



LEADERS HOLDING CO.TM

Est. 1971

How to use the credit card reader

PAX Device

The desktop credit card reader should be used to process payments by dip, swipe, or tap payments while a guest is present in the store. If a guest is not present, you can take payment by typing the credit card information directly into NetSuite in the “Take Payment” screen. You should never type or enter data directly into the credit card terminal.

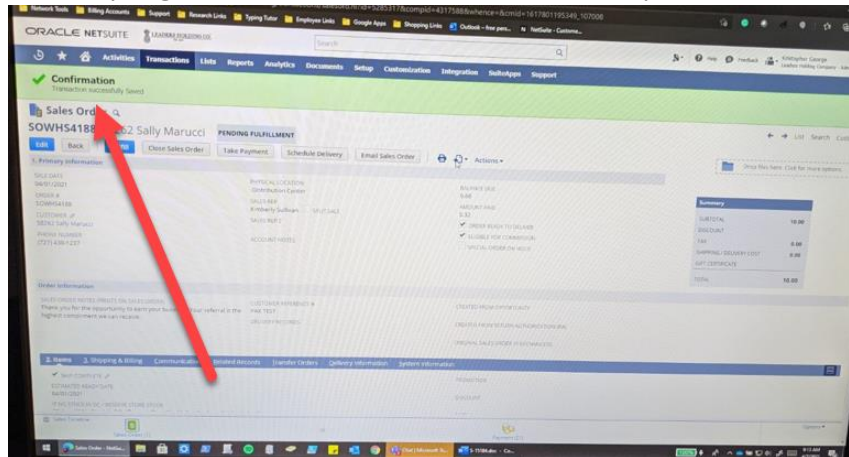
The PAX device should be ready to go each day. If you have any concerns, please consult the troubleshooting portion of this procedure.

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Taking a Payment

1. From NetSuite, on any device in the showroom, click **Take Payment**.
2. If your store has more than one PAX please select the PAX device you plan to use. It will be labeled if you are not sure which one it is. After entering the particulars press Save
3. Follow the prompts on the PAX Device
4. Wait till you get the Green Confirmation bar at the top of the screen before proceeding.



5.

Tap and Pay

Tap to pay is accessed by holding the payment method to the logo on the back top of the terminal.



Printing Preferences

Printing preferences can be set to the following methods. Leaders would prefer it be set to No Receipt. Receipts can always be printed out of NetSuite if the customer would like a paper copy. Remember, NetSuite automatically emails a receipt to the guest after a deposit is taken on a new sale.

1. Open the pay guardian app
2. Clicking the three dots in the top right of the screen
3. Click "Toggle Printer"
 - a. If your device says "Set Image" and not "Toggle Printer," contact IT immediately to prevent future errors. Your device needs an update. (727) 254-5550

Printing Method	Result
No Receipt	No copies printed (Preferred)
Merchant Copy	A printed receipt for Leaders Only (Never a need for this)
Customer Copy Only	A printed copy for the customer only
Merchant and Customer Copy	A printed copy for the customer and Leaders

Manual Batch Close

From the Pax terminal

1. Click and open the Bridgepay App
2. Tap Function
3. Tap Batch

Re-Booting the Terminal

If your Pax is not taking payments) try rebooting.

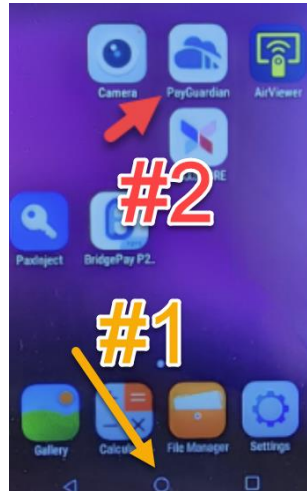
1. Press and holding the **Red X** until the screen says restart
2. Tap restart on the screen
3. After the device finishes its reboot process try to take the payment again. If it is still not taking payments email (it@leadersfurniture.com) for assistance.



Clearing History

If a payment fails after the PAX machine batches out, the history may have not been cleared. To help prevent payments from failing it is important that a PAX device clear its history every night. Follow these steps to set the machine up to clear its history every night.

1. On the PAX device, click on the circle at the bottom of the device to go to the app screen
2. Select the PayGuardian App



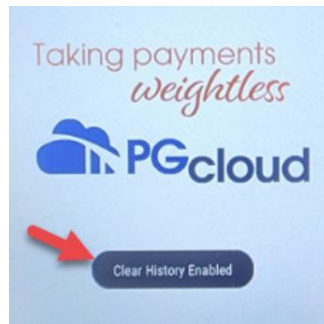
3. Click on the three dot ellipsis in the top right of the screen



4. Click "Toggle Clear History"



5. "Clear History Enabled" should pop up on the bottom of the screen
 - a. If "Disabled" pops up on the screen, repeat steps



Troubleshooting

Concern	Solution
The device will not turn on	<p>Check that the power cord is plugged all the way in the back of the device.</p> <p>Check that the power cord is plugged into an outlet</p> <p>Check to make sure the surge protector is turned on</p> <p>Contact IT if the concern persists. it@leadersfurniture.com</p>
The device will not activate to take a payment.	<p>Many stores have more than one terminal. Make sure you selected the correct terminal and try again</p> <p>Reset the device by unplugging it for one minute. Follow the Daily Refresh procedure, give the terminal a few minutes to load and try again.</p>
"Settle" Error. The device will not take payment	<p>The device did not "Batch Close" automatically and the automatic "Clear History" may not be activated. Do a manual Batch Close by following the steps in the Manual Batch Close section of this procedure and follow the "Clear History" Section of this Procedure to make sure your machine is clearing its history each night.</p>
The payment is not posting back to NetSuite	<p>Most of the time a payment does not post back to NetSuite is because the device was the PAX device asked a question on screen that was not answered and the device "timed out." An example would be, "Would you like to print a customer copy" of the receipt.</p>