



## **Will my Transaction Express/Patient Statement Payments process change?**

No. Finix is only replacing Stax for in-office payments at the time of service. Any other payment methods or portals will remain the same.

## **Does my Finix device accept Tap To Pay?**

Yes, the devices are tap compatible. However, some forms of payment that cannot be verified (i.e. certain card types through Apple Pay) may be declined.

## **How do I process refunds for transactions taken on my previous Stax device?**

You can process what is called an unverified return through your payment screen on the Finix device. The card MUST be present to process an unreferenced refund. You cannot type a card number in. If you experience issues, please email TVOps and Finix support with your Site ID (found on the Finix Dashboard), card type, last four, time of transaction and amount of refund.

## **My Transaction Insights Dashboard is not updating, or I do not have access to the dashboard. How do I reconcile at the end of the day?**

All transactions can be viewed on the Finix device itself and manually added together to reconcile for end of day reporting. You can also use the “Payments > Transactions” Tab in the Dashboard to view all transactions and manually reconcile. The Summary by Card Type report on the devices is in development and anticipated by the end of June.

## **I forgot my password for the Finix Dashboard.**

You can reset your password through the self-service “Forgot Password” reset link on the login screen.

## **I'm experiencing connectivity issues with my device.**

- See [this article](#) if you're having connectivity issues.
- Try switching the black C-cables (terminal ↔ Pax box, Pax box ↔ outlet).
- Ensure the power cord is plugged into the bottom of the terminal, not the side.
- When contacting support, always provide the Serial number from the bottom of your Pax A800 credit card terminal.



## **How do I add new users to the Finix Dashboard?**

We are working closely with the Finix team to update permissions and allow Practice Managers to manage users. In the interim, each location should have access to the dashboard through their Site and Manager shared email accounts. If a specific individual needs separate access, please email [TVOps@teamvisionteam.com](mailto:TVOps@teamvisionteam.com) with Katie Worley ([kworley@luxotticaretail.com](mailto:kworley@luxotticaretail.com)) on CC.

## **Manual Card Entry:**

Manual entry is strongly discouraged unless necessary. It results in higher fees and a greater risk of failed payments and chargebacks. Manually record the last 4 digits of the card on the receipt after it prints.

## **Do I need to batch out my devices at the end of each night?**

No, your devices will automatically batch at the end of each business day. All prior transactions will still be viewable on the device, so be aware of transaction dates when reconciling. Finix is a live processor, so everything happens in real time.