PAXSTORE

PAXSTORE RESELLER ADMIN GUIDE

Date: 2019-07-31

Version: 1.00

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PREFACE

PAXSTORE – Reseller Admin Guide
Version: 20190731 v1.00
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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 Reseller-level administrator guide.

1.1   Document Conventions

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

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

- **BroadPOS Marketplace** – The administrator portal where Reseller Admins manage sub-resellers, merchants, and terminals.
- **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.
- **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 the main reseller and sub-resellers. This includes editing the main reseller account, adding, editing and deleting sub-reseller accounts. The Reseller Admin also manages applications, users and user permissions, reports, terminals and merchants.

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1.2　Document Acronyms

- **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
- **PN** – Part Number
- **POS** – Point of Sale
- **PUK** – Personal Identification Number (PIN) Unblocking Key
- **OS** – Operating System
- **RAM** – Random Access Memory
- **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 resellers 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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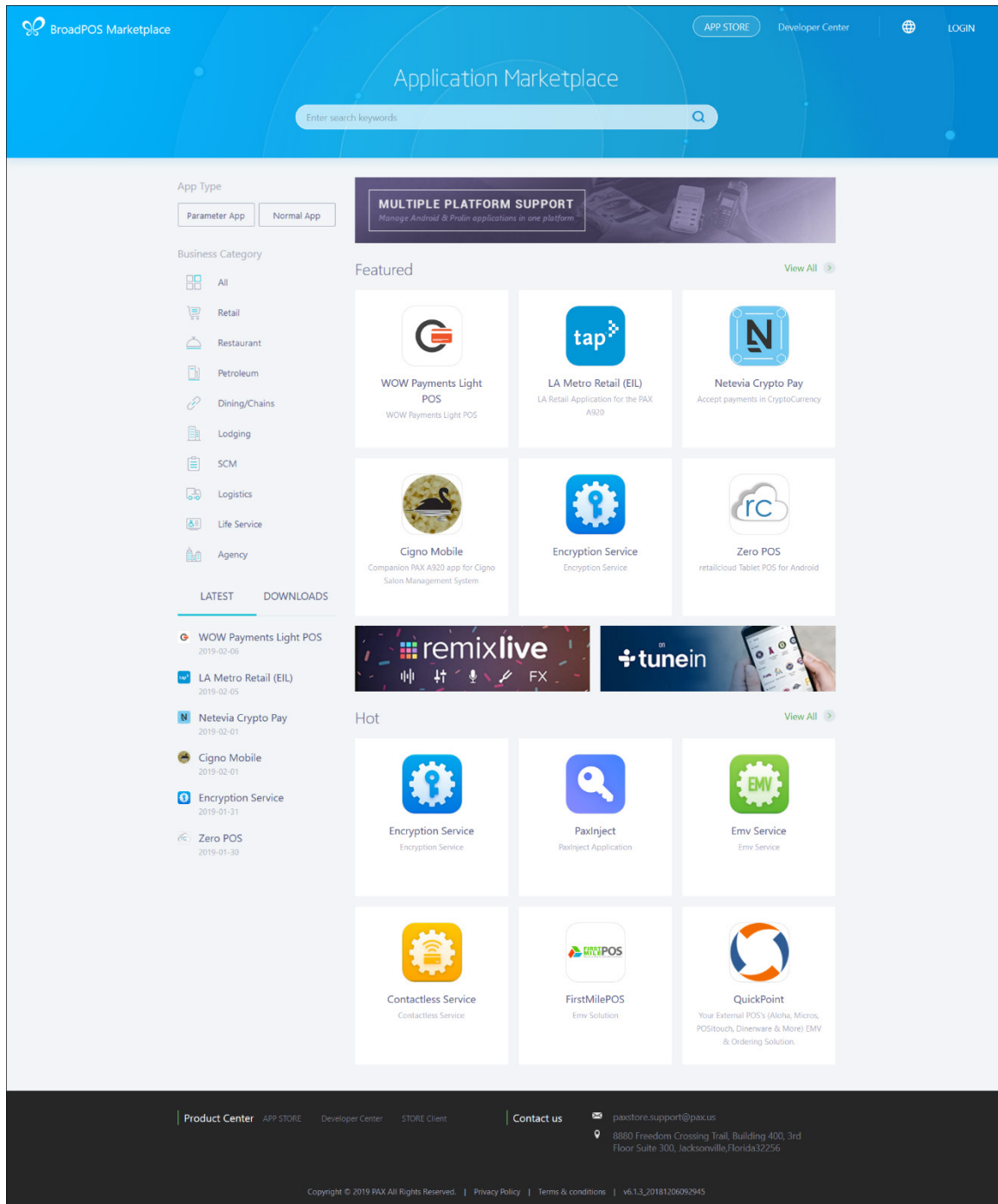
The APP STORE contains *Featured* and *Hot* sections to highlight applications and provides the ability to display the most recently updated applications, most downloaded applications, or applications by application category, such as retail, restaurant and lodging.
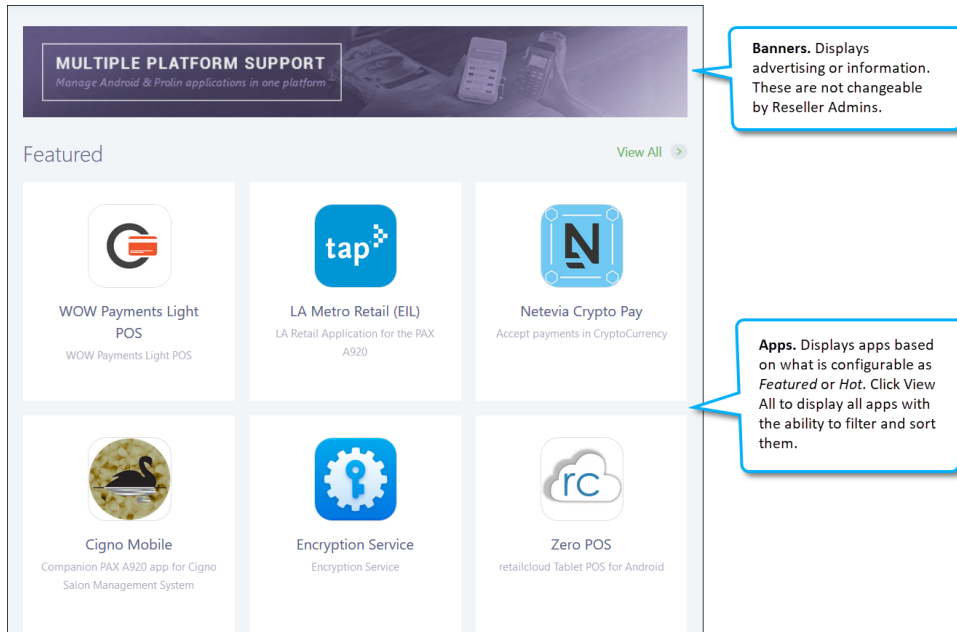
On the Marketplace home page there are navigation links, various application search options and application listings. The following image describes the Application Marketplace header:
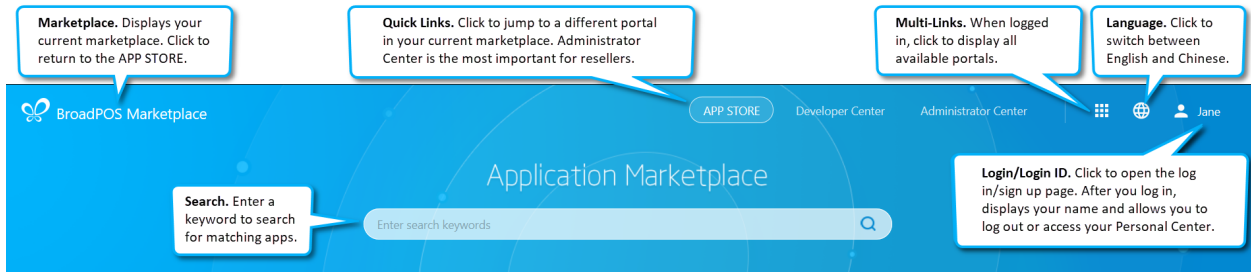
The following image describes the Application Marketplace filter:

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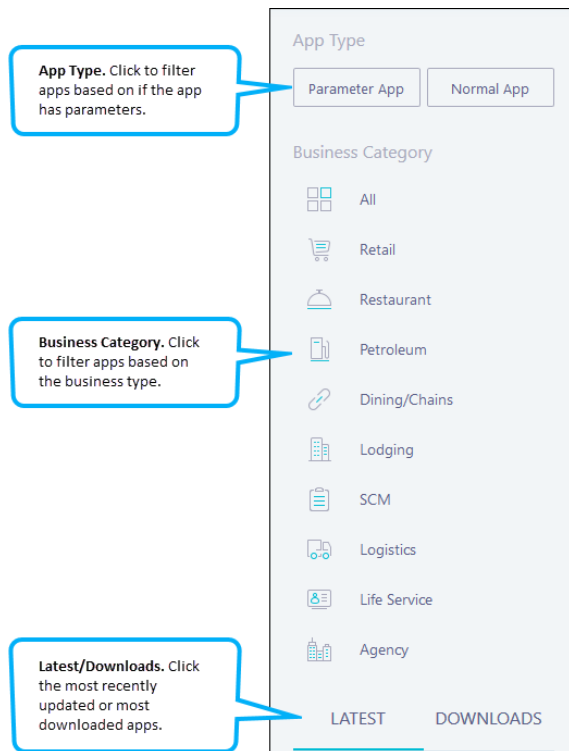
The following image describes the Application Marketplace app content:

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:

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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.

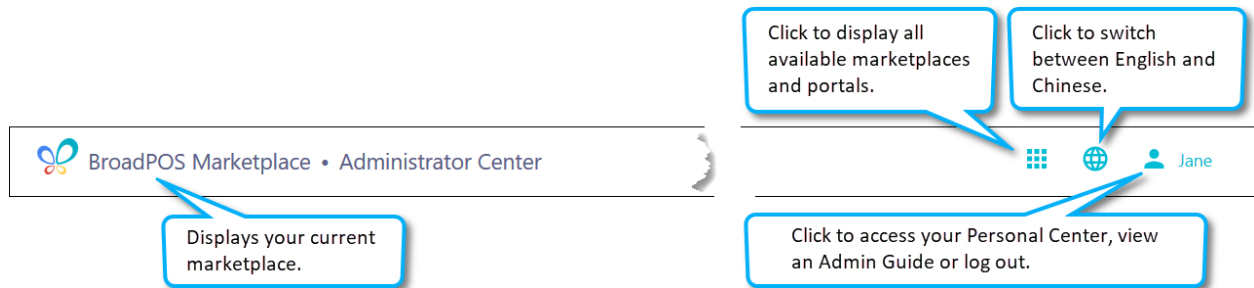**Description:** A more detailed description of the application.

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.

20190731 v1.00   15   PAXSTORE Customer Support
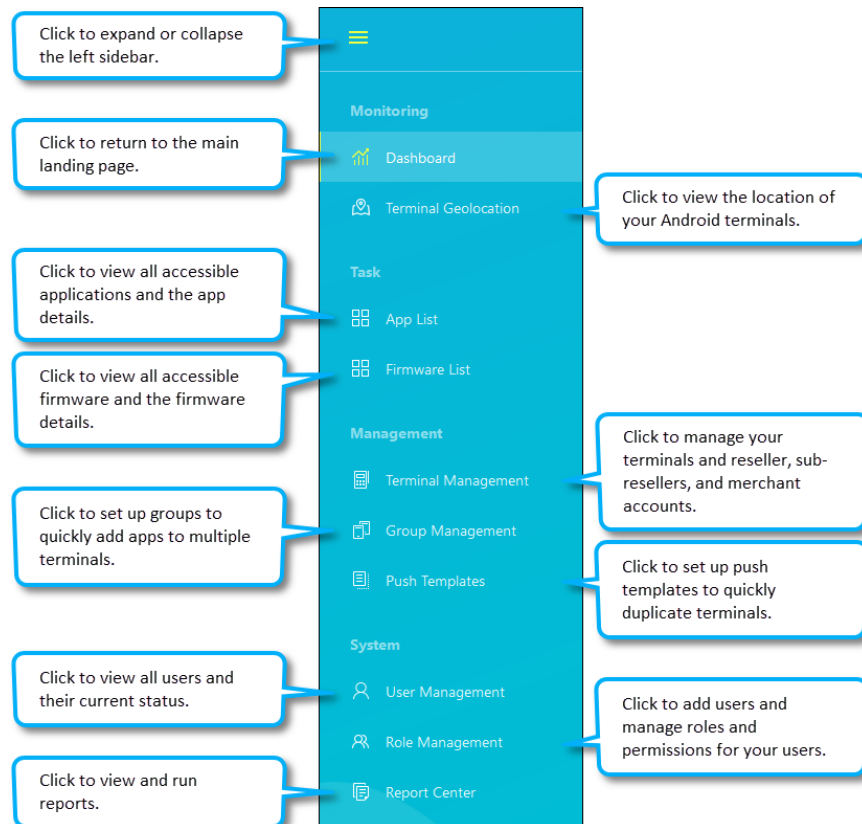paxstore.support@pax.us
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4   Administrator Center

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

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.

BroadPOS Marketplace • Administrator Center

Jane

Displays your current marketplace.

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

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

Click to expand or collapse the left sidebar.

Monitoring

Click to return to the main landing page.

Dashboard

Terminal Geolocation

Click to view the location of your Android terminals.

Task

Click to view all accessible applications and the app details.

App List

Firmware List

Click to view all accessible firmware and the firmware details.

Management

Terminal Management

Click to manage your terminals and reseller, sub-resellers, and merchant accounts.

Click to set up groups to quickly add apps to multiple terminals.

Group Management

Push Templates

Click to set up push templates to quickly duplicate terminals.

System

Click to view all users and their current status.

User Management

Role Management

Click to add users and manage roles and permissions for your users.

Click to view and run reports.

Report Center

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As a Reseller Admin, you can:

- Manage sub-resellers
- Manage merchants
- Manage terminals
- Manage reseller-related users and roles
- Push apps and parameters
- Push firmware
- Uninstall apps
- View the terminal device status

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 App List

The App List shows all apps currently available in the marketplace. You can switch the layout of the page, sort the apps by name, email or last updated time, filter by cost, OS or type of app, or search for apps by name or installation package. Clicking on an app allows you to view the app's information, including the versions of the app and the terminals the app is installed on. You can also use the app list to more easily locate the app's installation package information.

The are two types of apps available:

- **Normal app** – an app with no parameters.
- **Parameter app** – an app with editable parameters. All payments apps are parameter apps.

The following image shows the marketplace's App List page:

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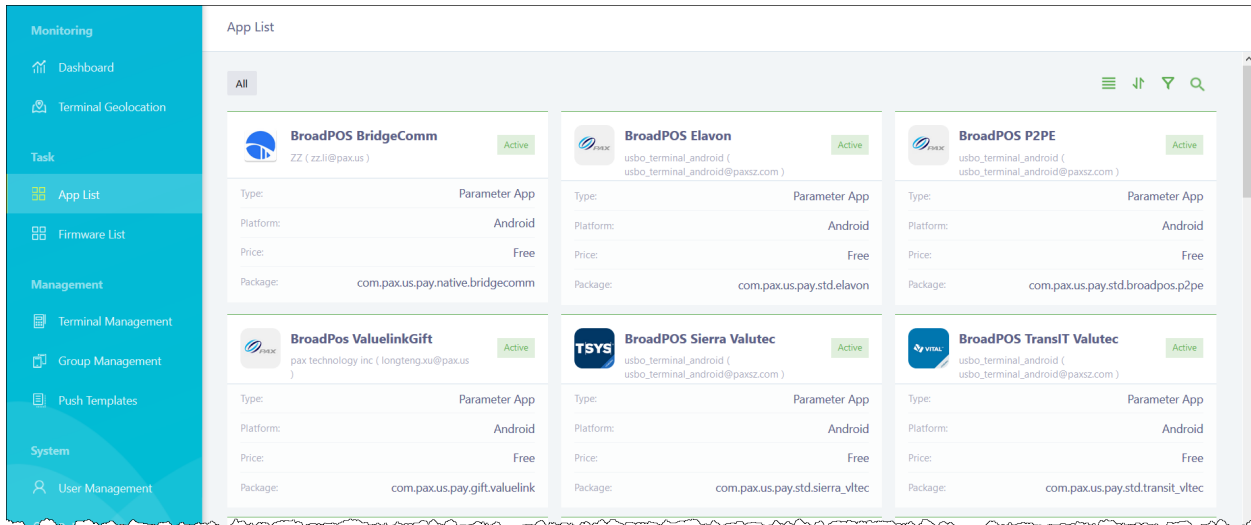
7   Firmware List

The Firmware List shows all firmware currently available. You can switch the layout of the page, sort the firmware by name or last updated time, filter by type of firmware or terminal model, or search for firmware by name. Clicking on a firmware block allows you to view the firmware's information, including the available firmware packages.

The following image shows the marketplace's Firmware List page:

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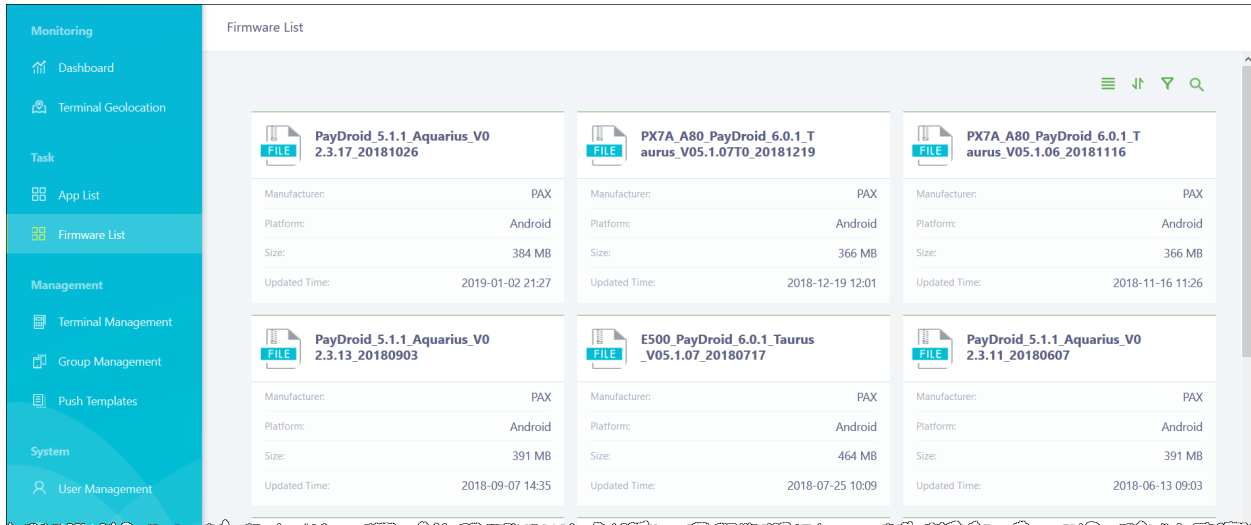
8 Terminal Management

The bulk of a Reseller Admin's actions occur within Terminal Management, which allows you to manage sub-resellers, merchants and terminals. Only PAX can create a Reseller Admin. Reseller Admins cannot add, edit or delete other reseller accounts; 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 sub-reseller, merchant or terminal, you must activate it.

The following image shows the reseller's Reseller Detail page:
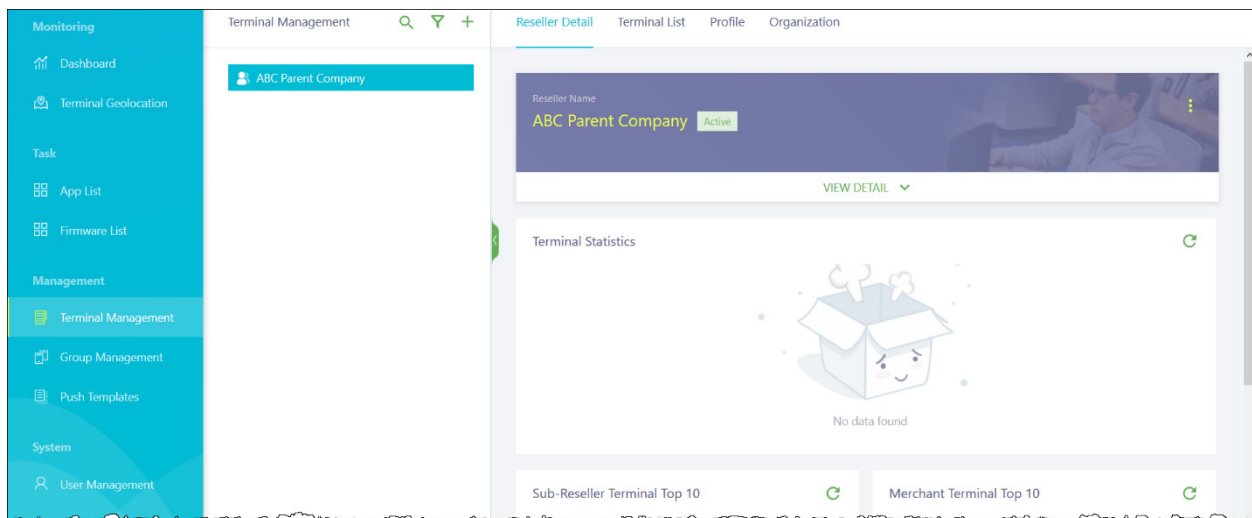
The initial Terminal Management page starts with the reseller's details, including:

Reseller Detail tab: View your 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) button: Edit your reseller account information.

VIEW DETAIL panel: View the details of your reseller account.

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

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

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

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8.1   Create a Sub-Reseller

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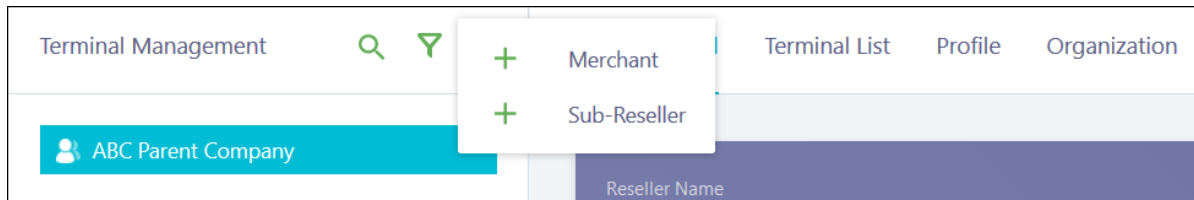
Click **Organization** > **Sub-Reseller** > **+ SUB-RESELLER**. The following image shows the reseller's Organization page:

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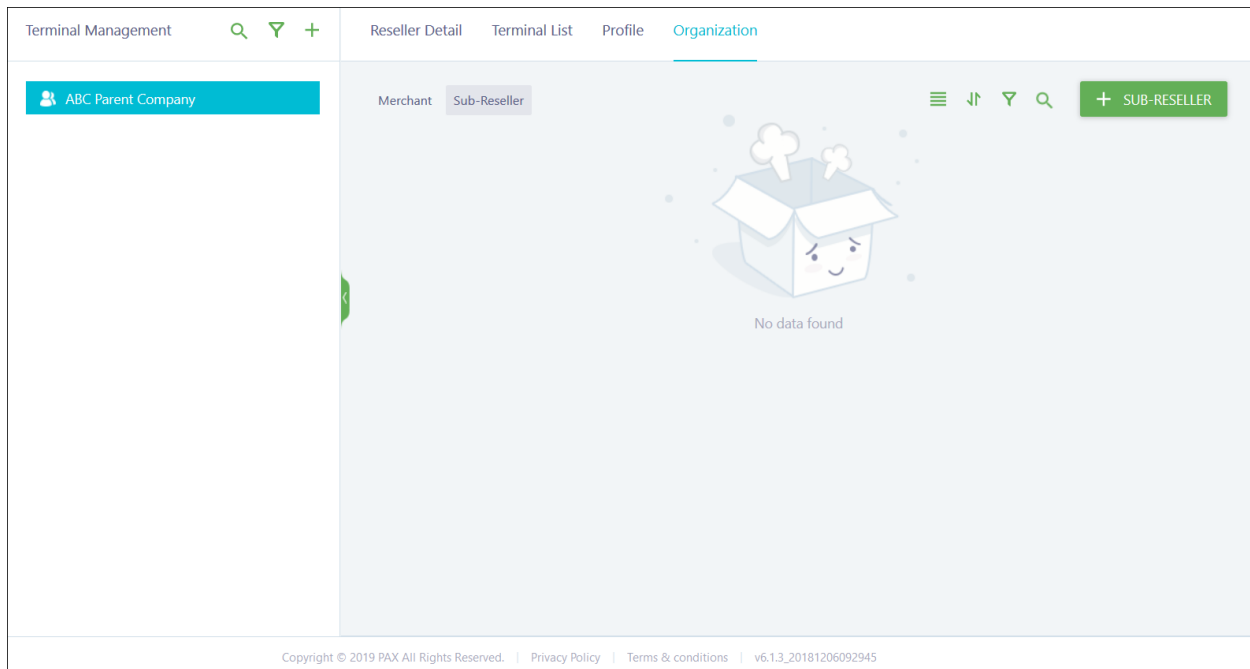
A pop-up window appears with the fields to complete to set up a new sub-reseller. A red asterisk (*) highlights the required fields. The following image shows the Create Sub-Reseller window:

Create Sub-Reseller

Login Name(Email Address) *   Contact Name *

Reseller Name *   Country
Please Select *

Phone No. *   State/Province
Please Select

Company   City

Postal Code   Address

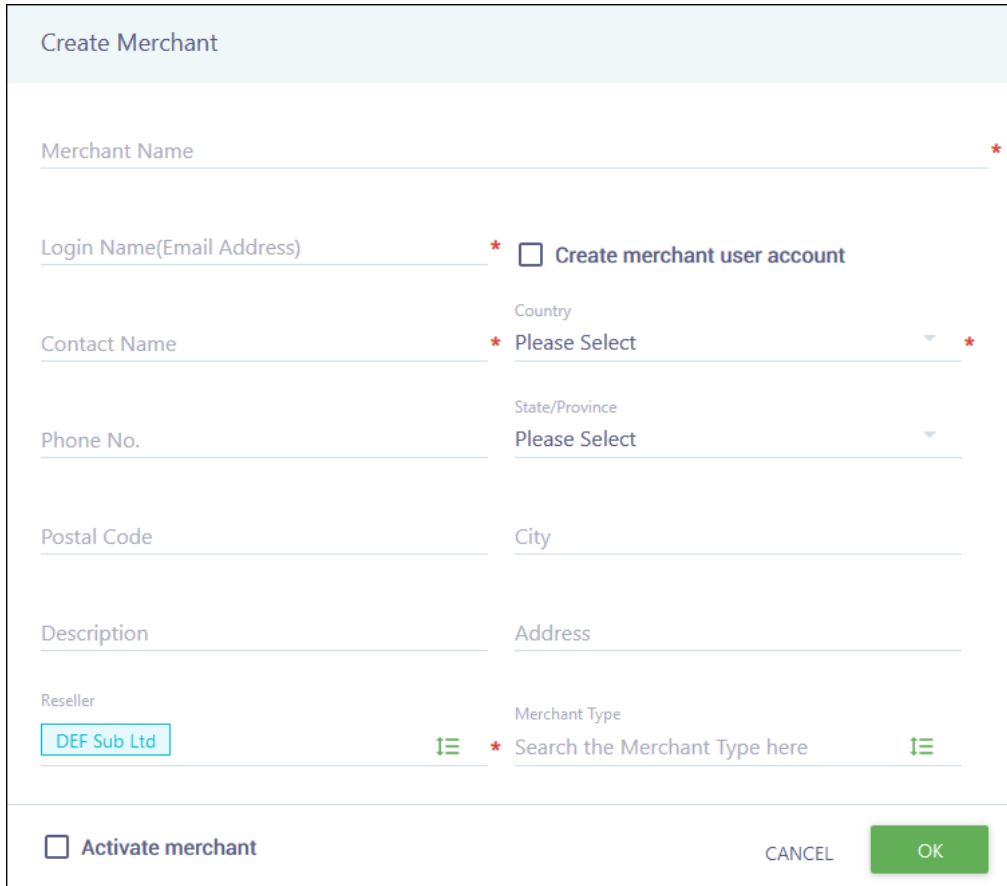☐ Activate reseller   CANCEL   OK

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** – (Optional) The state or province where the sub-reseller company is located.
- **Company** – (Optional) The name of the sub-reseller company.
- **City** – (Optional) The city where the sub-reseller company is located.
- **Postal Code** – (Optional) The zip code for the sub-reseller company.
- **Address** – (Optional) The address for the sub-reseller company.
- **Activate reseller** – (Recommended) 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:
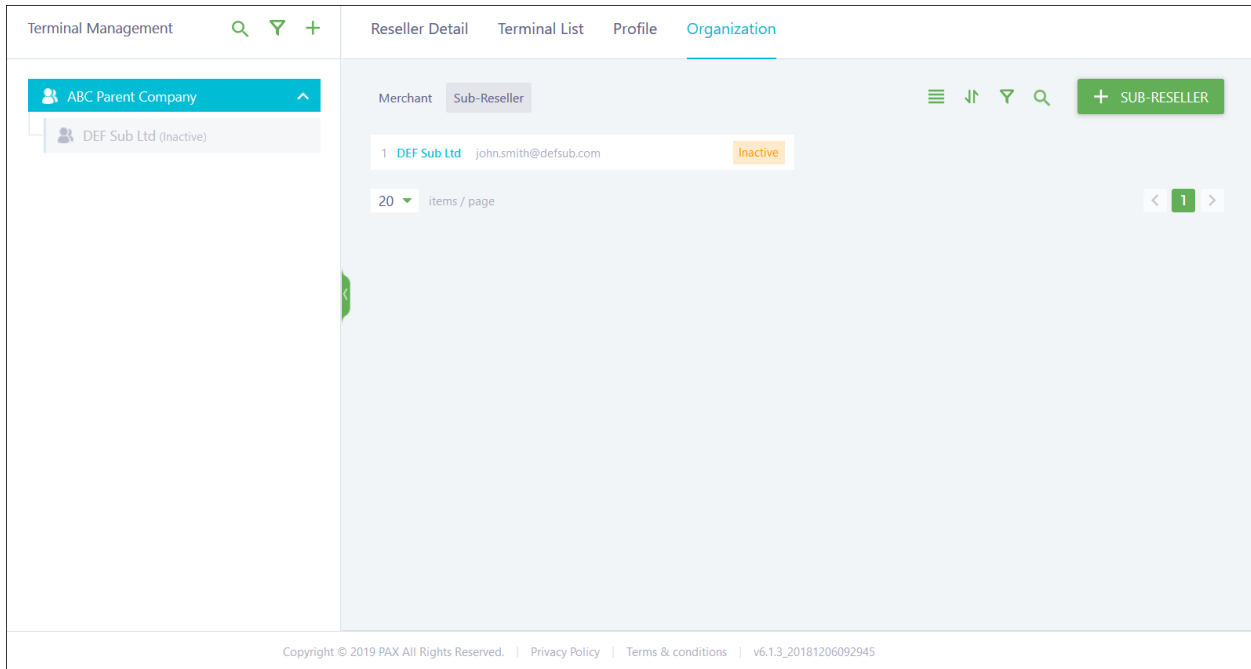
To activate the sub-reseller, hover over its row and click the activate icon. A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the sub-reseller's row:

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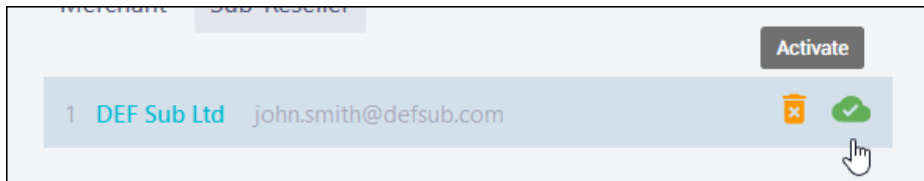
You can also click the sub-reseller to open its details and activate using the option within the more options icon (vertical ellipsis) on the Reseller Detail page. The following image shows the sub-reseller's Reseller Detail page:
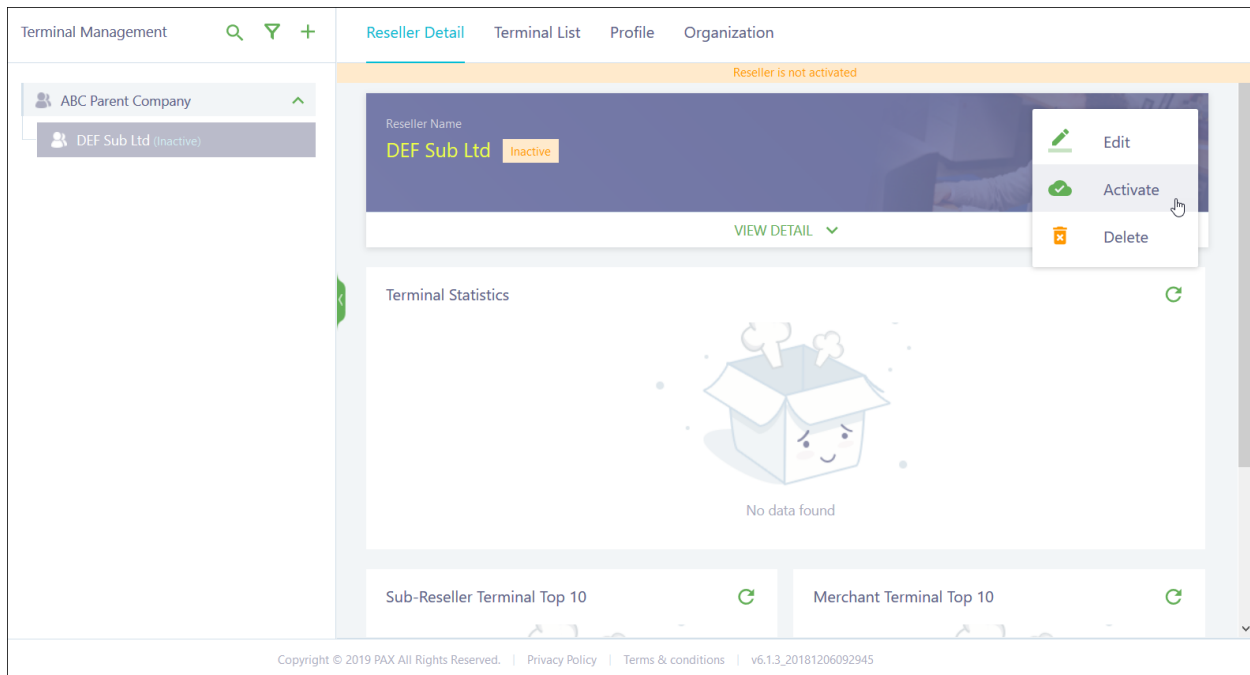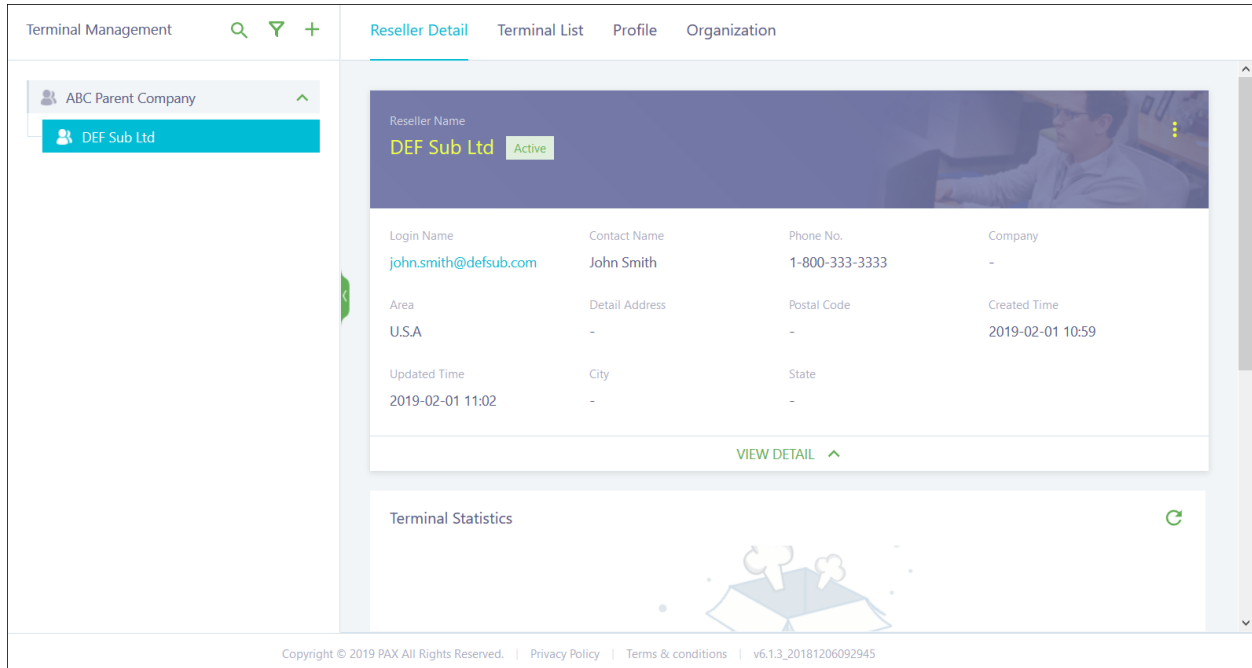
All available options in the more options menu are:

- **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:
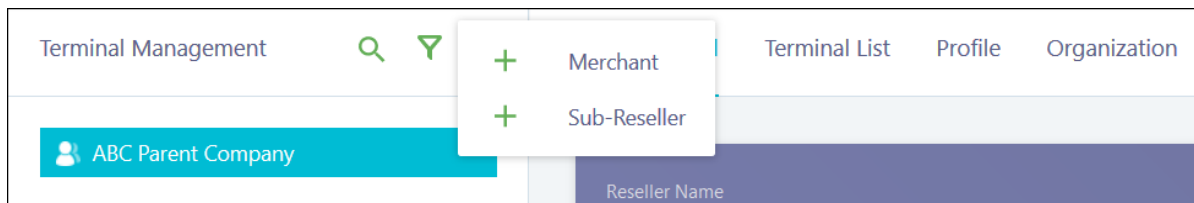
8.2   Create a Merchant

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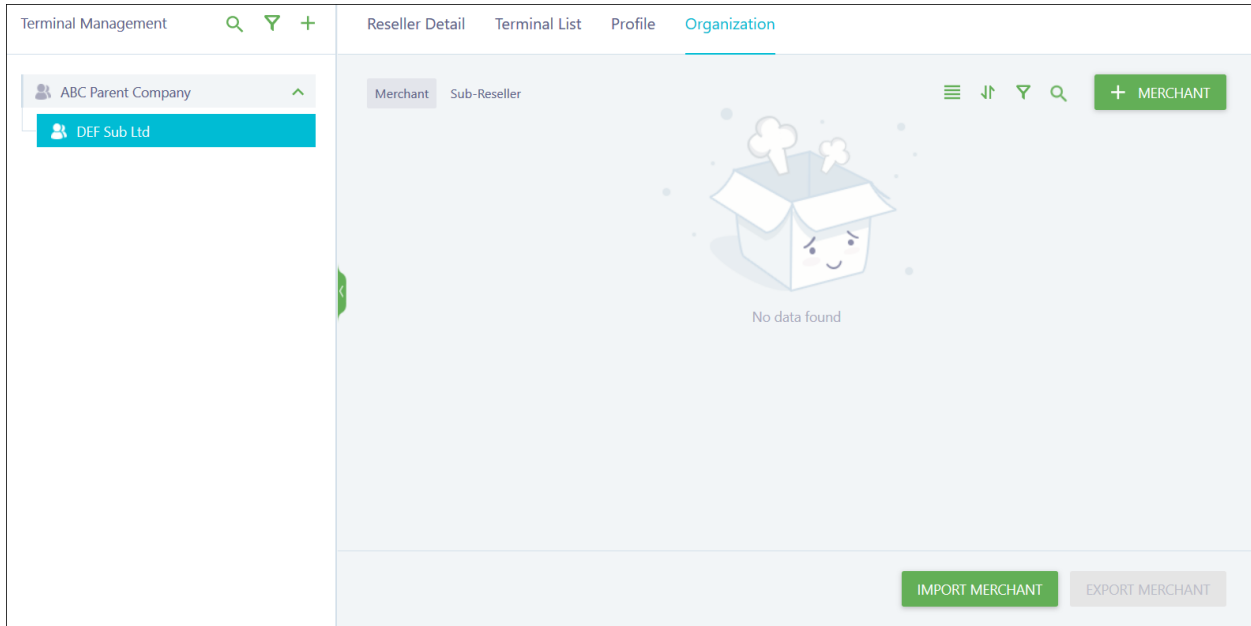
A pop-up window appears with the fields to complete to set up a new merchant. A red asterisk (*) highlights the required fields. The following image shows the Create Merchant window:

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).
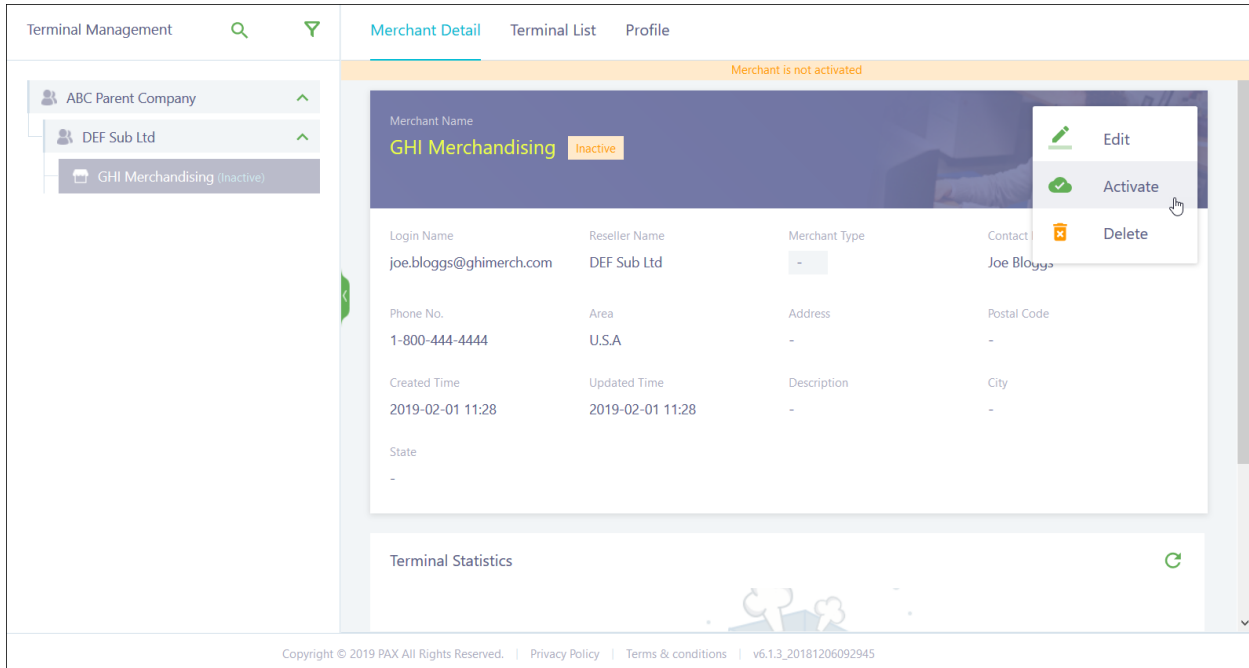
If you did not activate automatically, you must complete activation. Manual activation can be completed from the Organization page or the merchant's Merchant Detail page. The following image shows the sub-reseller's Organization page with an inactive merchant:
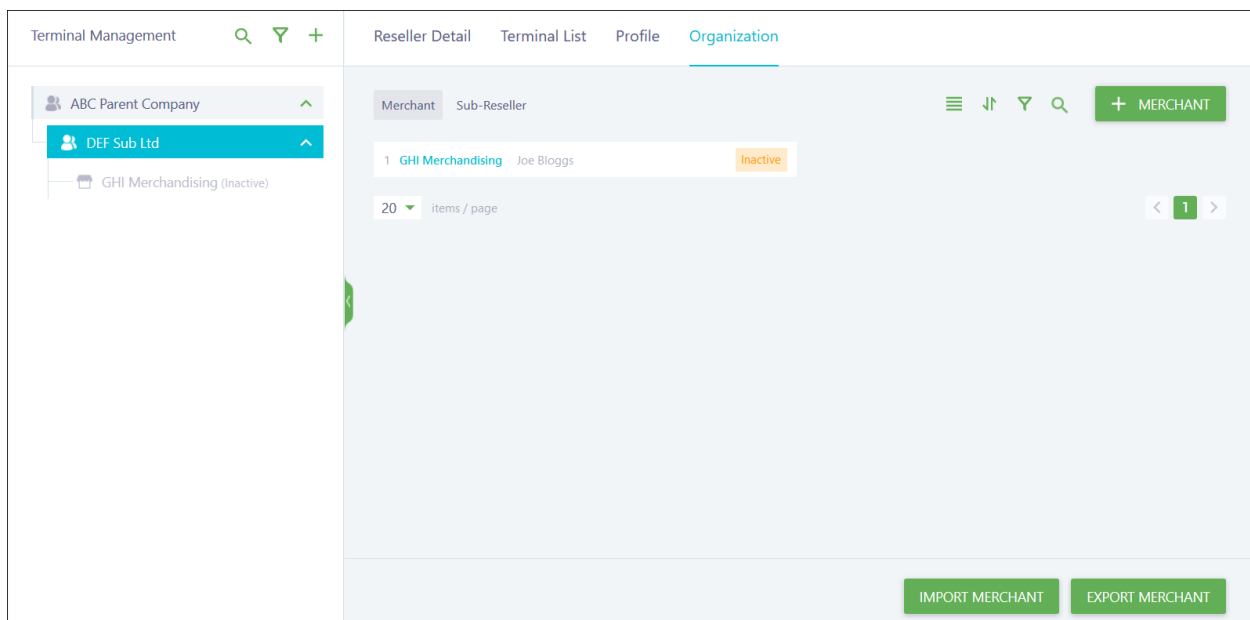
To activate the merchant, hover over its row and click the activate icon. A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the merchant's row:

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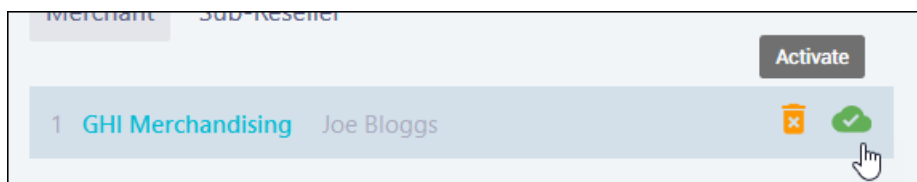
You can also click on the merchant to open its details and activate using the option within the more options icon (vertical ellipsis) on the Merchant Detail page. The following image shows the merchant's Merchant Detail page:


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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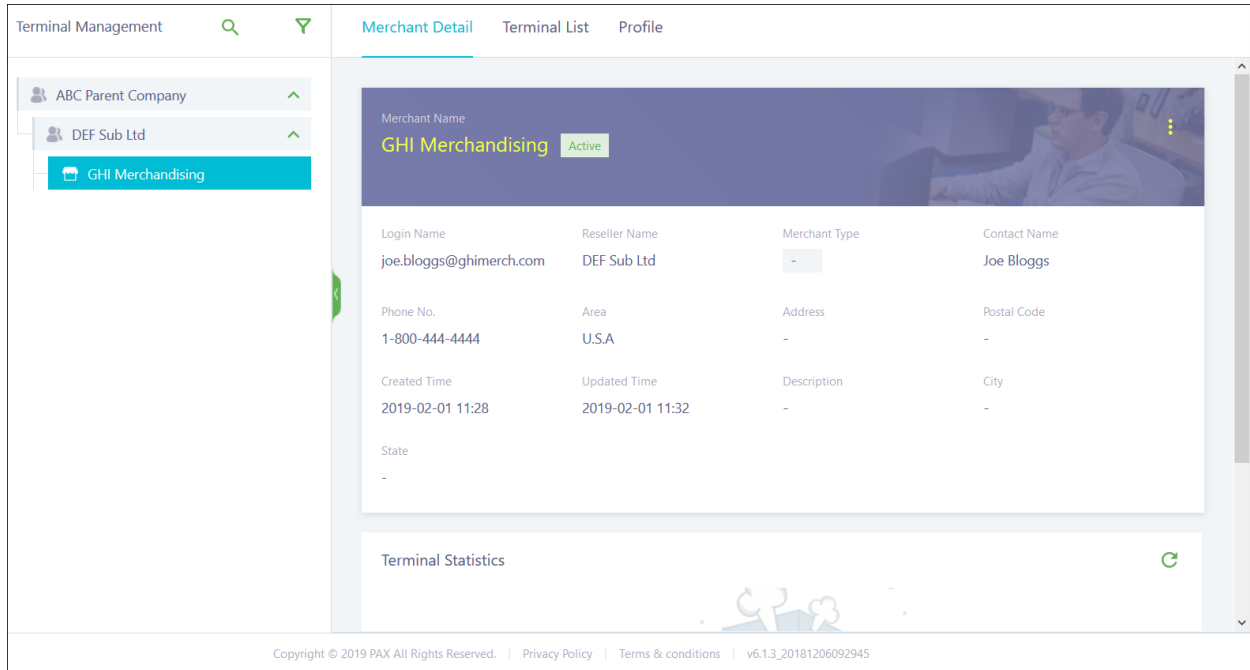
8.3   Create a Terminal

Before adding a terminal, it is best practice to create the proper sub-resellers and merchant accounts first. You can add a terminal to your reseller account 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.
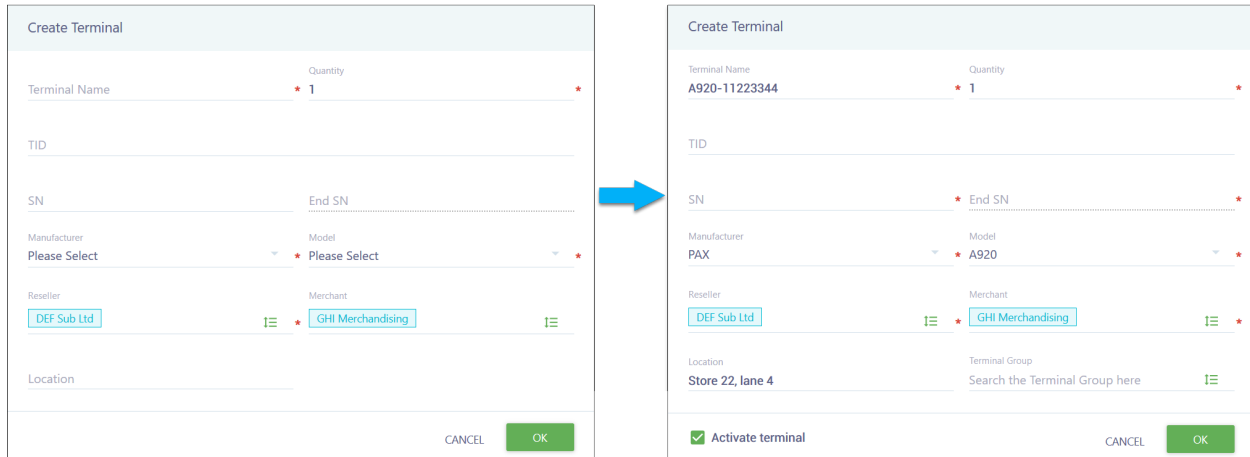
To create a terminal, navigate to the merchant you want to add the new terminal to and click **Terminal List** > **+ TERMINAL**.

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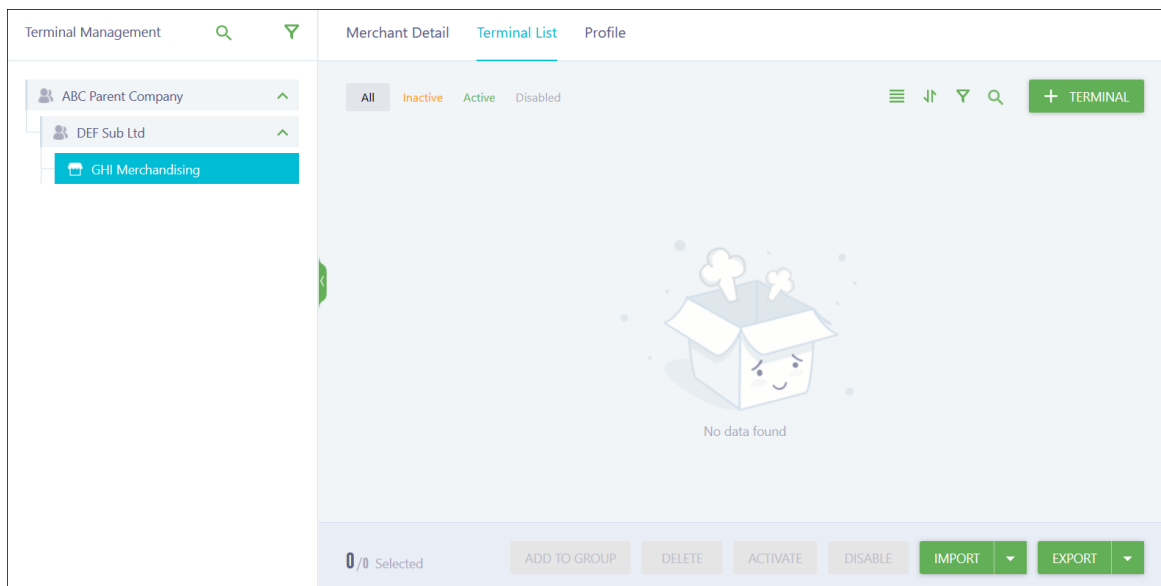
A pop-up window appears with the fields to complete to set up a new terminal. A red asterisk (*) highlights the required fields. The following image shows the Create Terminal window:

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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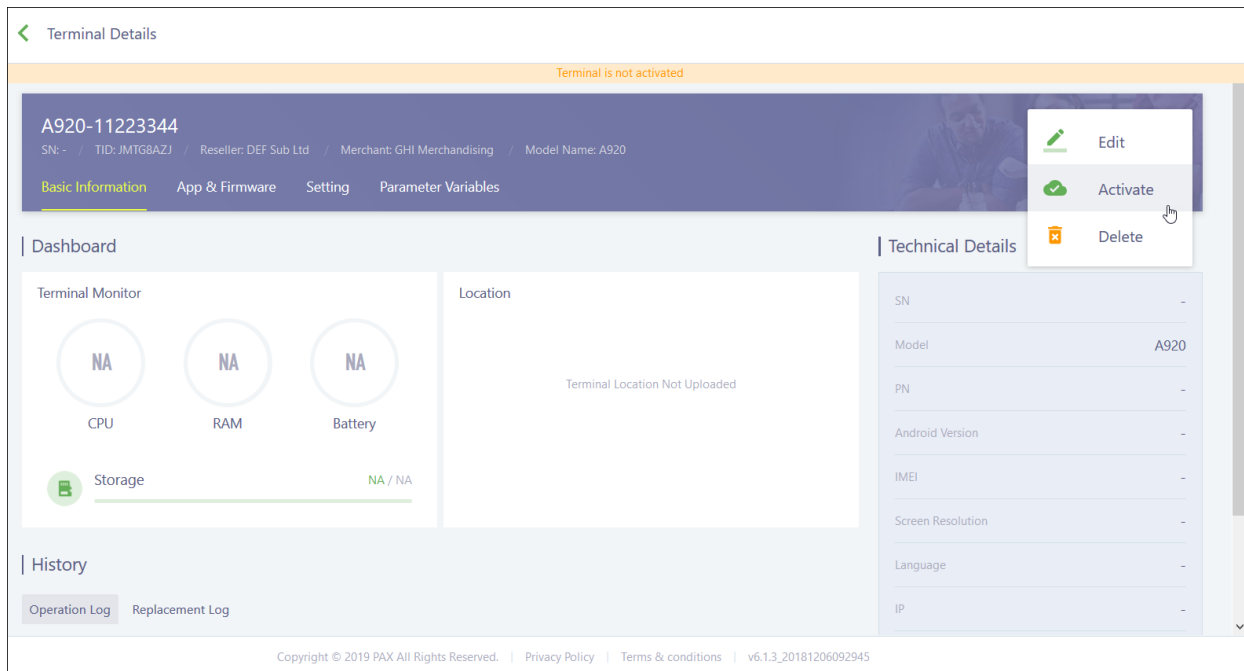
When you are done, click **OK** to save or **CANCEL** to quit without saving. Your Terminal List updates with the new terminal with an Active or Inactive status, determined by whether you activated the terminal during creation. The following image shows the merchant's Terminal List page:
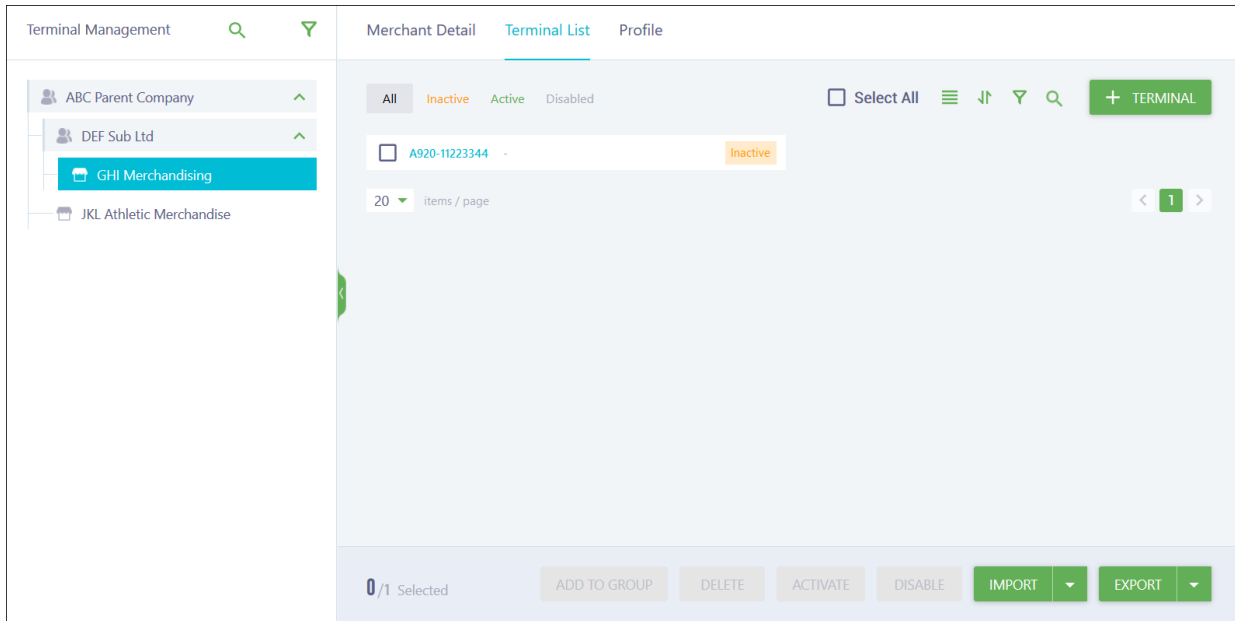
To activate the terminal, hover over its row and click the **Activate** icon. A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the terminal's row:

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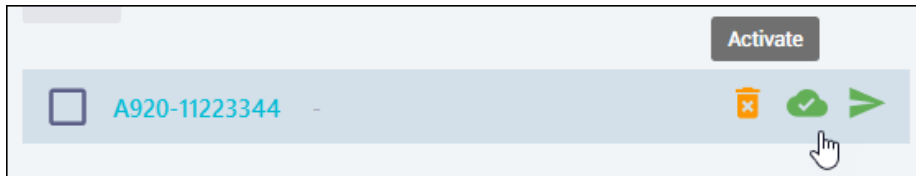
You can also click the terminal to open its details and activate it using the option within the more options icon (vertical ellipsis) on the Terminal Details page. The following image shows the terminal's Terminal Details page:

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.

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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:
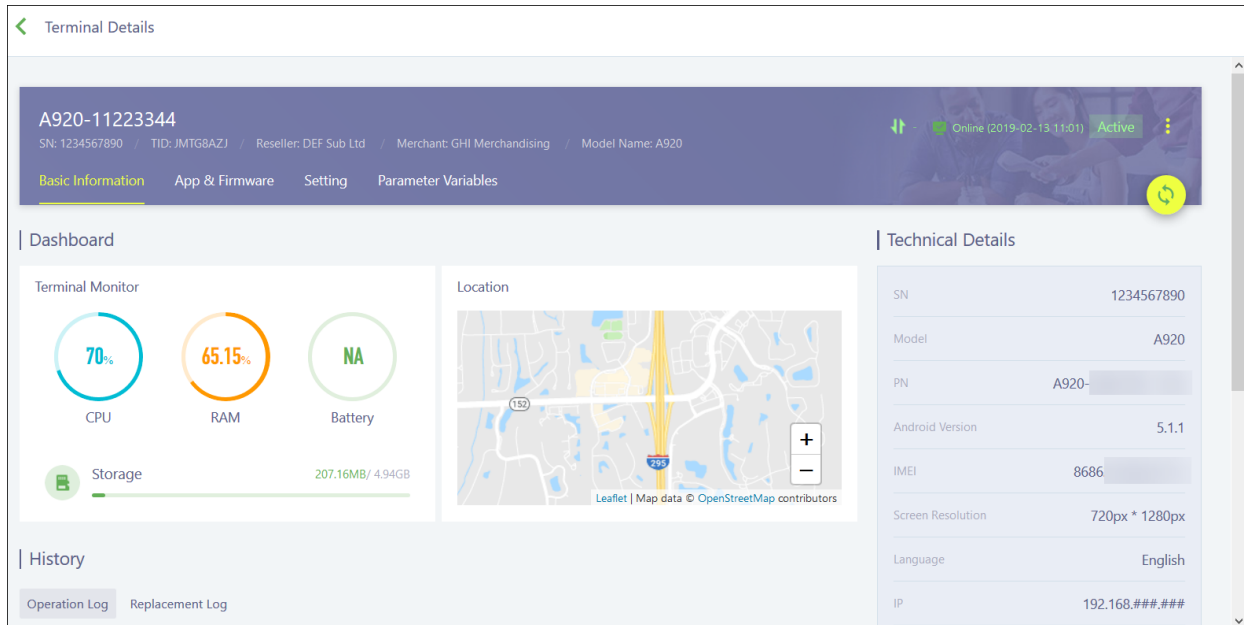
8.4   Manage a Profile

Reseller, sub-reseller and merchant 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 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.

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The following image shows the Profile page:
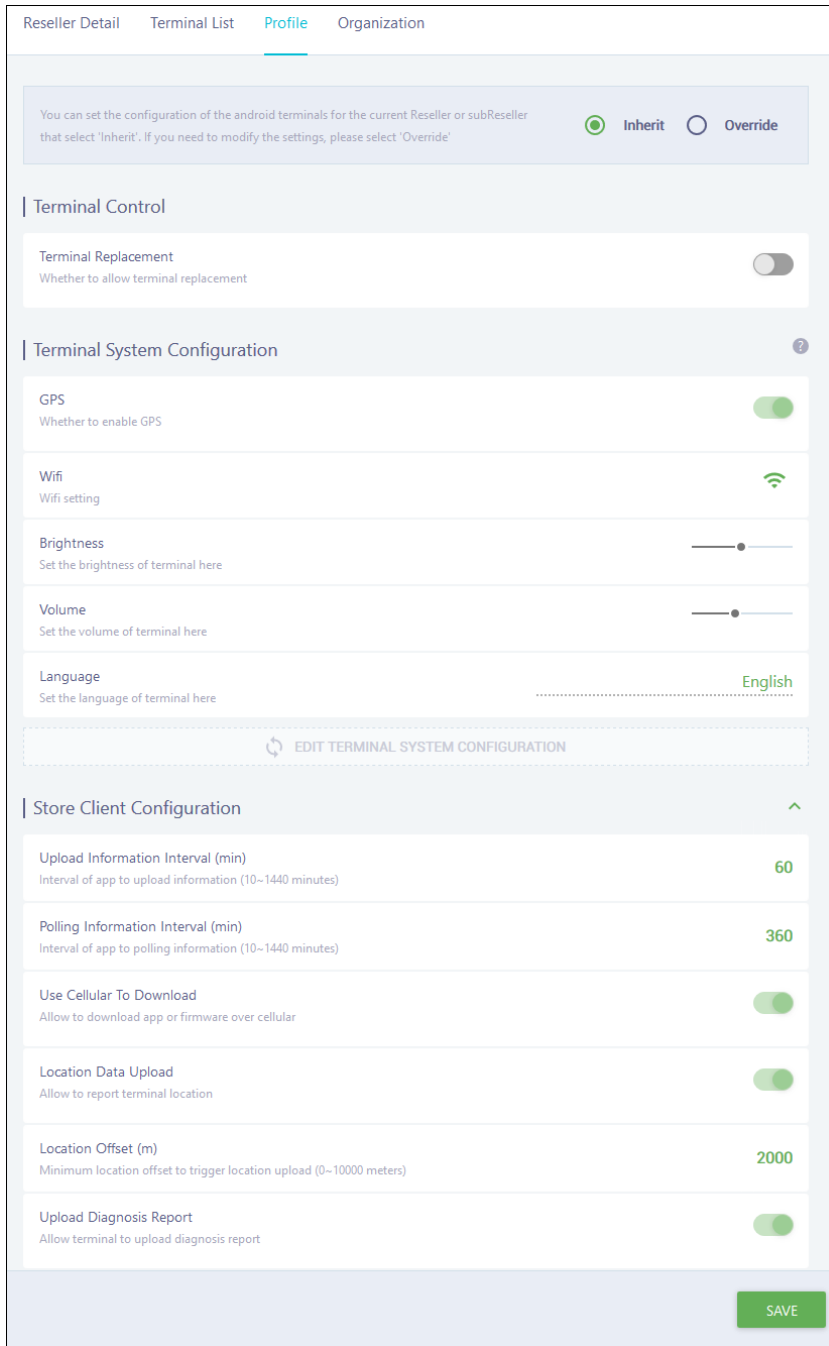
8.5   Manage a Terminal

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.

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8.5.1   View the Terminal Information

The Basic Information tab provides the general terminal information and includes three sections:
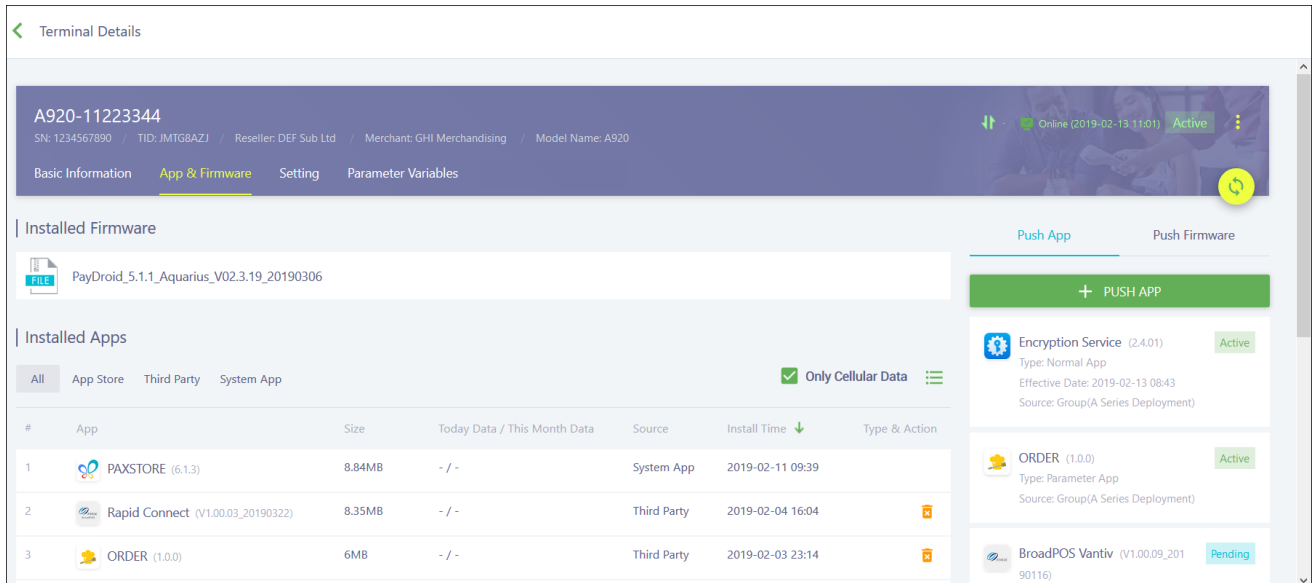
- **Dashboard** – Displays information about the physical terminal. The Terminal Monitor displays the terminal's current CPU, RAM, Battery and Storage. Location displays a map with the terminal's current location.
- **History** – Displays a record of actions performed on the terminal, such as when it 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
    - Language
    - IP
    - Time Zone
    - MAC Address

8.5.2   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:
    - **App Store** – an EMV-certified payment app developed by PAX.
    - **Third Party** – non-payment apps developed by third parties.
    - **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.

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

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8.5.2.1   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 apps' push configuration settings.

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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
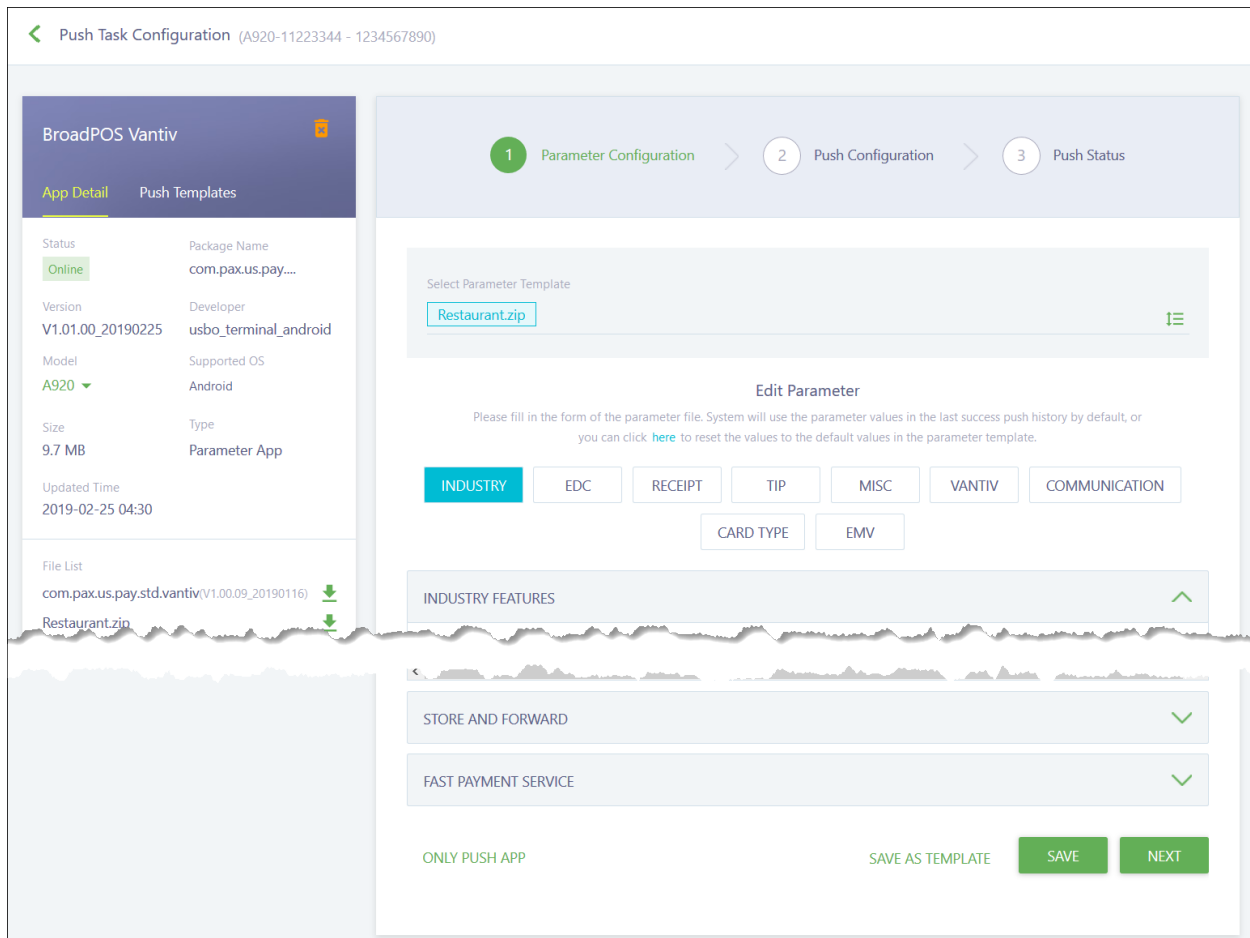
	Name
☑	restaurant.zip
☐	retail.zip

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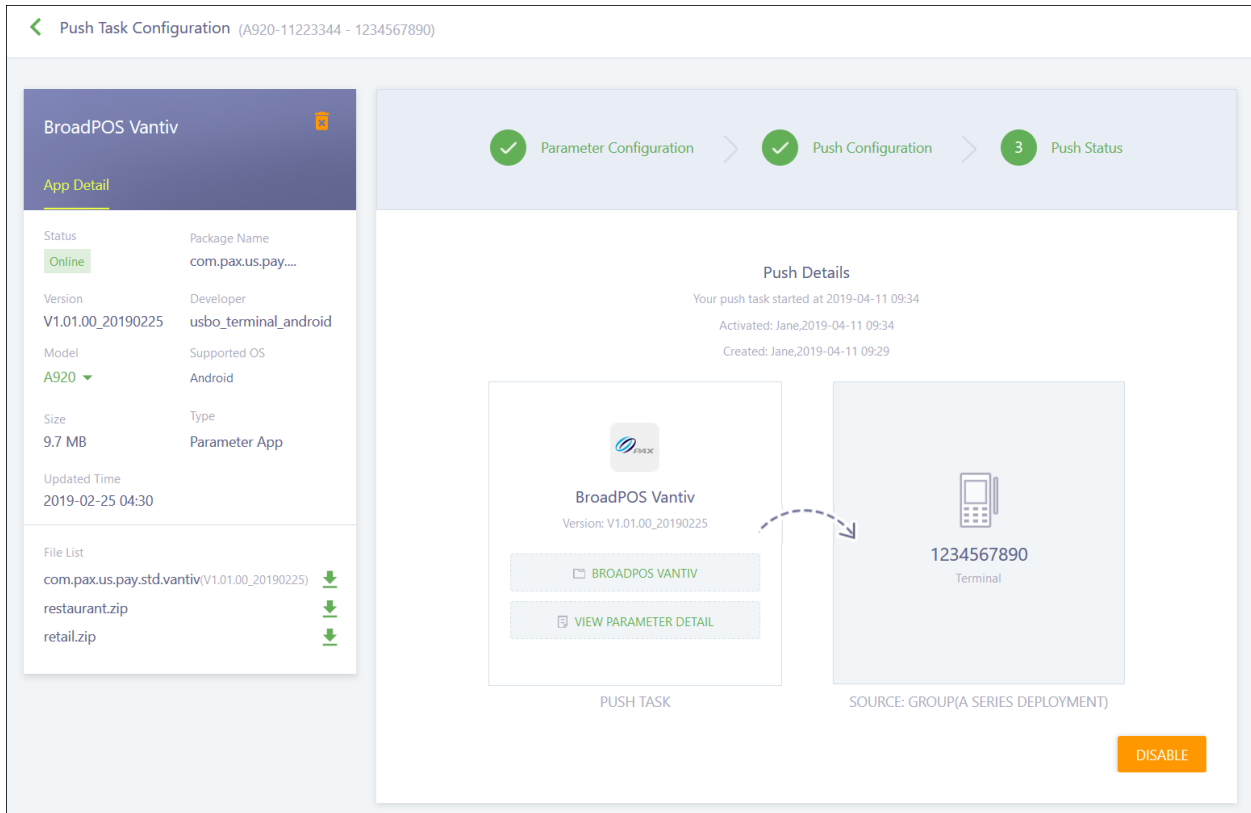
Apps display the Push Details section and option to disable the push. The SOURCE information is replaced by PUSH TERMINAL.

8.5.2.2   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:
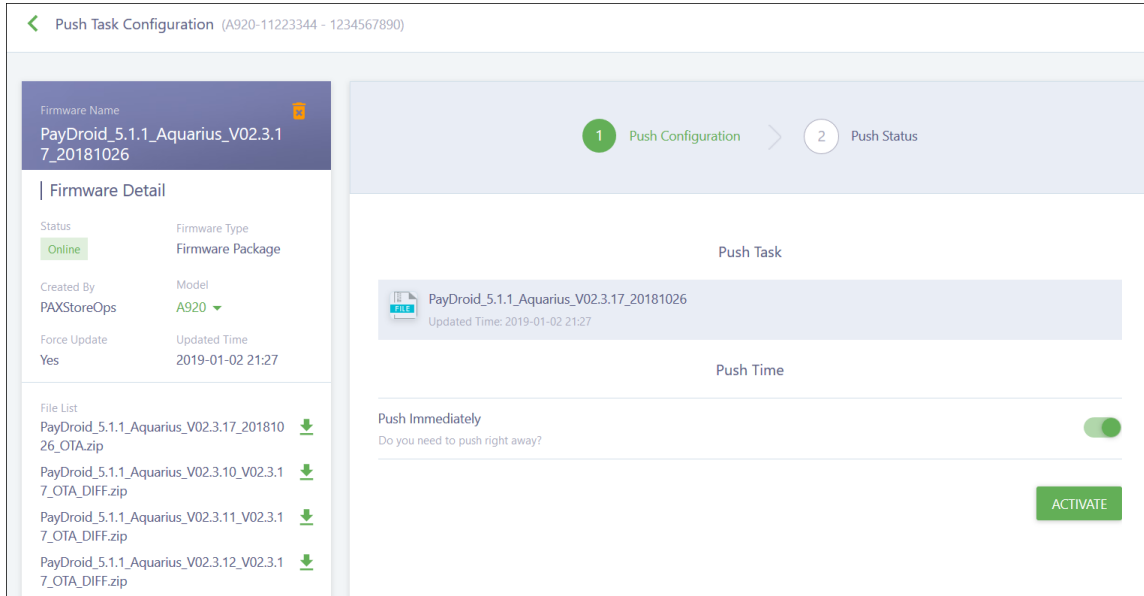
If you turn **Push Immediately** off, you will need to set the time zone, date and time to push the app to the terminal. When you are ready, click **ACTIVATE** to push the firmware and view the status of the push. The following image shows the firmware's Push Status page:

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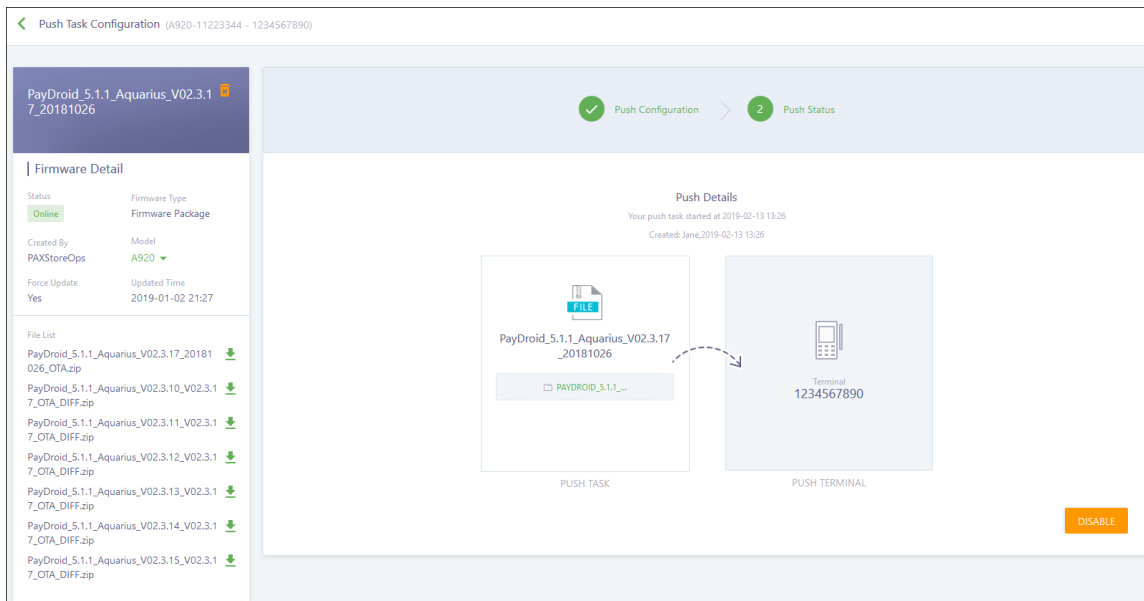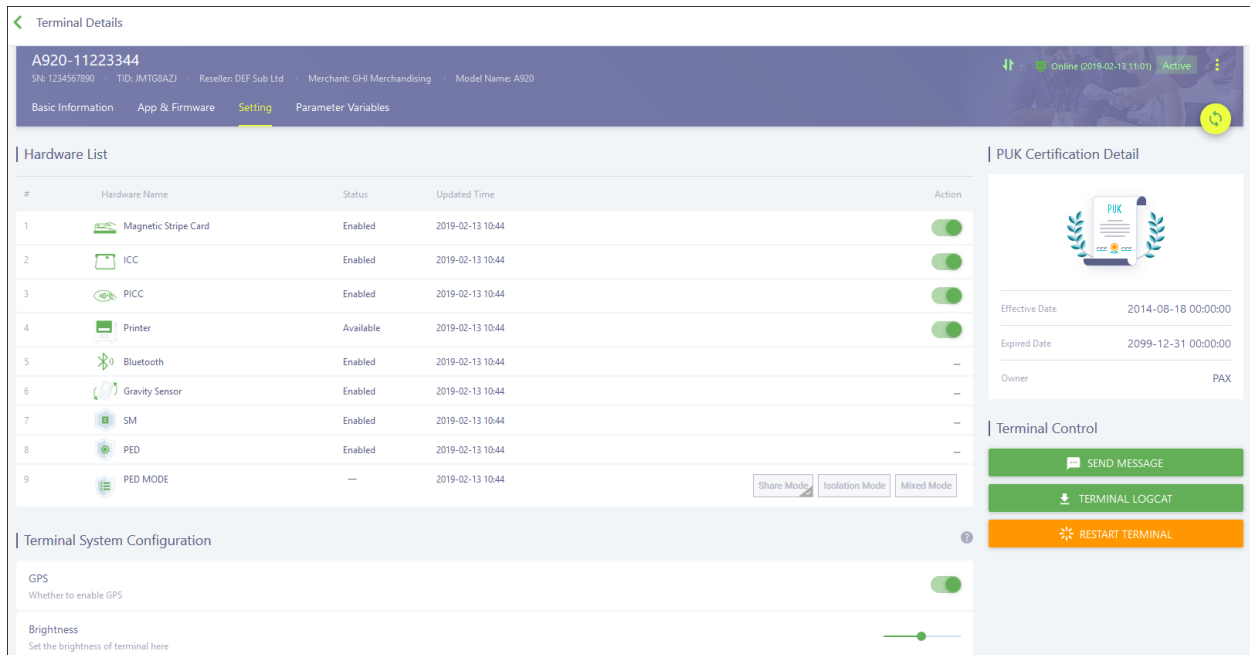
8.5.3   View the Terminal's Settings

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:

8.5.4   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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9 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:
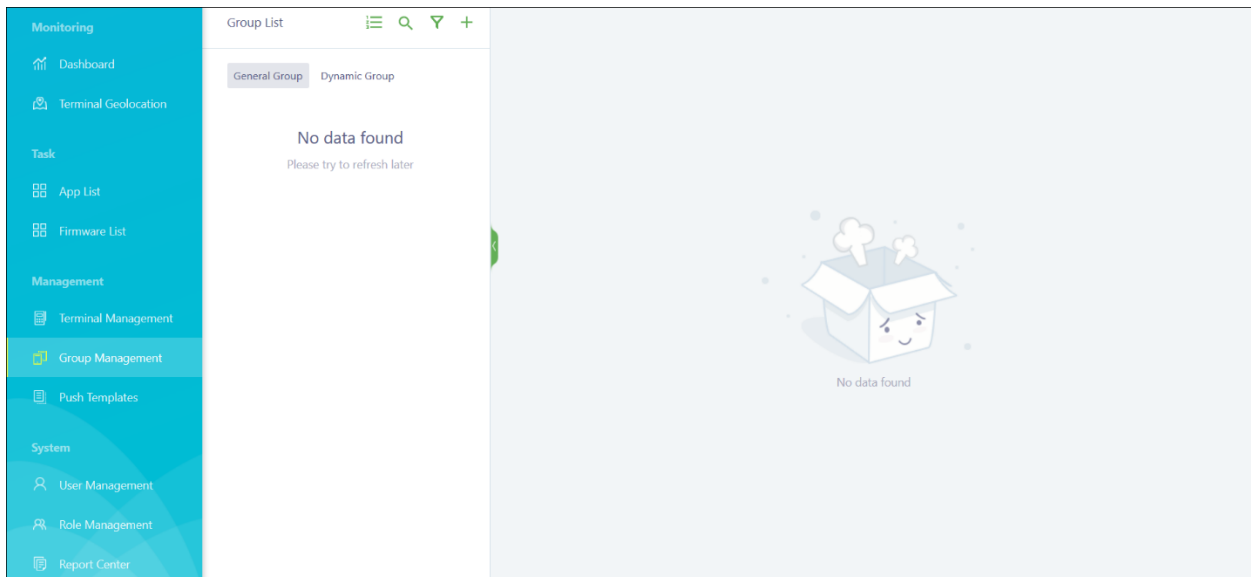
Click the **+** icon and then either **+ General Group** or **+ Dynamic Group**. The following image shows the quick add menu:

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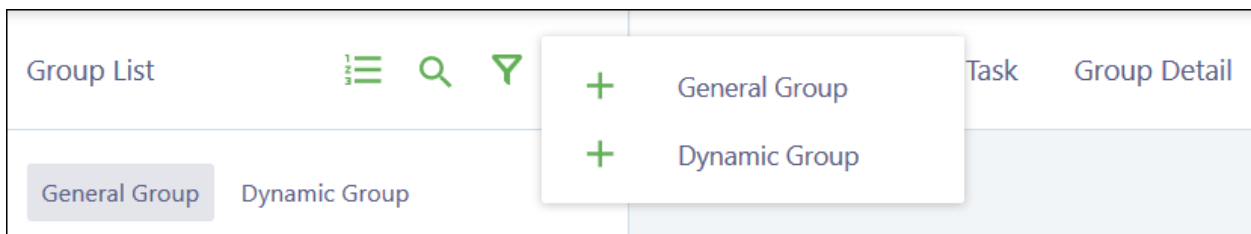
The following image shows the New General Group window:

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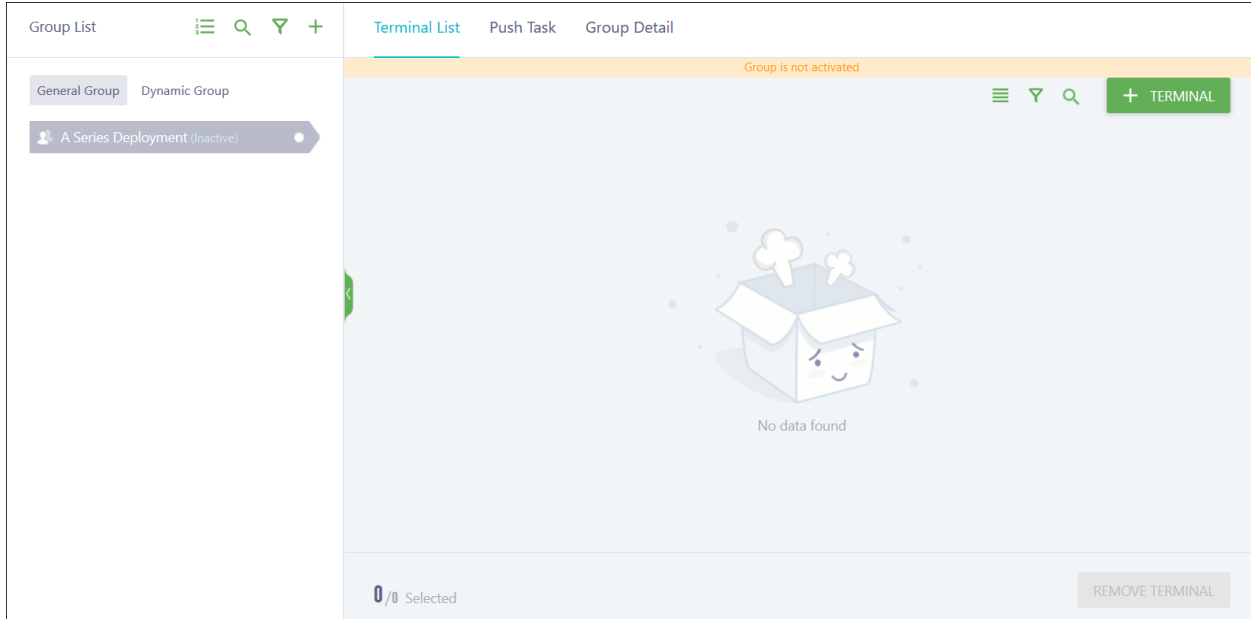
Immediately after creation, all terminals that fit the dynamic group criteria are added to the terminal group, regardless of Active or Inactive status. The following image shows the dynamic group's Terminal List page with an inactive group:

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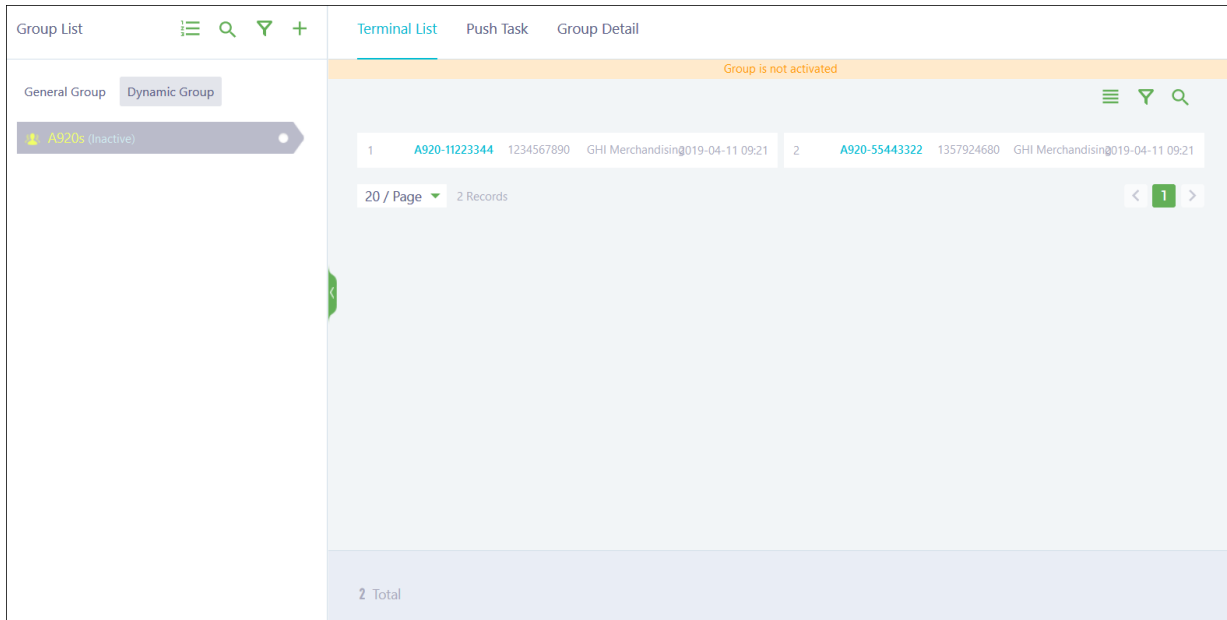
To manually activate the terminal group, click **Group Detail** and activate using the option within the more options icon (vertical ellipsis). A confirmation pop-up displays, and you must click **OK** to finish the activation. The following image shows the terminal group's Group Detail page:
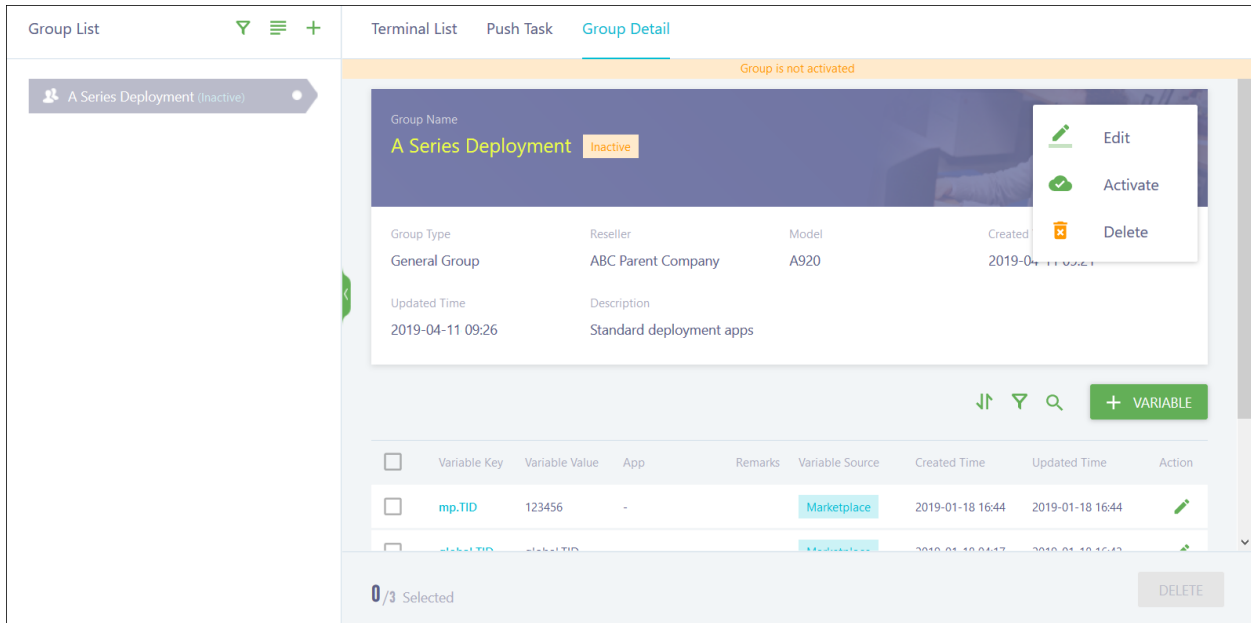
Once your terminal group is activated, you need to add the apps or firmware to the group. Click **Push Task** and then one of the push task lists: **Push App List**, **Push Firmware List**, **Push Package List**, or **Push Message List**. These tasks vary based on the terminal model selected. The following image shows the group's Push Task page:

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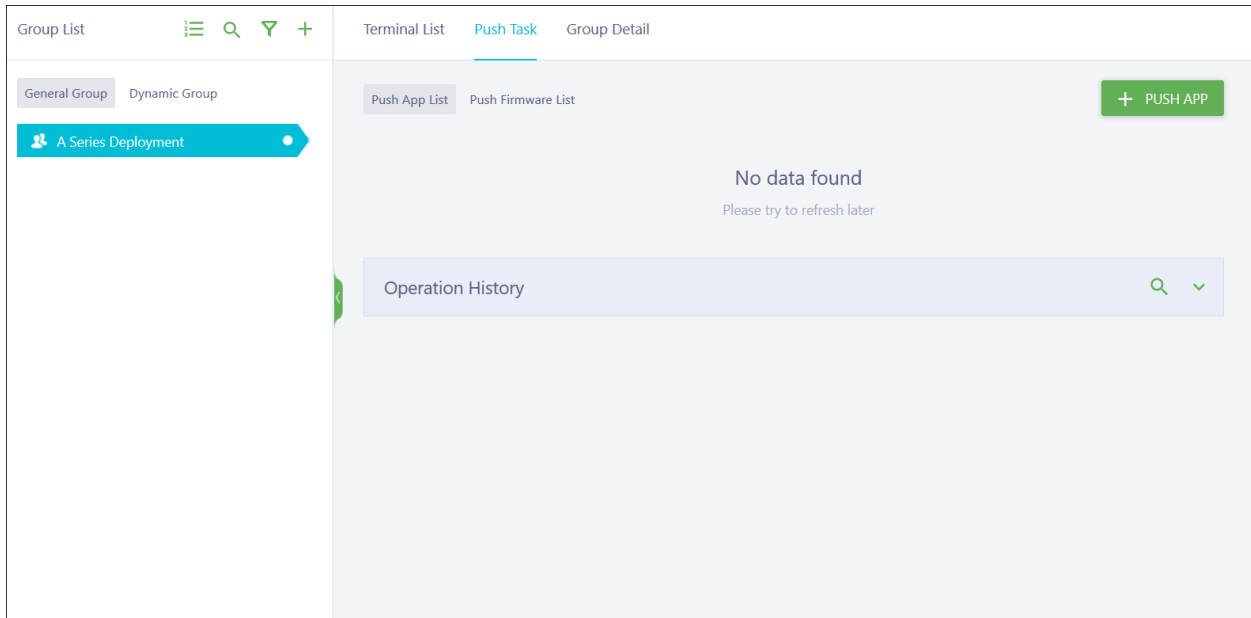
Click **+ PUSH MESSAGE** to send a message directly to all terminals in the terminal group.

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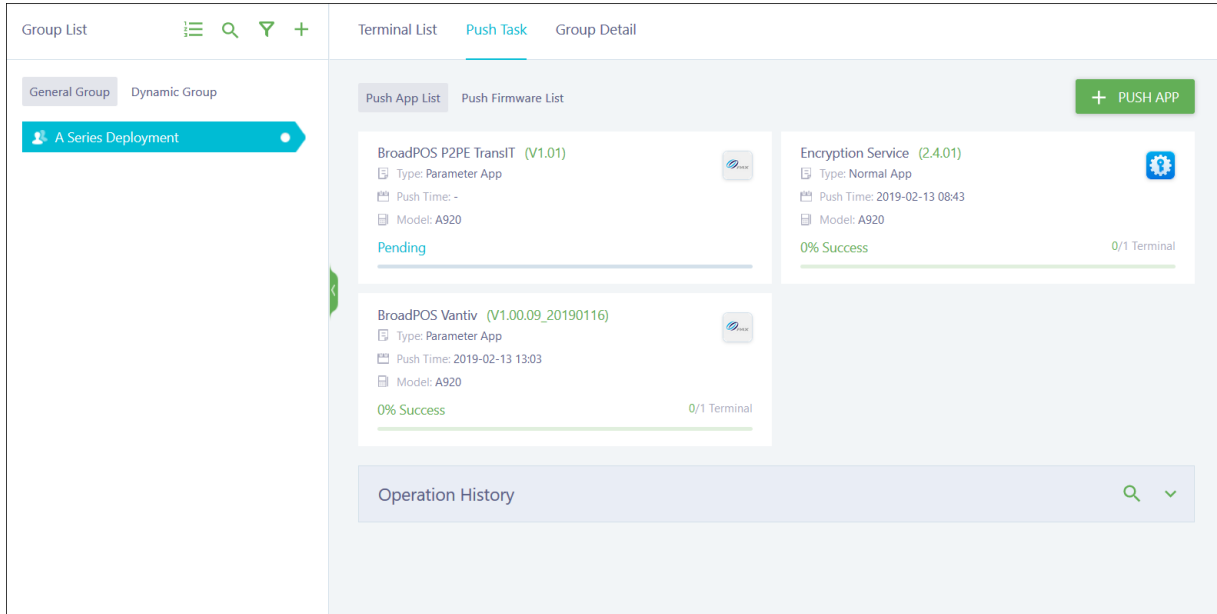
For general groups, your terminal group is now ready to be added to terminals during creation (if automatically activating the terminal), or you can manually add a terminal to it using **+ TERMINAL** in the Terminal List.

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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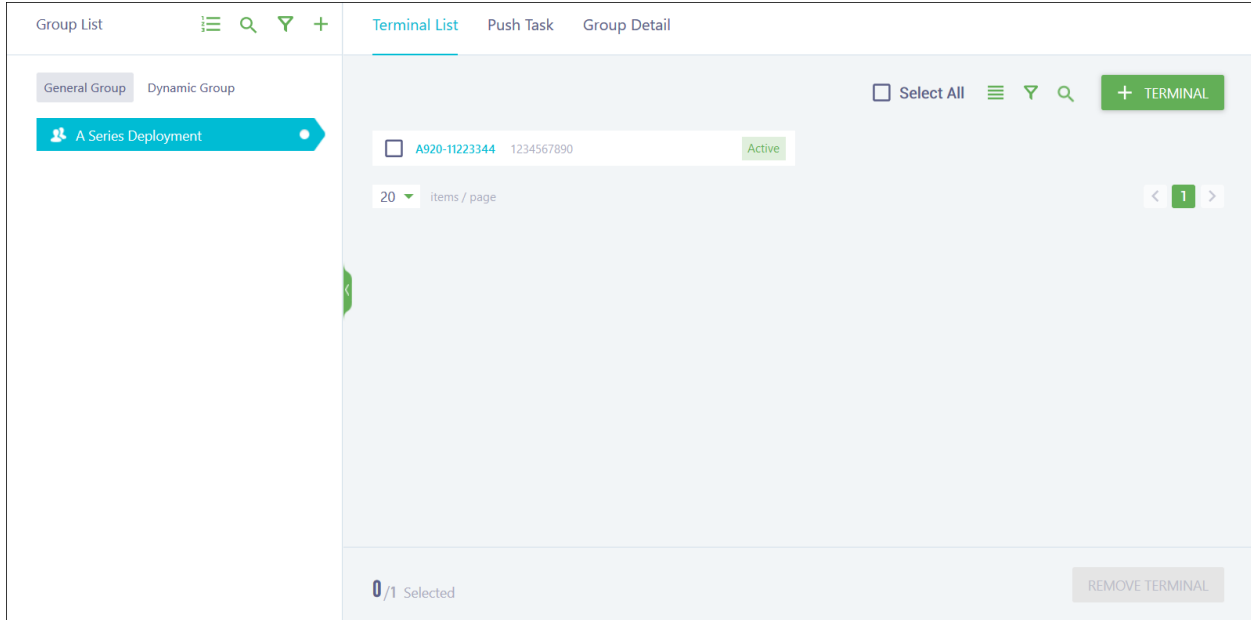
10 Push Templates

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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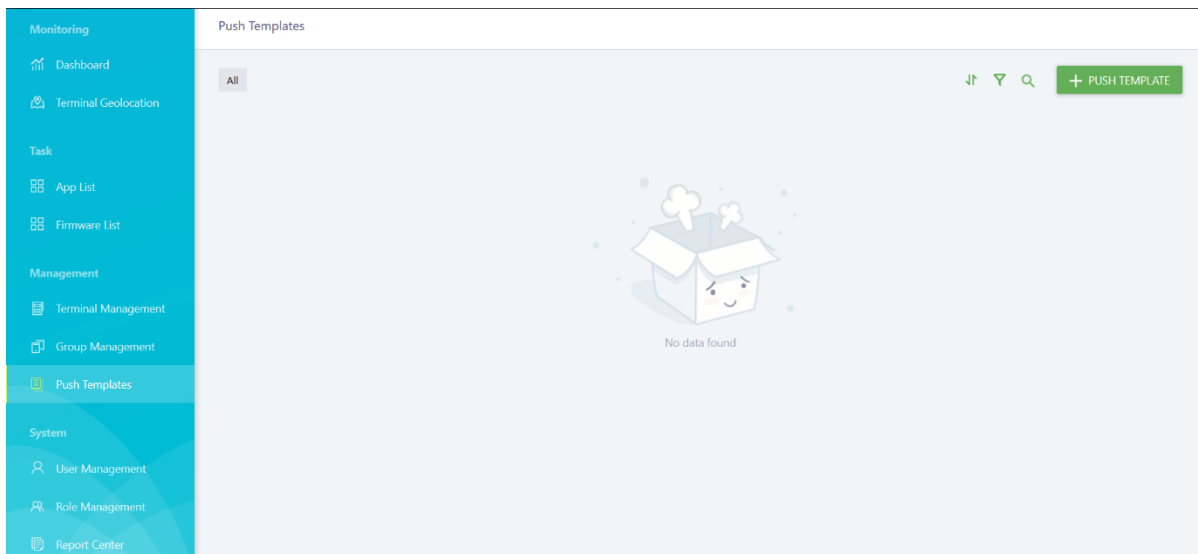
There are two ways to create a push template.

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

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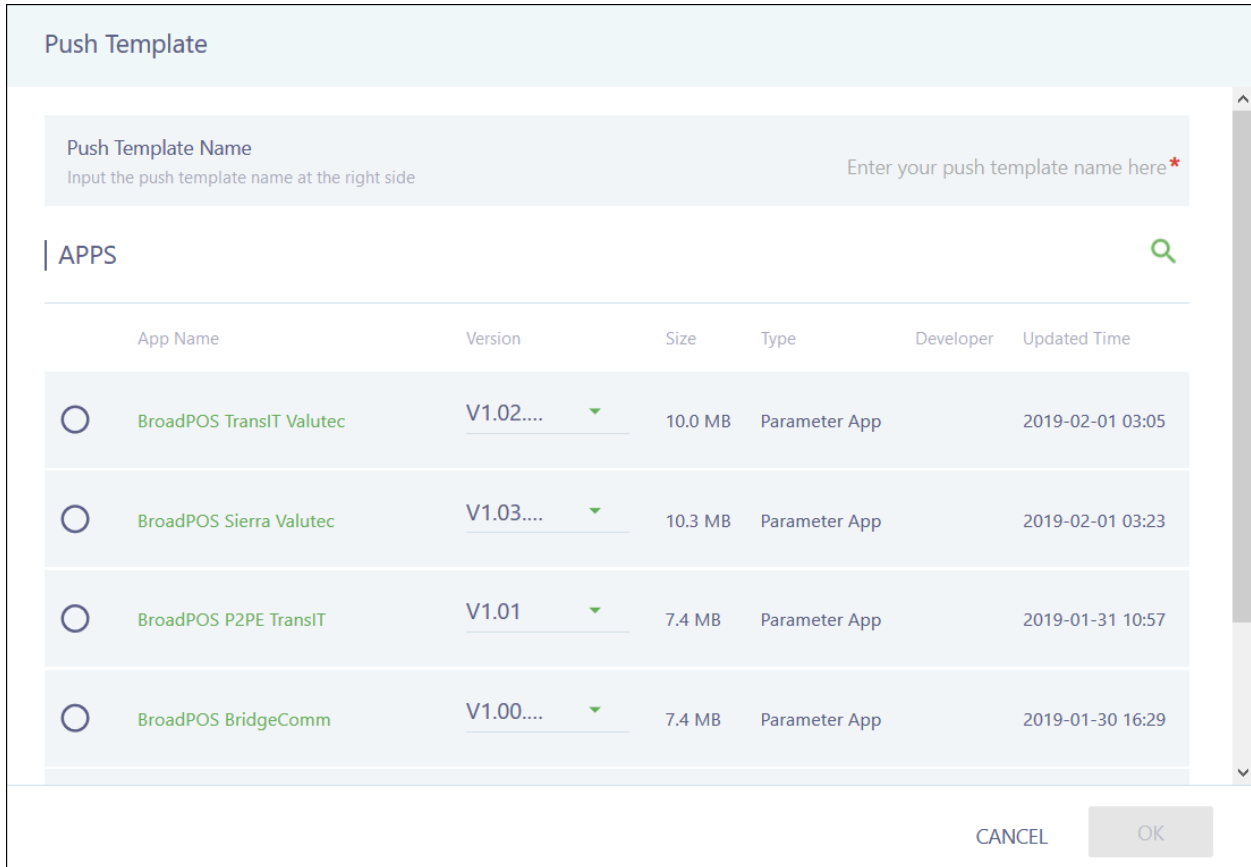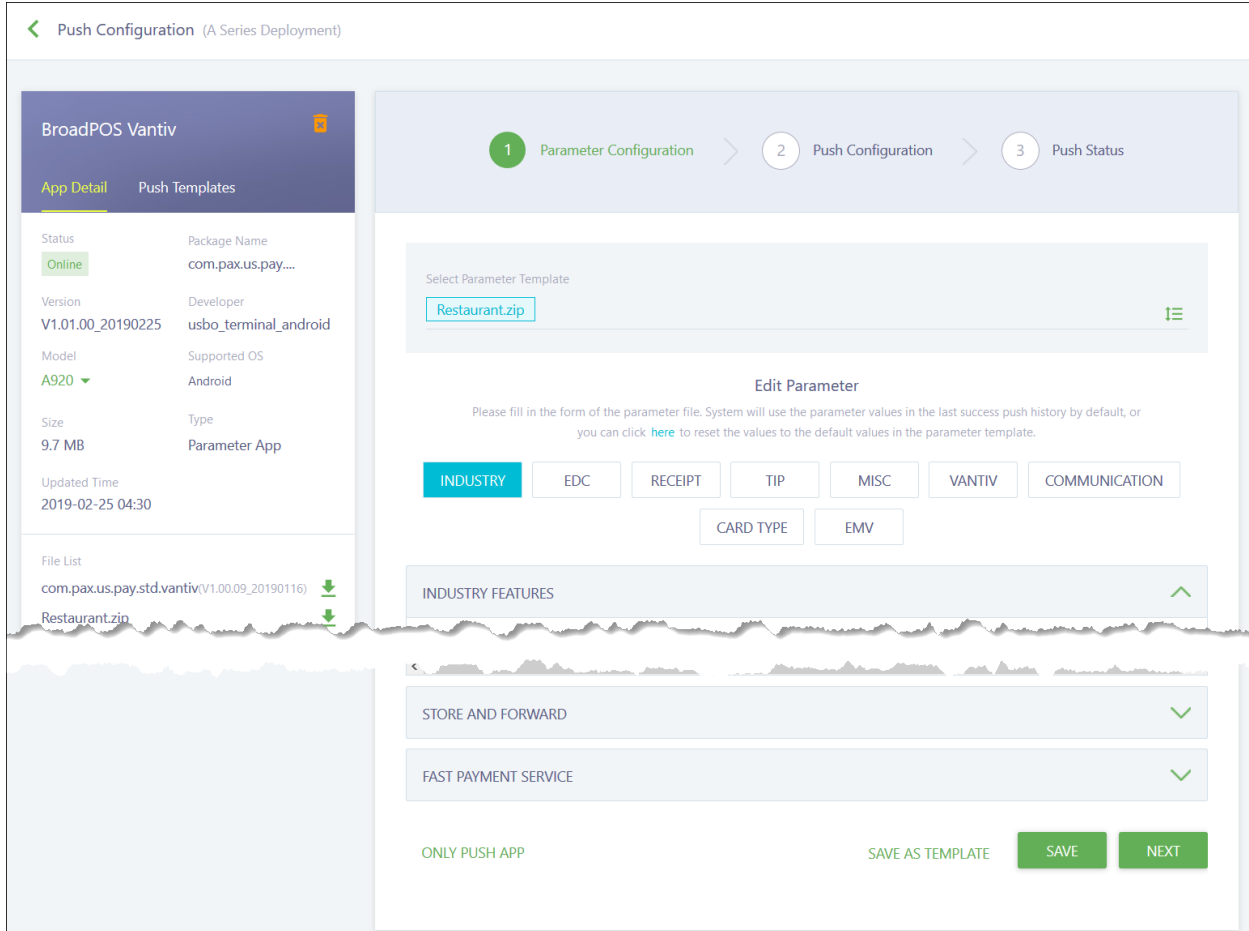
Enter the name for the push template and select a parameter app to add. Click **OK** to save or **CANCEL** to quit. Your app is added to your push template list. The following image shows the Push Templates page:
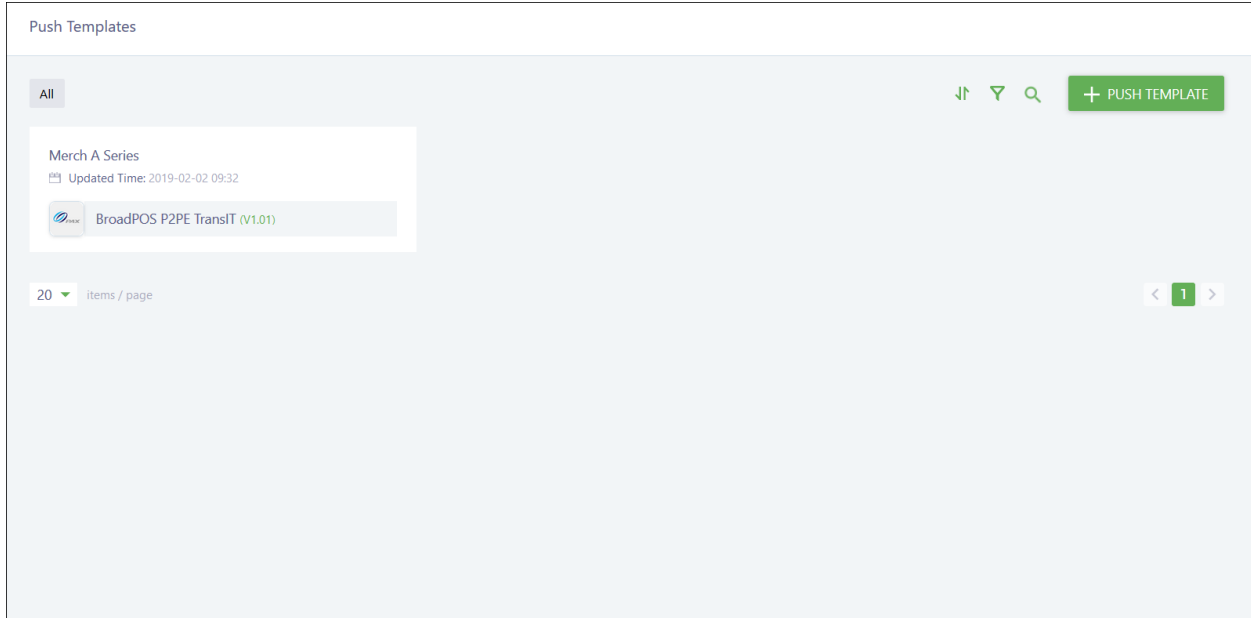
Next, you need to edit the parameters by clicking on the push template in your list to open the app parameters. After editing, click **SAVE** to save your updates. You can also delete the push template from this screen by clicking the trash can icon next to the app name. The following image shows the push template app's page:

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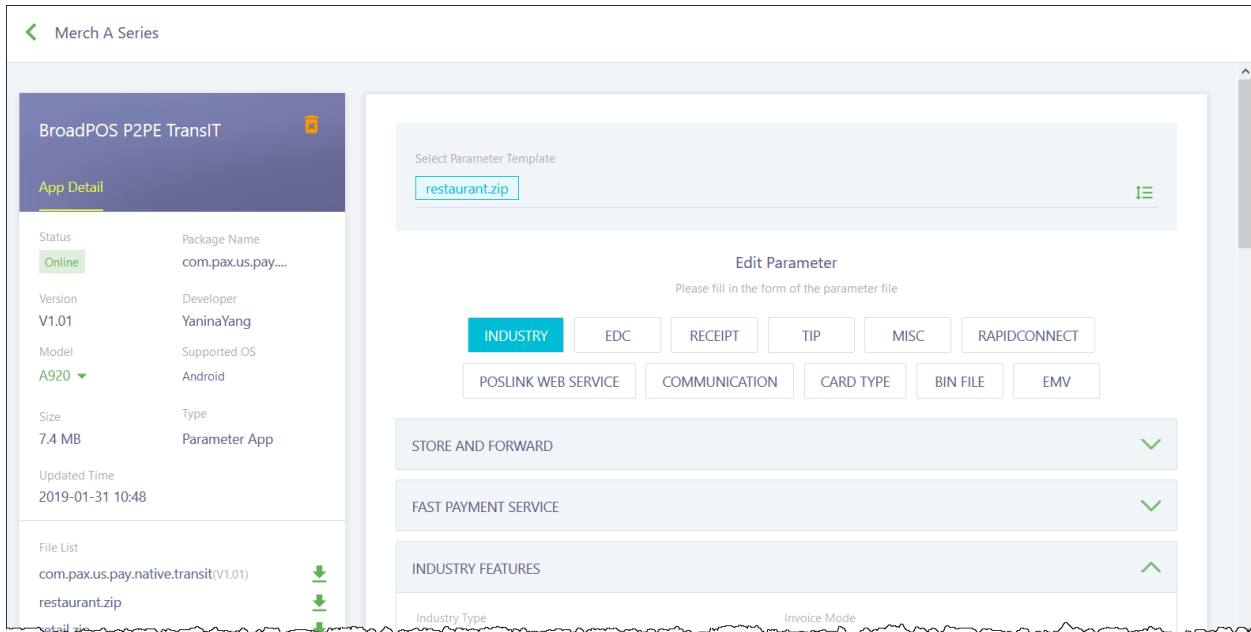
Another second way to make a push template occurs when you activate an app on a terminal or terminal group. Click on a pending parameter app to view its push configuration settings. Edit any necessary parameters and set up a push template by clicking **SAVE AS TEMPLATE**. The following image shows the 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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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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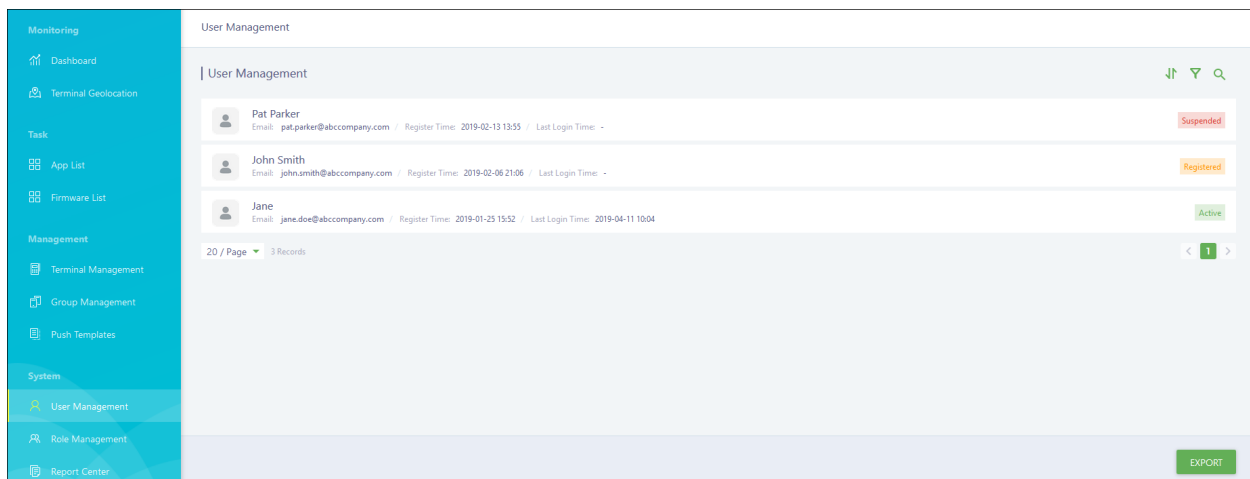
Click on a user's row to open the User Detail and view the basic information on file for a user. You can also quickly delete all user roles, except Administrator, from this window. To add user roles or delete a user, you must use Role Management. The following image shows the User Detail window:

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

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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:
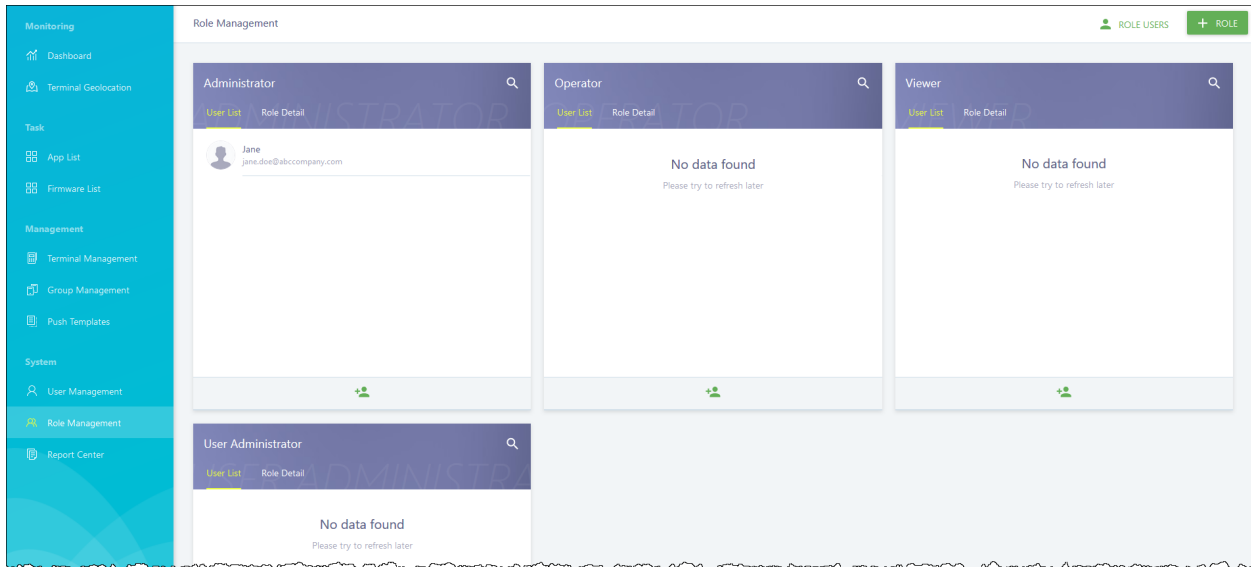
12.1 Create a New User

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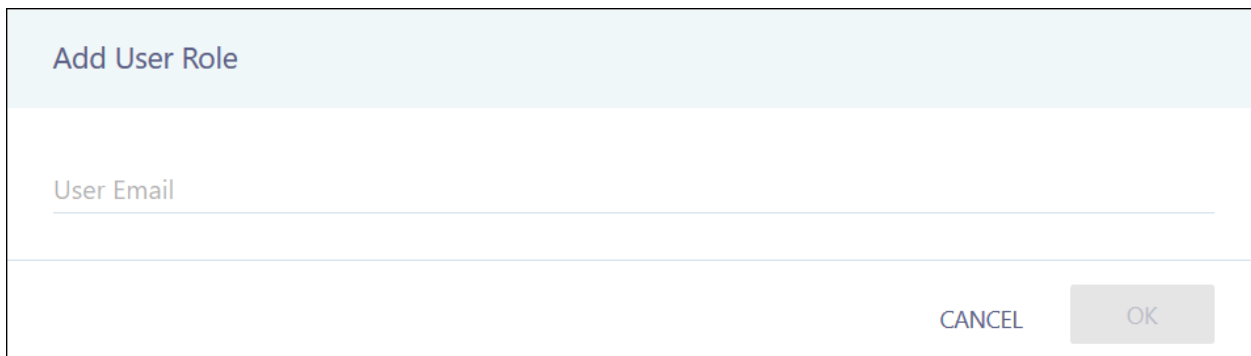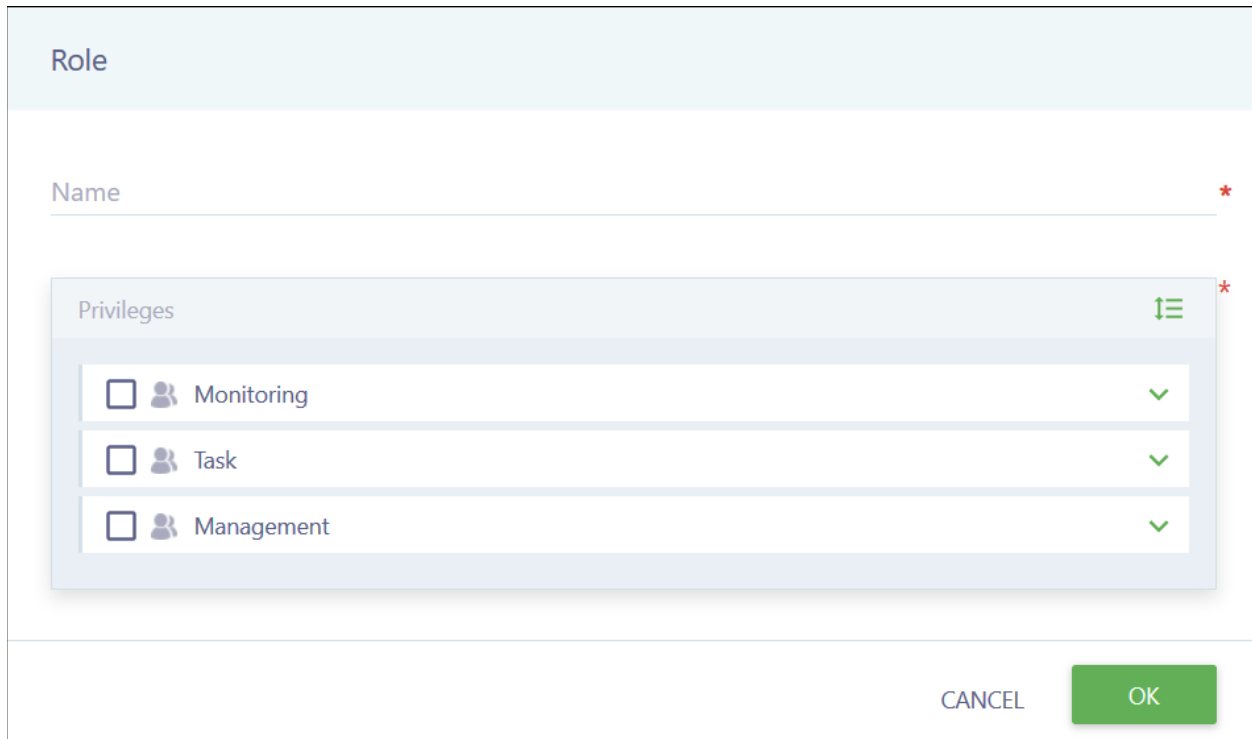
Enter the new user's email address. If the user already exists for your company, the user account will display and be selected. Click **OK** to create the user or **CANCEL** to quit. An activation email is sent to the entered email address, and the user is added to the role on the Role Management page.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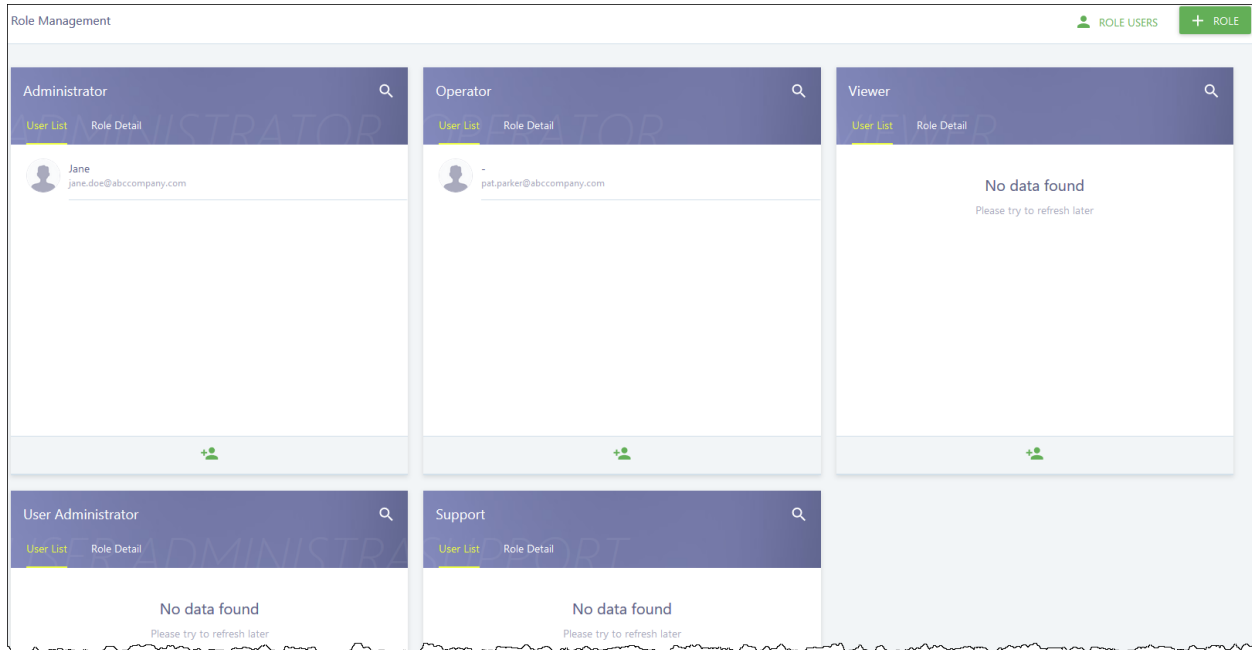
When the new user logs in, the user will only see the options the user has access to in the left sidebar.

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:

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

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

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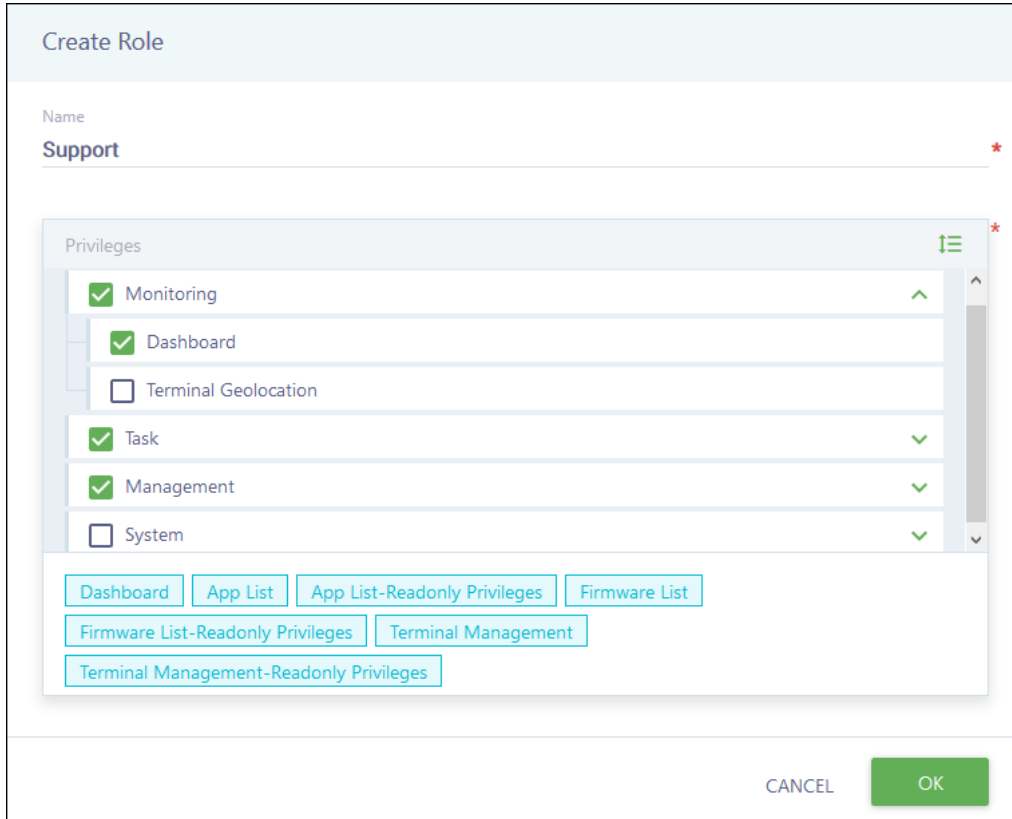
When you are done, click **OK** to create the role or **CANCEL** to quit. Your new role displays. The following image shows the Role Management page:

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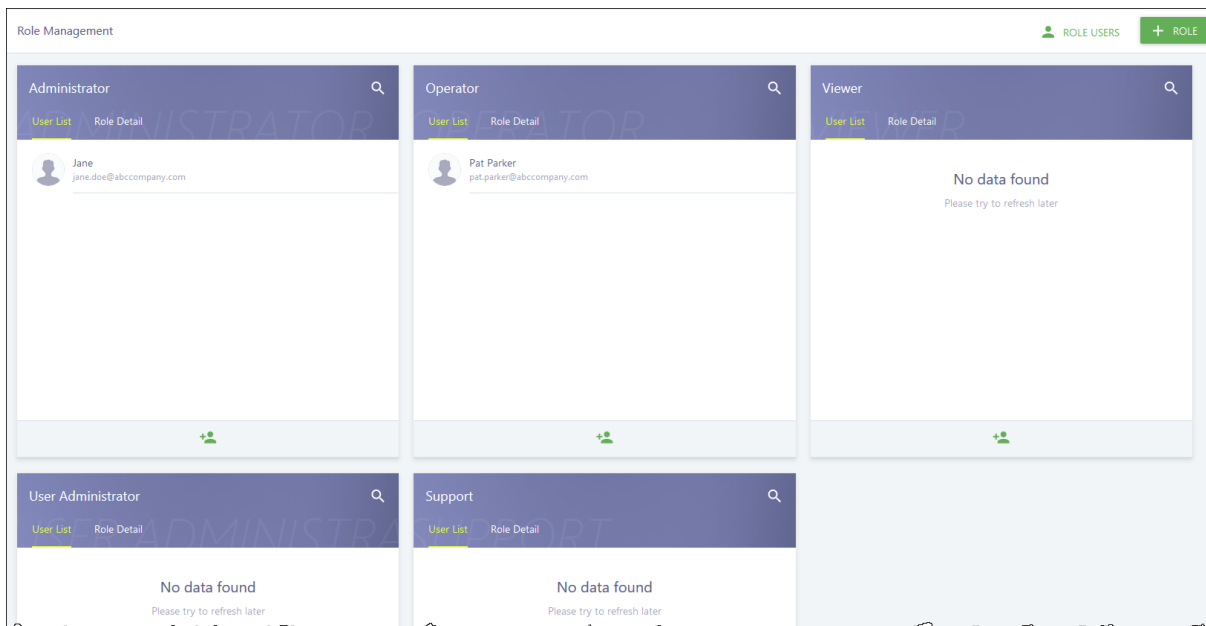
12.3 Manage a User

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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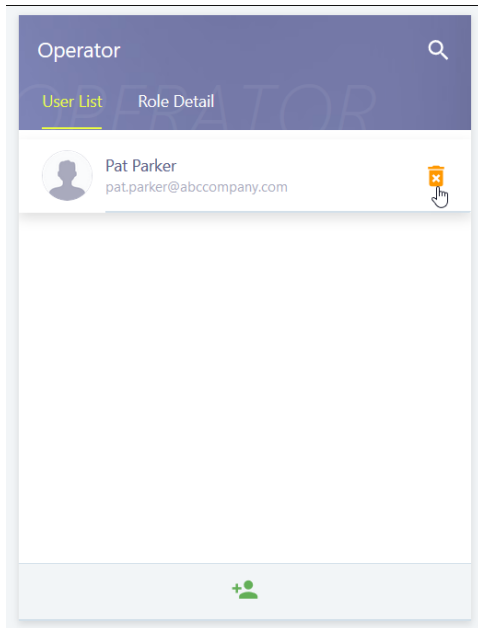
12.4 Manage a Role

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:
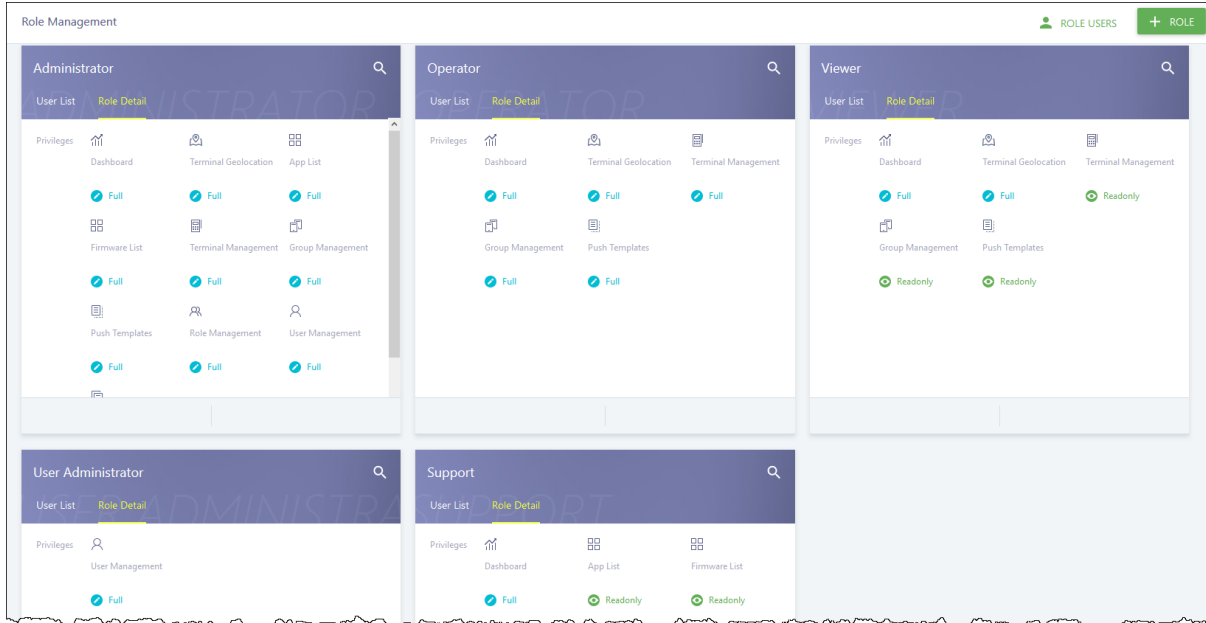
12.5 View All Role Users

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 Reseller 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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