



PAX S500 Stand-Alone User Guide

PAX S500 Stand-Alone User Guide V1.0
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Support

Contact Information

PHONE: 800-675-6573 Option 2

EMAIL: service@bluefin.com

ESCALATION EMAIL: servicemanagers@bluefin.com

Response Times

PHONE: Average hold time is 30 seconds; hold times over two minutes are rare

EMAIL: Response within 24 hours

Hours

Monday – Friday: 7:00 am – 6:00 pm Central

Saturday: 8:00 am – 4:30 pm Central

Overview

- Default password is either “1” or the current date in the format of MMDDYYYY
- As illustrated below, Bluefin’s PAX terminals connect to our PayConex payment gateway on the backend. Within PayConex, you can access processing history, reports, and the ability to reissue or refund transactions.
- Bluefin’s PAX terminals utilize PCI-validated Point to Point Encryption (P2PE), the highest standard of data security. PCI-validated P2PE prevents clear-text cardholder data from being present in a merchant or enterprise’s system or network where it could be accessible in the event of a data breach.
- “Batching” in the terminal consists of printing a report and clearing the terminal but does not affect actual settlement. Actual batching is done automatically in PayConex on the backend. If you would like to adjust your actual backend batch time to optimize settlement timing or to assist you with reconciling your deposits, please contact Bluefin. For PayConex manual, FAQs, support help and more, visit: www.bluefin.com/merchant-support



Processing

Batch out terminal

Only need to do manually before turning off terminal

- 1) Press FUNC
- 2) Press 2 for “Batch”
- 3) Press 1 for “Batch Close”

Swiped transaction

- 1) Ensure bottom right corner says “Sale”
- 2) Enter Amount
- 3) Press ENTER
- 4) Swipe card
- 5) Follow additional prompts (varies depending on programming)

Keyed transaction

- 1) Ensure bottom right corner says “Sale”
- 2) Enter Amount
- 3) Press ENTER
- 4) Enter card number, expiration date, and additional info as prompted (varies depending on programming)

Void a transaction

Prevents sale from settling, use in place of refund if transaction has not batched out

- 1) Press arrows until V/SALE screen
- 2) Press ENTER
- 3) Search by transaction or reference number
- 4) Transaction will be displayed; press ENTER
- 5) Press cancel at signature screen

Refund a transaction

Only refund transactions that were not run the same day, otherwise use Void. For security reasons, refunding by card number is often restricted. If you are unable to do this, please contact us.

- 1) Press arrows until you reach RETURN option
- 2) Press ENTER
- 3) Choose if by card number or reference number
- 4) Enter amount
- 5) Press ENTER
- 6) Swipe or enter card number or reference number

Authorization

NOTE: *Authorizations do not settle unless manually captured.*

- 1) Press arrows until you reach AUTH option
- 2) Enter amount
- 3) Swipe or key card
- 4) Sign if swiped

Force sale

Manually capture an existing authorization.

- 1) Press arrows until you reach FORCED option
- 2) Enter amount
- 3) Swipe or key card
- 4) Enter auth number (if it has letters, press number key and then alpha key until correct letter is displayed)

Void a forced transaction

- 1) Press arrows until you reach V/FRCD
- 2) Press ENTER
- 3) Enter Transaction # and press ENTER
- 4) Transaction will be displayed
- 5) Press ENTER
- 6) Will ask if card present, respond
- 7) Press cancel at signature screen

Settings

Receipt settings

Change whether customer receipt prints out

- 1) Press MENU
- 2) Press 3 for "Operation Settings"
- 3) Press the down arrow and then press 4 for "Receipt Print"
- 4) Press 1 for "Customer Copy"
- 5) Follow prompt to turn off or on

Change whether receipt preprints immediately

- 1) Press MENU
- 2) Press 3 for "Operation Settings"
- 3) Press the down arrow and then press 4 for "Receipt Print"
- 4) Enter password and then press ENTER
- 5) Press 2 for "Preprint"
- 6) Follow prompt to turn off or on

Change receipt font size

- 1) Press MENU
- 2) Press 3 for "Operation Settings"
- 3) Scroll down then press 4 for "Receipt Print"
- 4) Enter password and then press ENTER
- 5) Press 3 for "Font Size"

Follow prompt to select a size



Editing receipt "Header" (top of receipt)

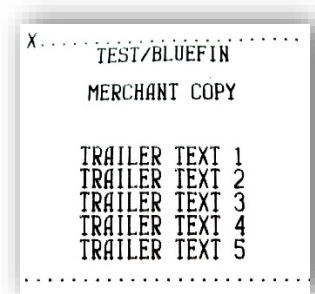
- 1) Press MENU
- 2) Press 2 for "Merchant Settings"
- 3) Press 3 for "Edit Header"
- 4) Enter Password and press ENTER
- 5) Select the line you would like to edit

Header Text 1	Merchant Name
Header Text 2	Street address
Header Text 3	City, State or Province, Postal Code
Header Text 4	Phone
Header Text 5	Anything else you would like to add!

- 6) Edit the text- use clear or cancel to delete existing text, to enter text press the corresponding button and then the alpha key. To type a space, press the "0" key then press alpha four times. EXAMPLE: To type the letter "L", type "5" then press ALPHA three times.
- 7) Press ENTER

Editing receipt "Trailer" (bottom of receipt)

- 1) Press MENU
- 2) Press 2 for "Merchant Settings"
- 3) Press 4 for "Edit Trailer"
- 4) Enter Password and press ENTER
- 5) Select the line you would like to edit
- 6) Edit the text- use clear or cancel to delete existing text, to enter text press the corresponding button and then the alpha key. To type a space, press the "0" key then press alpha four times. EXAMPLE: To type the letter "L", type "5" then press ALPHA three times.
- 7) Press ENTER



Disabling receipt printing

- 1) Press MENU
- 2) Press 3 for "Operation Settings"
- 3) Press 1 for "No Paper Mode"
- 4) Enter password and then press ENTER
- 5) Pick one of 3 options and press ENTER:

OFF	Terminal will only process if paper is inserted
ON	Nothing will print until "No Paper Mode" is switched to "OFF" or "AUTO"
AUTO	RECOMMENDED. Will print unless there is no paper at which point it will automatically go into "No Paper Mode"

Reprinting a receipt

- 1) Press FUNC
- 2) Press the down arrow
- 3) Press 2 for "Reprint"
- 4) Select option

1. Last Cust Rcpt	Prints the receipt from the most recent successful transaction
2. Any receipt	Prints receipt specified; must know transaction number

Security Settings

Make certain transaction types are password protected

- 1) Press MENU
- 2) Press 2 for "Merchant Settings"
- 3) Press 2 for "Authorization"
- 4) Press 1 for "Transaction Types"
- 5) Choose the transaction type you want to make password-protected
- 6) Press 3 for "Pswd Protected"

Changing password

NOTE: Default password is either "1" or today's date in the form of DDMMYYYY, so July, 4 2016 would be 07042016

- 1) Press MENU
- 2) Press 2 for "Merchant Settings"
- 3) Press 2 for "Security Settings"
- 4) Enter Password and press ENTER
- 5) Press 1 for "change password"
- 6) Press ENTER again for "Yes"
- 7) Enter old password when prompted and press ENTER
- 8) Enter new password when prompted and press ENTER
- 9) Reenter new password when prompted and press ENTER

Disabling/re-enabling/password protecting certain transaction types (e.g. refunds, EBT, etc.)

- 1) Press MENU
- 2) Press 2 for “Merchant Settings”
- 3) Press 1 for “Authorizations”
- 4) Enter password and press ENTER
- 5) Press 1 for “Transaction Types”
- 6) Select the number corresponding with the card type you wish to edit
- 7) Follow prompts on the screen to enable, disable, or password protect the transaction type

Password protecting batching or keying transactions

- 1) Press MENU
- 2) Press 2 for “Merchant Settings”
- 3) Press 2 for “Security Settings”
- 4) Enter Password and press ENTER
- 5) Press 2 for “Batch” OR 4 for “Card Man. Entry” (to password-protect keyed transactions)
- 6) Press 2 for “Pswd Protected”

Disabling/re-enabling card types

NOTE: *These instructions are only for enabling or disabling card types within your terminal. If a card type is disabled, other devices connected to your account will still be able to accept that card. If you enable a card type that you were previously unable to accept, it must also be enabled by your merchant services provider.*

- 1) Press MENU
- 2) Press 2 for “Merchant Settings”
- 3) Press 1 for “Authorizations”
- 4) Enter password and press ENTER
- 5) Press 2 for “Card Types”
- 6) Press the number corresponding with the transaction type you would like to disable and press ENTER
- 7) Press 1 for “Disabled” or 2 for “Always Enabled”. PLEASE NOTE: This does nothing to change your backend configuration, if enabling a card please also make sure it was added by your merchant services provider.

Enabling AVS

- 1) Press MENU
- 2) Press the down arrow
- 3) Press 1 for “System Settings”
- 4) Press 3 for “Working Mode”
- 5) Enter password and press ENTER
- 6) Press 2 for “Fraud Control”
- 7) Select the processing method you wish to enable AVS on, 3 for “AVS onCardNotPrsnt” is recommended
- 8) Select which card types it should be used for, 1 for “ALL” is recommended
- 9) Select which components of AVS should be used, 3 for “Zip” is recommended

Enabling CVV on Card Not Present (CNP) transactions

- 1) Press MENU
- 2) Press the down arrow
- 3) Press 1 for "System Settings"
- 4) Press 3 for "Working Mode"
- 5) Enter password and press ENTER
- 6) Press 2 for "Fraud Control"
- 7) Press the down arrow
- 8) Select 1 for "V-Code"
- 9) Select which card types it should be used for, 1 for "ALL" is recommended

General Settings

Disable or enable the beeping noise

- 1) Press MENU
- 2) Press 3 for "Operations Settings"
- 3) Press 2 for "Buzzer Setup"
- 4) Press 1 for "Buzzer Setup"
- 5) Press 1 to turn it off, or 2 to turn it on

Put in demo mode or remove from demo mode for training or testing

- 1) Press MENU
- 2) Press 3 for "Operation Settings"
- 3) Press 3 for "Operation Mode"
- 4) Enter password and press ENTER
- 5) Press 1 to keep in normal mode or 2 for demo mode

Change logo on image screen

- 1) Create a version of your logo that is exactly 320x80 pixels
- 2) Send to service@bluefin.com
- 3) When you receive confirmation that it has changed, turn terminal off and back on

If you do not know how to change the image size, just send us your logo and we will crop it for you

Change terminal date or time

- 1) Press MENU
- 2) Press the down arrow
- 3) Press 1 for "System Settings"
- 4) Press 1 for "Date/ Time setup"
- 5) Enter the correct date (enter today's date if already correct)
- 6) Press ENTER
- 7) Enter correct time in 24 hour format
- 8) Press ENTER

Enabling duplicate transaction check

This feature will display a warning that says “Duplicate transaction, continue?” if a transaction for the same amount is attempted on the same card within the same batch.

- 1) Press MENU
- 2) Press the down arrow
- 3) Press 1 for “System Settings”
- 4) Press 3 for “Working Mode”
- 5) Enter password and press ENTER
- 6) Press 3 for “Local Dup Check”
- 7) Press 2 for “ON” or 1 for “OFF”

Turning backlight on or off

- 1) Press MENU
- 2) Press 3 for “Operation Settings”
- 3) Press 4 for “Screen Backlight”
- 4) Select Option

1. OFF	Always off- screen will always be dim
2. ONwith 60s timeout	On when a key is pressed and 60 seconds thereafter
3. Always ON	Backlight is always on

Print report of all settings

- 1) Press MENU
- 2) Press 3 for “Operation Settings”
- 3) Press the down arrow
- 4) Select 3 for “Print Setup”
- 5) Enter password and press ENTER
- 6) A report of all settings will print out

Adding a clerk and server

NOTE: *In order to do this, must have clerk mode enabled by Bluefin*

- 1) Press MENU
- 2) Press 2 for “Merchant Settings”
- 3) Press the down arrow key twice
- 4) Press 2 for “Clerk/Server Name”
- 5) Enter the Password and press ENTER
- 6) Enter desired Clerk number and press ENTER
- 7) Enter clerk name by pressing the number corresponding with the desired letter and then the orange Alpha key
- 8) Press ENTER
- 9) The next screen will prompt to enter an additional clerk; if not adding additional clerks press cancel to return to the main menu

EXAMPLE: *If you wanted to enter the name BOB you would enter 2 Alpha for B, 6 Alpha Alpha for O, 2 Alpha Alpha for B.*

Setting up automatic batching

IMPORTANT NOTE: *“Batching” in the terminal consists of printing a report and clearing the terminal but does not affect actual settlement. Actual batching is done automatically by Bluefin on the backend. If you would like to adjust your actual backend batch time to optimize settlement timing or to assist with reconciliation please contact Bluefin.*

- 1) Press MENU
- 2) Press 2 for “Merchant Settings”
- 3) Press the down arrow then select 3 for “Set Batch Time”
- 4) Enter password and press ENTER
- 5) Press 2 for Autobatch “On”
- 6) Enter batch time and press ENTER

Network settings

Setting up static IP

NOTE: *Dynamic IP is the default and is already setup*

- 1) Press MENU
- 2) Press the down arrow and then press 2 for “Communications”
- 3) Enter Password and press ENTER
- 4) Press the down arrow and then press 3 for “LAN Parameters”
- 5) Press 1 for “LAN type” and choose “Static”
- 6) Press 2 for “IP Address”
- 7) Enter the desired IP address and press ENTER

Enabling store and forward

IMPORTANT NOTE: *“Store and Forward” allows you to process while offline. This means that when you are running the transactions, they are not hitting the approval networks. Once the terminal goes back online, it accesses the network and actually runs the transactions. This means that when you use store and forward you have no way of knowing if a card is going to be approved or not. Bluefin is not responsible for losses incurred while running transactions in “Store and Forward” mode, regardless of whether the outage is caused by your network or ours.*

- 1) Press the MENU button
- 2) Choose option 3 Operation Settings
- 3) Press the down arrow key twice
- 4) Select option 1 for Store&Forward
- 5) Enter Terminal Password and press ENTER
- 6) Choose option 1 S&F On/Off
- 7) Press ENTER when the Terminal Displays Store & Forward Switch On?
- 8) Choose Option 3

1. Stay Online	“Store and Forward” is completely turned off
2. Stay Offline	Do not use this setting
3. Offline Until Batch	Processes offline and then processes everything online once a batch is initiated
4. Offline on Dmnd	When transaction is attempted terminal will attempt to process online; if no connection “Process Offline?” prompt will display. Transaction will process once batch is initiated in terminal.

- 9) Limit Per EDC Press Cancel
- 10) Enter Max Amount Press ENTER to bypass or enter the maximum transaction dollar amount
- 11) Enter Max Total Press ENTER or enter the maximum total transaction dollar amount that you will allow to be run offline (all transactions added together)
- 12) Offline Anyway Press ENTER

ADDITIONAL NOTE: Home screen will not display whether or not terminal is in offline mode. Receipts run in offline mode will not have an authorization code and will display a "Terminal Reference Number" in place of a "Transaction #". Upon batching out, if any transactions are declined, a decline receipt will print as well as a loss report showing the count and dollar amount of transactions lost while processing in offline mode.

Reporting

IMPORTANT NOTE: Instructions below are for printing out reports from the terminal. Bluefin's PAX terminals are connected to our PayConex online payment gateway, where much more robust reports are located. To download a PayConex gateway manual, please visit Bluefin.com/merchant-support.

Designating a default report

A "default report" is a report of your choosing that will print out when "default report" is chosen.

- 1) Pull up report using instructions on subsequent pages
- 2) A message will come up right before you pull it saying "SET CUR. DEFAULTS?", press ENTER

Printing default report

- 1) Press MENU
- 2) Press 1 for "Reports"
- 3) Enter password and press ENTER
- 4) Press 1 for "Default Report"

Print history report

A History report shows totals by day by card type for a specified period of time

- 1) Press MENU
- 2) Press 1 for "Reports"
- 3) Enter password and press ENTER
- 4) Press 3 for "History Report"
- 5) FROM BATCH DATE: Enter date for beginning of report and press ENTER
- 6) TO BATCH DATE: Enter date for end of report and press ENTER
- 7) SELECT PMT TYPE: Press 1 for "ALL" or select which transaction types should be include
- 8) SELECT CARD TYPE: Press 1 for "ALL" or select which card types should be included
- 9) SELECT TRAN. TYPE: Press 1 for "ALL" or select alternate transaction type
- 10) Press Cancel to not set as default report, or enter to set as default

Create on-screen report of all transactions

- 1) Press MENU
- 2) Press 1 for "Reports"
- 3) Enter password and press ENTER
- 4) Press 4 for "Display Trans."
- 5) Press 1 for "Scroll All"
- 6) Use up and down arrows to navigate transactions

Print report showing available data storage

Report shows the number of stored transactions vs. terminal capacity

- 1) Press MENU
- 2) Press 1 for "Reports"
- 3) Enter password and press ENTER
- 4) Press the down arrow
- 5) Choose 2 for "FileSysReport"

Printing reports of current batch

- 1) Press MENU
- 2) Press 1 for "Reports"
- 3) Enter password and press ENTER
- 4) Press 2 for "Current Report"
- 5) Select the report you want (SEE KEY)
- 6) SELECT PMT TYPE: Press 1 for "ALL" or select which transaction types should be include
- 7) SELECT CARD TYPE: Press 1 for "ALL" or select which card types should be included
- 8) SORT METHODS: Press 2 for "By Card Type" or select an alternate sort method
- 9) SELECT TRAN. TYPE: Press 1 for "ALL" or select alternate transaction type
- 10) Press Cancel to not set as default report, or ENTER to set as default

CONDENSED REPORT

EDC:	CREDIT
Batch Number:	11
Card Type:	Visa
Trn Crd Tp Acct \$Amount	
.....	
1 VI SL 8616	3.00
2 VI SL 8616	4.00
Records:	2
Total:	7.00
.....	
CREDIT Records:	2
CREDIT Total:	7.00
.....	
Records:	2
Overall:	7.00
End of Report	

SHORT REPORT

EDC:	CREDIT
Batch Number:	11
Card Type:	Visa

SALE:	3.00

SALE:	4.00

Records:	2
Total:	7.00

CREDIT Records:	2
CREDIT Total:	7.00

Records:	2
Overall:	7.00

JOURNAL REPORT

TOTALS ONLY

```

07/15/2016      11:53:59
-----
Terminal SN:    65000718
-----
EDC:           CREDIT
Batch Number:   11
Card Type:      Visa
-----
SALE:          3.00
Transaction #:  1
Trans. Date:   07/15/2016
Trans. Time:   11:50:37
Entry:         Swiped
Account:       *****8616
Clerk(S):      555
Auth. Code:    CV1056
Ref. Number:   00000021081
-----
SALE:          4.00
Transaction #:  2
Trans. Date:   07/15/2016
Trans. Time:   11:51:22
Entry:         Swiped
Account:       *****8616
Clerk(S):      555
Auth. Code:    CV1067
Ref. Number:   00000021101
-----
Records:       2
Total:         7.00
-----
CREDIT Records: 2
CREDIT Total:  7.00
-----

```

```

07/15/2016      11:54:16
-----
Terminal SN:    65000718
-----
EDC:           CREDIT
Batch Number:   11
Crđ Cnt.       Total    Tip
VI 2           7.00    0.00
-----
CREDIT Records: 2
CREDIT Total:  7.00
-----
Records:       2
Overall:       7.00
-----

```

Transaction search

- 1) Press MENU
- 2) Press 1 for "Reports"
- 3) Enter password and press ENTER
- 4) Press 4 for "Display Trans."
- 5) Decide what you want to search for
 - Press 2 to search by invoice
 - Press 3 to search by server/clerk ID
 - Press 4 to search by transaction number
 - Press the down arrow and 1 to search by card type
 - Press the down arrow and 2 to search by last 4 digits of card number
- 6) Enter search criteria as prompted and press ENTER; if more than one transaction meets the criteria use the up and down arrows to scroll between them