FINIX CREDIT CARD PROCESSOR TRANSITION

What: All TeamVision locations (except Rosin & Lunet) will transition from Stax Payments to Finix Payments for credit card processing.

Why: Finix helps TeamVision save money, offers great customer service, and improves backend operations. Their reporting and management software will make the team more efficient, simplify the application process, and support new integrations and consolidations.

What you need to know:

- PC Owners will be completing new applications for all locations

- New Credit Card terminals will be shipped

- Old Credit Card Terminals will be sent back to Stax

- Other changes will be behind the scenes and not impact you directly.

Next Steps:

- See attached spreadsheet for by-site details.

- Each location is assigned an Operations Partner to assist directly with the transition process.

- Go-live dates indicate the first day of the week that your site will transition to the new devices. Your Operations Partner will work with you to determine the exact timing of your site's transition given business hours and availability.

- Use the CHECKLIST on the next page to keep track of all necessary steps for the transition.

CHECKLIST

This is a high-level overview of the steps you will take to install your new Finix Credit Card device(s). Please note that go-live week steps will need to be completed **before or after business hours** to avoid business disruption. Partner with your Operations Manager to determine the best day/time to complete these activities with them.

Check when done	By When	Action
	Immediately	Share this change and attached communication with ALL team members.
	Upon receipt of new device(s)	Once new credit card device arrives in office, email the Ops manager assigned to your site with the Serial Number and MAC Address of each device along with where the device(s) will be in the store (i.e. Front desk, Optical, etc.). If device does not arrive by Wednesday prior to go-live date, email Katie Worley (kworley@luxotticaretail.com) ASAP.
	By Fri prior to go-live	Schedule time with your Operations Manager during go-live week to complete the setup and activation process. This should be done at the beginning or end of a business day.
	Prior to go-live	For anyone that processes payments, review the Finix Guide for how to process transactions.
	Prior to go-live	If not already doing so, review Policy and Procedure for Cash Handling in the Toolkit.
	Go-live week	Confirm transactions have been batched on old Stax device, then unplug power and ethernet and set old device aside.
	Go-live week	Plug new device into power source and ethernet. Ops Partner will activate device remotely.
	Go-live week	Process test sale and refund for $0.01 with site credit card. Process all transactions on new device going forward.
	By Friday AFTER go-live	Send old Stax devices and power cords to: 　　TPG SHIPPING/RECEIVING 　　6705 Keaton Corp Pkwy 　　OFallon, MO 63368

FINIX CREDIT CARD DEVICE

SETUP AND ACTIVATION

Your Finix Credit Card terminal should come with:

PAX A800
Credit Card
Device

Power Adapter
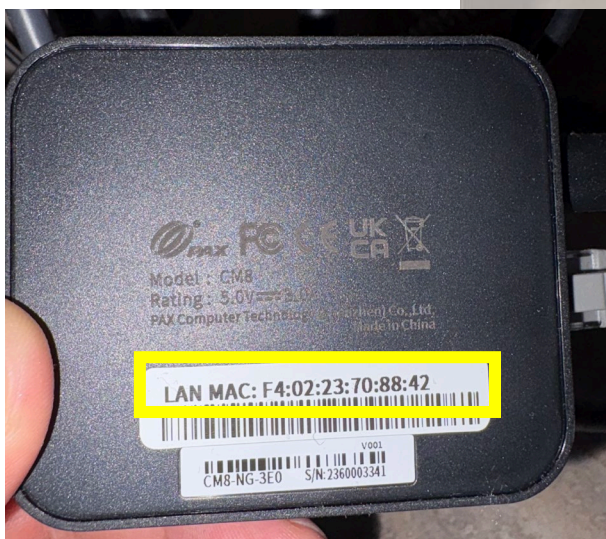
Ethernet Communications Box

BY FRIDAY PRIOR TO GO-LIVE WEEK: Email the Serial Number on the outside of the box and the MAC Address on the Ethernet Communications Box to your Operations Manager.

A800-0AW-RE6-13AA   S/N: 2210079294
Production Date:2023

Wi-Fi MAC: C8:40:52:84:AB:BC

V002

Model : CM8
Rating : 5.0V
PAX Computer Technology (Shenzhen) Co.,Ltd.
Made in China

LAN MAC: F4:02:23:70:88:42

CM8-NG-3E0   S/N:2360003341
V001

During your scheduled time with your Operations Manager, complete the installation.

NOTE: The installation can happen any day during your go-live week. These steps must be completed either **at the end of your business day** after all transactions have been batched out **or prior to opening** for the day.

1   Plug the Power adapter into the Ethernet Comm Box. Remove the ethernet cable from your current Stax Credit Card Device (if applicable) and plug into the Ethernet Comm Box.

2   Plug the Ethernet Comm Box into the PAX A800 Credit Card Device.

3 Power on the Device. You should see "Activate Your Device" along with the Serial Number. The Operations Manager will activate the device live from the online dashboard.
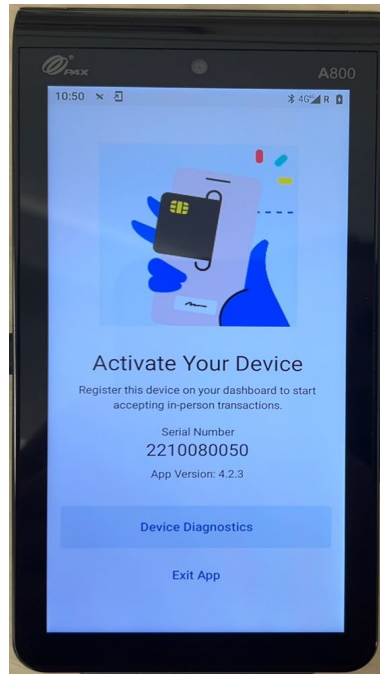
4 Once the Operations Manager has activated the device, open the "Settings" App. Then tap "Network & Internet".
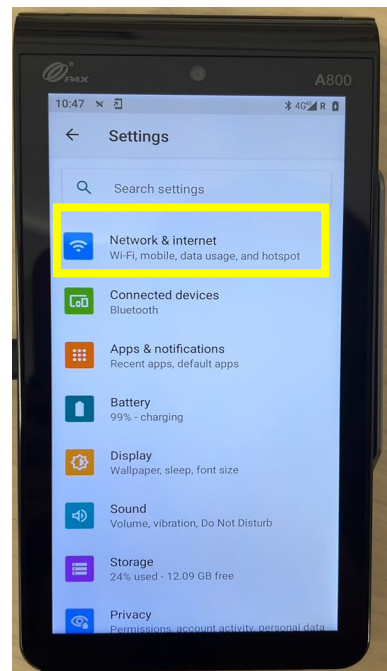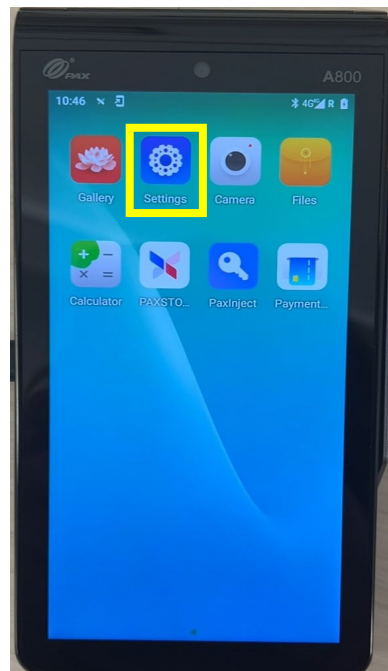
5   Tap the green bubble to TURN OFF WI-FI. Confirm that Ethernet is active.
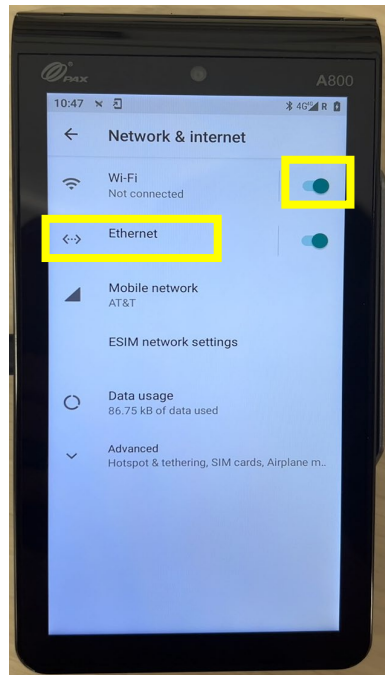
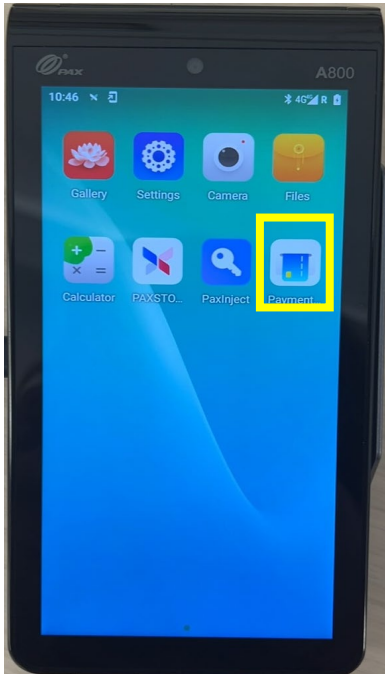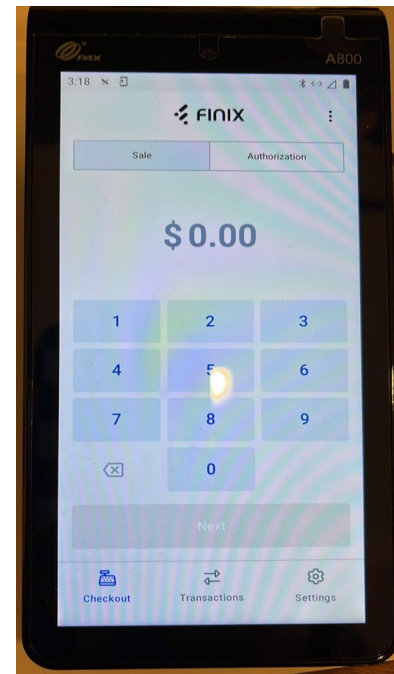**6**   Your device is now ready to process a test transaction.

PROCESSING A TRANSACTION

1 From the Home Screen, Open the "Payment" application.

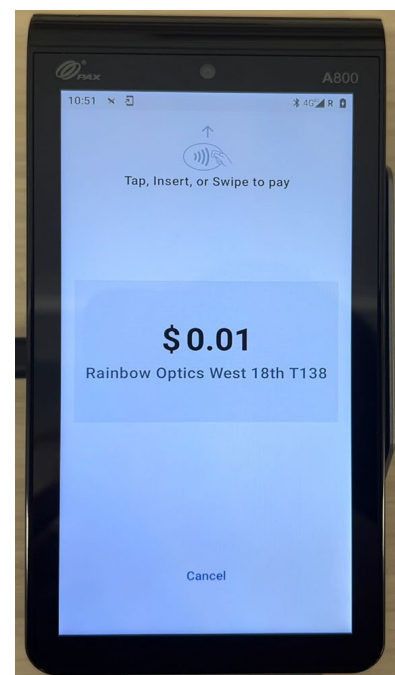**2** Type in the desired dollar amount, then click "Next".

3 "Confirm and Pay" or "Manually enter a card" for phone payments.*
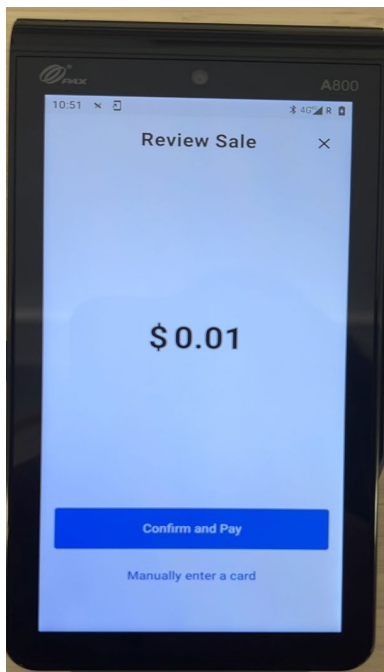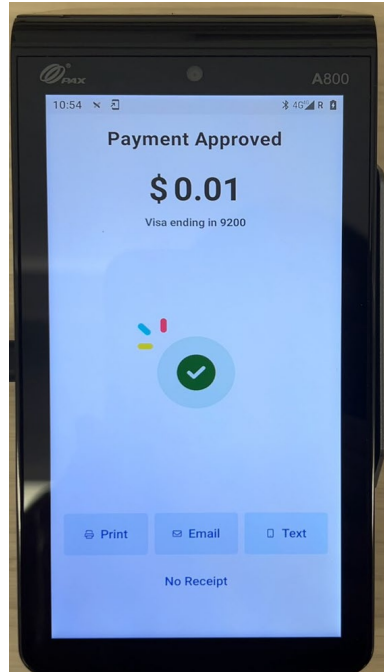

4 Tap, Insert, or Swipe Card.

*Please note there is a higher transaction fee associated with manually entered card payments. Please do not use this option unless necessary.
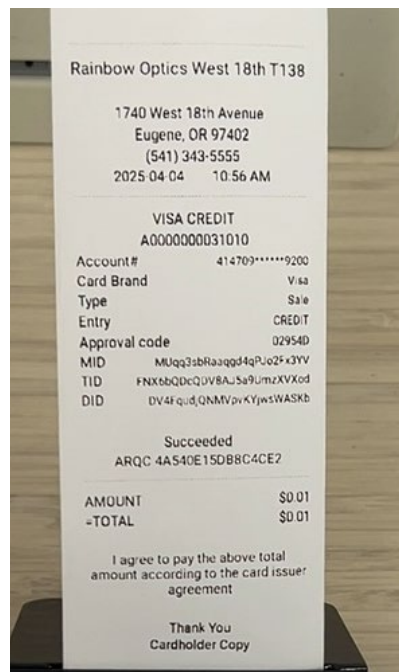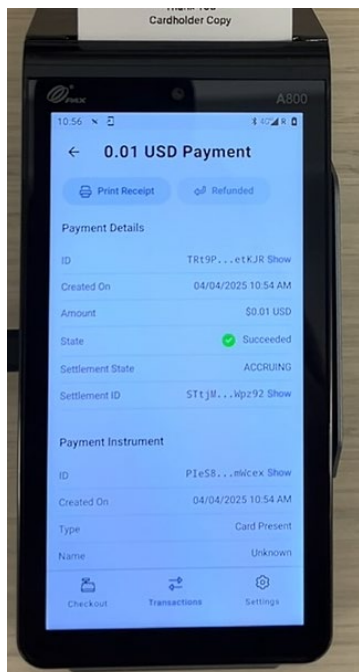
9

5 Select preferred patient receipt type (print, email, text).

- NOTE: ALWAYS print a receipt to staple to your Ciao! Receipt for daily closing reconciliation.

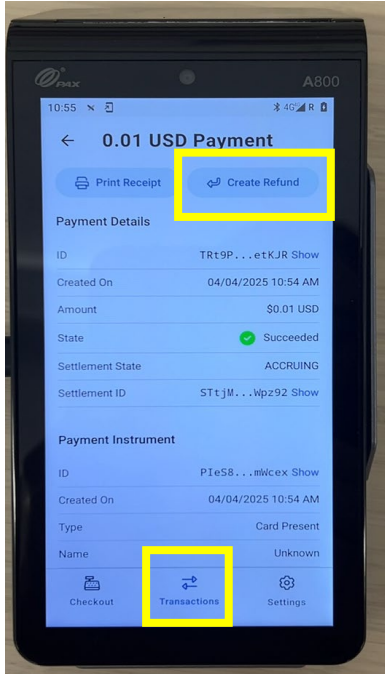**6** Confirmation page will appear, and receipt will print.

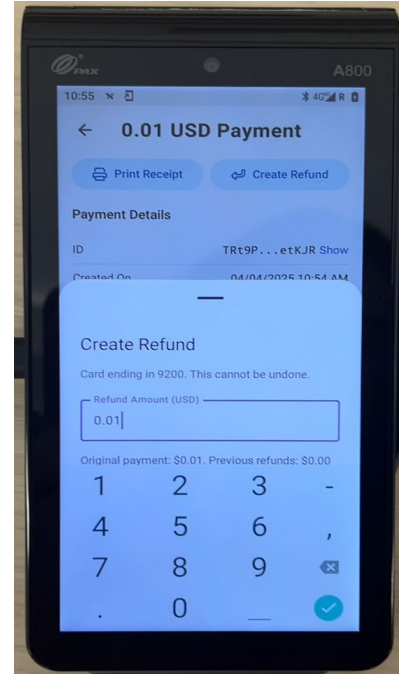# PROCESSING A VERIFIED REFUND

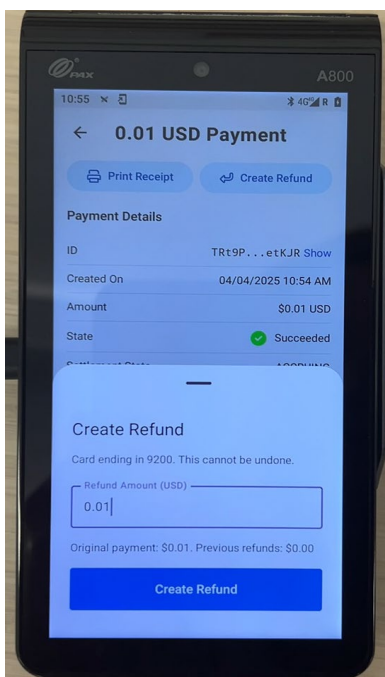**1** From the payment screen, Tap "Transactions", find the transaction then "Create Refund"

2 Type in the desired refund amount.

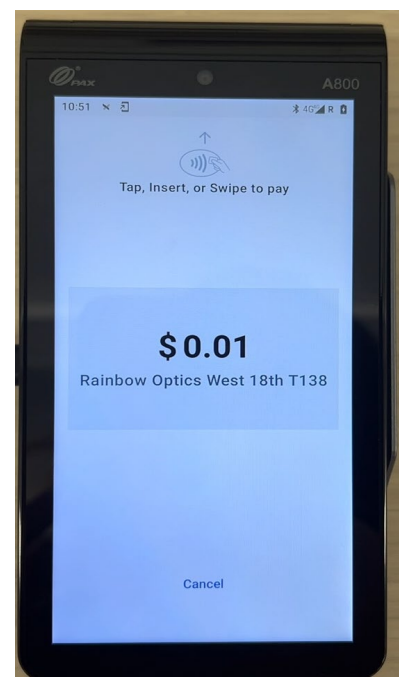**3** Select "Create Refund"

4 Tap, Insert, or Swipe Card for refund.

FINIX ONLINE DASHBOARD

TeamVision

Eye care, together.

Finix Dashboard

Finix Dashboard is an online platform that allows you to search and reconcile transactions, review and respond to disputes, issue refunds from a previous business day, and process online payments if your physical terminal ever goes down.

Setting up your login: An activation email will be sent to the site shared mailbox for initial login. Managers can choose to create individual logins or share the site login once they have gained access to the portal.

Daily Login: Access the Finix Dashboard HERE. Multi-factor authentication is required- employees will be prompted to either enter a Code sent from Finix or from a mobile authenticator app such as Google Authenticator.

Visit the links below to learn more about how to use your dashboard:

- Managing Team Members – Add and remove users
- Transaction Insights – At-a-glance overview of key performance metrics
- Managing Disputes – Learn how to manage and respond to disputes from your online
        dashboard
- Virtual Terminal – Use this if in-store payment devices go down during business hours
- Troubleshooting Your Terminal – Common issues that can arise with payment terminals

SUPPORT

Email support@finix.com for basic inquiries and general support.

Provide a clear description of the issue in the email's subject line and include as many details as possible (links, pictures, videos, code snippets, etc.). If you'd prefer to speak over the phone, include your phone number and what times work best in your email to support@finix.com.

The online dashboard can be used to assist with end of day reconciliation activities. The "Transactions" tab in your merchant account shows all transactions processed for the selected time-frame.

1 From the "Transaction Insights" tab, select "Today" then click Done.

2 Take note of the "LAST UPDATED" time in the upper right corner. Any transactions processed after this time will not be reflected in your card brand totals.

14

3 Scroll down to the "Card Payment Data" section. This shows totals for each card brand (like Visa, Mastercard, etc.). These totals do not include any transactions made after the "Last Updated" time (shown in the top right corner of the page).
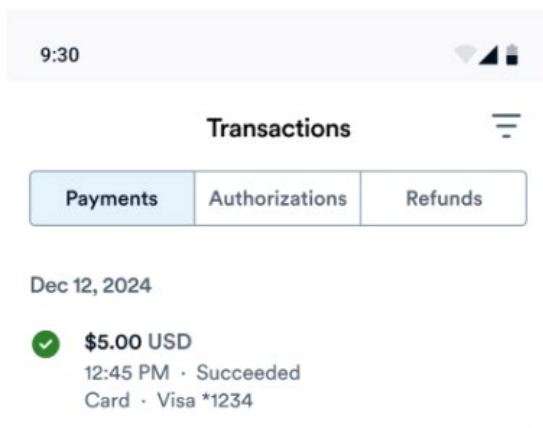
To get the correct total:

- Look at the total shown for each card brand.

Card Payment Data ⓘ

Card Brand ⬍	Transaction Volume ⬍
VISA	$8,011.21
MASTERCARD	$888.20
AMERICAN_EXPRESS	$876.00

- Add any new transactions that happened after the "Last Updated" time. Review Transaction log on your Credit Card Terminal noting time stamps.
  - Example: If the last update was at 11:41 PM, and a $5.00 Visa payment was made at 12:45 PM, add $5.00 to the Visa total shown.(e.g., $8,011.21 + $5.00 = $8,016.21)

9:30

Transactions ☰

| Payments | Authorizations | Refunds |

Dec 12, 2024

✅ **$5.00** USD
12:45 PM · Succeeded
Card · Visa *1234

- Enter the final totals (original amount + any later transactions) into Ciao! at closing.
- If totals do not match, use the transaction Tab in the dashboard or on your terminal to reconcile each transaction, find the mismatch, and recount.