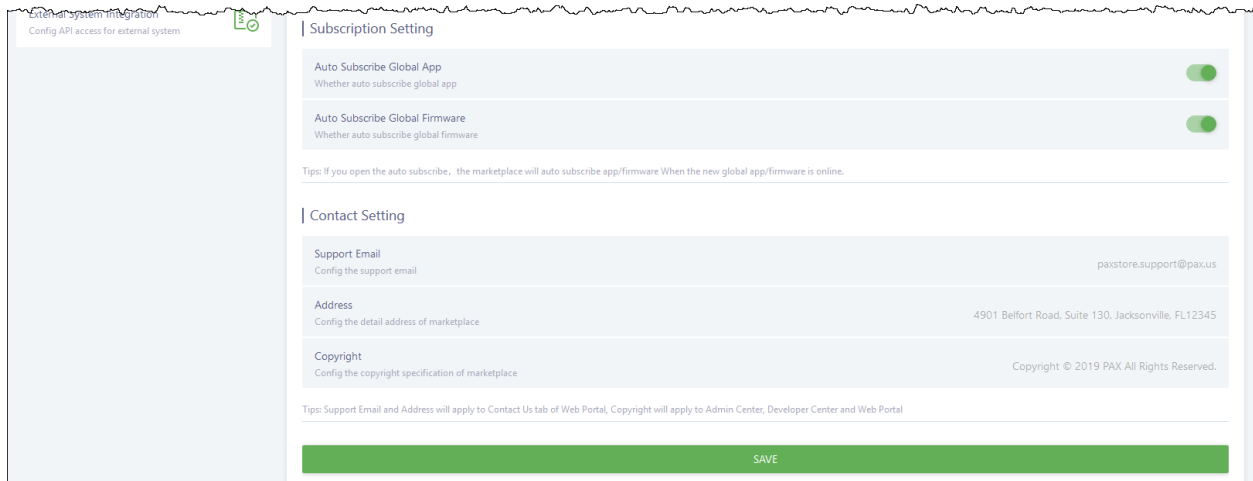
This section pertains to developers and is not configurable for Marketplace Admins. White labelled marketplaces do not have developers.

**Customize Developer Resource** sets a different URL for a developer guide.

**Sandbox Terminal Upper Limit For Each Developer** controls the maximum number of terminals a developer can use in the sandbox.

**RKI Server Provider** shows the server providing the cryptographic key injection for PIN debit and other data encryption keys, such as point-to-point encryption. This field is still in development. You cannot edit this field.

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The following image shows the bottom of the Marketplace Information page:



## 10.1.3  Subscription Setting

**Auto Subscribe Global App** controls whether a new version of an app will automatically be applied to all resellers and sub-resellers already subscribed to the app.

**Auto Subscribe Global Firmware** controls whether a new version of the firmware will automatically be applied to all resellers and sub-resellers already subscribed to the firmware.

## 10.1.4  Contact Setting

This section pertains to the contact information shown throughout PAXSTORE and is not configurable for Marketplace Admins. These fields contain the information for PAX, even if the marketplace is white labelled.

**Support Email** and **Address** show the contact information for PAX in the footer of the APPSTORE. It includes the email to contact support and PAX's physical address.

**Copyright** shows the copyright symbol, year of publication, and copyright owner's name in the footers of the Administrator Center, Developer Center, and APPSTORE.

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## 10.2 PUK & Signature

Do not edit the PUK & Signature page as changing these settings can cause your terminal to malfunction.

The following image shows the PUK & Signature page:
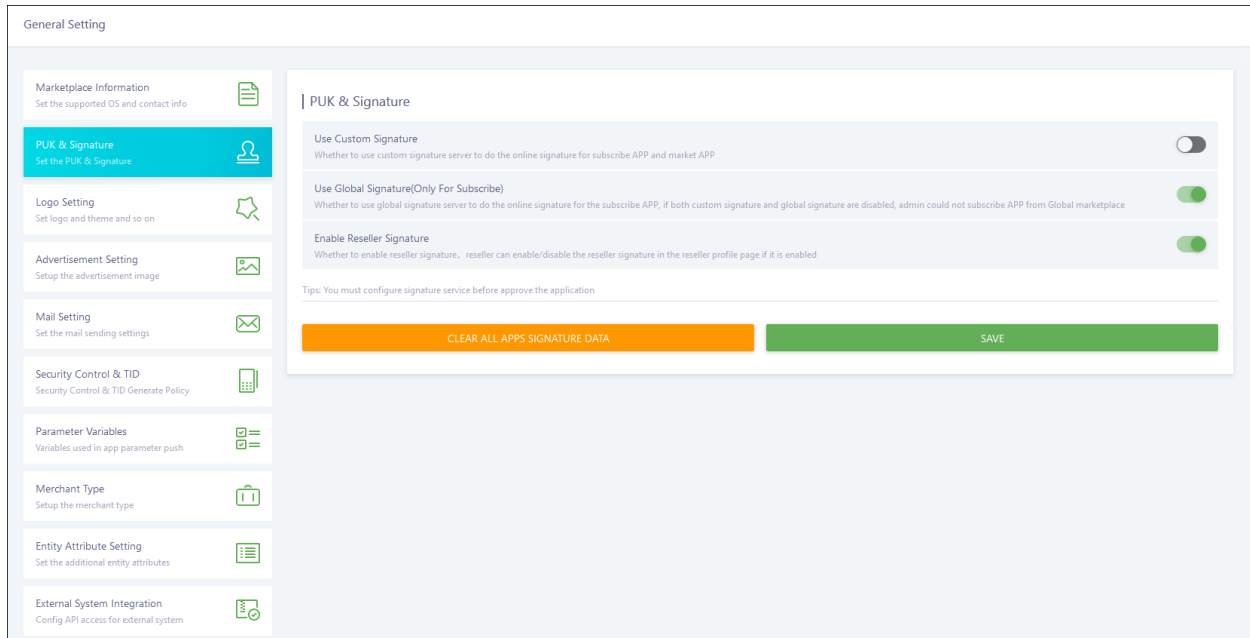


**Use Custom Signature** allows you to configure a Marketplace Signature file for your applications. This means that only applications signed by your organization work on the terminals.

**Use Global Signature** configures the marketplace to use the default PAX Signature for all applications.

---

**NOTE:** If both Use Custom Signature and Use Global Signature are disabled, no applications will be able to be used on the marketplace.

---

**Enable Reseller Signature** allows the individual reseller accounts on the marketplace to sign applications.

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## 10.3 Logo Setting

Logo Setting controls the logo used in the branding of your marketplace. These fields accept png, jpg or jpeg.

The following image shows the Logo Setting page:
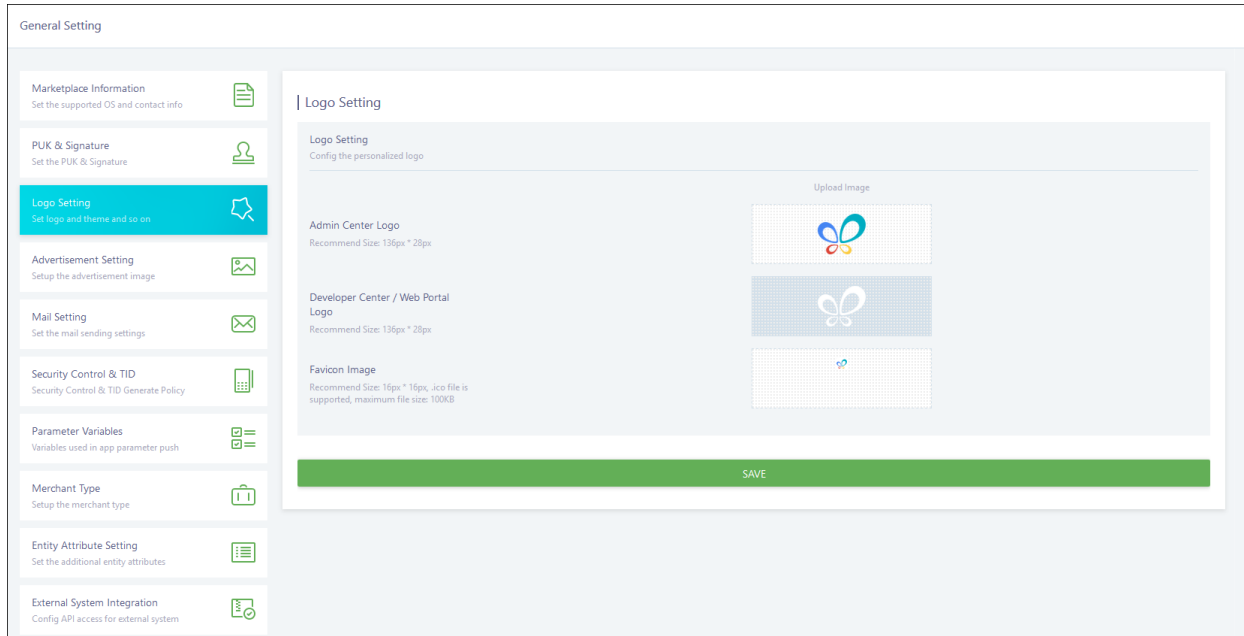


**Admin Center Logo** sets the logo that appears in the top left next to your marketplace name when you view the Administrator Center. For best results, it is recommended that your logo be 136 px by 28 px with a white or transparent background.

**Developer Center/Web Portal Logo** sets the logo that appears in the top left next to your marketplace name when you view the Developer Center and APPSTORE. For best results, it is recommended that your logo be 136 px by 28 px with a transparent background.

**Favicon Image** sets the logo that appears in the address bar and tabs of your browser, and bookmarks for your marketplace. For best results, it is recommended that your logo be 16 px by 16 px and no greater than 100 KB in size. This field also accepts ico files.

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## 10.4  Advertisement Setting

Advertisement Setting controls the logo used in the branding of your marketplace.

The following image shows the top of the Advertisement Setting page:
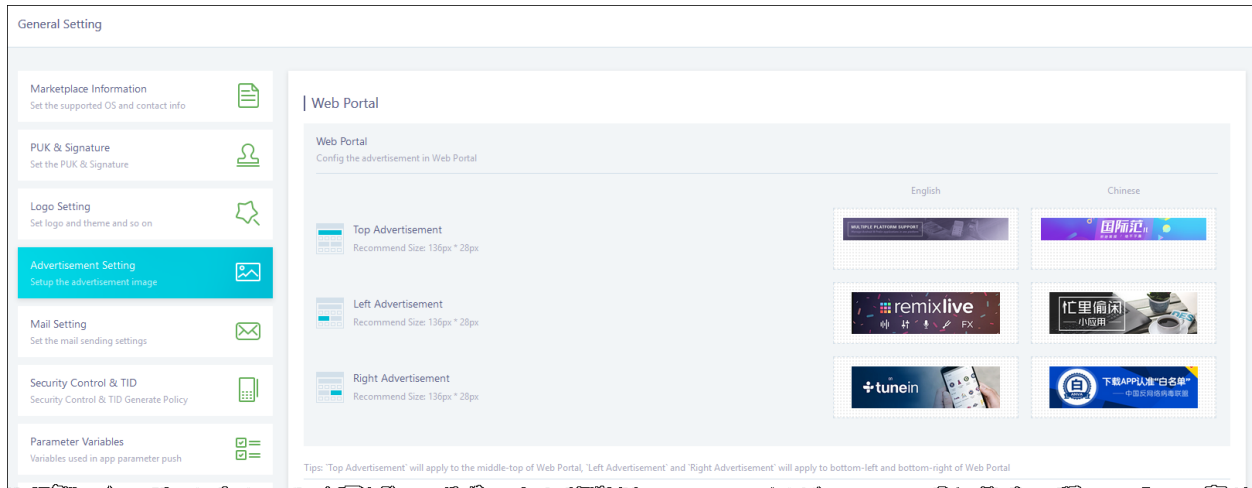


### 10.4.1  Web Portal

Web Portal configures the top, left, and right advertisements for the APPSTORE web portal. You can set a different image to be used for English and Chinese.

The following image shows the top of the Advertisement Setting page:
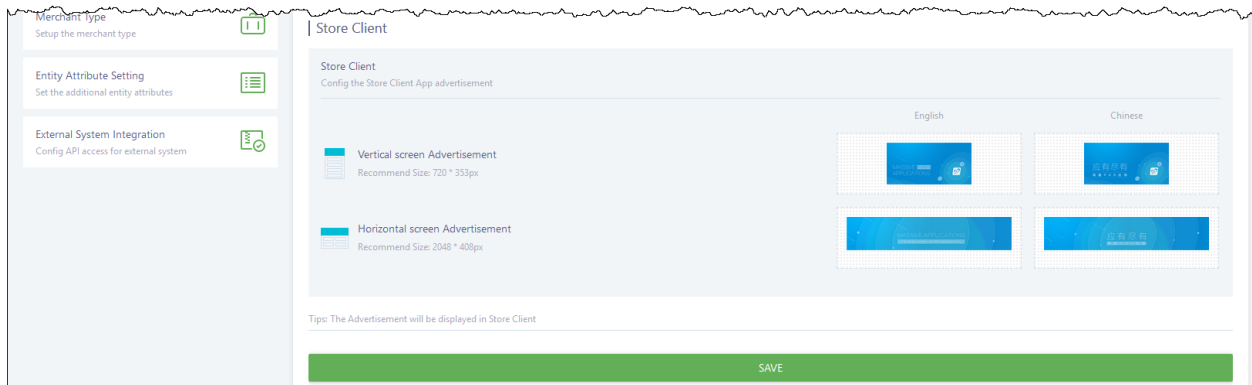


### 10.4.2  Store Client

Store Client controls the vertical and horizontal background advertisements for the web client. You can set a different image to be used for English and Chinese.

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## 10.5 Mail Setting

Mail Setting shows you the email templates that can be sent to your users. Templates are not configurable. Each section contains a toggle to enable or disable those email communications. Unless you plan on having merchants access the Administrator Center, you should disable all these communications.

The following image shows the top of the Mail Setting page:
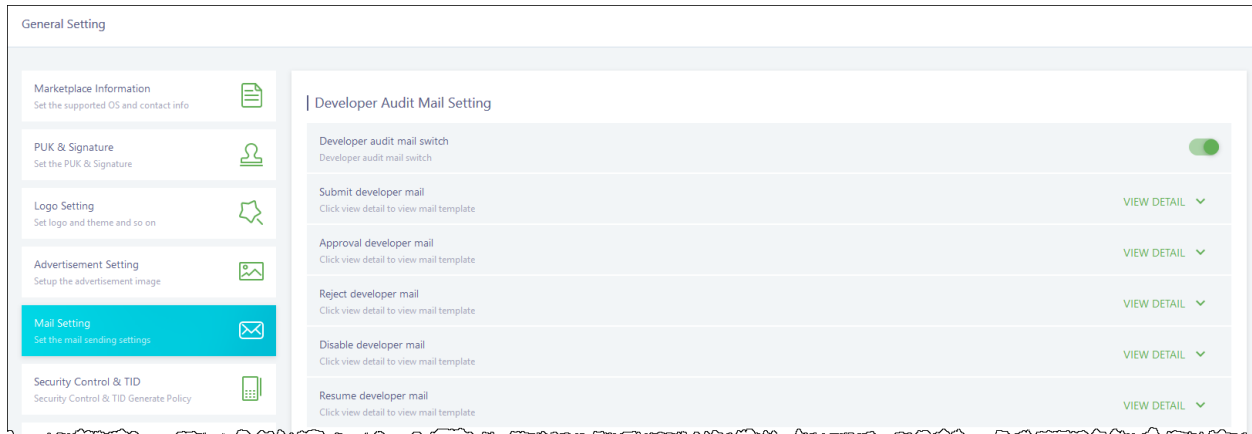


**Developer audit mail switch** controls if developer emails are sent. Developers cannot be added to your marketplace, so it is recommended you disable this field.

The following image shows the middle of the Mail Setting page:
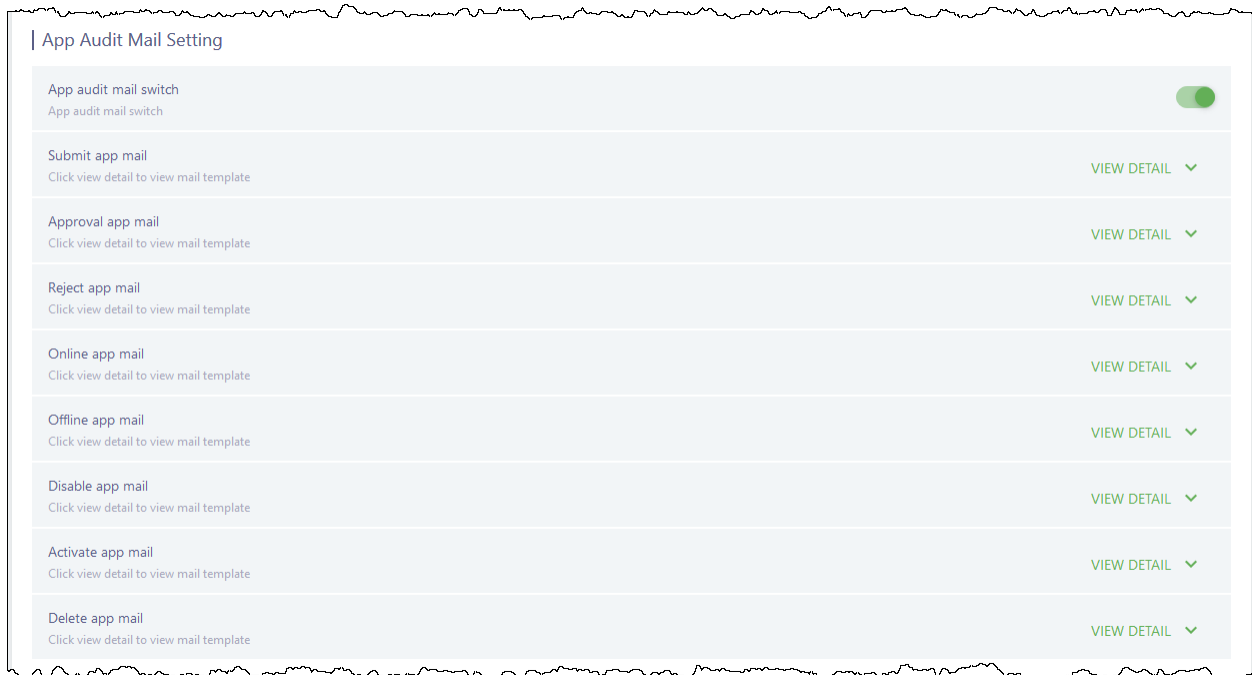


**App Audit Mail Switch** controls if app submission emails are sent. Marketplace Admins cannot review, approve, or deny app submissions, so it is recommended that you disable this field.

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The following image shows the bottom of the Mail Setting page:



**Merchant mail switch** controls whether emails are sent to merchants. Merchant emails should only be sent if you want merchants to have access to the Administrator Center. If you do not want your merchants to have access, it is recommended you disable this field.

## 10.6  Security Control & TID

Security Control determines the security settings for your marketplace and its terminals. Changing these settings could cause your terminals to malfunction. Use caution when updating.

The following image shows the top of the Security Control & TID page:
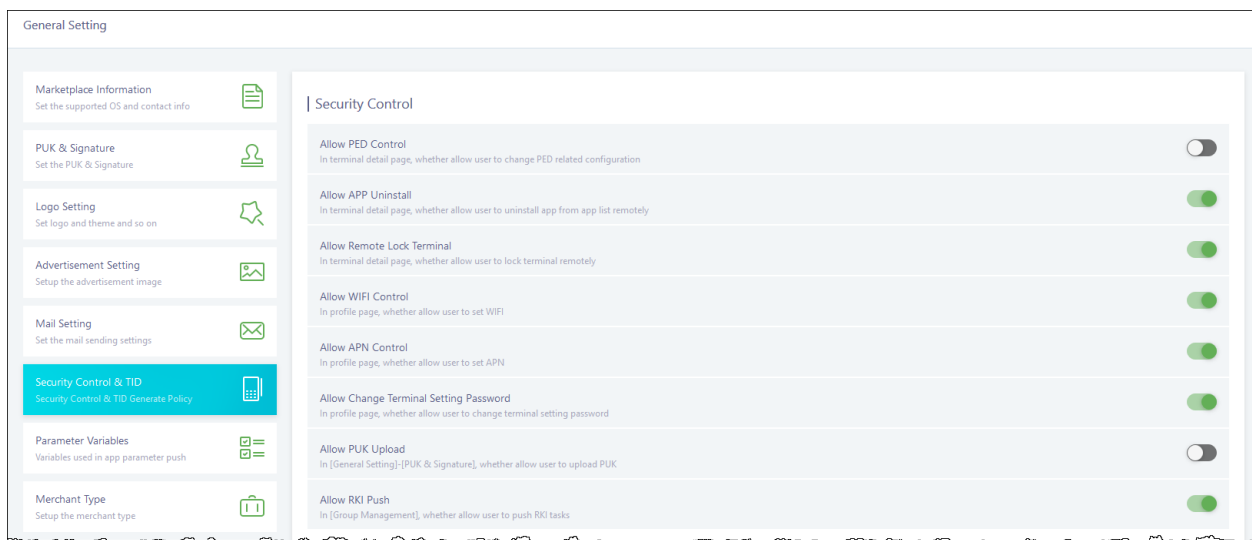


### 10.6.1  Security Control

Security Control determines the security settings for your marketplace. Changing these settings could cause your terminals to malfunction. Use caution when updating.

**Allow PED Control** is not applicable to North America and should never be adjusted. Your terminals will lock and be unstable until PAX reprograms them.

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**Allow APP Uninstall** determines whether you can uninstall the applications from the terminal detail page.

**Allow Remote Lock Terminal** determines whether the Remote Lock function on the Terminal Detail page appears. Remote Lock allows you to prevent the terminal from functioning until unlocked.

**Allow WiFi Control** determines whether you can configure the WiFi information on a terminal using PAXSTORE in the Profile tab.

**Allow APN Control** determines whether you can configure the APN information on the terminal using PAXSTORE in the Profile tab.

**Allow Change Terminal Setting Password** determines whether individual resellers can configure default passwords for the Android portion of the terminal.

---

NOTE:    If the password is forgotten, you cannot recover it and you will never be able to access network settings on your terminal.

---

**Allow PUK Upload** determines whether you can upload a PUK on the PUK & Signature page. Allowing a PUK to be uploaded could result in your terminal malfunctioning.

The following image shows the bottom of the Security Control & TID page:

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## 10.6.2  TID Generate Policy – Android / Traditional OS

**TID Generate Policy** controls how a TID is generated for a terminal when using an Android operating system or traditional terminal operating system.

**TID Length** controls the length of the TID that is generated when a terminal is created. It can be set to a minimum of 8 digits up to a maximum of 16 digits.

**Allow Alphabet** controls whether the TID can contain alphabet characters.

**Allow Number** controls whether the TID can contain numbers.

---

**NOTE:**     Allow Alphabet, Allow Number, or both must be enabled to generate a TID.

---

**TID Prefix** controls whether a TID is generated with a custom prefix at the beginning. This prefix counts as part of the total TID Length.
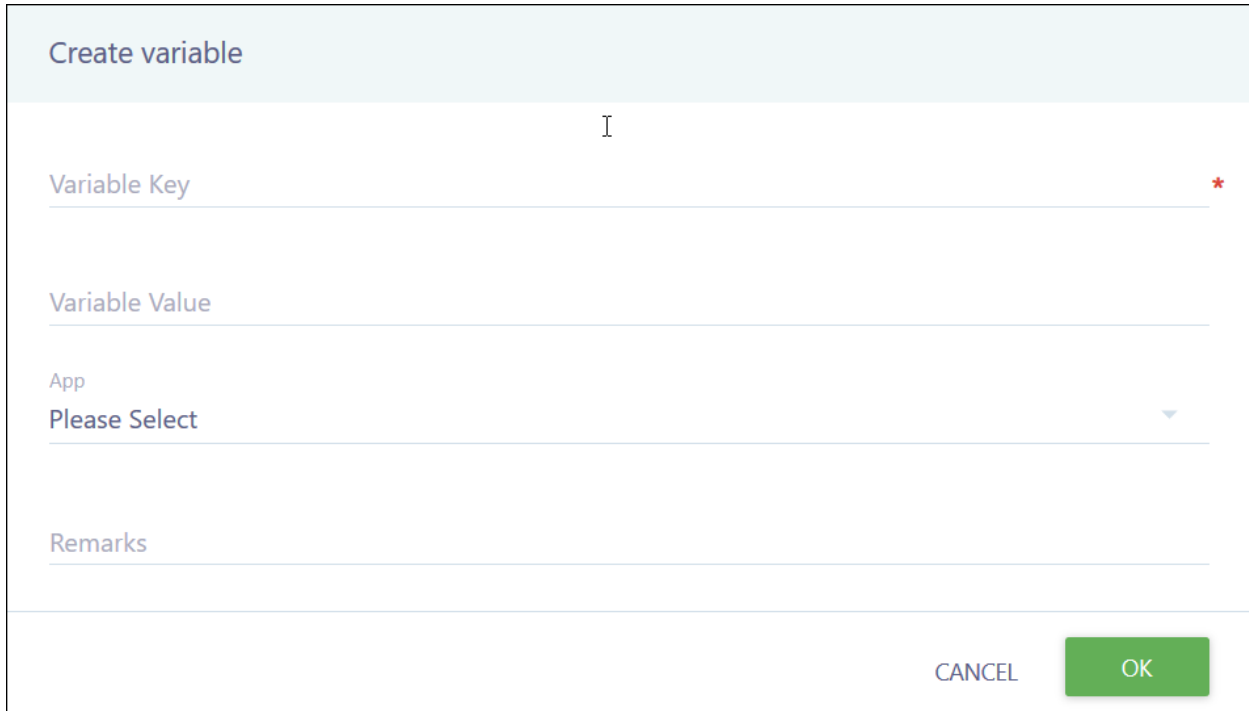
## 10.7  Parameter Variables

Parameter Variables allows you to set global parameter variables for your marketplace. These variables allow you to replace a specific value with a key for a parameter within an app for the entire marketplace so you and your resellers can automatically apply an enforced value to a parameter or later perform a mass update using a variable template. You and your resellers would enter #{variablekey} in the parameter field of the app when adding apps to terminals with variablekey being the Variable Key field you enter when creating a new variable.

The following image shows the Parameter Variables page:

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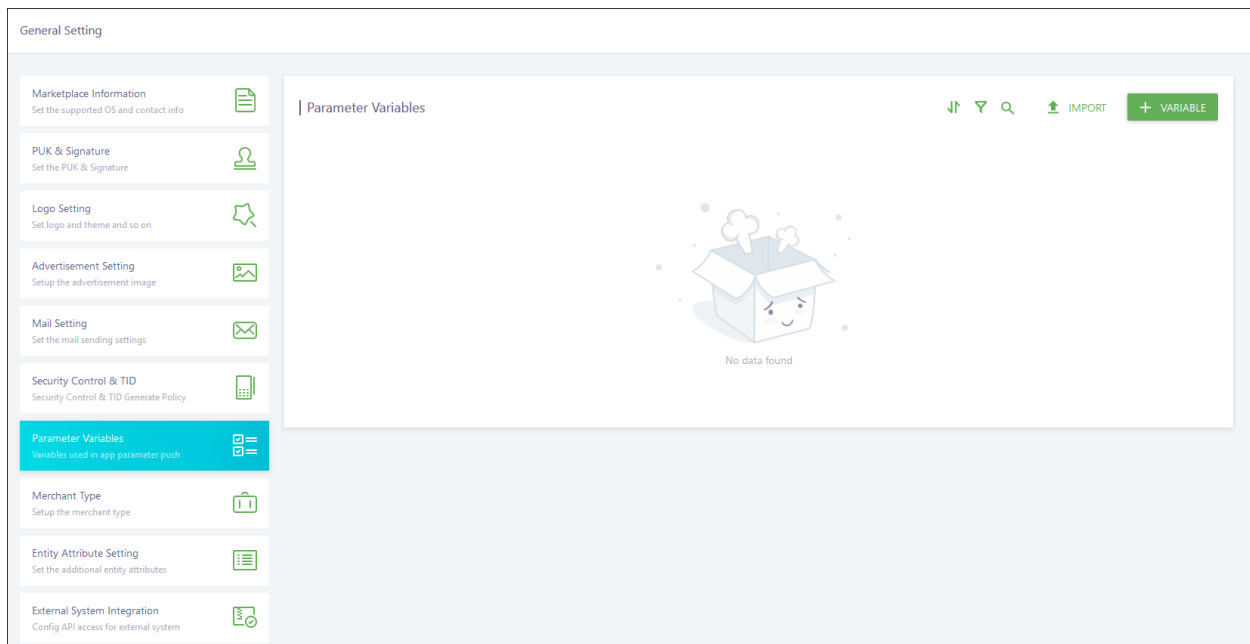
Click **+ VARIABLE** to create a new global variable. The following image shows the Create variable window:



Complete the following fields:

- **Variable Key** – The keyword used to pass a value to the parameter.
- **Variable Value** – The value being passed to the parameter. Do not add a value if this information changes based on merchant type, processor, app, etc.
- **App** – The app to apply the variable to. This app is selected from your entire list of subscribed parameter apps. Unsubscribed and normal apps will not appear in this list.
- **Remarks** – Additional information, such as a comment about the purpose of the variable or instructions.

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## 10.8 Merchant Type

Merchant Type allows you to create global merchant types for your marketplace. You can edit or delete any merchant type. New marketplaces are now created with the following merchant types set up by default: Retail w/Tip, Restaurant, Retail, Lodging, Business to Business, Utility, MOTO, eCommerce, Public Sector, Petroleum, Fast Food, Convenience, QSR, and Government.

The following image shows the Merchant Type page:
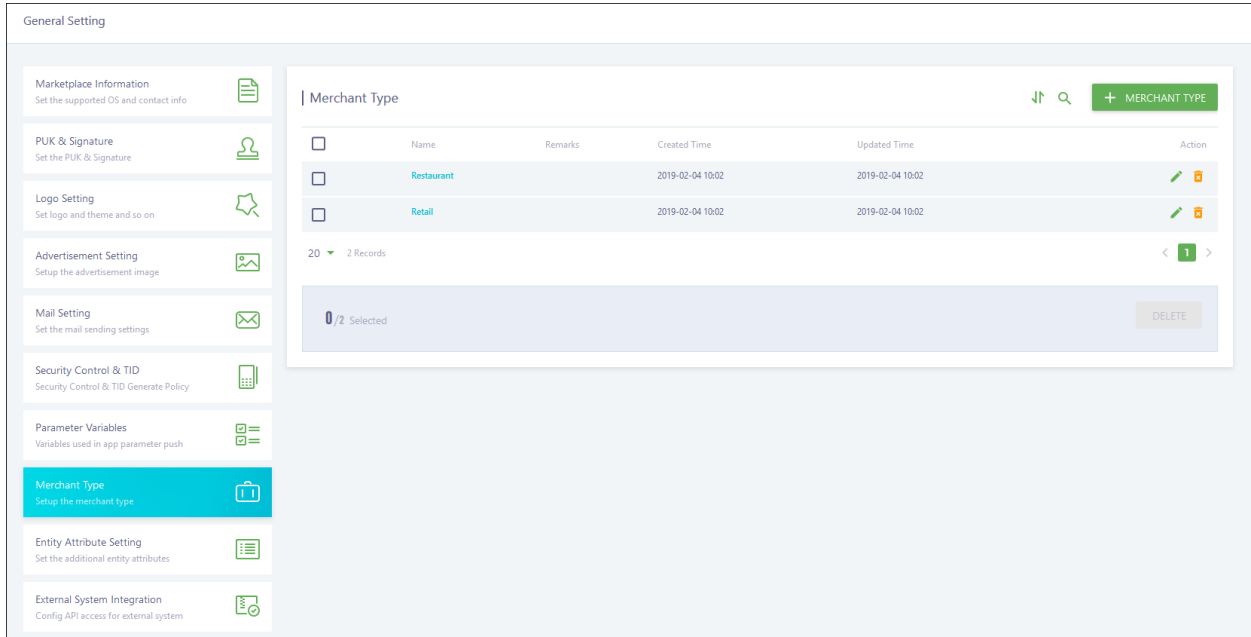


Click **+ MERCHANT TYPE** to create a new global merchant type. The following image shows the Add Merchant Type window:



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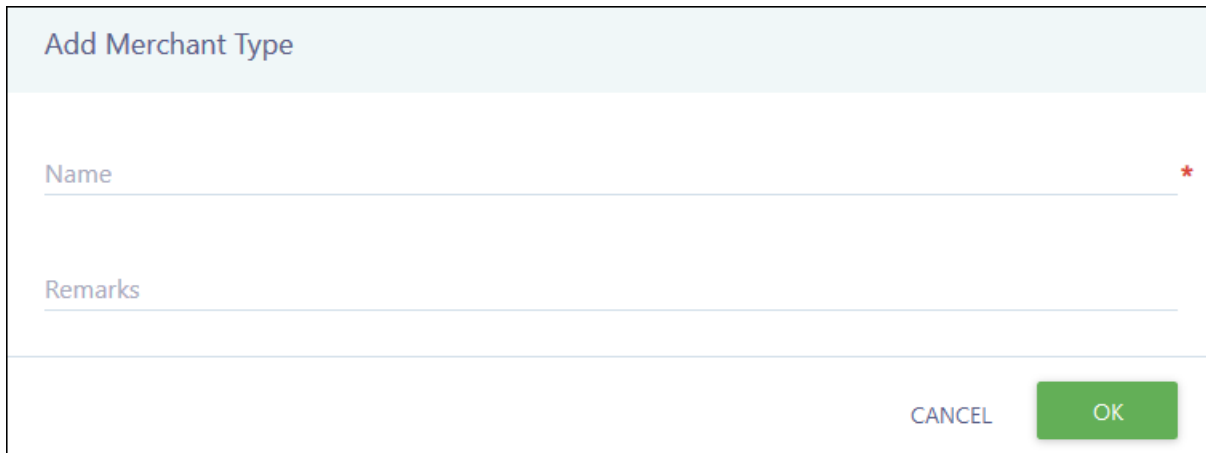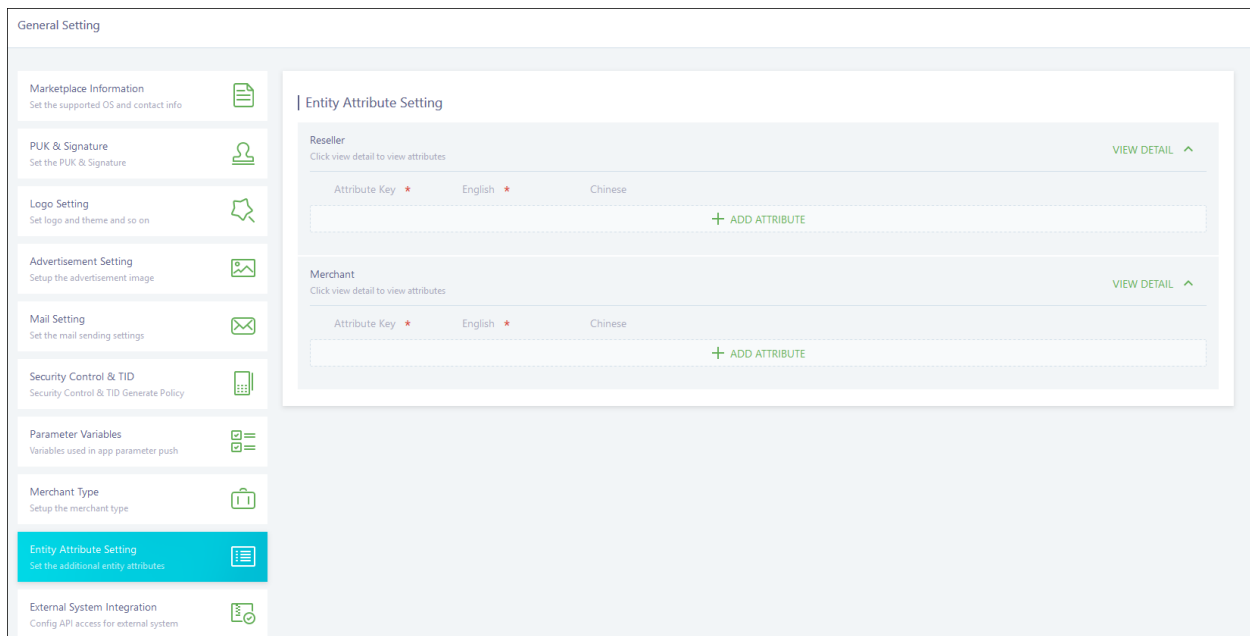
Complete the following fields:

- **Name** – The name used to classify the business by its type of goods or services provided. For example, you can create a merchant type of Bar to provide greater clarification for the business than applying the merchant type of Restaurant.
- **Remarks** – Additional information, such as a comment about the purpose of the merchant type or clarification on when to use this merchant type.

## 10.9 Entity Attribute Setting

Entity Attribute Setting allows you to create global attributes for your marketplace. These attributes are additional information fields that must be filled in when creating a new reseller/sub-reseller or merchant.

The following image shows the Entity Attribute Setting page:

Click **+ ADD ATTRIBUTE** to create a new required global attribute when creating a reseller/sub-reseller or merchant. The following image shows the Edit Attribute window:



Complete the following fields:

- **Attribute Key** – The key used to define the attribute in PAXSTORE.
- **Attribute Label** – The friendly name for the attribute that displays when creating a reseller/sub-reseller or merchant. It should describe the type of information you want the creator to provide.
- **Input Type** – Controls the type of input that must be completed for this attribute. The available options are Text (entering characters) or Selector (choosing from a dropdown).
- **Required** – Controls whether the attribute must be completed when creating a reseller/sub-reseller or merchant.
- **Min Length** – Only appears if Text is the Input Type. The minimum number of alphanumeric characters that must be entered for this attribute.
- **Max Length** – Only appears if Text is the Input Type. The maximum number of alphanumeric characters that can be entered for this attribute.

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- **Regular Expression** – Only appears if Text is the Input Type. Allows you to specify the format of valid values for this attribute.
- **Select Options(JSON Format)** – Only appears if Selector is the Input Type. The options you want to show in the dropdown list for this attribute.

## 10.10  External System Integration

External System Integration controls whether an external API can access your marketplace, displays the access information for the API to use, and resets the information when needed. This feature is currently in development as PAX is creating a web API to allow companies to write software to pull or push data from PAXSTORE.

The following image shows the External System Integration page:
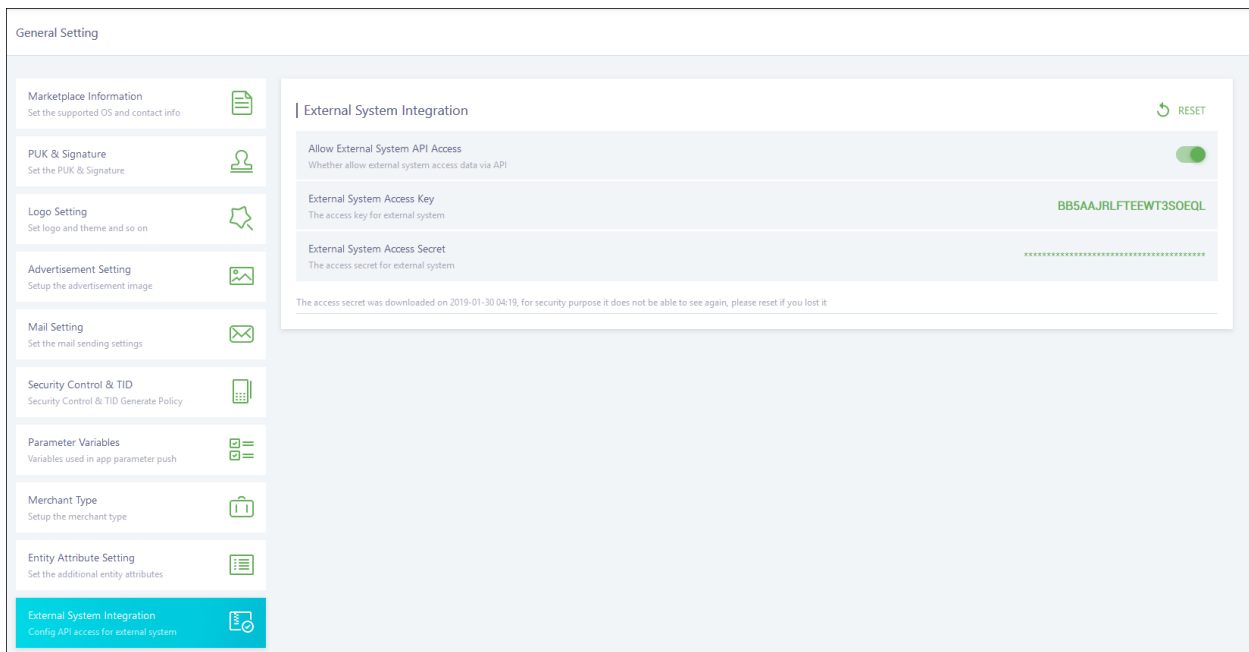


**Allow External System API Access** controls whether an external system can assess PAXSTORE's data by using an API.

**External System Access Key** shows the access key the external system must use to connect to your marketplace to pull or push data. This acts similarly to a username for the external system.

**External System Access Secret** masks the access secret code generated for the external system to use to connect to your marketplace. This acts similarly to a password for the external system.

---

**NOTE:**     If you forget your access secret, you must reset it.

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# 11 User Management

User Management shows the Reseller Admin a list of all users within the Administrator Center and basic functions for managing a user.

Users can have one of five statuses:

- **Registered** – The user has not activated his or her account using the registration link in the welcome email yet. You can resend the welcome email as needed by hovering over a Registered user's row and click **SEND REACTIVATION EMAIL**.
- **Active** – The user can log in at any time. You can reset an active user's password as needed by hovering over an Active user's row and click **RESET PASSWORD**.
- **Locked** – The user has attempted to log in with incorrect credentials multiple times and cannot log in anymore.
- **Suspended** – The user has not logged in for 90 days and cannot log in anymore. Reseller Admins cannot reactive a suspended account. Contact your PAX rep to reactivate suspended accounts.
- **Disabled** – The user has been disabled and cannot log in anymore.

The following image shows the User Management page:



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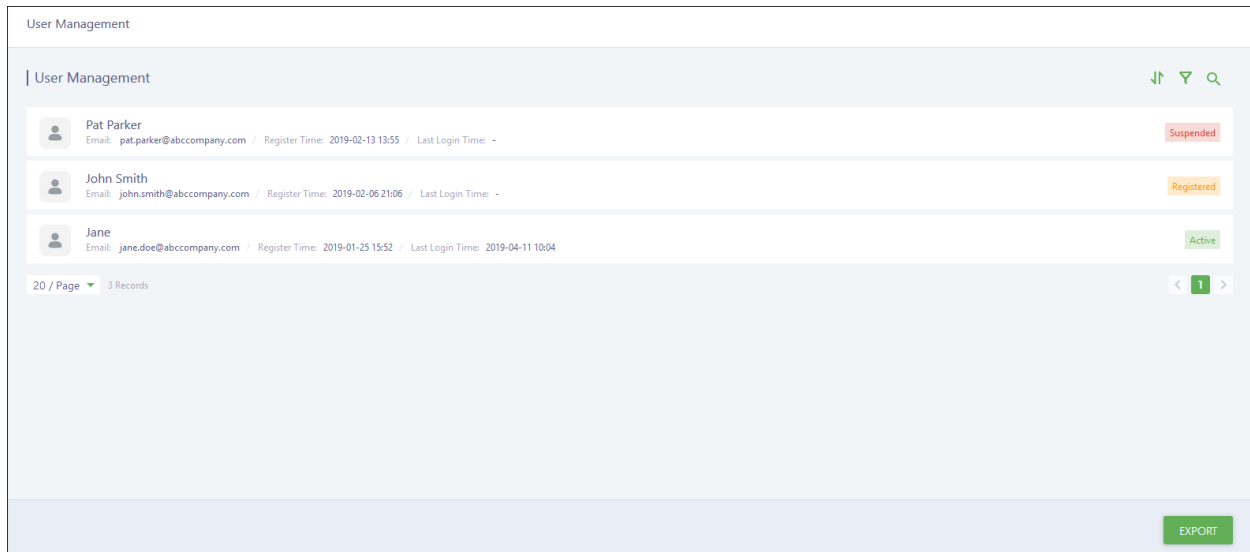
Click on a user's row to open the User Detail and view the basic information on file for a user. You can also quickly delete all user roles, except Administrator, from this window. To add user roles or delete a user, you must use Role Management. The following image shows the User Detail window:

## User Detail

**Pat Parker**

| | |
|---|---|
| Email | pat.parker@abccompany.com |
| Phone No. | - |
| Address | - |

**User Roles**

Operator
BroadPOS Marketplace - ABC Parent Company

Merchant
BroadPOS Marketplace - DEF Sub Ltd - GHI Merchandising

| | |
|---|---|
| Register Time | 2019-02-13 13:55 |
| Last Login Time | - |

CLOSE

# 12 Role Management

Role Management provides the Reseller Admin control over assigning users access to specific functions. All reseller accounts come with the Administrator, Operator, Viewer and User Administrator roles already created.

**NOTE:** Users cannot edit or delete their own profile. Users cannot delete the default roles.

The following image shows the initial Role Management page:
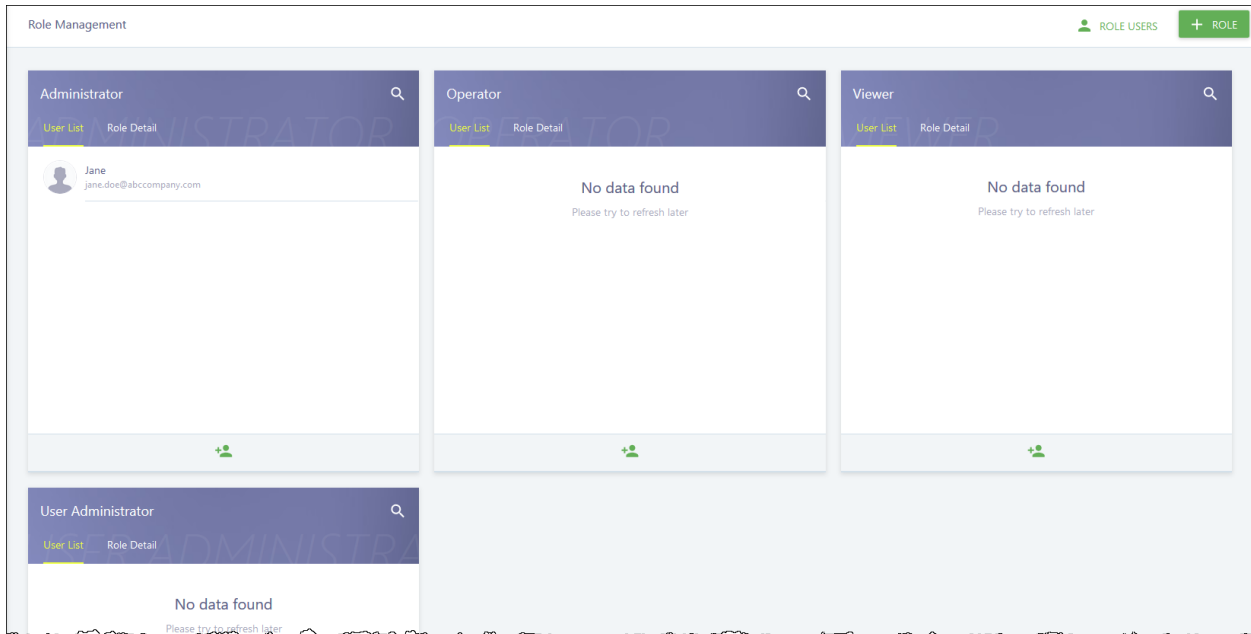


## 12.1 Create a New User

To create a new user, click the person icon at the bottom of a role. The following image shows the Add User Role window:



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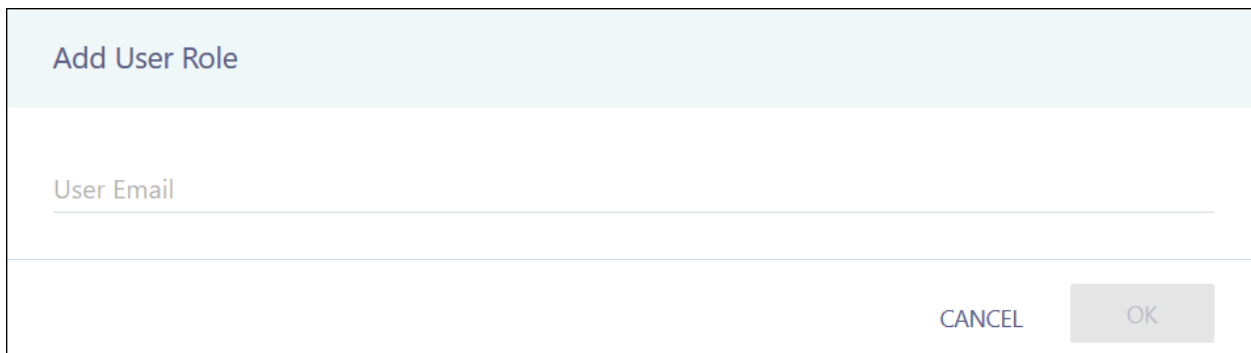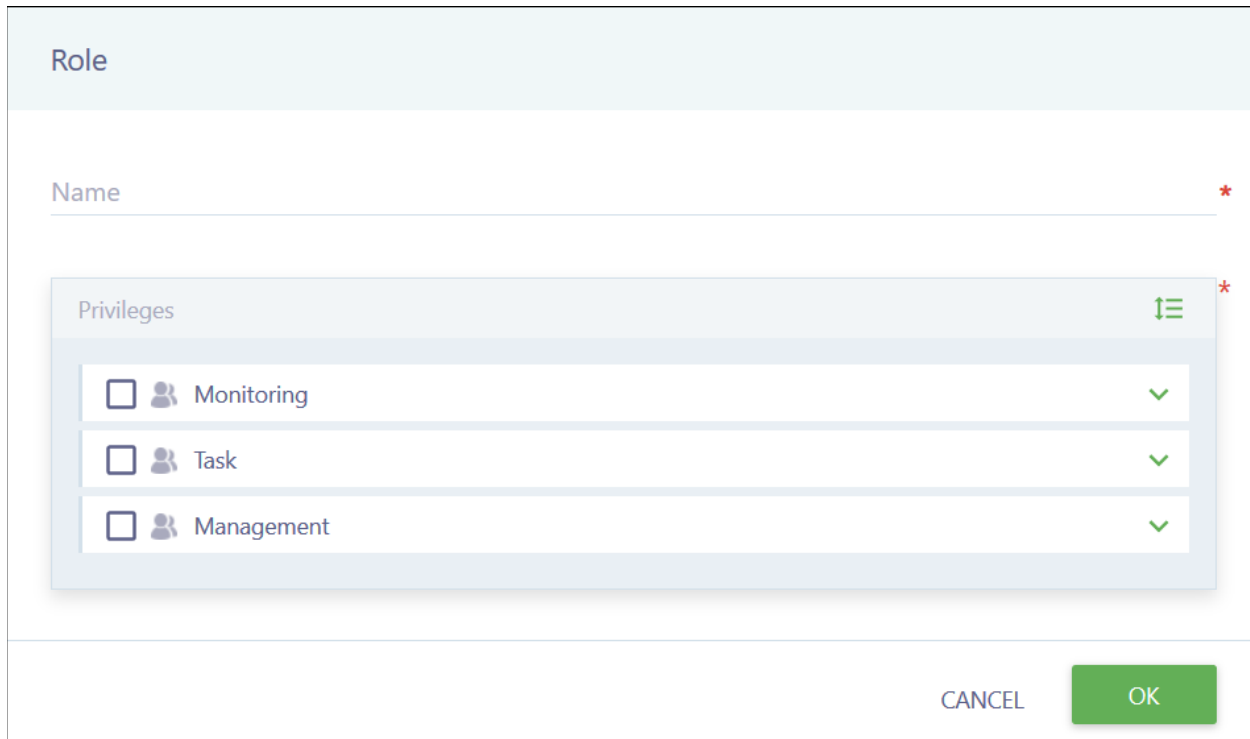
Enter the new user's email address. If the user already exists for your company, the user account will display and be selected. Click **OK** to create the user or **CANCEL** to quit. An activation email is sent to the entered email address, and the user is added to the role on the Role Management page. The user's name will not update until their account has been activated. The following image shows the Role Management page:
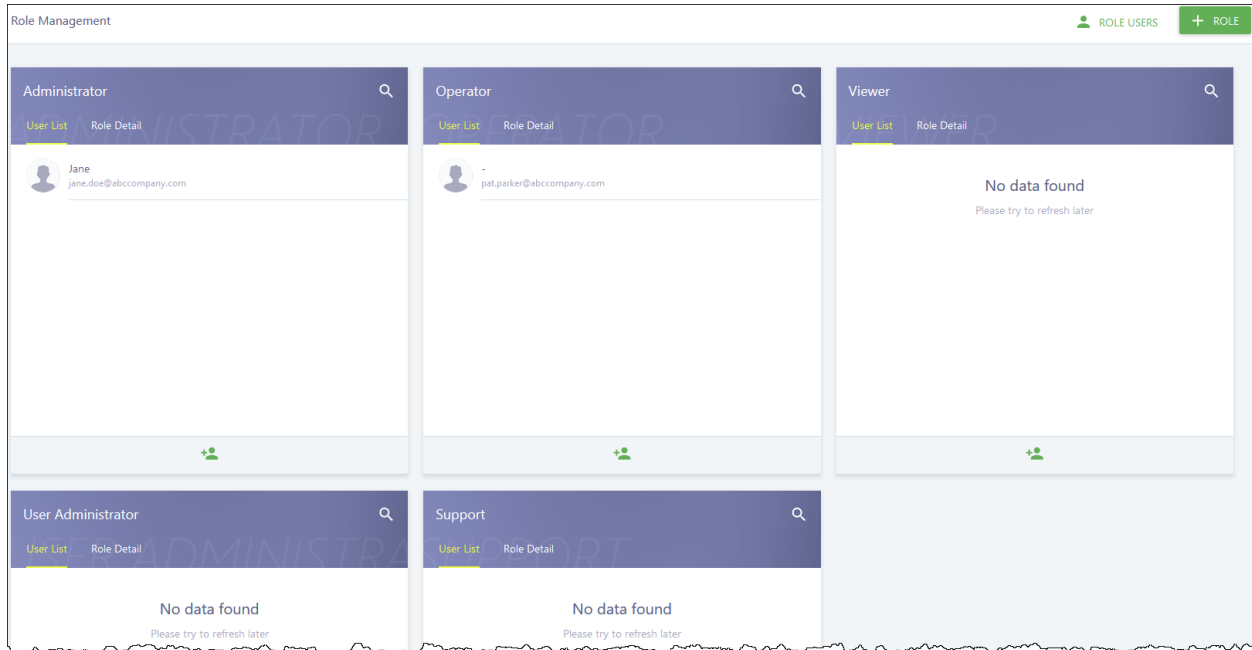


When the new user logs in, the user will only see the options the user has access to in the left sidebar.

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## 12.2  Create a New Role

To create a new role, click **+ ROLE**. Enter a case-sensitive name for the new role, such as Terminal Manager or Support. Click the boxes next to the privileges you want to assign to the role. Privileges are grouped into the same categories as the left sidebar. You cannot give a role access to the Role Management category. Click the expand arrow to view more granular privileges. Most privileges allow you to specify if the role has full control or read-only ability. The following image shows the Role window:

Role

Name                                                                                              *

Privileges                                                                                    ☰

☐ 👥 Monitoring                                                                          ⌄

☐ 👥 Task                                                                                      ⌄

☐ 👥 Management                                                                          ⌄

CANCEL        OK

As you add privileges to the role, the current privileges display beneath the Privileges box. The following privileges are available:

- **Monitoring**
  - Dashboard
  - Terminal Geolocation
- **Task**
  - App List
    - Read-only Privileges
    - Full Privileges
  - Firmware List
    - Read-only Privileges
    - Full Privileges
- **Management**
  - Terminal Management
    - Read-only Privileges
    - Full Privileges
  - Group Management
    - Read-only Privileges
    - Full Privileges
  - Push Templates
    - Read-only Privileges
    - Full Privileges
- **System**
  - User Management
    - Read-only Privileges
    - Full Privileges

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The following image shows the Role window:
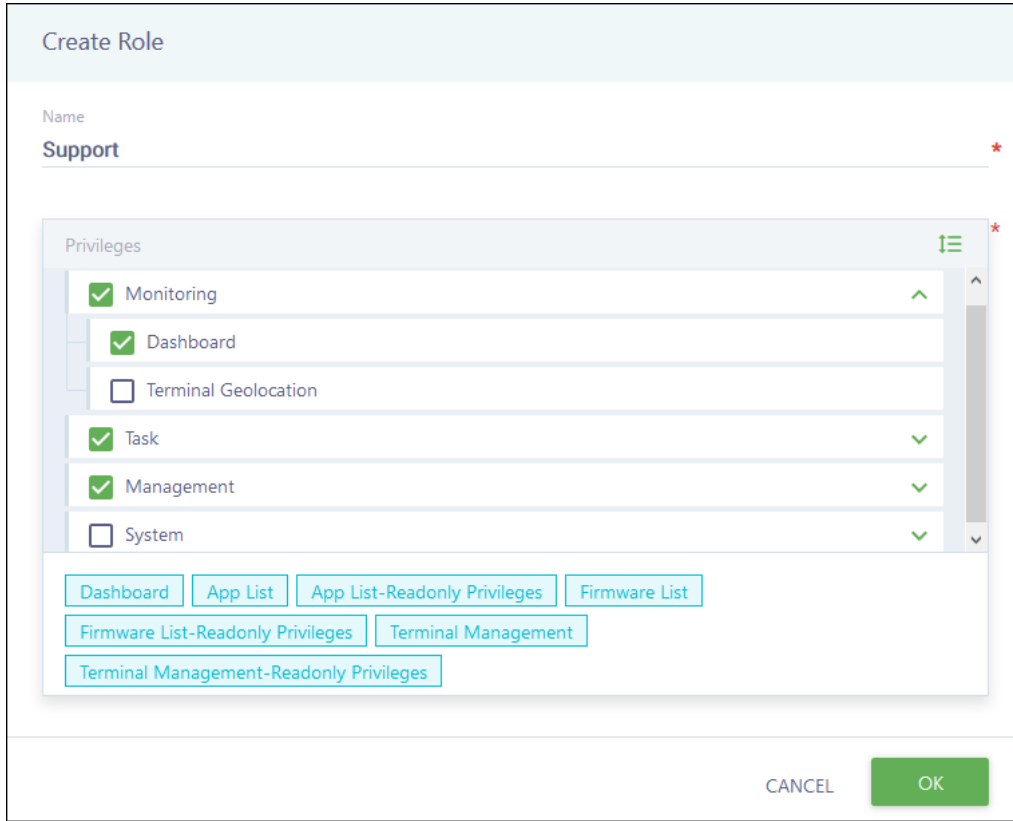


When you are done, click **OK** to create the role or **CANCEL** to quit. Your new role displays. The following image shows the Role Management page:

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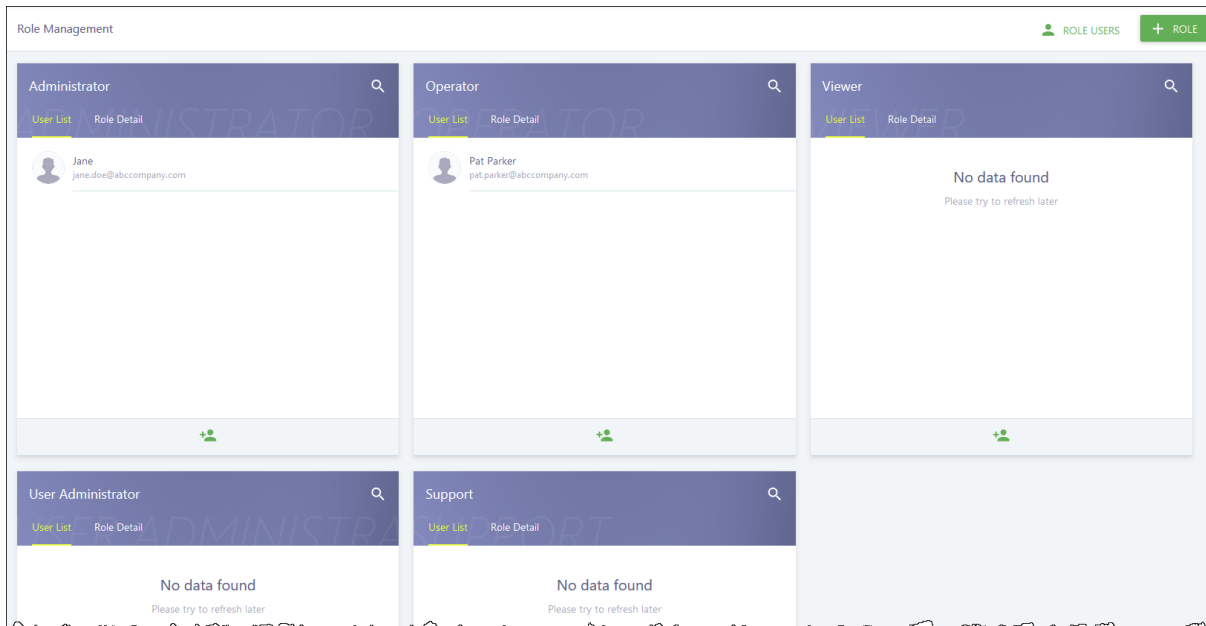
## 12.3  Manage a User

Hover over a user's row to display the delete user option. You cannot delete your Reseller Admin or edit other user accounts. To edit a user account, have the user log in and edit the information using the Personal Center. A confirmation prompt appears if you delete a user. The following image shows the role's user list:



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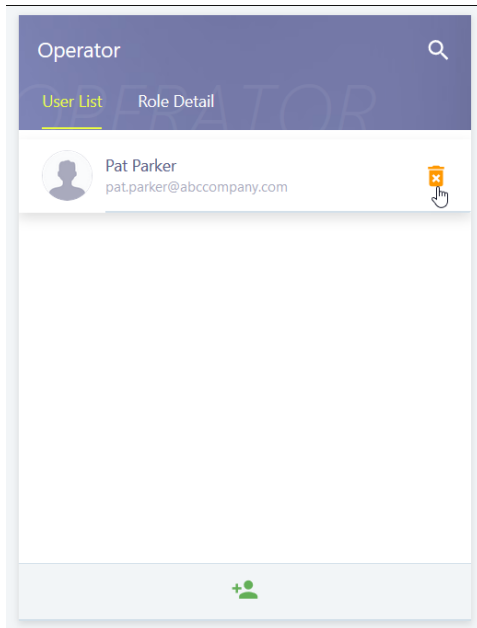
## 12.4  Manage a Role

Click **Role Detail** to view a role's assigned permissions. You cannot edit or delete the Administrator, Operator, Viewer and User Administrator roles. You can edit and delete any roles you create. A confirmation prompt appears if you delete a role. The following image shows some of each role's details:
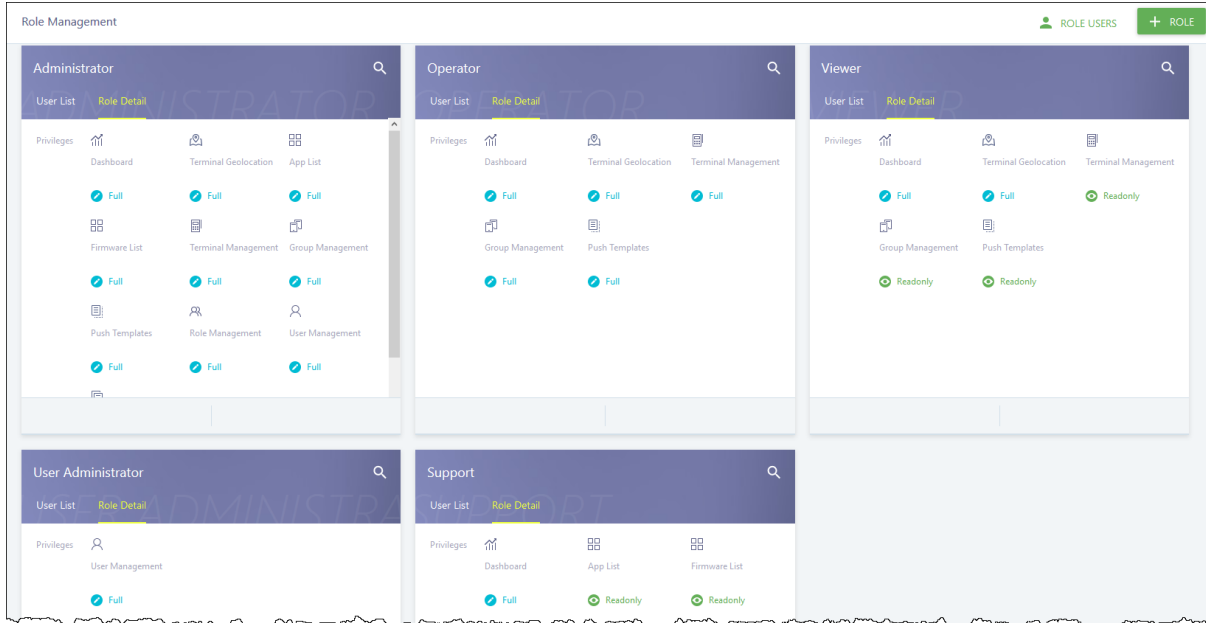


## 12.5  View All Role Users

To view all existing role users, click **ROLE USERS**. A list of all current role users displays along with their email, status and assigned user role. The following image shows the Role Users window:



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## 13 Report Center

Report Center provides the Marketplace Admin with several basic reports you can run or export. This section is currently under development. The following image shows the initial Report Center page:



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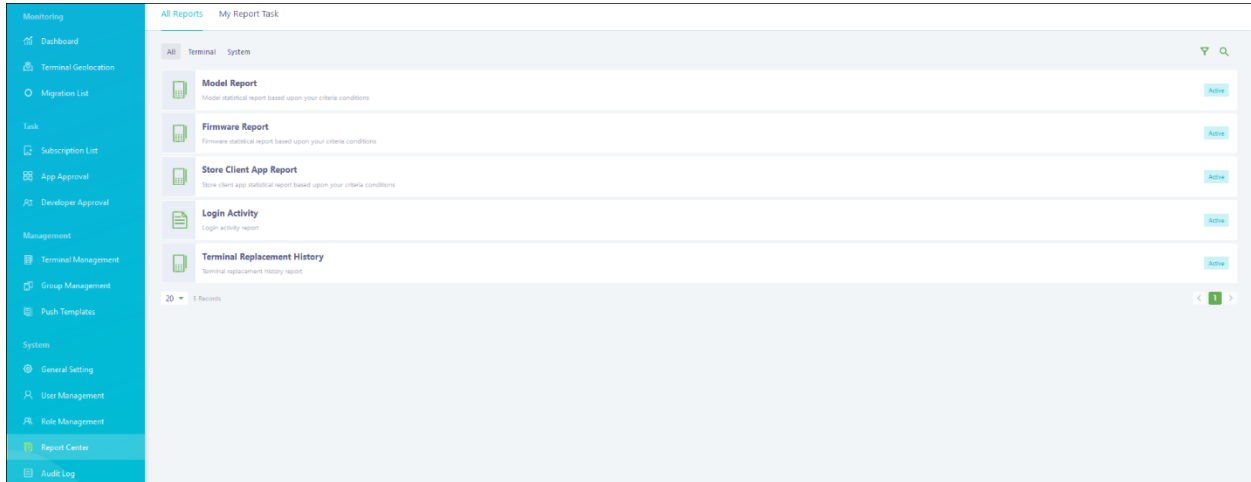
# 14 Audit Log

Audit Log shows you everything that's been done, such as logging in, creating a terminal, pushing an app, etc., and who did it.

Audit Log contains two tabs: Operation Log and Login Log. Operation Log shows you everything that a user has attempted to do in the Administrator Center and whether the action was successful or not. The Login Log shows you when each user accessed the Administrator Center and when each user logged out.

Audit Log allows you to export a maximum of 1000 records.

The following image shows the initial Audit Log page:

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