



PAX S500 Standalone

User Guide



Document History

Document Date: July 2019

Document Version: 2.1

Legal Notice

Copyright © 2019 Bluefin Payment Systems LLC.

Bluefin Payment Systems LLC is a registered ISO of Wells Fargo Bank, N.A., Walnut Creek, CA.

Bluefin Payment Systems LLC is a registered ISO/MSP of Deutsche Bank AG, New York, New York.

Bluefin Payment Systems LLC is a registered MSP/ISO of the Canadian branch of U.S. Bank National Association and Elavon, Inc. Georgia, a wholly owned subsidiary of U.S. Bancorp, Minneapolis, MN.

Decryptx® is a registered trademark of Bluefin Payment Systems LLC in the United States and/or other countries.

P2PE Manager® is a registered trademark of Bluefin Payment Systems LLC in the United States and/or other countries.

PayConex™ (Gateway) is a trademark of Bluefin Payment Systems LLC.

PayConex™ (for Salesforce) is a trademark of Bluefin Payment Systems LLC.

PayConex™ (Plus) is a trademark of Bluefin Payment Systems LLC.

QuickSwipe® (Mobile POS) is a registered trademark of Bluefin Payment Systems LLC in the United States and/or other countries.

Table of Contents

- Overview.....5
 - Contacting Support.....5
 - Response Times5
 - Payment Process Flow.....5
- Getting Started6
 - Using the Keypad6
 - Password.....7
 - Setting up Your Terminal.....7
 - Processing Credit Card Transactions7
 - Voiding Debit Card Transactions8
 - Common Settings.....9
 - Troubleshooting Tips.....10
 - Customizing Device Logo.....10
- Managing Receipts11
 - Disabling Receipt Printing11
 - Reprinting a Receipt12
- Working With Batches.....12
 - About Batching12
 - Batch Out a Terminal12
 - Password Protect Batching.....12
 - Scheduling Automatic Batching12
 - Batch Reports12
- Settings13
 - Security13
 - Changing the Password13
 - Password Protect Batching or Keying Transactions13
 - Keyed/Manual Entry - Disabling/Enabling.....13
 - Enabling Address Verification Service (AVS)14
 - Enabling Card Verification Value (CVV)14
 - General14
 - Enabling Duplicate Transaction Check14
 - Adjusting Backlight14
 - Print Report of All Settings.....15
 - Enabling Clerk ID Mode15
 - Adding a Clerk / Server15
 - Setting up Automatic Batching16

- Restaurant Mode 16
 - Tips 16
 - Enabling Server ID Mode / Table Mode 16
- Network Settings..... 17
 - Configuring your Network 17
 - Setting up Static IP 17
 - Store and Forward: 17
- Reporting 17
 - Printing Default Report..... 17
 - Print History Report 18
 - Create On-screen Report 18
 - Current Batch Report 18
 - Designating a Default Report 19
 - Transaction Search 19
- Appendix: Receipt Samples 20
 - Font Sizes 20
 - Trailer..... 21
 - Batch Reports 21
- Appendix: Transaction Types 23
 - Credit 23
 - Debit 23

Overview

Bluefin's PAX terminals utilize PCI-validated Point to Point Encryption (P2PE), the highest standard of data security. PCI-validated P2PE addresses every possible source of a data breach and makes it virtually impossible to steal full-text card data from your customers.

Contacting Support

PHONE: 800-675-6573

Available 24/7 (24 Hours/Day and 7 days a week.)

Option 2 for Technical Support and

Option 4 for Customer Service

EMAIL: service@bluefin.com

ESCALATION EMAIL: servicemanagers@bluefin.com

Escalation emails are routed to Support Manager, VP of Operations, and Lead Support Rep, so even if one person is out of the office, someone else will respond.

WEB PORTAL: Click the **Contact Support** tab within P2PE Manager.

Response Times

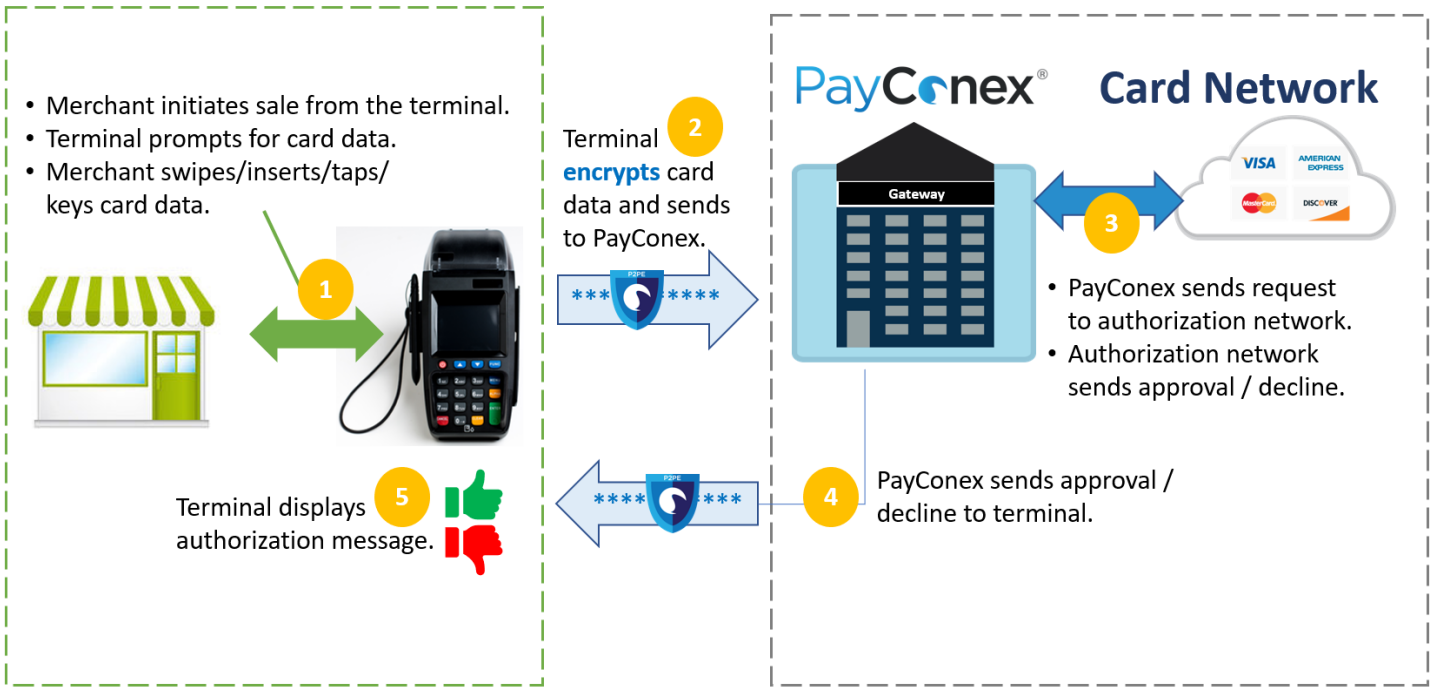
PHONE: Average hold time is 30 seconds; hold times over two minutes are very rare

VOICEMAIL: Call back within four hours during business hours

EMAIL: Response within 24 hours

Payment Process Flow

As illustrated in the diagram below, Bluefin's PAX terminals connect to our PayConex payment gateway on the backend. Within PayConex, you can access processing history, reports, and you can reissue or refund transactions.



Related Information: To review the PayConex manual, FAQs, support help and more, visit: www.bluefin.com/merchant-support

Getting Started

Your terminal is preprogrammed and ready for use immediately! Depending on your organization’s network security, your Network Team might need to modify their firewall to allow the device to communicate.

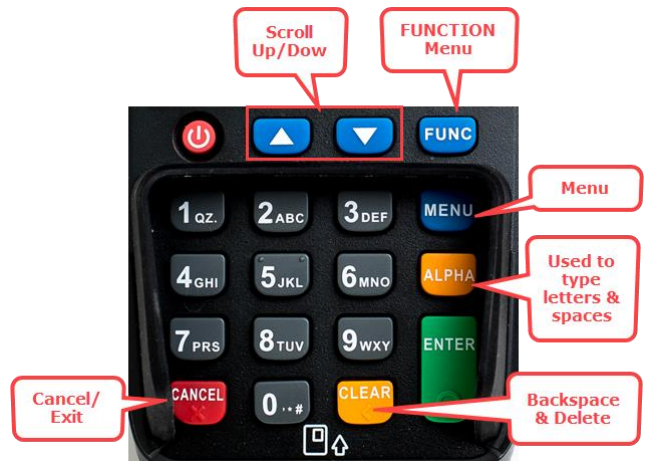
IMPORTANT: The following port and URL should be open, so the device can communicate:

- **Transactions URL:** secure.payconex.net on Port 443
- **Device Health Check URL:** t.broadpos.com on Port 9120

We recommend that you use a surge protector and charge your device for 24 hours to ensure that the battery is fully charged.

Using the Keypad

- Whenever “scrolling” is mentioned in this guide, use the arrow buttons.
- To type a letter, press the corresponding number then press **ALPHA** until the desired letter displays.
- To type a space, press **0** and then press **ALPHA** four times.
- To backspace and delete, press **CLEAR**.
- To exit a screen/menu and return to the previous level press **CANCEL**.



Password

To enter the default password, enter today's date in the following format: MM:DD:YYYY

Setting up Your Terminal

WIFI	Connecting to WiFi	<ol style="list-style-type: none"> 1) Press MENU on the keypad. 2) Scroll down (press the down arrow) and select Communication. 3) Enter the password and press ENTER. 4) Scroll down and select WiFi Parameters. 5) Select your WiFi Network (SSID) from the options press ENTER. 6) Select Password and enter the password. Then press ENTER.
SECURITY	Change WiFi Security Type <i>NONE, WEP-64, WEP-128, WPA-TKIP, WPA2-AES, AUTO</i>	<ol style="list-style-type: none"> 1) Press MENU. 2) Scroll down and select Communication. 3) Enter the password and press ENTER. 4) Scroll down and select WIFI Parameters. 5) Select Security. 7) Select your Security Type as appropriate. Tip: If unsure, scroll down and select Auto.
ENTERPRISE WIFI	Enterprise WiFi - Locate the MAC Address	<p>To set up enterprise WiFi, you will need to do the following:</p> <ol style="list-style-type: none"> 1) Locate the MAC address of your device and share it with your network administrator. (See steps below) 2) When you're notified that the MAC address is added to the network: <ul style="list-style-type: none"> o Set your SSID to your designated network per your administrator's instructions. (Refer to the Basic WIFI Configuration steps above.) o Set your Security Type to None. (Refer to Change WiFi Security Type steps above.) <p>To locate your MAC address, do the following:</p> <ol style="list-style-type: none"> 1) Turn your terminal Off. (Press the POWER button.) 2) Turn your terminal On (Press the POWER button) and as soon a screen illuminates, <u>press and hold the MENU</u> button (located above the number 3 on the keypad) until the base menu displays. 3) Scroll down and select Show version. 4) Scroll down and select the WiFi Info. Then, the following information displays: Name, MAC Address, FWVER (Firmware version) 5) Record the MAC address and share it with your network configuration administrator. 6) To return to the Bluefin App, press the red "X"/CANCEL button <u>twice</u>.

Processing Credit Card Transactions

BATCH	Batch out terminal	<ol style="list-style-type: none"> 1) Press FUNC. 2) Select Batch. 3) Enter the password if required and press ENTER. 4) Select Batch Close. <p>Related Information: Refer to Working With Batches.</p>
--------------	---------------------------	---

SALE	Card Present Transaction	<ol style="list-style-type: none"> 1) Ensure bottom right corner says "Sale" 2) Enter Amount 3) Press ENTER. 4) Swipe/Insert/Tap or key card.
	Keyed Transaction (Card Not Present)	<ol style="list-style-type: none"> 1) Ensure bottom right corner says "Sale." 2) Enter Amount. 3) Press ENTER. 4) Enter card number, expiration date, and additional info as prompted.
V/SALE	Void a Transaction <i>Prevents sale from settling. You can do this instead of a refund if the transaction has <u>not</u> batched out.</i>	<ol style="list-style-type: none"> 1) Scroll down (press the down arrow) to select V/Sale. 2) Press ENTER. 3) Search by transaction or reference number. 4) When the transaction displays, press ENTER. 5) Press CANCEL at signature screen.
RETURN	Refund a Transaction <i>Only refund transactions that were processed on a <u>previous</u> batch. (You should <u>not</u> refund a transaction processed in the current batch. Instead, see "Void a transaction" above.)</i>	<ol style="list-style-type: none"> 1) Scroll to select Return. 2) Press ENTER. 3) Choose <u>one</u>: By Card Number or Reference Number. NOTE: By default, refund by card number is disabled. If it is enabled on your terminal, refunding by card number is <u>not</u> tied an offsetting sale. 4) Enter amount and press ENTER. 5) Swipe/Insert/Tap or enter card number or reference number <p>Important: You <u>cannot</u> process a debit refund. Instead, see Voiding Debit Card Transactions below.</p>
AUTH	Authorization <i>Authorizations do <u>not</u> settle unless manually captured.</i>	<ol style="list-style-type: none"> 1) Scroll to select Auth. 2) Enter amount. 3) Swipe/Insert/Tap or key card. 4) If this is a Card Present transaction, obtain customer signature.
FORCED	Force sale <i>Manually capture an existing authorization.</i>	<ol style="list-style-type: none"> 8) Scroll to select Forced. 9) Enter amount. 10) Swipe/Insert/Tap or key card. 11) Enter Auth number Tip: To type a letter, space or backspace and delete, refer to Using the Keypad.
V/FRCD	Void a Forced Transaction	<ol style="list-style-type: none"> 1) Scroll to select V/Frcd. 2) Press ENTER. 3) Enter Transaction number and press ENTER. 4) Press ENTER. 5) Respond to prompt if this is a Card Present transaction. 6) Press CANCEL at signature screen.

Voiding Debit Card Transactions

IMPORTANT: Voiding a debit transaction, must occur in the same batch as the transaction.

V/SALE	Void a Transaction <i>Void the sale.</i>	<ol style="list-style-type: none"> 1) Toggle to DEBIT. (Tip: Tap CREDIT on screen to toggle.) 2) Scroll to select V/Sale and press ENTER. 3) Enter the transaction number on the receipt and press ENTER. (Or, scroll through the transactions to locate the transaction.)
---------------	--	---

Common Settings

SECURITY	<p>Password Protect certain transaction types <i>Toggle between enabling and disabling password protection.</i></p>	<ol style="list-style-type: none"> 1) Press MENU. 2) Select Merchant Settings. 3) Select Authorization. 4) Enter password if prompted and press ENTER. 5) Select Transaction Types and then choose Credit or Debit. 6) Choose the transaction type you want to password protect. 7) Select Pswd Protected.
GENERAL	<p>Beeping Noise <i>Toggle beeping sound OFF / ON.</i></p>	<ol style="list-style-type: none"> 1) Press MENU. 2) Select Operations Settings. 3) Select Buzzer Setup. 4) Select Buzzer Setup again. 5) Choose <u>one</u>: Off or On.
	<p>Access Demo Mode for training or testing. <i>Toggle between demo mode and normal mode.</i></p>	<ol style="list-style-type: none"> 1) Press MENU 2) Select Operation Settings. 3) Select Operation Mode. 4) Enter password if prompted and press ENTER. 5) Choose <u>one</u>: Normal Mode or Demo Mode.
	<p>Change logo on image screen</p>	<ol style="list-style-type: none"> 1) Create a version of your logo that is exactly 320x220 pixels and 24-bit. 2) Name the bitmap (BMP) image: mt30_ad1.r 3) Send an email with the image attached to service@bluefin.com 4) When you receive confirmation that it has changed, <u>Batch Out</u> your terminal and then turn terminal OFF and then ON. (Press the POWER button.) <p>Note: For help modifying your logo, refer to Customizing Device Logo below.</p>
	<p>Change terminal Date or Time</p>	<ol style="list-style-type: none"> 1) Press MENU. 2) Scroll down and select System Settings. 3) Select Date/ Time Setup. 4) Enter today's date in the following format MM:DD:YYYY and then press ENTER. 5) Enter correct time using a 24-hour format (HH:MM:SS) and then press ENTER.
	<p>Ping</p>	<ol style="list-style-type: none"> 1) Press MENU. 2) Enter password if prompted and press ENTER. 3) Select Communications. 4) Enter password if prompted and press ENTER. 5) Select LAN Parameters. 6) Select Ping.
RECEIPTS	<p>Customer Receipt <i>Toggle setting to print / cancel printing receipt.</i></p>	<ol style="list-style-type: none"> 1) Press MENU. 2) Select Operation Setting. 3) Scroll down and select Receipt Print. 4) Enter password if prompted and press ENTER. 5) Select Customer Copy and then select <u>one</u> payment type: All, Credit or Debit 6) Select <u>one</u> option based on your preference: Off (cancel printing of receipt) or On (print receipt)
	<p>Preprint Receipt</p>	<ol style="list-style-type: none"> 1) Press MENU.

<p><i>Toggle setting to preprint / cancel preprinting receipt.</i></p>	<ol style="list-style-type: none"> 2) Select Operation Setting. 3) Scroll down and select Receipt Print. 4) Enter password if prompted and press ENTER. 5) Select Preprint. 6) Select <u>one</u> option based on your preference: Off (cancel preprinting of receipt) or On (preprint receipt)
<p>Change receipt Font Size</p> <p>Related Information: <i>Appendix: Receipt Samples</i></p>	<ol style="list-style-type: none"> 1) Press MENU. 2) Select Operation Setting. 3) Scroll down and select Receipt Print. 4) Enter password if prompted and press ENTER. 5) Select Font Size. 6) Select <u>one</u> option based on your preference. <p>NOTE: Changes in font size do not apply to the header and trailer.</p>
<p>Change Receipt Header or Trailer</p> <p>The following format is typically used: 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= (Text based on your preference)</p>	<p>Note: You can email your requested header/trailer text to Bluefin Payment Systems at service@bluefin.com and we will update it for you. Once updated, restart your terminal and the new text should appear.</p> <p>To <u>manually</u> change the text, do the following:</p> <ol style="list-style-type: none"> 1) Press MENU. 2) Select Merchant Settings. 3) Select Edit Header to modify the top of the receipt or Edit Trailer to modify the bottom of the receipt. Select <u>one</u> based on your preference. 4) Enter password if prompted and press ENTER. 5) Edit the Header / Trailer and press ENTER when you're done <p>Related Information: <i>Using the Keypad and Appendix: Receipt Samples</i></p>

Troubleshooting Tips

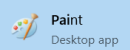
<p>Terminal Locked</p>	<p>To unlock the terminal due to password lock, power the device OFF and then ON.</p>
<p>Display</p>	<p>The display is touch screen and responds well if you tap it with your fingernail.</p>

Customizing Device Logo

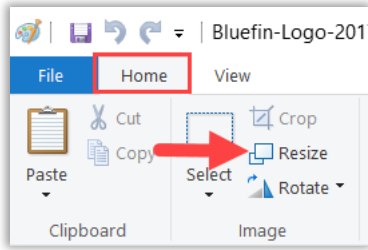
To modify your company's logo so it can display on the device, follow the steps below:

1. Resize the image.
2. Save the image.
3. Attach the image to an email and send to service@bluefin.com.

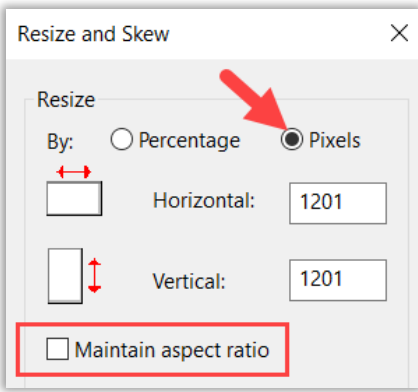
Important: The instructions below apply to the **Windows 10** operating system.

<p>Open your logo file in Paint.</p> 	
<p>1. Resize the Image</p>	<p>2. Save the Image as a bitmap, 24-bit</p>

Select **Resize** from the **Home** tab in the ribbon.

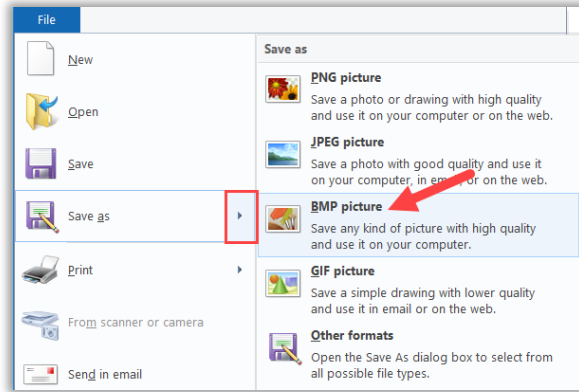


Click **Pixels** for Resize By. **Deselect** the checkbox **Maintain aspect ratio** (It should be selected by default)



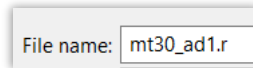
Change the **Horizontal number** to **320**.
Change the **Vertical number** to **100**.
Click **OK** when you're done.

Click **File > Save As > BMP** and then navigate to a folder where you'd like the image to be stored.



Tip: Hover your mouse over **Save As** to display the various Save options.

Change the File name to: **mt30_ad1.r**



Click **Save** when you're done.

3. Email the Image
Attach the image to an email and send to service@bluefin.com.

Managing Receipts

Disabling Receipt Printing

- 1) Press **MENU**.
- 2) Select Operation Setting.
- 3) Select No Paper Mode.
- 4) Enter password if prompted and press **ENTER**.
- 5) Select one option based on your preference:

Off	Receipts will print if there is paper.
On	Receipts will <u>not</u> print.
Auto	<u>Recommended</u> . Receipts will print until the paper runs out. Then, the terminal will automatically switch to "No Paper Mode".

Reprinting a Receipt

- 1) Press **FUNC**.
- 2) Scroll down to select **Reprint**.
- 3) Select one option and then follow the prompts:

Last Cust Rcpt	Prints the receipt from the most recent successful transaction.
Any Receipt	Prints the receipt for a specified transaction number.

Working With Batches

About Batching

“Batching” in the terminal consists of generating a batch report and clearing the terminal of transaction records....

Best Practice: We recommend that you have paper in your terminal when “batching.”

If you do not have paper in your terminal, the batch report will not print, and it cannot be reprinted from the terminal. **Tip:** If your processor is Elavon, Chase Paymentech or TSYS, you can review your batch report in PayConex from Reports > Card Batch Report.

IMPORTANT: “Batching” in the terminal does not affect actual processor settlement.

Batching, for the purpose of settlement, is done automatically in the PayConex Gateway for the following processors: Elavon, Chase Paymentech and TSYS. If your processor is First Data Rapid Connect, batching is controlled by the processor.

If you would like to adjust your batch time to optimize settlement timing or to assist you with reconciling your deposits, please contact Bluefin Support.

Batch Out a Terminal

Refer to the **Getting Started** section in this guide and locate the Batch Out Terminal row in the [Processing Credit Card Transactions](#) table.

Password Protect Batching

Refer to [Password Protect Batching or Keying Transactions](#).

Scheduling Automatic Batching

Refer to [Setting up Automatic Batching](#).

Batch Reports

Refer to [Current Batch](#) for information about running the following types of batch reports:

- 7) Condensed Report

- 8) Short Report
- 9) Journal Report
- 10) Totals

Related Information: [Appendix: Receipt Samples](#) displays samples of each report.

Settings

Security

Changing the Password

To change the terminal password, do the following:

- 1) Press **MENU**.
- 2) Select Merchant Settings.
- 3) Select Security Settings
- 4) Enter password if prompted and press **ENTER**.
- 5) Select User Password.
- 6) Confirm you want to change the password and press **ENTER** for Yes (or **CANCEL** for No.)
- 7) Enter new password when prompted and press **ENTER**.
Reenter new password when prompted and press **ENTER**.

Password Protect Batching or Keying Transactions

- 1) Press **MENU**
- 2) Select Merchant Settings.
- 3) Select Security Settings
- 4) Enter password if prompted and press **ENTER**.
- 5) Select a function to password protect: **Batch** or **Card Man. Entry**
- 6) If you select **Card. Man Entry**, choose one: **All, Credit, Debit**
- 7) Select Pswd Protected.

Keyed/Manual Entry - Disabling/Enabling

IMPORTANT Keyed/Manual Entry must be provisioned by your merchant services provider before you can enable this feature on your terminal.

NOTE: The instructions below only apply to enabling or disabling manual card entry in your terminal/device. These settings are terminal-specific and therefore do not impact other terminals in your account.

- 1) Press **MENU**.
- 2) Select Merchant Settings.
- 3) Select Security Settings
- 4) Enter Password and press **ENTER**.
- 5) Select Card Man. Entry.
- 6) Select a payment type. (**All, Credit, Debit**)
- 7) Select one based on your preference: **Disabled, Always Enabled**.

Enabling Address Verification Service (AVS)

- 1) Press **MENU**.
- 2) Select System Settings.
- 3) Select Working Mode.
- 4) Enter password if prompted and press **ENTER**.
- 5) Select Fraud Control.
- 6) Select the processing method that should use AVS. (**AVS OnCardNotPrsnt** is recommended)
- 7) Select the applicable card types for AVS. (**ALL** is recommended)
- 8) Select the components of AVS that should be used. (**Zip** is recommended)

Enabling Card Verification Value (CVV)

- 1) Press **MENU**.
- 2) Scroll to select **System Settings**.
- 3) Select Working Mode.
- 4) Enter password if prompted and press **ENTER**.
- 5) Select Fraud Control.
- 6) Scroll down and select **V-Code**.
- 7) Select the applicable card types for CVV. (**ALL** is recommended)
- 8) Select one based on your preference:

OFF	CVV prompt not enabled
ON IF MANUAL	CVV prompt enabled for keyed / manual card entry
ON IF MAN, CRDNOTPRSNT	CVV prompt enabled for card not present keyed /manual card entry.
ON ALWAYS	CVV prompt enabled always

General

Enabling Duplicate Transaction Check

When this feature is enabled, an alert will display ("Duplicate transaction, continue?") if a transaction for the same amount is attempted on the same card within the same batch.

- 1) Press **MENU**.
- 2) Select System Settings.
- 3) Select Working Mode.
- 4) Enter password if prompted and press **ENTER**.
- 5) Select Local Dup Check.
- 6) Select one option based on your preference: **On** (enable this feature) or **Off** (disable the feature)

Adjusting Backlight

- 1) Press **MENU**.
- 2) Select Operation Settings.
- 3) Select Screen Backlight.
- 4) Select one option based on your preference:

OFF	NOTE: These two options function in the same way. Backlight is ON when a key is pressed and there is activity. When there is <u>no activity</u> , backlight stays illuminated for 60 seconds and then the screen dims.
ON with 60s timeout	
Always ON	Backlight is always ON

Print Report of All Settings

Tip: This report is useful to review the options you selected and the customizations you’ve made. This report is print-only so you must have paper in the terminal.

- 1) Press **MENU**.
- 2) Select Operation Settings.
- 3) Scroll down and select **Print Setup**.
- 4) Enter password if prompted and press **ENTER**.
- 5) A report of all settings will print.

Enabling Clerk ID Mode

NOTE: This setting applies to the retail industry.

To track transactions by clerk (clerk ID and name) you need to enable this function and add clerk information.

Step 1:

- 1) Press **MENU**.
- 2) Select Merchant Settings.
- 3) Scroll down and select **Additional Prompts**.
- 4) Enter the Password and press **ENTER**.
- 5) Select Clerk ID Mode.

Step2: To enter Clerks, refer to steps 5-7 in [Adding a Clerk and Server](#).

Adding a Clerk / Server

NOTE: For retail merchants, to add a Clerk, you must have Clerk ID Mode enabled in the terminal . Refer to **Enabling Clerk ID Mode** above.

- 1) Press **MENU**.
- 2) Select Merchant Settings.
- 3) Scroll down and select **Clerk/Server Name**.
- 4) Enter the Password and press **ENTER**.
- 5) First Entry: Enter the Clerk #/Server ID and press **ENTER**.
Subsequent Entry: Press **CANCEL**. Then Enter the Clerk #/Server ID you want to add, and press **ENTER**.
- 6) Enter the name and press ENTER.
Tip: Refer to [Using the Keypad](#).

- 7) Follow the prompts to enter an additional clerk/server or press **CANCEL** when you're done.

Setting up Automatic Batching

- 1) Press **MENU**.
- 2) Select Merchant Settings.
- 3) Scroll down and select **Set Batch Time**.
- 4) Enter the Password and press **ENTER**.
- 5) Select Autobatch On.
- 6) Enter batch time in the format HH:MM and press **ENTER**.

Restaurant Mode

NOTE: This setting applies to the restaurant industry and must be provisioned by Bluefin Support.

Restaurant Mode allows you to enable the following functions on your terminals:

- Add **Tips** during the check-out process (The function is managed by Bluefin Support for all terminals in your account.)
- **Track transactions by Server.** The terminal will prompt for the Server ID during the payment process. (This function is terminal-specific, so you can enable it based on your preference.)
- **Track transactions by Table.** The terminal will prompt for the table number during the payment process. (This function is terminal-specific, so you can enable it based on your preference.)

Refer to the sections below for more detailed information.

Tips

In Restaurant Mode you can add Tips during the check-out process if this option is enabled by Bluefin Support.

IMPORTANT: PAX terminals apply the tip during the credit card transaction (not after the transaction.) So, you cannot adjust the sale after the transaction to add a tip.

Please contact Bluefin Support to enable/disable tips or to make changes to the tip prompts that display in your terminals.

Enabling Server ID Mode / Table Mode

These options allow you to track transactions by Server / Table.

To enable Server ID Mode or Table mode, do the following:

- 1) Press **MENU**.
- 2) Select Merchant Settings.
- 3) Scroll down and select **Additional Prompts**.
- 4) Enter the Password and press **ENTER**.
- 5) Scroll to select the option(s) based on your preference: **Server ID Mode, Table Mode (Guest No Mode)** is also available. Example Hotel guest)

Related Information: To add Servers to the terminal and track transactions by server ID and name, refer to steps 5-7 in [Adding a Clerk and Server](#).

Network Settings

Configuring your Network

The PAX S500 device is plug-and-play. However, depending on your organization's network security, your Network Team might need to modify their firewall to allow the device to communicate.

IMPORTANT: The following port and URL should be open, so the device can communicate:

- **Transactions URL:** secure.payconex.net on Port 443
- **Device Health Check URL:** t.broadpos.com on Port 9120

Setting up Static IP

NOTE: Dynamic IP is setup by default.

To set up a static IP, do the following:

- 1) Press **MENU**.
- 2) Scroll down and select **Communication**.
- 3) Enter Password and press **ENTER**.
- 4) Select **LAN Parameters**.
- 5) Select **LAN type** and then **Static**.
- 6) Scroll to select each of the following options. Enter the appropriate information and press **ENTER**:
 - IP Address**
 - Subnet Mask**
 - Gateway IP**
 - DNS IP**

Store and Forward:

The feature is not supported by Bluefin.

Reporting

NOTE: The instructions below are for printing reports from the terminal.

Bluefin's PAX terminals are connected to our PayConex online payment gateway, where more robust reports are located. To download the PayConex User Guide, please refer to www.bluefin.com/merchant-support

Printing Default Report

- 1) Press **MENU**.

- 2) Select **Reports**.
- 3) Enter password and press **ENTER**.
- 4) Select Default Report.

Print History Report

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

- 1) Press **MENU**.
- 2) Select **Reports**.
- 3) Enter password and press **ENTER**.
- 4) Select History Report.
- 5) Respond to the following prompts:

FROM BATCH DATE	Enter the start date of the report in the format MM/DD/YYYY and press ENTER .
TO BATCH DATE	Enter the end date of report and press ENTER .
SELECT PMT TYPE	Select All or select the transaction types to be included.
SELECT CARD TYPE	Select All or select the card types that should be included.
SELECT TRAN. TYPE	Select All or select a transaction type that should be included.

Create On-screen Report

To create an on-screen report of all transactions, do the following:

- 1) Press **MENU**.
- 2) Select **Reports**.
- 3) Enter password and press **ENTER**.
- 4) Select Display Trans.
- 5) Select Scroll All.
- 6) Select the payment type of your choice. (All, Credit, Debit)

Current Batch Report

To print a report from the current batch, do the following:

1. Press **MENU**.
2. Select **Reports**.
3. Enter password and press **ENTER**.
4. Select Current Report.
5. Select a report type based on your preference: Condensed Report; Short Report; Journal Report; Totals. Refer to [Appendix: Receipt Samples](#) to see the reports.
6. Respond to the following prompts:

SELECT PMT TYPE	Select ALL or select certain transaction types based on your preference
SELECT CARD TYPE	Select ALL or select certain card types based on your preference.
CHOOSE CLERK/SERVER	Select ALL or enter a specific clerk/server ID # (Spec. Servr/Clerk

SORT METHODS	Select By Card Type or another sort method based on your preference.
SELECT TRAN. TYPE	Select ALL or select certain transaction types based on your preference.
Set Cur. Defaults?	Choose <u>one</u> of the following: Press ENTER to set as default. Press CANCEL to stop and not set up a default report

Designating a Default Report

You can choose your own default report and it will print when **Default Report** is selected.

To designate a report as your Default Report, refer to [Current Batch Report](#). Follow the steps to select a report type:

- 11) Condensed Report
- 12) Short Report
- 13) Journal Report
- 14) Totals

Then follow the prompts to customize the report. The last step allows you to set the report as your default report.

Transaction Search

You can search for transactions in your current batch in your terminal.

- 1) Press **MENU**.
- 2) Select **Reports**.
- 3) Enter password and press **ENTER**.
- 4) Select Display Trans.
- 5) Select one to search for a transaction:

Scroll All
By Invoice
By Server/Clerk ID
By Transaction #
By Card Type
By Card Number (last 4 digits of card number)

- 6) Enter your search criteria when prompted and then press **ENTER**.
Tip: If more than one transaction meets the search criteria you can scroll to view them.

Appendix: Receipt Samples

Font Sizes

The following receipts illustrate the different font sizes.

NOTE: Changes in font size do not apply to the header and trailer.



Trailer



Batch Reports

Condensed Report	Short Report
<pre> 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 </pre>	<pre> 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 </pre>

Journal Report	Totals Only
<pre> 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: 000000021081 ----- 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: 000000021101 ----- Records: 2 Total: 7.00 ----- CREDIT Records: 2 CREDIT Total: 7.00 ----- </pre>	<pre> 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 ----- </pre>

Appendix: Transaction Types

Credit

Auth (EN)	An Auth secures the funds and provides an authorization number. (NOTE: Funds are <u>not</u> captured.)
PostAuth (EN)	Capture funds from a previous Auth.
Forced (EN)	A Forced Transaction refer to capturing a transaction from an authorization acquired outside the device
Return (EN)	Refund
VSale (MGR)	Void Sale
VPost (EN)	Void a Post Auth
VForced (EN)	Void a Forced transaction

Debit

Balance (EN)	(Not supported by Bluefin.)
Vsale (MGR)	Void debit sale