Getting Started

CardX Terminal

Getting Started Guide

CardX

Tip: Advanced Network Settings

For clients that have a firewall:
Please instruct your IT team to open ports "443",
"80", and "8013".

For clients with a static IP address:
Most clients are able to process transactions as soon
as they connect the CardX Terminal to the internet.
For those clients who have static IP addresses,
we invite you to email support@cardx.com for us to
complete your installation.

Setting Up Your CardX Terminal

1

Insert the power cord into the base of the
CardX Terminal and plug into power.

2

Connect the included ethernet cable into the
port labeled "ETH" on the base of the CardX
Terminal, then connect to internet.
Please note that this cable must be connected
to your ethernet port, not a phone line.

3

When the application powers on, select "CardX".

Tip: The CardX Terminal Is a Turnkey Solution

The CardX Terminal will automatically pass on
the credit card fee when credit cards are presented.
To comply with the rules, the CardX Terminal
automatically detects when a debit card is entered
and applies no fee to the customer's card.

For this reason, there is no need to enter a PIN.

Sale

Running a sale by inserting or swiping a card

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1. Select **SALE** `F1`

2. Enter the sale amount and press **ENTER** ⮐

3. Insert or swipe the card.

4. Remove the card when prompted. The CardX Terminal will display the total amount.

5. Select **OK** `F3` to complete the sale.

6. Press **ENTER** ⮐ to print a receipt for the customer.

Tip: Key-Entry for Debit Cards

Key-entered debit transactions on the CardX
Terminal do not qualify for the 1% + $0.25 rate.
Instead, they will be charged 3.38%. To achieve
the 1% + $0.25 rate, please swipe or insert the
debit card. If you require key-entry for debit
transactions, we invite you to sign up for our
Virtual Terminal at no additional cost.

For credit cards, your cost is always 0%.

Keyed Sale

Running a sale by key-entering a card (including for a phone order)

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1   Select **KEYED SALE** `F2`

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2   Enter the sale amount and press **ENTER** ⏎

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3   Enter the card number and press **ENTER** ⏎

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4   Is the card physically present? Select **YES** `F3` or **NO** `F4`

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5   Enter the expiration date (in "MMYY" format), then press **ENTER** ⏎

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6   Enter the CVV code, then press **ENTER** ⏎

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7   Enter the ZIP code, then press **ENTER** ⏎

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8   For street address, enter the street number only (e.g., "401" for 401 N. Michigan Ave.), then press **ENTER** ⏎

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9   Select **OK** `F3` to complete the sale.

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10   Press **ENTER** ⏎ to print a receipt for the customer.

Void

Canceling a sale (on the same day, before the transaction settles)

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(1) Select **VOID** `F3`

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(2) Select a transaction to void with one of the following options:

`F2` **ACCOUNT #**

Enter the last four digits of the card number and press

ENTER ⏎   Press the far-right purple key ▢

to process the void.

`F3` **REF #**

Enter the "Transaction #" from the receipt and press

ENTER ⏎   Press the far-right purple key ▢

to process the void.

`F4` **LAST TRANS**

This option voids the most recent sale.

Refund

Refunding a sale when the card is present (after the sale settles)

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1. Select **REFUND** `F4`

2. Enter the Manager Password (by default, "111111") and press **ENTER** ⏎

3. Enter the refund amount and press **ENTER** ⏎

4. Insert or swipe the card.

5. Remove the card when prompted to complete the refund.

6. Press **ENTER** ⏎ to print a refund receipt for the customer.

Keyed Refund

Key-entering a refund (when the card is not present)

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1. Press the far-left purple key ⬤ for **MORE**.

2. Select **KEYED REFUND** `F1`

3. Enter the Manager Password (by default, "111111") and press **ENTER** ↵

4. Enter the amount and press **ENTER** ↵

5. Enter the card number ("Manual Entry") and press **ENTER** ↵

6. Is the card physically present? Select **YES** `F3` **OR NO** `F4`

7. Enter the expiration date (in "MMYY" format), then press **ENTER** ↵

8. Enter the ZIP code, then press **ENTER** ↵

9. For street address, enter the street number only (e.g., "401" for 401 N. Michigan Ave.), then press **ENTER** ↵

10. Press **ENTER** ↵ to print a refund receipt for the customer.

Tip: Reprinting Receipts Is Available on the Same Day Only

A receipt may only be reprinted on the same day the transaction is authorized. After the transaction has settled, you will no longer be able to reprint a receipt.

Reprint

Reprinting a receipt

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(1)   Press the far-left purple key ▮ for **MORE**.

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(2)   Select **REPRINT** `F2`

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(3)   Select a receipt to reprint with one of the following options:

     `F2` **ACCOUNT #**
        Enter the last four digits of the card number and press
        ENTER ⏎   Select **SLCT** `F4` to reprint the receipt.

     `F3` **REF #**
        Enter the "Transaction #" from the receipt and press
        ENTER ⏎   Select **SLCT** `F4` to reprint the receipt.

     `F4` **LAST TRANS**
        This option reprints a receipt for the most recent sale.

Tip: If the Batch Report Doesn't Print Automatically

The CardX Terminal is a "host-based" terminal, meaning that each transaction is stored at the processor, and the processor automatically settles the batch for you.

The CardX Terminal relies on your Internet Service Provider (ISP) to connect and print the batch report. Any interruption to your internet connection may prevent the batch report from printing automatically. However, if your CardX Terminal does not print out a batch report at the end of the day, you can be confident that your transactions will still be settled by the processor without issue.

If you'd like a report, you can manually print the batch report, but this must be performed before running any new transactions.

Report Menu

Accessing transaction reporting

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1   Press the far-left purple key [ ] for **MORE**.

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2   Select **REPORT MENU** **F3**

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3   Select among the following options:

F1   **TOTALS REPORT**
This shows summary totals (organized by card brand) in the current batch.

F2   **DETAILS REPORT**
This shows the individual transactions in the current batch.

F3   **BATCH REVIEW**
This allows you to sort through individual transactions in the current batch and reprint a receipt or a void transaction.

F4   **CLOSE BATCH**
To print the Totals Report and then close the batch, clearing it from the Terminal's local memory, select **YES** **F3**

MORE

[ ] **CLEAR BATCH**
To proceed with clearing the batch from the Terminal's local memory, press **F1** This requires the Manager Password (by default, "111111").

Changing Time / Date

1. Press **F2** and **F4** simultaneously to access the **VERIX TERMINAL MANAGER.**

2. Enter password **1** ALPHA ALPHA **6** **6** **8** **3** **1** and press **ENTER** ↵

3. Press the far-left purple key ▮ once to scroll down, then select **CLOCK** **3**

4. Select Time **2** key-enter the correct time, then press **ENTER** ↵

5. If you'd like to change the date, select **DATE** **3** key-enter the correct date, then press **ENTER** ↵

6. When complete, exit by pressing **CLEAR** ✖ three times, then select **RESTART** **3** to restart the terminal.

Correcting a "POS ID Error"

In the event that you receive a "POS ID Error", this means the CardX Terminal needs to re-authenticate to the host. To do this, simply follow the steps below:

①   In the main menu, press the far-left purple key   for **MORE**, then select **SETUP MENU** F4

②   Press the far-left purple key   once to scroll down, then select **AUTHENTICATE TERMINAL** F2

③   Select **YES** F3

④   Enter the Manager Password (by default, "111111") and press **ENTER** ↵

⑤   Once complete, press **CLEAR** ✕ to return to the main menu.

Restarting the Terminal

If for any reason you need to restart the Terminal, please perform the following steps:

(1) Press `F2` and `F4` simultaneously to access the
VERIX TERMINAL MANAGER.

(2) Enter password `1` `ALPHA` `ALPHA` `6` `6` `8` `3` `1`
and press **ENTER** `↵`
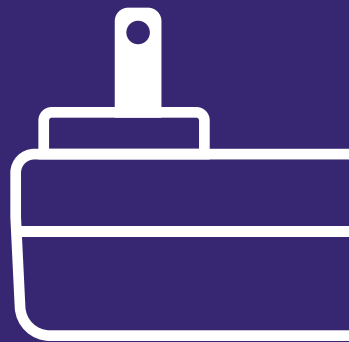
(3) Select **RESTART** `3`

(4) Select **CARDX** to start the CardX application.

Ordering Paper Resupplies

As our valued client, you are welcome to email us at **paper@cardx.com** to order complimentary paper resupplies for the CardX Terminal. For fastest fulfillment, please include your business's name, merchant identification number (MID), and the shipping address in your request. Once we receive your request we will ship 10 additional rolls of paper.

Contact Information

We invite you to email **support@cardx.com** for the fastest response. You may also reach us by phone at **(877) 885-2097.**

CardX