Heartland | Cash Register Express

PAX Anywhere User Guide

Rev 11/2019

Table of Contents

Date	Doc Version	Author	Summary
11/11/2019	1.0	BG	Initial Release, CRE 13.1007

Overview

In this article, we describe how to configure CRE for use with multiple PAX devices so that credit card transactions initiated at any given station can be modified and finalized at any other workstation with a PAX device present. This functionality allows users to easily conduct transactions with the freedom to move between stations as desired. As well, transactions processed in this environment will settle in a single batch, regardless of the number of terminals, which simplifies and facilitates deposit reconciliation.

Prerequisites

In order to take advantage of this new functionality, the following must be true:

- Merchant must process via PAX and HPS.
- PAX devices must be updated to app version 1.01.00E or later.
- PAX devices must use the restaurant parameter BroadPOS template with the following specifications:
  - All devices must have the same **shared** Cross TID, Device ID, Username and Password.
  - Each device must have its own **unique** identifier as required by card issuer.
- Merchant must have CRE version 13.1007 or later installed.

If you require assistance with PAX configuration, contact PAX Support at 888.909.8498.

CRE Configuration

1   To configure CRE, go to **Setup**, **Setup Screen**, then select the **Payment Processing** tab.
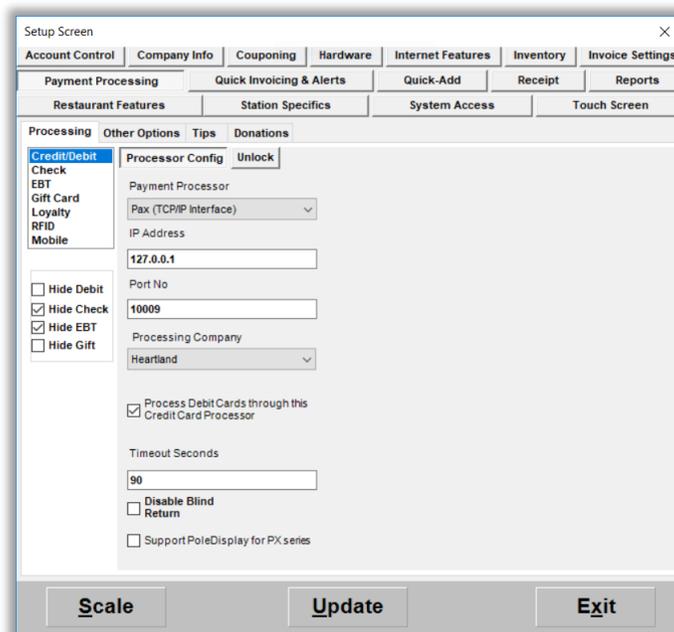
2   On the **Processing** tab, with **Credit/Debit** selected, choose **PAX (TCP/IP Interface)** under **Payment Processing**.

3   Enter appropriate values for **IP Address** and **Port No**, select **Heartland** as the **Processing Company**, and click **Update**.

4   Go to the **Other Options** tab and check the **Perform AutoSettlement** box.

5   In the **AutoSettlement Configuration** section, define a **Settlement Time** that will not interfere with operations and/or end-of-day processes, and click **Update** to save your changes.
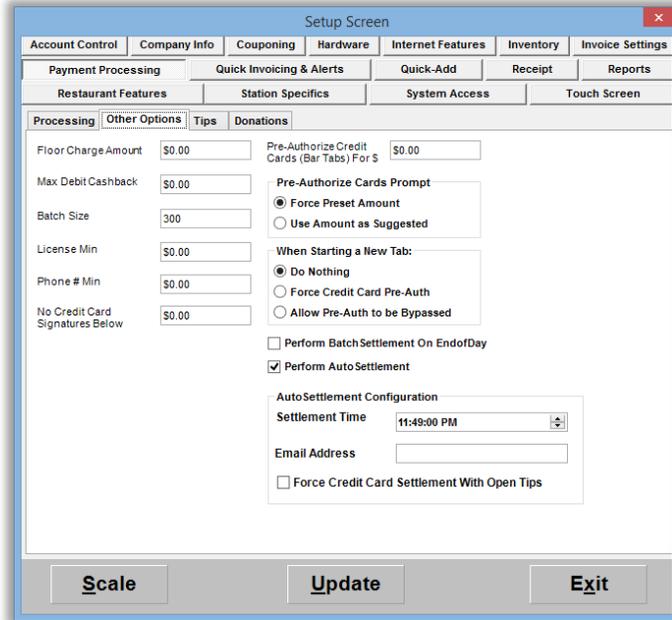
6   Repeat steps 4 and 5 at **ALL** stations where a PAX device is in use.

Settlement Options

Automatic/Force Settlement (Recommended)

CRE will settle your batch for you automatically when configured as described below.

1 From the **Payment Processing** tab of the **Setup Screen**, go to the **Other Options** tab and check the **Force Credit Card Settlement With Open Tips** box.

2 In the **AutoSettlement Configuration** section, define a **Settlement Time** that will not interfere with operations and/or end-of-day processes, and click **Update** to save your changes.

3 Repeat these steps at each station with a PAX device present.

4 In order to verify your batches have settled, we recommend confirming with Heartland each morning, either by calling the Heartland Service Center, or by logging onto InfoCentral.

Manual Settlement (Not Recommended)

Although we strongly recommend using the Force Settlement described above, if you prefer to, you can manually settle your batch each day after you have completed your business. To do this, follow these steps:

1 From one of your stations with a PAX device present, click **Administrative**, then **Credit Card Settlement**.
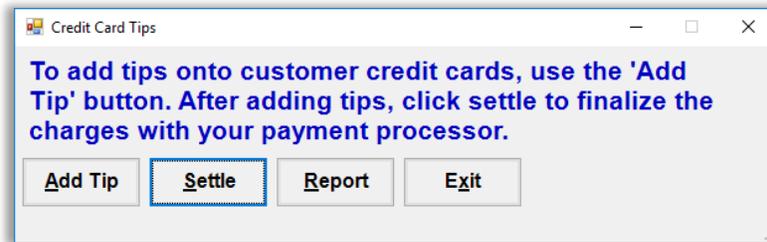
2 Click **Add Tip** to enter any missing tips, then click **Settle** and wait for completion notice to appear. To learn more about adding tips, please refer to this guide.

IMPORTANT NOTES

▸ Regardless of settlement method, each station with a PAX device present must be turned on, with CRE running, at the designated **Settlement Time**.

▸ Although the batch will settle from only one station, **Perform AutoSettlement** must be enabled at all stations so that the transactions in the PAX devices can be cleared.