

FINIX CREDIT CARD PROCESSOR TRANSITION

UPDATED 6/27/25



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.
- Credit Card Terminals older than 12 months will be recycled.
- Credit Card Terminals newer than 12 months will be sent back.
- 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.



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)	<p>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.).</p> <p>If device does not arrive by Wednesday prior to go-live date, email Katie Worley (kworley@luxotticaretail.com) and tvops@teamvisionteam.com ASAP.</p>
	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.
	On 8/15/25	<p>Sites that integrated prior to 6/1/24: Factory reset and recycle old Stax Device</p> <p>Sites that integrated AFTER 6/1/24: Email support@staxpayments.com to receive a return label</p>

FINIX CREDIT CARD DEVICE

SETUP AND ACTIVATION



RETURN TO TABLE
OF CONTENTS

Your Finix Credit Card terminal should come with:

Power Adapter



Ethernet Communications Box



PAX A800
Credit Card
Device



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.





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.

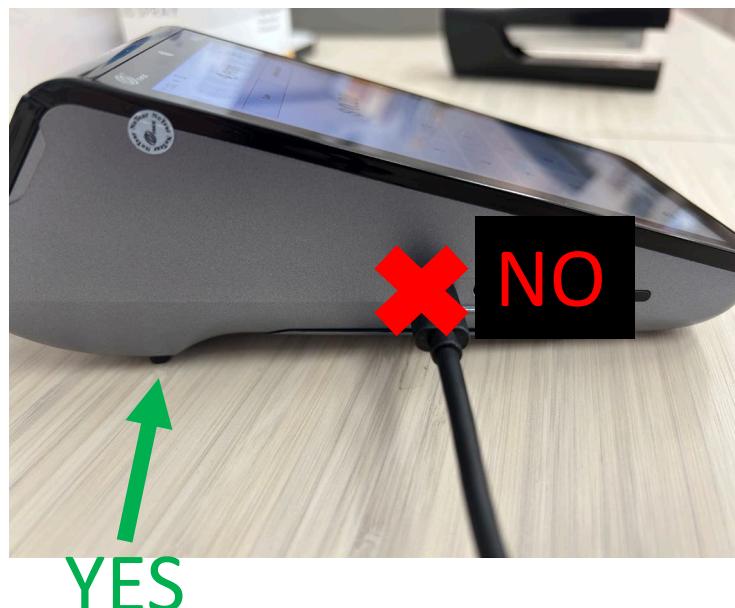
1

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. The cables are device-specific. Please ensure the cable is plugged into the device it was boxed with.



2

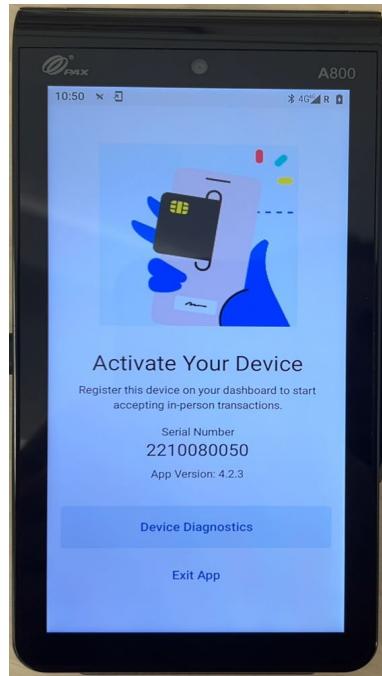
Plug the Ethernet Comm Box into the BOTTOM of the PAX A800 Credit Card Device.





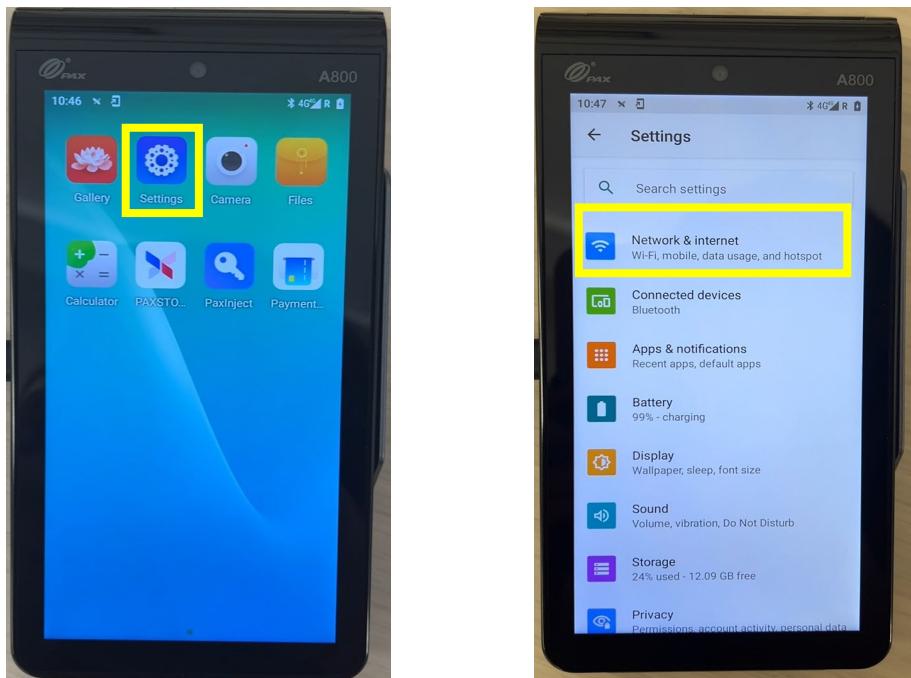
3

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

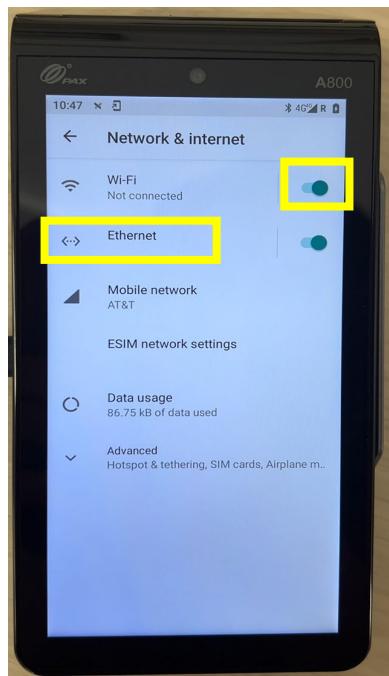
Once the Operations Manager has activated the device, open the “Settings” App. Then tap “Network & Internet”.





5

Tap the green bubble to TURN OFF WI-FI. Confirm that Ethernet is active.



6

Disable e-Sim Settings

The devices operate only on Wifi or Ethernet connectivity please verify that cellular eSim is disabled.

Access the Settings Menu

1. Tap the "Settings" app (usually represented by a gear icon).
2. Navigate to SIM Settings
3. In the Settings menu, scroll and tap on "Network & Internet"
4. Open ESIM Network Settings
5. Toggle off eSIM Card option
6. Return to Network & Internet and tap on "Advanced"
7. Tap on "SIM cards"
8. Disable the SIM
9. Toggle off all the sim slots. ie "SIM slot 1" and "SIM slot 2".

7

Your device is now ready to process a test transaction.

UPDATE PAYMENT APP

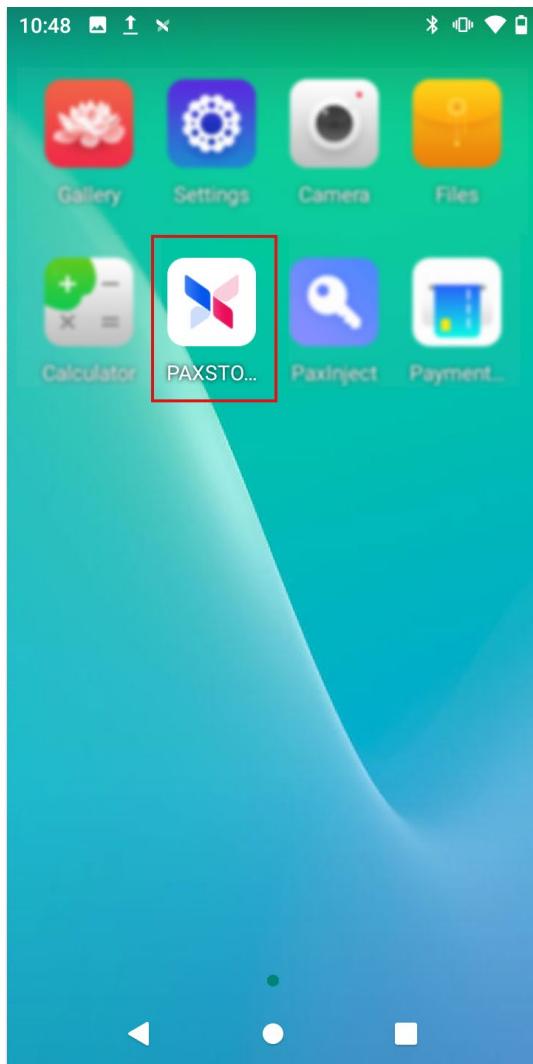


RETURN TO TABLE
OF CONTENTS

As of 6/25/25, all devices need to be on version 5.6.0 or later. Recent updates include the addition of the “Transaction Summary Report” for end of day card brand totals. Follow the instructions below to update your payment app.

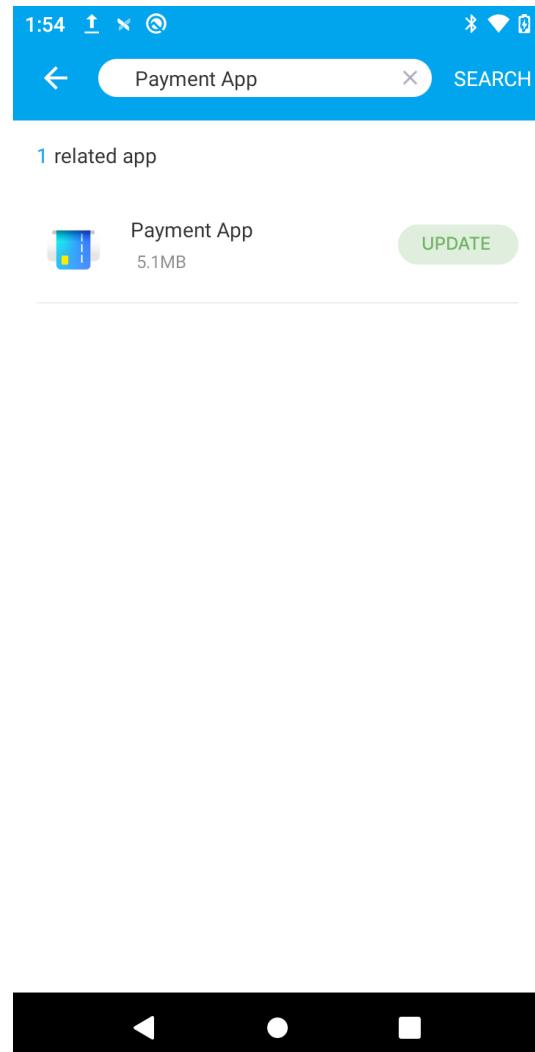
1

Navigate to the PAXSTORE App on your terminal.



2

Search for “Payment App” and click “Update”.



PROCESSING A TRANSACTION



RETURN TO TABLE
OF CONTENTS

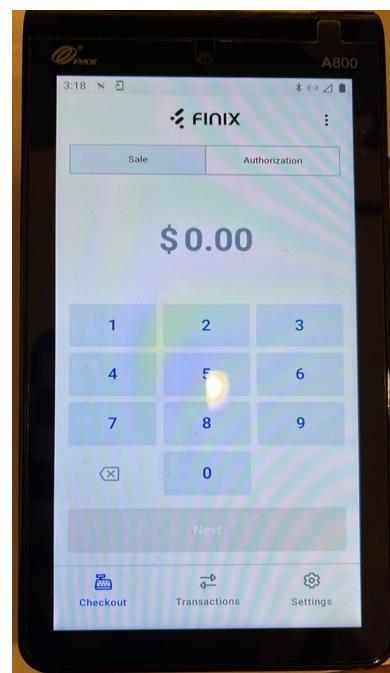
1

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



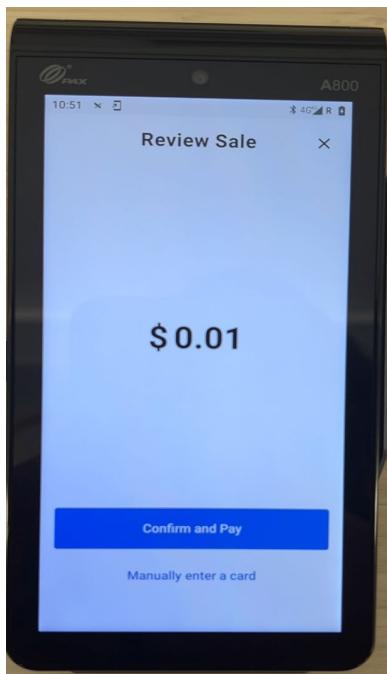
2

Confirm "SALE" is selected,
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.



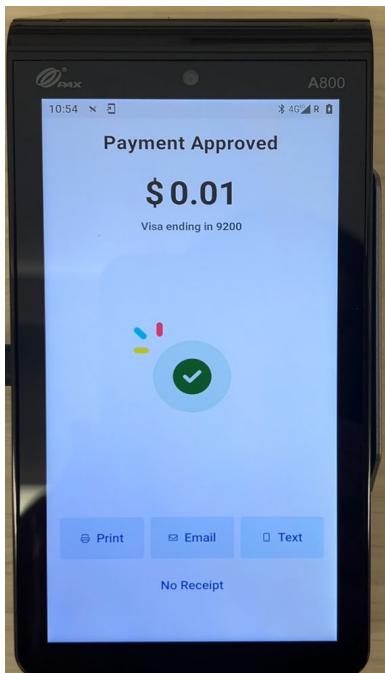
*Please note there is a higher transaction fee
associated with manually entered card
payments. Please do not use this option
unless necessary.



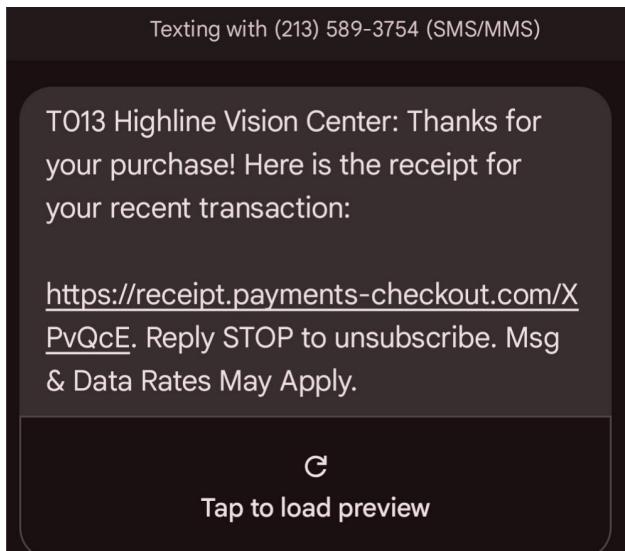
5

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

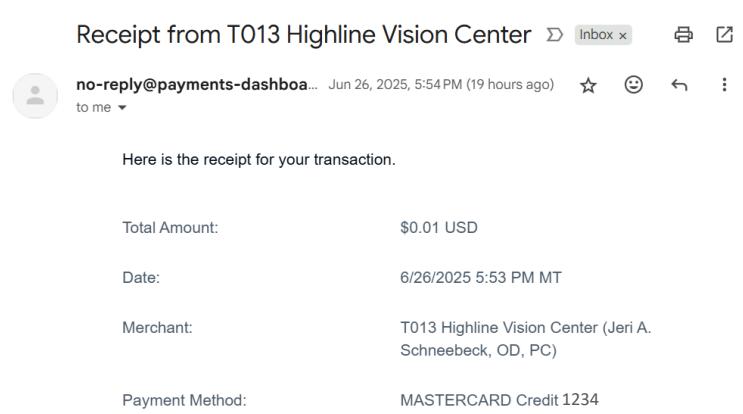
- NOTE: ALWAYS print the merchant receipt to staple to your Ciao! Receipt for daily closing reconciliation.



TEXT EXAMPLE



EMAIL EXAMPLE



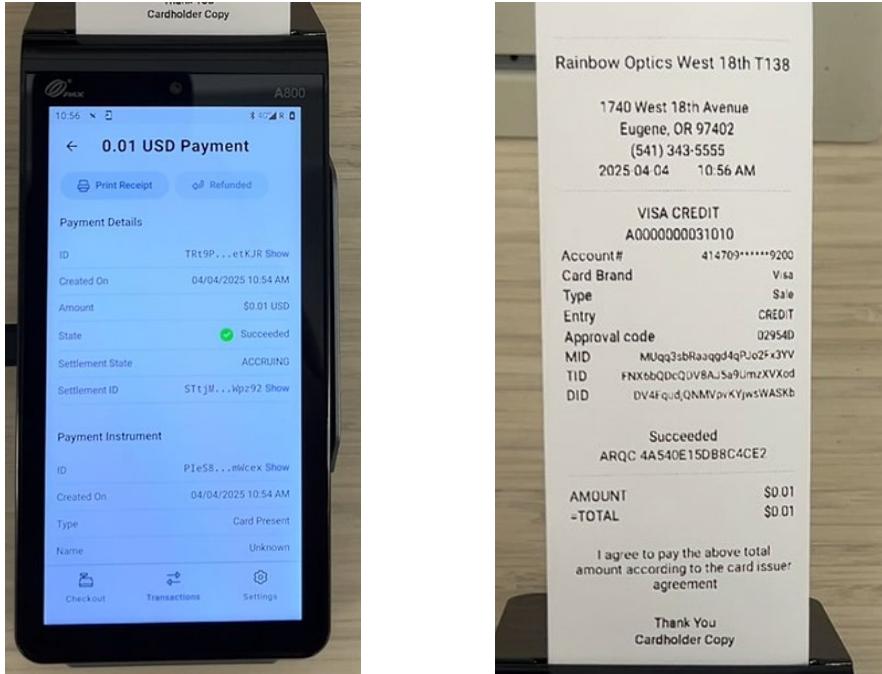
PROCESSING A TRANSACTION



RETURN TO TABLE
OF CONTENTS

6

Confirmation page will appear, and receipt will print.



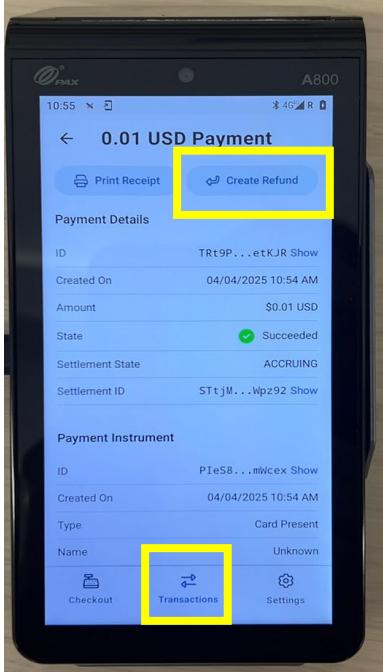
PROCESSING A VERIFIED REFUND



RETURN TO TABLE
OF CONTENTS

1

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



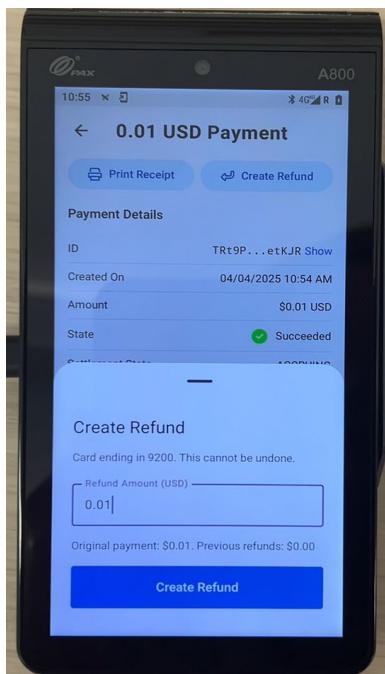
2

Type in the desired refund amount.



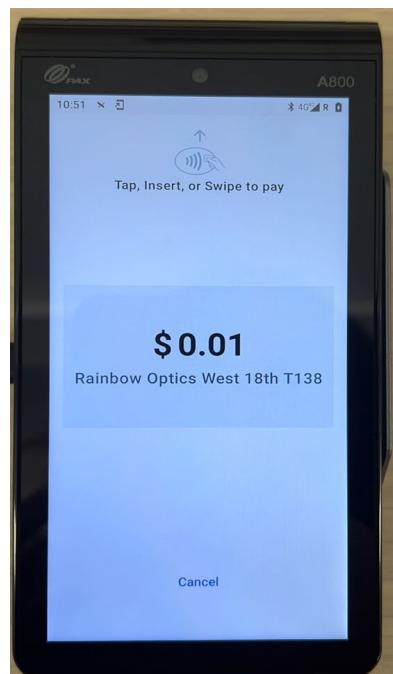
3

Select "Create Refund"



4

Tap, Insert, or Swipe Card for refund.



PROCESSING AN UNREFERENCED REFUND



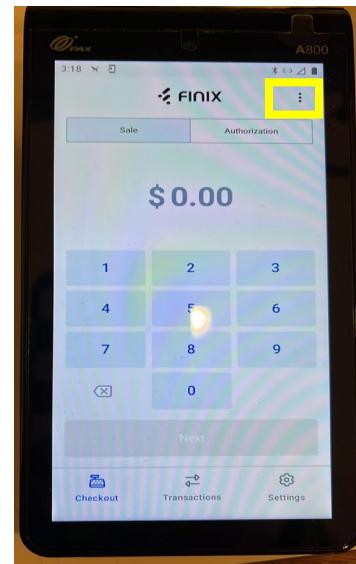
RETURN TO TABLE
OF CONTENTS

In rare situations, you may need to process a refund for a transaction that was not originally completed on the Finix Credit Card Terminal. This is referred to as an unreferenced refund. Common examples include:

- The original transaction was processed on a Stax device.
- The original form of payment is no longer available (e.g., card expired, lost, or stolen).

Important: The card you are refunding to **must be present** to issue an unreferenced refund. No manual entry is allowed.

- 1 From the payment screen, Tap the 3 dots in the upper right corner, then select "Create Refund"
- 2 Type in the desired refund amount.
- 3 Select "Create Refund"
- 4 Tap, Insert, or Swipe Card for refund.



If you encounter errors or issues when attempting an unreferenced refund, please email support@finix.com and CC TVOps@teamvisionteam.com. The support team will investigate and provide guidance. Please include:

- Site number
- Transaction ID
- Last 4 of the card
- Time and date of attempted refund
- Amount

If the refund still cannot be processed, you will need to attempt the refund to a different card or issue the refund via a Home Office check. Please note, these situations are typically due to restrictions from the card issuer, not a system error.

VIEWING & REPRINTING PRIOR TRANSACTION

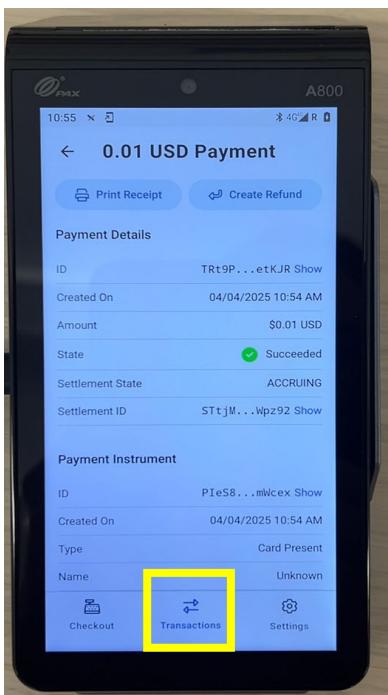


RETURN TO TABLE
OF CONTENTS

All transactions processed on any device and the online dashboard are viewable from every device. All devices communicate with each other and the online dashboard, making data consistent no matter which device you use to view transactions.

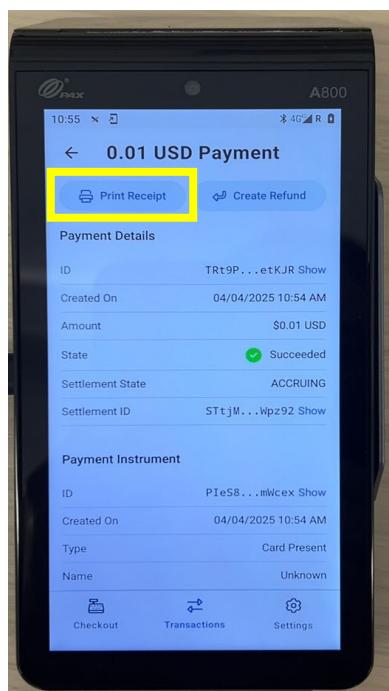
1

From the Payments App, select “Transactions” from the bottom of the screen. Please note that refunds and sales are housed in two different screens. Tap the appropriate payment type at the top to find your transaction.



2

Scroll to search for the desired transaction. To re-print the receipt, tap “Print Receipt”.



END OF DAY CLOSING REPORT



RETURN TO TABLE
OF CONTENTS

Finix devices will auto-batch at the end of each night. No action is necessary to close out your device. To gain access to the totals by card brand for end of day closing procedures in Ciao! Optical, you will view the “Transaction Summary Report” directly on your Finix Credit Card Terminal.

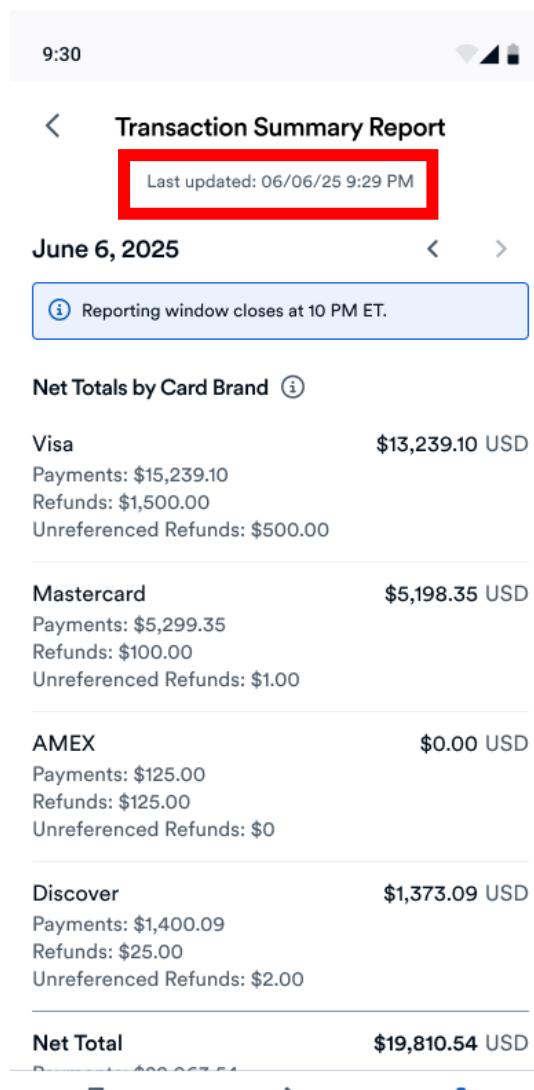
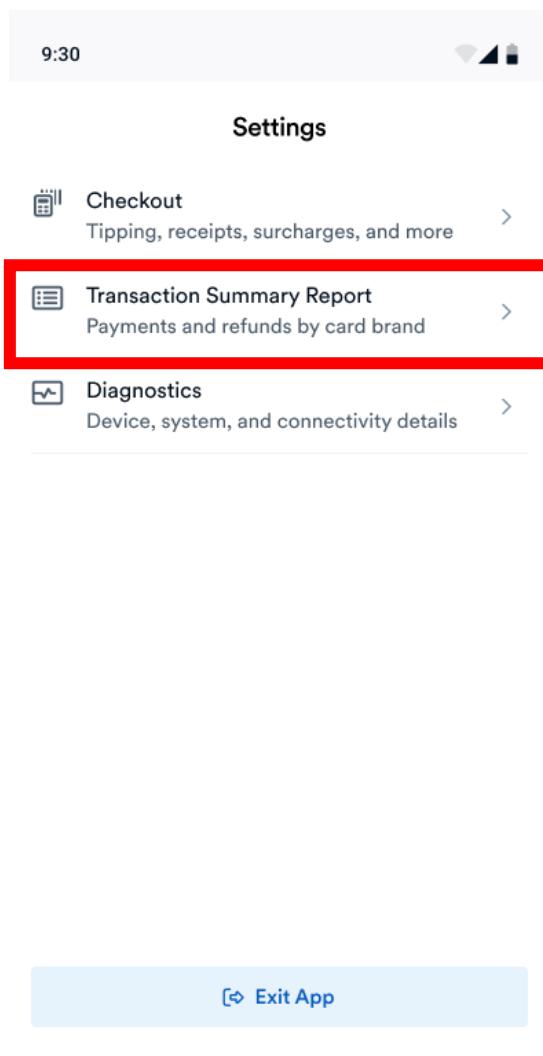
NOTE: You must be on Payment App version 5.6.0 or later to access this report. To update your payment app, follow the instructions [HERE](#). All terminals are connected, so you will see the same information on every terminal in your office.



From the payment screen, Tap “Settings” then “Transaction Summary Report”.



At the top, you will see the date and time of the last update. Confirm that you have not processed any transactions after the reported time.



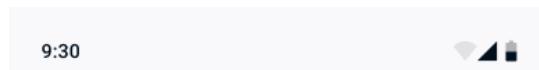
END OF DAY CLOSING REPORT



RETURN TO TABLE
OF CONTENTS

3

The amount listed in **BOLD** next to each card brand is the amount you will enter in Ciao! Optical for your closing report.



Transaction Summary Report

Last updated: 06/06/25 9:29 PM

June 6, 2025



ⓘ Reporting window closes at 10 PM ET.

Net Totals by Card Brand ⓘ

Visa	\$13,239.10 USD
Payments: \$15,239.10	
Refunds: \$1,500.00	
Unreferenced Refunds: \$500.00	
Mastercard	\$5,198.35 USD
Payments: \$5,299.35	
Refunds: \$100.00	
Unreferenced Refunds: \$1.00	
AMEX	\$0.00 USD
Payments: \$125.00	
Refunds: \$125.00	
Unreferenced Refunds: \$0	
Discover	\$1,373.09 USD
Payments: \$1,400.09	
Refunds: \$25.00	
Unreferenced Refunds: \$2.00	
Net Total	\$19,810.54 USD



Checkout



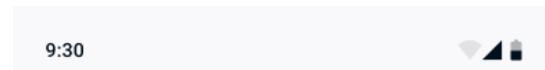
Transactions



Settings

4

To view a previous day's totals, toggle using the small arrow next to the date.



Transaction Summary Report

Last updated: 06/06/25 9:29 PM

June 6, 2025



ⓘ Reporting window closes at 10 PM ET.

Net Totals by Card Brand ⓘ

Visa	\$13,239.10 USD
Payments: \$15,239.10	
Refunds: \$1,500.00	
Unreferenced Refunds: \$500.00	
Mastercard	\$5,198.35 USD
Payments: \$5,299.35	
Refunds: \$100.00	
Unreferenced Refunds: \$1.00	
AMEX	\$0.00 USD
Payments: \$125.00	
Refunds: \$125.00	
Unreferenced Refunds: \$0	
Discover	\$1,373.09 USD
Payments: \$1,400.09	
Refunds: \$25.00	
Unreferenced Refunds: \$2.00	
Net Total	\$19,810.54 USD



Checkout



Transactions



Settings

NOTE: This report is currently NOT ABLE TO PRINT. You must view on the device and manually record the numbers in your Ciao closing process.

FINIX ONLINE DASHBOARD

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 and the Manager mailbox for initial login. If additional logins are necessary, please contact tvops@teamvisionteam.com with kworley@luxotticaretail.com on CC.

Daily Login: Access the Finix Dashboard [HERE](#). Multi-factor authentication is required—employees will be prompted to use a phone number for text or download an authenticator app.

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

- [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

FINIX FAQ & SUPPORT



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 unreferenced return through your payment screen on the Finix device ([Slide 12](#)). 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 support@finix.com with your Site ID, card type, last four, time of transaction and amount of refund.

How do I reconcile at the end of the day?

Use the “Transaction Summary Report” on your device ([Slide 16](#)). You can also use the “Payments > Transactions” Tab in the Dashboard to view all transactions and manually reconcile.

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 with Katie Worley (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.

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.