TD Generation Merchant Guide - All in One

TD Generation Merchant Guide

All in One

* Image shown is the HSPA terminal

533792 – V2.1 – 10/15 (EN)

CALL CENTRE INFORMATION

Please call the TD Merchant Solutions Help Desk at **1-800-363-1163**. We would be happy to answer any questions you may have.

Authorization:
24 hours a day, seven days a week

Terminal Inquiries:
24 hours a day, seven days a week

General Merchant Inquiries:
Monday – Friday, 8 a.m. – 8 p.m. ET

Printer/Stationery Supplies:
Monday – Friday, 8 a.m. – 5 p.m. ET

MERCHANT INFORMATION

Merchant Name . . . .

Merchant Number . . . .

Table of Contents

Section 1
Responsibilities

With TD Generation, like any other Point of Sale (POS) product, the merchant is responsible for various security requirements to ensure cardholder privacy to prevent fraud. This section will cover what you as a merchant must do to ensure that your system is safe and secure.

Welcome to TD Merchant Solutions

The purpose of this guide

The TD Generation terminal family is a growing and exciting new product line that offers a wide range of functionality and flexibility to merchants. This guide covers the three different TD Generation terminals and provides helpful information about the equipment, its features, and TD Merchant Solutions. Please ensure you read this guide so that you become familiar with the capabilities of your terminal and how it can support your business needs.

It also provides general administrative guidelines with respect to both credit and Interac Direct Payment. The provision of Visa®, MasterCard® and/or Interac® Direct Payment merchant services to you (the user) by TD Merchant Solutions is governed by the Merchant Solutions Agreement and any other agreement(s) that govern the services that we may provide to you. The use of the TD Generation terminal with respect to the provision of merchant services by a third party is governed by any agreement(s) with such third party.

Accepted Card Types

The following are accepted card types:

- American Express®
- American Express® Expresspay
- Discover®
- Interac® Direct payment
- Interac Flash™
- JCB
- MasterCard®
- MasterCard® PayPass™
- VISA®
- Visa® Electron (Credit only)
- VISA payWave®

- This is not a definitive list as TD regularly updates terminals to accept new cards and payment methods.

Legend

Important Icons

The exclamation mark and the light bulb icons can be found throughout this guide. Be sure to read these warnings and helpful tips when you see them as they provide important information when using the TD Generation product.

- Important information
- Helpful tip

As well, the three different TD Generation terminals can have different functionality. The following icons are used to identify when section applies to the Generation, HSPA and/or Wi-Fi terminals.

- For Generation terminals
- For HSPA terminals
- For Wi-Fi terminals

Hardware Terminology

There are a few hardware terms we use in the guide that you should know to optimize your interactions with the TD Generation package.

- **Access point / Repeater -** For every site that uses one or more Wi-Fi terminals, it will also include an access point to allow the terminals to perform financial transactions. If that access point's wireless signal range is unable to cover the entire work space – such as a very large restaurant – a repeater will be added. This repeater will cover the remaining work space and must overlap with the access point's wireless coverage area to facilitate communication.

- **Charger base -** A charger base is used for the HSPA and Wi-Fi terminal to keep it charged when it is not in use. This is an optional piece of equipment as either terminal can be connected to the included power cord and recharged via an electrical outlet.
- **Hub -** A hub is always paired with the Generation terminal as it connects the terminal to an electrical outlet and the Internet.
- **Generation terminal -** This is a wired terminal connected to the Internet via an Ethernet cable or a dial-up phone line through the Hub.
- **HSPA terminal -** This terminal uses the same cell towers that a mobile phone would use in order to perform financial transactions and does not require cabling to connect to the Internet.
- **Wi-Fi terminal** - This is a wireless terminal that uses a specialized router called the access point. As this device does not require cabling to connect to the Internet, this terminal can be used within a large area as long as it is within the signal range of the access poin. If the area is too large for the access point, repeaters will be added to provide coverage.

Screen Terminology

There are three different screens on the TD Generation terminals. They are:

- **Idle screen -** This is the default screen that appears on the terminal when it is not in use. It has the TD logo displayed on it.
- **Desktop screen -** This is the screen that you go to immediately after the *Idle* screen. It contains the icons for the most commonly used transactions.
- **Main Menu screen -** This is the screen that you go to immediately after the *Desktop* screen. It contains the icons for the less commonly used transactions. There may be more than one *Main Menu* screen depending on how many features your terminal has access to.

Navigation on the terminal

There are three ways to navigate the screen and select icons. They are:

Dash Keys

The two **dash** keys have multiple uses. They can be used to:

1. Quickly move from screen to screen by pressing the appropriate key.
2. Navigate menus by quickly taking you to the top or bottom menu option on the screen.
3. Selecting an on screen option. In this case you will see a boxed word on the bottom-left or right corners of the screen. Press the associated **dash** key and that option will be selected.

Direction Pad

To navigate with the direction pad, use it to scroll to the desired icon. It can also be used to scroll through menu options. Once you find the desired icon or menu option, highlight it and press **OK**.

Icon Number

Navigating with the icon number is very quick and easy. Once you get to the page with the desired icon, press the number associated with it on the numeric keypad. This cannot be used for navigating menus, only icons.

How do I access the...

Desktop screen?

From the *Idle* screen:

- Press the left **dash** key.

  OR
- Press **OK**.

Main Menu screen?

From the *Desktop* screen:

- Press the right **dash** key to advance one screen at a time.

Protecting Cardholder Privacy

As a merchant, you have a responsibility to protect your customers from possible credit card fraud by maintaining the confidentiality of their personal information. The industry requires that merchants protect cardholder's account and transaction information including:

- Names
- Account numbers, CVD/CID/CVV, etc., the three-digit data printed on the back of Visa and MasterCard or the four-digit data appearing on the front of an Amex card
- Information embossed, encoded or appearing on Visa cards ("information") in accordance with the *Visa Account Information Security Standards*

You may not use this information for any purpose except to complete transactions authorized by the card issuer.

All information must be:

- Stored in a secure area
- Accessible by only authorized staff
- Destroyed and rendered unreadable before it is discarded

- If you make arrangements with any third party for the purpose of collecting, processing or storing information you must have a written contract with the third party that is in compliance with the Visa Account Information Security Standards.

- You must allow TD Merchant Solutions or Visa to inspect your premises and ensure that we can inspect the premises of any third party to verify that Information is securely stored and processed. The Visa Account Information Security Standards Manual is available at www.visa.com or under security information at www.mastercard.com. For further information, please contact TD Merchant Solutions.

How should I store cardholder receipts?

The following are guidelines that you should use when storing cardholder receipts:

- Users are responsible for retaining all receipts to respond to cardholder inquiries.
- Keep receipts in a secure place for at least one year. Envelopes arranged by date in a secured filing cabinet can work well.
- Transaction receipts should be stored in a dark, secure area with limited access.
- If you have several terminals use a separate envelope for each terminal.
- For VISA and MasterCard transactions, file and store receipts for at least one year.
- For Direct Payment transactions, store receipts as long as you retain cash register tapes.
- If we need a receipt copy, please send it to us within eight days and retain a copy for your records.
- The required storage and response times are for TD Merchant Solutionsonly and may vary by financial institution.

- Thermal Paper receipts cannot be stored in plastic coated products or exposed to direct heat/cold sources.

How can I secure my TD Generation product?

The TD Generation terminal is able to perform unauthorized transactions including debits to the merchant's account due to fraudulent usage. It is the merchant's responsibility to take whatever steps necessary to secure the terminal, any user IDs or passwords and to prevent unauthorized use. In any event, the merchant will be liable for any unauthorized use of the terminal or any user IDs or passwords. Security can be placed on particular transaction types by request through the TD Merchant Solutions Help Desk. See *Section 6 – Administration and Configuration* for more information.

There are two settings of user security on a terminal:

No Security

This is the default setting and requires no action by the merchant on initial setup. This option means that the payment system is not setup to use unique IDs. Merchants that choose to use no security still have the option to setup a store/manager override ID and password to access areas of the terminal that have a mandatory requirement for supervisor password.

- This is the default setting and it will allow access to almost every function of the terminal.

Security

This option allows the user to setup supervisors and operators with an ID login in ID Setup. The supervisor setup requires you to create a password. You can activate this by going to Desktop -> Main Menu -> **Control Panel** -> Logon Method. See *Section 6 – Administration and Configuration* for more information.

How can I secure force post and call for authorizaiton transactions?

There are two more ways to further reduce fraudulent transactions on your terminal. They are:

Force post fraud prevention

You can now enable/disable or password protect force post transactions on your terminal. If a force post transaciton occurs the temrinal will either:

1. Disabled - State that the transaction is not allowed and a different payment method is required.

   or

2. Password protected - Request a supervisor to enter their password.

Call the TD Merchant Solutions Help Desk to enable or modify this setting.

Call for authorization fraud prevention

You can now enable/disable call for authorization transactions. Call the TD Merchant Solutions Help Desk to enable or modify this setting.

Overview

The TD Generation terminal provides automatic credit /debit card authorizations and draft capture. The integrated printer prints cardholder and merchant receipts and printed reports for balancing transactions. It is used by the cardholder during a debit/credit card transaction to insert/tap/swipe their card, select his/her account and enter their PIN (Personal Identification Number). The Generation terminal has three readers: contact chip, contactless chip and magnetic stripe.

- The contact chip reader used by the customer to insert a chip enabled credit/debit card.
- The contactless reader is used by customer to tap a contactless credit/debit card.
- The magnetic stripe reader is used by merchant to swipe a credit/debit card during a transaction. The merchant may need to swipe the card for the customer.

Cardholder transactions are processed by selecting a transaction type, inserting, tapping or swiping the card through the card reader, or manually keying in a credit card, and entering the transaction information. If the card is manually entered a manual imprint of the credit card is required. All of the available transactions are described in this guide.

- If a signature is required for a credit card transaction, always verify that the cardholder’s signature on the receipt matches the signature on the reverse of the card.

How many transactions are stored and for how long?

The terminal can store up to 10 business days of detailed transactions and 45 days of totals and store a maximum of 999 transactions per batch and 1500 transactions per business day. As well, the terminal can have multiple batches stored on it.

When do I call for cardholder authorization?

WHENEVER	ACTION
…the **CALL FOR AUTH** message is seen. (No comm error seen)	**1.** Do not attempt the transaction again. **2.** Press the **OK** (**O**) or **CANC** (**X**) key and call for a voice authorization immediately.
…the **CALL FOR AUTH** message is seen. (Comm error seen)	**1.** Try again the transaction again. OR **2.** Tap the **OK** or **CANC** key and call for a voice authorization.
…the card number on the screen does not match the number embossed on the card.	**1.** Press the **CANC** (**X**) key and call for a voice authorization immediately. **2.** Request a **CODE 10** authorization. In this situation, you may be dealing with a fraudulent card and **CODE 10** will alert the financial institution to this possibility.
…the cardholder signature on the receipt does not match the signature on the reverse of the card.	**1.** Call for a voice authorization. **2.** Request a **CODE 10** authorization. The financial institution will be able to advise whether or not the correct individual is using the card. They will also tell you how to proceed.
…you have any doubts about the validity of a card or a transaction.	**1.** Call for a voice authorization. **2.** Request a **CODE 10** authorization. The financial institution will be able to advise whether or not the correct individual is using the card. They will also tell you how to proceed.

When do I use my imprinter?

WHENEVER	ACTION
…you're unable to use the cards chip or swipe the card through the terminal due to a problem with the card's magstripe.	**1.** Key in the transaction manually. **2.** Take an imprinted draft for the cardholder's signature. **3.** Indicate the transaction details in the imprinted copy and staple the printer receipt to the signed copy.
…your printer is not working.	**1.** Take an imprinted draft for the cardholder's signature. **2.** Indicate the transaction details on the imprinted copy.
…the system is down, the terminal does not ask for an authorization number and you receive a telephone authorization.	**1.** Take an imprinted draft. **2.** Note all transaction details on the draft. **3.** Call for authorization. **4.** When the system becomes available, enter all manually imprinted transaction by going to: Desktop-> Main Menu -> **Debit/Credit** -> Force Post, then staple all printed transactions to the imprinted sales draft(s).

What do I do if there is a dispute over a debit transaction?

If a customer questions an alleged erroneous debit card transaction, they must be referred to their own financial institution to correct the problem. The merchant will be responsible for any attempt to make debit card account corrections and will not be reimbursed if a cash refund is provided to the customer.

Summary

After reading this section you now know how to:

- Identify the different components
- Protect cardholder privacy
- Protect yourself from credit cardholder fraud
- Address debit card transaction disputes

In the next section you will learn about what comes in your TD Generation Welcome Kit.

Section 2
Welcome Kit Contents

Now that you know what your responsibilities are as a merchant regarding the TD Generation package, you should review what is contained in the Welcome Kit.

TD Generation Welcome Kit Contents

What is always provided in the Generation package?		
Terminal w/power pack (not shown)	**Hub w/communications cable**	**Guides and Supplies**
		• Merchant Guide • Quick Reference Guide • Paper Rolls (4)

What is always provided in the HSPA package?		
Terminal w/power pack (not shown)		**Guides and Supplies**
		• Merchant Guide • Quick Reference Guide • Paper Rolls (4)

What is always provided in the Wi-Fi package?		
Terminal w/power pack (not shown)	**Access point and antenna w/power pack, network cable (not shown)**	**Guides and Supplies**
		• Merchant Guide • Quick Reference Guide • Paper Rolls (4)

What are the optional components?

Repeater w/power pack (not shown)	**Charger Base w/power pack (not shown)**
Wi-Fi 	HSPA Wi-Fi 
• A repeater is used when a work area cannot be covered by the access point alone.	• The Generation terminal doesn ot have a battery so it does not need a charger base.

What do I need to provide for the TD Generation product?

Generation Wi-Fi

You are responsible for providing one of the following:

- Analog phone line (Generation only)
- Static IP Internet Connection
- DHCP (Dynamic IP) Internet connection

How do I order more components?

If something is missing from your welcome kit, or you require TD Generation supplies for your business, please contact TD Merchant Solutions Help Desk at **1-800-363-1163** to place an order.

Summary

After reading this section you now know what comes in your Welcome Kit:

- Merchant Guide, Quick Reference Guide and four paper rolls
- Terminal with power pack
- Hub and cables (Generation only)
- Access point, network cable and antenna (Wi-Fi only)

And what optional components may be included (dependent upon your installation):

- Repeater(s) (Wi-Fi only)
- Charger base with power pack (HSPA and Wi-Fi only)

In the next section you will learn more about each of the components mentioned in this section.

Section 3
Introducing TD Generation

Now that you know what comes in your Welcome Kit, it is time to learn about the features of the terminal and components. This section will go over each of these components and explain how they work individually and together.

The TD Generation Terminals

The terminal is the first and most important component of the TD Generation package. It includes built-in:

- Colour screen
- Direction pad
- Numeric/command keypad
- Printer
- Speaker
- Battery (HSPA and Wi-Fi only)
- Power port (HSPA and Wi-Fi only)

Customers will use the terminal to initiate transactions with your business by using a debit, credit, loyalty or gift card.* Once the transaction is entered on the terminal, the data is then sent wirelessly to via the cellular network (HSPA) or the access point (Wi-Fi). If you have the Generation terminal, transactions are sent via the cables connected to your phone line or Internet connection.

*Some card types may not be accepted by your terminal.

The Generation Terminal

1. **Paper Chamber Button**
   Press this button to open the paper chamber.
2. **Dash Keys and Direction Pad**
   Use the **dash** keys and the **direction pad** to navigate all the screens.
3. **Paper Advance**
   Press this key to advance the paper roll in the terminal.
4. **Power Key**
   Press the **power** key to power the terminal on. Press and hold the **power** key for 3 seconds to power the terminal off.
5. **Command Keys**
   Use these keys to cancel an entry (red **X**), return to previous screen (yellow **<**) or activate your selection (green **O**), also known as the **OK** key.
6. **Insert Slots/Contactless/Card Swipe**
   Use the insert slot along the bottom of the terminal for chipped cards, the screen for contactless cards and the slot along the right for all others.

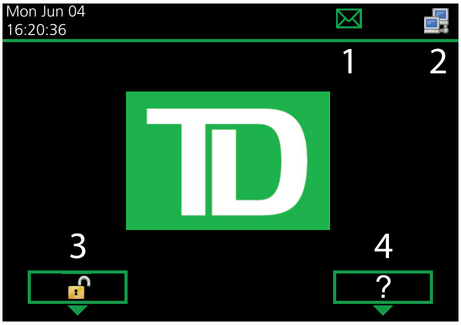
Communications

The Generation terminal communicates via a phone line or an wired ADSL Internet connection. The image shown is the phone line version of the hub.

! • The hub shown is the dual phone line hub. Depending on your installation, you may have a single Ethernet hub with a single line.

Idle Screen and Icons

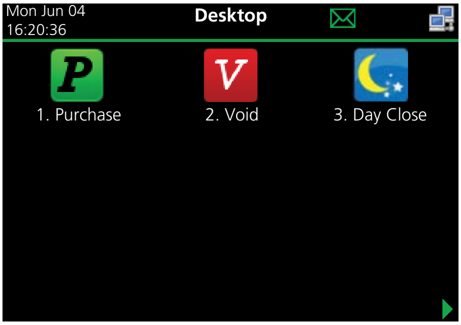
The default screen is called the *Idle* screen. It displays a lot of important information and different ways to access your terminal's functionality. On it there are numerous icons. They are:



1. **Mail**
   An envelope icon indicates that you have an email waiting. A supervisor ID and password may be required to access it.
2. **Internet Status Icon**
   This icon indicates whether your terminal is properly connected to the Internet. If it isn't connected you will see a red circle with a white dash over the connection icon.
3. **Access Desktop Screen***
   Press the left **dash** key to access the *Desktop* screen. This is where your transaction icons are located. A supervisor ID and password may be required.
4. **Help***
   Press the right **dash** key to access the *Help* screen.

Desktop Screen

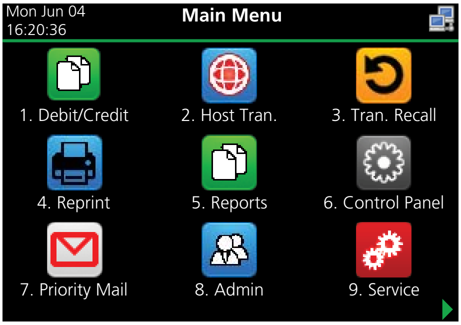
From the *Idle* screen, press **OK**, or press the left **dash** key, and the *Desktop* screen appears. The *Desktop* screen displays three icons: Purchase, Void and Day Close. Any other icons that you will use will be displayed on the *Main Menu* screen.



Main Menu Screen

To enter the *Main Menu* screen, go to the *Desktop* screen and then press the right **dash** key. This screen displays any other icons besides Purchase, Void and Day Close.

- Debit / Credit
- Gift Card
- Cash Transaction
- Host Transactions
- Transaction Recall
- Reprint
- Reports
- Control Panel
- Priority Mail
- Admin
- Service (For TD Technicians only)



- There may be more than one *Main Menu* screen on your terminal. The number of screens depend on the number of available icons. If there are more than nine icons, there will be two *Main Menu* screens.

The Generation Hub

The Generation terminal comes with a hub to allow for easy power and Internet connection. It includes:

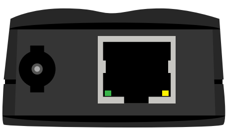
- A power cable
- A power port
- One or more comm ports (Ethernet or phone line)

Ports

There are two different hubs available, each with their own port configurations. They are:

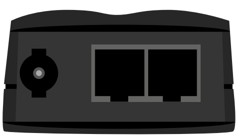
Single Ethernet

This configuration has a connection which allows you to connect an Ethernet cable from your Internet connection to the hub.



Dual Phone Line

This configuration has two ports which allows you to connect to a phone line and to connect to your phone.



The HSPA Terminal

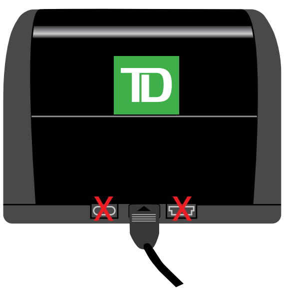
1. **Paper Chamber Button**
   Press this button to open the paper chamber.
2. **Dash Keys and Direction Pad**
   Use the **dash** keys and the direction pad to navigate all the screens.
3. **Paper Advance Key**
   Press this key to advance the paper roll in the terminal. This key also has an asterisk on it for data entry.
4. **# Key / Power Key / Call Key**
   Press the **power** key to power the terminal on. Press and hold the **power** key for 3 seconds to power the terminal off.
5. **Command Keys**
   Use these keys to cancel an entry (red **X**), return to previous screen (yellow **<**) or activate your selection (green **O**), also known as the **OK** key.
6. **Insert Slots/Contactless/Card Swipe**
   Use the insert slot along the bottom of the terminal for chipped cards, the screen for contactless cards and the slot along the right for all others.

Communications

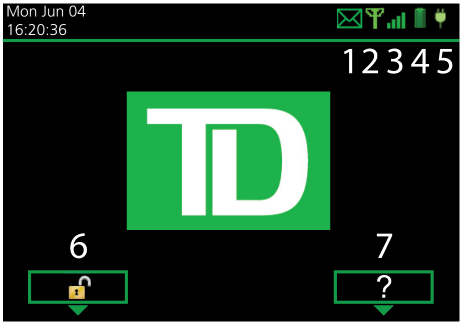
The HSPA terminal communicates via the same cell towers that your mobile phone uses. The HSPA terminal must be within a tower's range in order to function.

Ports

On the back of the terminal there are three ports. Only the middle one, the power port, is currently used. When you want to recharge the terminal, just plug in the power cable (provided) into a wall outlet and into the middle port on the top of the terminal. In the image to the right, the power cord is attached to the middle port and all unused ports are indicated with a red **X**.



Idle Screen and Icons



The default screen is called the *Idle* screen. It displays a lot of important information and different ways to access your terminal's functionality. On it there are numerous icons. They are:

1. **Mail**
   An envelope icon indicates that you have an email waiting. A supervisor ID and password may be required to access it.
2. **Signal**
   This icon indicates whether the terminal is:
   - not connected (**red**),
   - attempting to connect (**orange**),
   - or connected (**green**).
3. **Signal Strength**
   Indicates the connection strength.
4. **Battery Level**
   This icon indicates the terminal power level.
5. **Battery Charging**
   This icon indicates that the terminal is charging.
6. **Access Desktop Screen***
   Press the left **dash** key to access the *Desktop* screen. This is where your transaction icons are located. A supervisor ID and password may be required.
7. **Help***
   Press the right **dash** key to access the *Help* screen.

* The dash key's purpose changes depending on which screen you are currently viewing.

Desktop Screen

From the *Idle* screen, press **OK**, or press the left **dash** key, and the *Desktop* screen appears. The *Desktop* screen displays up to nine icons that represent that various options on the terminal. The first three icons on the *Desktop* screen (Purchase, Void and Day Close) are fixed and cannot be changed or moved.

Customization

The remaining six icon positions can be filled with other icons that are commonly used by you. Your available options are:

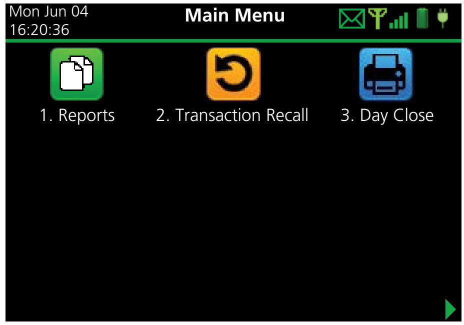
- Phone Mail Purchase
- Cash Purchase
- Pre-Auth / Open Tab
- Incremental Auth / Top Up Tab
- Invoice Tab
- Pre-Auth Completion / Close Tab
- Gift Card Redemption
- Debit/Credit
- Loyalty Award
- Force Post Purchase
- Last Receipt
- Log Off

- To have any of these options added to your terminal's desktop, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.
- You cannot have more than nine icons on the *Desktop* screen. Excess icons will appear on the *Main Menu* screen.

Main Menu Screen

To enter the *Main Menu* screen, go to the *Desktop* screen and then press the right **dash** key. This screen displays icons that aren't used as often as the desktop icons.

- Debit / Credit
- Gift Card
- Loyalty
- Cash Transaction
- Host Transactions
- Transaction Recall
- Reprint
- Air Miles
- Reports
- Control Panel
- Priority Mail
- Admin
- Service (For TD Technicians only)



- There may be more than one *Main Menu* screen on your terminal. The number of screens depend on the number of available icons. If there are more than nine icons, there will be two *Main Menu* screens.

Customization

Main Menu screen customization is not available.

The Wi-Fi Terminal

1. **Paper Chamber Button**
   Press this button to open the paper chamber.
2. **Dash Keys and Direction Pad**
   Use the **dash** keys and the direction pad to navigate all the screens.
3. **Paper Advance**
   Press this key to advance the paper roll in the terminal.
4. **Power Key**
   Press the **power** key to power the terminal on. Press and hold the **power** key for 3 seconds to power the terminal off.
5. **Command Keys**
   Use these keys to cancel an entry (red **X**), return to previous screen (yellow **<**) or activate your selection (green **O**), also known as the **OK** key.
6. **Insert Slots/Contactless/Card Swipe**
   Use the insert slot along the bottom of the terminal for chipped cards, the screen for contactless cards and the slot along the right for all others.

Communications

The Wi-Fi terminal communicates via a router called an access point. The access point is connected to your Internet connection and receives financial transactions wirelessly from your terminal. You must have an active Internet connection in order to use the Wi-Fi terminal.

Ports

On the back of the terminal there are three ports. Only the middle one, the power port, is currently used. When you want to recharge the terminal, just plug in the power cable (provided) into a wall outlet and into the middle port on the top of the terminal. In the image to the right, the power cord is attached to the middle port and all unused ports are indicated with a red **X**.

Idle Screen and Icons

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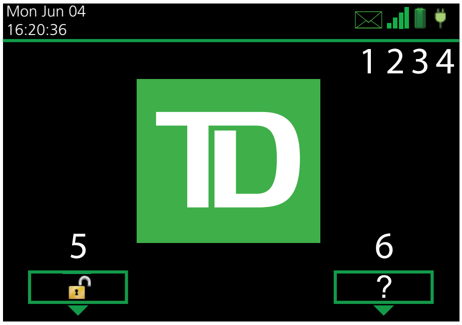

1. **Mail**
   An envelope icon indicates that you have an email waiting. A supervisor ID and password may be required to access it.
2. **Signal Strength**
   Indicates the Wi-Fi connection strength.
3. **Battery Level**
   This icon indicates the terminal power level.
4. **Battery Charging**
   This icon indicates that the terminal is charging.
5. **Access Desktop Screen***
   Press the left **dash** key to access the *Desktop* screen. This is where your transaction icons are located. A supervisor ID and password may be required.
6. **Help***
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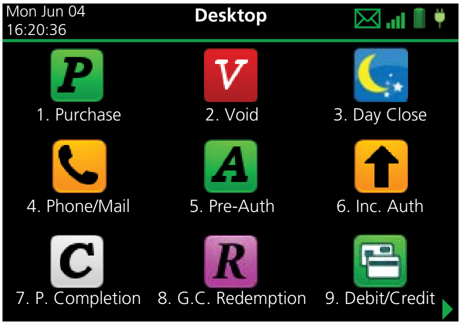


Customization

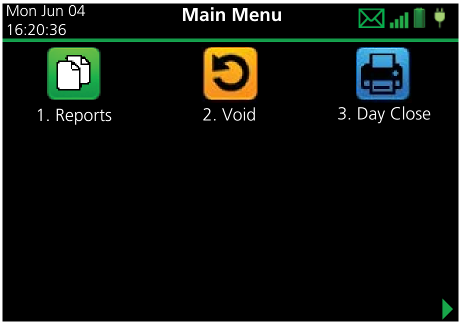
The remaining six icon positions can be filled with other icons that are commonly used by you. Your available options are:

- Phone Mail Purchase
- Cash Purchase
- Pre-Auth / Open Tab
- Incremental Auth / Top Up Tab
- Invoice Tab
- Pre-Auth Completion / Close Tab
- Gift Card Redemption
- Debit / Credit
- Loyalty Award
- Force Post Purchase
- Last Receipt
- Log Off

- To have any of these options added to your terminal's desktop, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.
- You cannot have more than nine icons on the *Desktop* screen. Excess icons will appear on the *Main Menu* screen.

Main Menu Screen

To enter the *Main Menu* screen, go to the *Desktop* screen and then press the right **dash** key. This screen displays icons that are not used as often as the desktop icons.



- Debit / Credit
- Gift Card
- Loyalty
- Cash Transaction
- Host Transactions
- Transaction Recall
- Reprint
- Air Miles
- Reports
- Control Panel
- Priority Mail
- Admin
- Service (For TD Technicians only)

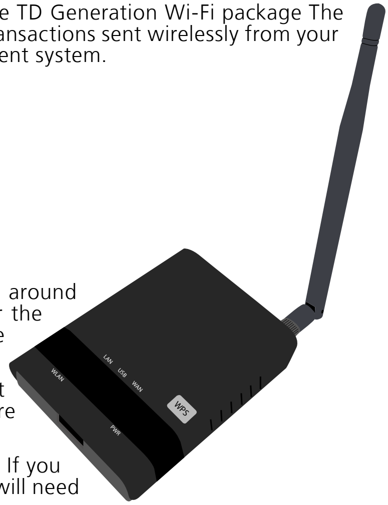
- There may be more than one *Main Menu* screen on your terminal. The number of screens depend on the number of available icons. If there are more than nine icons, there will be two *Main Menu* screens.

Customization

Main Menu screen customization is not available.

The Wi-Fi Access Point / Repeater

The access point is the second component of the TD Generation Wi-Fi package The access point acts like a router by receiving any transactions sent wirelessly from your terminal(s) and then forwards them to the payment system.



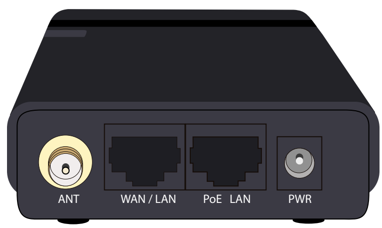
It includes:

- An antenna
- A power cable
- Multiple lights
- Multiple ports (USB, WAN/LAN, PoE LAN and PWR)

- Be sure not to move it or place barriers around your existing access point / repeaters after the installation as any changes may interfere with the signal strength.
- The access point is the first one installed at a site. Any other installed after the first are referred to as repeaters.
- It can connect up to 100 terminals at once. If you wish to have more than 100 terminals you will need to add a repeater.
- Don't worry, no one can access the access point Wi-Fi signal via their laptop or smartphone.

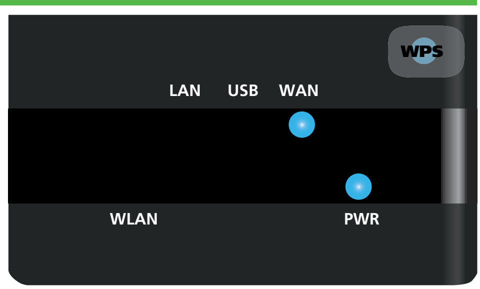
Ports

There are five ports on the access point (USB on the front, the ANTenna, WAN/LAN, PoE LAN and PWE) but the TD Generation only uses the ANT, WAN/LAN, PoE LAN and PWR ports.



Lights

There are five lights on the access point (WLAN, LAN, USB, WAN and PWR). Only the WAN, PWR and WPS are used and they are very helpful in troubleshooting any communication problems between the terminal and the access point/ repeater.



The Charger Base (Optional)

HSPA Wi-Fi

The charger base is a great option for businesses that require mobile terminals (restaurants, etc.). Just plug the power cord into the charger base and the other end into an electrical outlet. When you want to recharge an HSPA or Wi-Fi terminal, just place it in the charger base with the terminal's charge connectors (the rectangle with eight circles) aligned to the base's charge connectors (the rectangle with four metal pins).

- Ensure that the base's power cord is inserted completely. If it isn't the terminal won't charge.
- Placement of the charger base is important. Make sure it is convenient, but not in a high traffic area where a terminal could be knocked or pushed off the base.
- The base is form-fitted to the terminal so that there is almost no chance of sitting incorrectly and prevent it from charging.

Summary

After this section you should be able to:

- Understand the roles of the Generation terminal and hub
- Understand the different ports on the hub
- Understand the roles of the Wi-Fi terminal and access point
- Understand the different ports and their connections on the Wi-Fi terminal and access point
- Understand how to charge your HSPA/Wi-Fi terminal (with charger base and power pack)
- Access and navigate the *Desktop* and *Main Menu* screens on the terminal
- Know what icons can be customized on the *Desktop* screen (HSPA and Wi-Fi only)

In the next section you will learn about the transactions that can be performed on the terminal.

Section 4
Financial Transactions

Now that you know what each of the TD Generation components do, it is time to learn about how to use it in day-to-day business situations.

Continued on next page

Using the TD Generation

How do I read the instructions?

The transactions are laid out in sections to help you find where the transaction icon/menu is located on the terminal and then how to perform it. The following is an example on how to navigate the transaction tables in this section.

Title of the transaction

- Description of the transaction
- Icons indicating which terminals support this transaction
- Helpful tip
- Important information

NAVIGATION

Desktop -> Main Menu -> **Cash Trans** -> Cash Purchase

The Navigation pane shows you how to locate the desired transaction. The bolded step is the last icon in the process – in this case Cash Trans(action). The icon is also located to the left for your reference. Anything appearing after the bolded entry is a menu option that you would enter after selecting the icon.

PROMPT	DATA	EXPLANATION
This column will show you what will be seen on the screen.	This column will show what you must enter to proceed.	This column will provide an explanation or mention additional information that is required or beneficial to the step.

OPTIONAL/DEPENDENT STEP

There are two reasons why you may see a light grey box like this:

1. This is an optional step. Some transactions may have optional steps depending on the circumstances or configuration of your system (tips, cashback, etc.).
2. This step is dependent upon a previous choice. A good example of this is whether the customer swipes/inserts their credit card versus you manually entering the card information.

Note: This light grey box may also refer you to another transaction that has the steps already listed. They are comprised of multiple steps and would make transactions too long to include them in every procedure that offers them. A good example of this is an Air Miles transaction.

If you see steps in a white box like this, it means that they are part of the optional/dependent step.

TURN UNIT TOWARDS CUSTOMER OR OPERATOR

Turn the unit towards the person so that they can perform the necessary steps.

Performing Transactions

Some transactions will only be seen if your system has certain options enabled, or if you or the customer select a certain option during a transaction. Due to this, frequently used common and optional transactions have been called out here and are referred to throughout *Section 4 – Financial Transactions*.

Common Transactions

These transactions are payment methods available on the TD Generation terminal. You may see some or all of the following transactions. For example, you may not see the option to tap a credit or debit card as a method of payment. It depends upon whether this functionality is enabled on your terminal.

How do I process an insert credit card transaction?

This is used for processing transactions where the customer has inserted their chip-enabled, credit card.

PROMPT	DATA	EXPLANATION
PIN Entry	The customer enters their **PIN** and presses **OK**.	--

How do I process a swipe credit card transaction?

This is used for processing transactions where the customer has swiped the magnetic strip on their credit card.

PROMPT	DATA	EXPLANATION
PIN Entry	The customer enters their **PIN** and presses **OK**.	Unless there is a problem, the transaction will complete and then print the receipt. Customer signature is required.

How do I process an insert/swipe debit card transaction?

This is used for processing transactions where the customer has swiped or inserted their debit card.

PROMPT	DATA	EXPLANATION
Account Selection	The customer selects where the funds will be drawn from: • **CHEQUING** • **SAVINGS**	**--**
PIN Entry	The customer enters their **PIN** and presses **OK**.	The terminal begins the authorization process.
$XX.XX Approved	--	Customer removes their debit card.

How do I process a contactless credit/debit card transaction?

This is used for processing transactions where the customer taps their credit or debit card on the reader. This transaction option may not be activated on your terminal. Availability is determined at the time of installation.

- You will only see this transaction option if the total transaction amount is less than the limit assigned to your terminal.
- This option does not appear for transactions initiated by Manual Entry.

PROMPT	DATA	EXPLANATION
	TURN UNIT TOWARDS CUSTOMER	
Please Wait	The customer **taps** their contactless-enabled debit/credit card on the screen.	The transaction will complete and the customer will have the option to print a receipt.

How do I process a manual credit card transaction?

This is used for processing transactions where the customer must have their credit card information manually entered by you, the Merchant.

PROMPT	DATA	EXPLANATION
	TURN UNIT TOWARDS CUSTOMER	
XXXXXXX Enter Account # On PIN Pad	Enter the **account number** and press **OK**.	This can be up to 16 digits in length.
XXXXXXX Enter Expiry Date On PIN Pad	Enter the **expiry date** and press **OK**.	This is four digits in length.
XXXXXXX Manual Imprint Of Card Is Required Continue?	You select one of the following: • **NO** • **YES**	If you select **NO**, the transaction will be cancelled.
XXXXXXX Enter CVD From Card	Enter the **CVD number** and press **OK**.	It can be up to four digits in length. This is an optional step depending on your settings.

Optional Transactions

These transactions are dependent upon which functions are enabled on your terminal. You may see none, one, some or all of the following transactions. If you would like to enable one, some or all of these functions on your terminal, please call the TD Merchant Solutions Help Desk at **1-800-363-1163**.

- Depending on the terminal type (Generation, HSPA, or Wi-Fi), some of these functions may not be available.

How do I use supervisor override codes?

Supervisor override codes are IDs and passwords used to access restricted transactions. Your terminal may require a Supervisor Override code to proceed with any transaction.

PROMPT	DATA	EXPLANATION
Enter Supervisor ID	Enter **Supervisor ID** and press **OK**.	--
Enter Supervisor Password	Enter **Supervisor Password** and press **OK**.	--

How do I create manual invoice numbers?

Your terminal may require an invoice number to proceed with any financial transaction. You would see these steps if you're required to manually enter this information.

PROMPT	DATA	EXPLANATION
Invoice #	Enter the **invoice number** in the format required by your business and press **OK**.	This is an optional setting depending upon whether automatic invoice numbers is turned off. To have this set or changed, call the TD Merchant Help Desk at **1-800-363-1163**.

How do I process a cashback?

This is an option available to customers when, during a debit card transaction, they can request to add an extra amount to the purchase price and receive the added amount in cash. This option will only be seen if cashback is enabled on your terminal.

PROMPT	DATA	EXPLANATION
Cashback	The customer decides if they want cashback: • **NO** • **YES**	--
Cashback/Amount Selection/Entry	The customer selects a cashback amount from the options on screen: • **$ XX.XX** • **$ XX.XX** • **$ XX.XX** OR • **Enter a dollar value**	The cashback amounts displayed can be customized or be set to manual entry. To have this set or changed, call the TD Merchant Help Desk at **1-800-363-1163**.
Purchase $XX.XX Tip $XX.XX (Optional) Cashback $XX.XX Total $XX.XX	Customer confirms that the amount is correct: • **NO** • **YES**	You will only see the tip option if it is enabled on your terminal.

How do I process a tip?

Some businesses aren't associated with tips (retail, movie theatres, etc.) so this option will only be seen if tips are enabled on your terminal.

Please note, there are various different tip options that can be set up on your terminal. The following example is the most robust and incorporates a lot of the options. If you wish to change your tip options please contact TD Merchant Solutions Help Desk at **1-800-363-1163**.

PROMPT	DATA	EXPLANATION
	TURN UNIT TOWARDS CUSTOMER	
Tip Option 1. 10% ($XX.XX) 2. 20% ($XX.XX) 3. 30% ($XX.XX) 4. Other amount 5. No tip	The customer selects the tip desired tip option (**1**, **2**, **3**, **4** or **5**).	**Options 1**, **2** and **3** are fixed percentage amounts that calculate the dollar value in the bracket beside the percentage. It can also show as pre-set dollar values. These amounts (dollar or percentage values) are set up at the time of installation. To have these changed, call the TD Merchant Help Desk at **1-800-363-1163**. **Option 4** allows the customer to select a percentage or dollar tip option and then enter a customized amount. **Option 5** allows the customer to leave no tip.
	OPTION 4 If the customer chose Option 4 follow these steps	
Tip Option	The customer has two tip choices: • **$** for a dollar value tip • **%** for a percentage tip	If the customer doesn't want to leave a tip, they can do it through this option by entering a zero.

Tip Amount	The customer enters the **tip amount**.	Customer enters the **tip** and presses **OK**.
Purchase $XX.XX Tip $XX.XX Cashback (Optional) $XX.XX Total $XX.XX OK?	Customer confirms that the amount is correct: • **NO** • **YES**	--

How do I process a manual gift card?

This is used for processing transactions where the customer must have their gift card information manually entered by the Merchant. This option will only be seen if gift cards are enabled on your TD Generation product.

PROMPT	DATA	EXPLANATION
Enter Account #	Enter the **account number** and press **OK**.	This can be up to 21 digits in length.

How do I process a manual loyalty card transaction?

HSPA Wi-Fi

This is used for processing transactions where the customer must have their loyalty card information manually entered. This option will only be seen if loyalty cards are enabled on your terminal.

PROMPT	DATA	EXPLANATION
Enter Account #	Enter the **account number** and press **OK**.	This can be up to 21 digits in length.
Enter Expiry Date MM/YY	Enter the **expiry date** and press **OK**.	It can be up to four digits in length.

How do I process a split payment?

This is used for processing transactions where the customer decides to pay their bill with two or more payment types. To enable this feature, please call TD Merchant Solutions Help Desk at **1-800-363-1163**.

PROMPT	DATA	EXPLANATION
Enter Payment Amount $XX.XX	Enter the **payment amount** and press **OK**.	Enter the partial payment amount.
Payment: $XX.XX Balance Due: $XX.XX	Select the **back arrow** or **OK**.	If correct, select **OK**. Otherwise, select the **back arrow.**
Credit / Debit Card Gift Card (Optional) Cash	Select the payment method and press **OK**.	The customer selects how they are paying for the partial amount. Gift card appears only if you accept them.
Payment Method Payment Amount $XX.XX	Select the **back arrow** or **YES**.	If the amount and payment type are correct select **YES**. Otherwise, select the **back arrow.**

Performing Financial Transactions

How do I know the difference between purchase types?

The most common transaction that you will be performing on the terminal is a purchase. Depending on your type of business you may use one or both of the purchase options. The different options are:

Purchase: This purchase occurs when the customer is physically present in your store at the time of the transaction and uses the terminal. Some examples of this are grocery stores and restaurants.

Phone/Mail Purchase: This purchase occurs when the customer is not present in your store and either mails in or phones in their order. A mail order/telephone business would use this option.

- Ensure that you use the correct purchase option otherwise incorrect transaction codes will be sent to the issuers.
- If you receive an error message at any time, please refer to *Section 7 – Troubleshooting*.

How do I process a credit card purchase?

This transaction is used for processing credit card purchases. This transaction can include any of the following optional steps:

- Air Miles
- Tip

NAVIGATION

Desktop -> **Purchase**

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	This amount will be the total of the entire purchase including taxes and discounts.
Payment Amount	Select **SPLIT** or **PAY**.	If the customer is paying the entire amount with one payment select **PAY**. Otherwise, select **SPLIT**.
SPLIT PAYMENT If your transaction requires the steps for split payments, please refer to "*How do I process a split payment?*" on page 31?		
AIR MILES If your transaction requires the steps for Air Miles, please refer to the Air Miles section of *How do I process a cash purchase with Air Miles?* on page 39.		
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX OK?	Customer confirms that the amount is correct: • **NO** • **YES**	--
TIP If your transaction requires the steps for tips, please refer to page 30.		
$XX.XX Insert/Swipe/ Tap Card Manual Entry	To enter the card account, choose between: • **Insert/Swipe/Tap** • **Manual Entry**	The customer selects how they will use their credit card.
INSERT/SWIPE CREDIT CARD If your transaction requires the steps for insert/swipe a credit card, please refer to page 28.		

TAP CREDIT CARD If your transaction requires the steps to tap a credit card, please refer to page 28.		
MANUAL CREDIT CARD ENTRY If your transaction requires the steps to manually enter a credit card, please refer to page 29.		
TURN UNIT TOWARDS OPERATOR		
$XX.XX Approved Print Receipt?	You have two options: • **YES,** print the receipt • **NO,** and complete the transaction	If the purchase amount is over the threshold, you will not see this step. If you do not print the receipt, you will still proceed to the next step.
<Credit Card Company> $XX.XX Approved Remove Card Turn Unit To Operator	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. If there is a balance owing, return to the payment amount screen.

How do I process a debit card purchase?

This transaction is used for processing credit card purchases. This transaction can include any of the following optional steps:

- Air Miles
- Tip
- Cashback

NAVIGATION		
Desktop -> **Purchase**		
PROMPT	**DATA**	**EXPLANATION**
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	This amount will be the total of the entire purchase including taxes and discounts.
Payment Amount	Select **SPLIT** or **PAY**.	If the customer is paying the entire amount with one payment select **PAY**. Otherwise, select **SPLIT**.
SPLIT PAYMENT If your transaction requires the steps for split payments, please refer to *"How do I process a split payment?"* on page 31?		
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX OK?	Customer confirms that the amount is correct: • **YES** • **NO**	--
TIP If your transaction requires the steps for tips, please refer to page 30.		
$XX.XX Insert/Swipe Card/ Tap Card Manual Entry	To enter the card account, choose between: • **Insert/Swipe/Tap** • **Manual Entry**	The customer selects how they will pay.
INSERT/SWIPE DEBIT CARD If your transaction requires the steps for insert/swipe a debit card, please refer to page 28.		
TAP DEBIT CARD If your transaction requires the steps to tap a debit card, please refer to page 28.		

CASHBACK If your transaction requires the steps fro cashback, please refer to page 30.		
TURN UNIT TOWARDS OPERATOR		
$XX.XX Approved Print Receipt?	You have two options: • **YES,** print the receipt • **NO,** and complete the transaction	If the purchase amount is over the threshold, you will not see this step. If you do not print the receipt, you will still proceed to the next step.
$XX.XX Approved Remove Card Turn Unit To Operator	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. If there is a balance owing, return to the payment amount screen.

How do I process a phone or mail purchase?

This transaction is used for processing purchases when the card information is obtained by phone or mail.

NAVIGATION

Desktop -> **Phone/Mail Purchase**

OR

Desktop -> Main Menu -> **Debit/Credit** -> Phone/Mail Purchase

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	This amount will be the total of the entire purchase including taxes and discounts.
AIR MILES If your transaction requires the steps for air miles, please refer to the Air Miles section of *How do I process a cash purchase with Air Miles?* on page 39.		
Enter Account #	Enter the **account number** and press **OK**.	This can be up to 16 digits in length.
Enter Expiry Date MM/YY	Enter the **expiry date** and press **OK.**	This can be up to four digits in length.
Enter CVD From Card	Enter the **CVD number** and press **OK**.	This can be up to four digits in length and found on the back of the credit card. This is an optional step depending on your settings.
$XX.XX Auth # #####	--	--
$XX.XX Auth XX.XX	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I force post a phone or mail purchase?

This option is used when a purchase isn't logged in the terminal, but you've received an authorization code or called and received verbal authorization to proceed.

If you want to disable or protect force posts with a supervisor password, please call TD Merchant Solutions Help Desk at **1-800-363-1163**.

NAVIGATION

Desktop -> Main Menu -> **Debit/Credit** -> Force Post -> and select an option:

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	This amount will be the total of the entire purchase including taxes and discounts.
AIR MILES If your transaction requires the steps for Air Miles, please refer to the air miles section of *How do I process a cash purchase with Air Miles?* on page 39.		
PHONE/MAIL PURCHASES		
Enter Account #	Enter the **nine-digit account number** and press **OK**.	This is the credit card number and for phone/mail purchase only.
Enter Expiry Date MM/YY	Enter the **Expiry Date** and press **OK**.	--
ALL OTHER TRANSACTIONS		
$#.## Swipe Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
MANUAL CREDIT CARD ENTRY If your transaction requires the steps to manually enter a credit card, please refer to page 29.		
Authorization #	Select whether you wish to enter a: • **Space** • **Symbol** Then enter/spell the authorization number and press **OK**.	Enter your previously obtained authorization code. This could come from either a: • Phone authorization OR • Receipt that you're force posting
$XX.XX Auth # (Auth Code)	Select either: • **REPRINT** • **FINISH**	The receipts print and the transaction is now complete.

How do I process a refund?

This transaction is used to process store returns and refund the purchase to the customers' credit card.

NAVIGATION

Desktop -> Main Menu -> **Debit/Credit** -> Refund

PROMPT	DATA	EXPLANATION
Invoice #	Enter the **invoice number** and press **OK**.	You may not see this option. It depends on your business' settings.
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	--

AIR MILES If your transaction requires the steps for Air Miles, please refer to the Air Miles section of *How do I process a cash purchase with Air Miles?* on page 39.		
TURN UNIT TOWARDS CUSTOMER		
$XX.XX Insert/Swipe Card/ Tap Card	The customer decides how they will use their card. • **Insert/Swipe/Tap Card** • **Manual Entry**	--
INSERT/SWIPE CREDIT/DEBIT CARD If your transaction requires the steps to Insert/Swipe a credit/debit card, please refer to page 28.		
TAP CREDIT/DEBIT CARD If your transaction requires the steps to tap a credit/debit card, please refer to page 28**.**		
MANUAL CREDIT CARD ENTRY If your transaction requires the steps to manually enter a credit card, please refer to page 29.		
TURN UNIT TOWARDS OPERATOR		
$XX.XX Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I void a transaction?

This option is used to remove a previously entered transaction from the terminal.

NAVIGATION

Desktop -> **Void** and then select one of the following:

- Cash purchase
- Cash refund
- Phone/Mail purchase
- Pre-Auth / Open Tab
- Pre-Auth Completion / Close Tab
- Incremental Auth / Top Up Tab
- Purchase
- Refund

PROMPT	DATA	EXPLANATION
Enter Trace #	Enter the **Trace #** from the receipt of the transaction to be voided and press **OK**.	Enter the trace number from the receipt of the transaction to be voided.
Trace# ## Transaction Type <Credit Card #> <Date> <Time> $X.XX INV: ## ID: Auth: ########	Confirm the transaction to be cancelled: • **NO** • **YES**	--
$XX.XX Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

Pre-Authorizations and Tabs (Optional)

Depending on your business, you may use the Tab or the Pre-Authorization transactions. These transactions are very similar with only a few minor differences.

What is a tab?

This transaction generally used by bars and restaurants to open and monitor a customer's tab over the course of their visit to the merchant's place of business. The tab option has four steps:

- Open
- Increment (Optional – depends if the customer wishes to increase the tab amount)
- Invoice
- Close (with Tip and without Tip)

What is a pre-authorization?

This transaction is generally used by hotels, restaurants that deliver food and car rental agencies. Essentially the merchant would verify that the customer's credit card has the room for the amount of the purchase before the true transaction amount is charged at a later time. The pre-authorization option has three steps:

- Open
- Increment (Optional – depends if the customer wishes to increase the pre-authorization amount)
- Close (with Tip and without Tip)

How do I pre-authorize a transaction or open a tab?

This transaction is used to reserve funds on the cardholder account that will be settled at a later time by a pre-authorization or tab.

- If the transaction is used in a situation where a customer is running a tab, then the terminal scheme should be set to Tab instead of Pre-Auth. You must call the TD Merchant Solutions Help Desk to make this change.

NAVIGATION

Desktop -> **Pre-Authorization** or **Open Tab**

OR

Desktop -> Main Menu -> **Debit/Credit** -> Pre-Authorization or Open Tab

PROMPT	DATA	EXPLANATION
Amount	Enter the **dollar amount** and press **OK**.	This amount will be the total of the entire purchase including taxes and discounts.
AIR MILES (SWIPE/MANUAL) If your transaction requires the steps for Air Miles, please refer to the Air Miles section of *How do I process a cash purchase with Air Miles?* on page 39.		
TURN UNIT TOWARDS CUSTOMER		
$XX.XX Insert/Swipe Card/ Tap Card Manual Entry	The customer decides how they will use their card. • **Insert/Swipe/Tap Card** • **Manual Entry**	--
INSERT/SWIPE CREDIT/DEBIT CARD If your transaction requires the steps to Insert/Swipe a credit/debit card, please refer to page 28.		
TAP CREDIT/DEBIT CARD If your transaction requires the steps to tap a credit/debit card, please refer to page 28.		

MANUAL CREDIT CARD ENTRY If your transaction requires the steps to manually enter a credit card, please refer to page 29.		
TURN UNIT TOWARDS OPERATOR		
$XX.XX Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I increase a pre-authorized amount or top up a tab?

This transaction is used to reserve additional funds on the cardholder's account for a pre-authorization or tab.

NAVIGATION

Desktop -> **Incremental Authorization** or **Top Up Tab**

OR

Desktop -> Main Menu -> **Debit/Credit** -> Incremental Authorization or Top Up Tab

PROMPT	DATA	EXPLANATION
Invoice #	Enter the **invoice number** and press **OK**.	The invoice number is called **Inv #** on the original authorization/open tab receipt.
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	--
<Credit Card Number> Authorized XX.XX Increment XX.XX Total XX.XX OK?	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Auth # #####	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipt prints with the added amount.

How do I invoice a tab?

This transaction is used to invoice a customer's tab. This transaction is not used for pre-authorizations.

NAVIGATION

Desktop -> **Invoice Tab**

OR

Desktop -> Main Menu -> **Debit/Credit** -> Invoice Tab

PROMPT	DATA	EXPLANATION
Invoice #	Enter the **invoice number** and press **OK**.	The invoice number is called Inv # on the original open tab receipt.
AIR MILES (SWIPE/MANUAL) If your transaction requires the steps for Air Miles, please refer to the Air Miles section of *How do I process a cash purchase with Air Miles?* on page 39.		
Total Purchase $XX.XX	Enter the **dollar amount** and press **OK**.	This amount will be the total of the entire purchase including taxes and discounts.

<Credit Card Number> Invoice # OpenTab XX.XX Total XX.XX OK?	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Approved	--	The receipts print and the transaction is now complete. The customer can add a tip (if available) and must sign their receipt.

How do I complete a pre-authorization or close a tab?

This transaction is used to close an existing customer's pre-authorization or tab and leave a tip.

NAVIGATION

Desktop -> **Pre-Authorization Completion** or **Close Tab**

OR

Desktop -> Main Menu -> **Debit/Credit** -> Pre-Authorization Completion or Close Tab

PROMPT	DATA	EXPLANATION
Invoice #	Enter the **invoice number** and press **OK**.	The invoice number is noted as **Inv #** on the original open tab receipt.
Enter new amount $##.##	Enter the n**ew amount** and press **OK**.	--

TIP

If your transaction requires the steps for tips, please refer to page 30.

<Credit Card Number> Invoice # Authorized XX.XX Increment XX.XX Total XX.XX OK?	Confirm that the amount is correct: • **NO** • **YES**	--
Transaction Completed	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

Air Miles (Optional)

How do I process a cash purchase with Air Miles? (Optional)

HSPA Wi-Fi

This option is used for processing a purchase that will reward the customer with Air Miles.

- Air Miles is currently only available for HSPA and Wi-Fi terminals.
- Your head office will provide you with any information regarding the Air Miles offers that you're offering, such as: base offers, multipliers and/or bonus offers.
- You will only see this functionality if your terminal is configured for Air Miles.
- If the customer doesn't have Air Miles then just process the purchase transaction through your cash register.

NAVIGATION		
	Desktop -> Main Menu -> **Cash Trans** -> Cash Purchase OR Desktop -> **Cash Purchase**	
PROMPT	**DATA**	**EXPLANATION**
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	This is the total amount of the purchase.
Swipe AIR MILES Card	To enter the card account, choose between: • **Swipe** • **Manual Entry**	--
MANUAL ENTRY You will only see this option if you selected the manual entry option in the previous step.		
Enter Air Miles Account	Enter the Air Miles **account number** and press **OK**.	This is an 11 digit number.
Select Base Offer <Offer 1> <Offer 2>	Select the applicable **base offer** to the customer's purchase.	Base offers depend upon how much money the customer spends in your business. There can be any number of offers visible. It depends on how many your business allows.
<Offer #> Enter Net Amount	Enter the **purchase amount** to have this base offer applied to it and press **OK**.	Depending on the purchase, some or the entire purchase amount may be applied to Air Miles rewards. For example, at a pharmacy, Air Miles may only be applied to prescriptions, not sundries. You would enter the total of their prescription purchase here.
Select Multiplier Factor (Optional)	Select the appropriate **multiplier**.	This screen allows you to apply the appropriate multiplier to the Air Miles accrued for this offer.
* If your business offers multiple base offers you will be returned to the first base offer screen and the previously selected base offer will now have an asterisk (*) beside it. You can select another applicable base offer or select **DONE** to continue to the next step.		
ENTER BONUS OFFER You will see these options if your business has bonus offers available.		
Enter Bonus Offer Code	Enter the **bonus offer** for this offer and press **OK**.	Bonus codes are based on a number of products purchased that have an Air Mile reward attached to them. For example, a carton of milk earns one Air Mile. (Optional)
Code = <code> Enter Quantity (Optional)	Enter the **quantity** press **OK**.	Allows a quantity to be entered for the bonus code. If more bonus codes must be entered, press **OK** and you will return to the bonus code prompts.
* If your business offers multiple bonus offer codes you will be returned to the bonus code offer screen. You can enter another applicable base offer or press **OK** to continue to the next step.		

MANUAL OVERRIDE You will see these options if your business has a manual override of the points on a bonus code offer.		
Enter Supervisor ID	Enter **Supervisor ID** and press **OK**.	--
Enter Supervisor Password	Enter **Supervisor Password** and press **OK**.	--
Manual Override Enter Bonus Points	Enter the **Air Miles points** to be awarded to the customer (up to 999) and press **OK**. OR Enter **nothing** and press **OK** to award no points.	--
$ XX.XX Transaction Completed	--	The total purchase amount will be displayed.

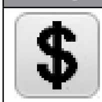
How do I process a cash refund with Air Miles? (Optional)

This option is used for processing a refund that will reward the customer with Air Miles. All the information that you require for this procedure is on the receipt. You will need the:

- Dollar amount per Air Miles offer
- Base offer information
- Base offer multiplier
- Bonus offer
- Bonus offer number

- Air Miles is currently only available for HSPA and Wi-Fi terminals.
- You will only see this functionality if your terminal is configured for Air Miles.
- If the customer doesn't have Air Miles then just process the refund transaction through your cash register.

NAVIGATION



Desktop -> Main Menu -> **Cash Trans** -> Cash Refund

OR

Desktop -> **Cash Refund**

Please follow the instructions in *How do I process a cash purchase with Air Miles?* on page 40 as they are identical.

Gift Cards (Optional)

Gift cards are an optional feature on the terminal. If your business offers gift cards, then there are special transactions for using them. When performing any gift card transactions, you must use the **Gift Card** or the **Gift Card Redeem** icon. Listed below are the current gift card types that the TD Generation terminals accept and the available transactions.

- The Generation terminal only accepts TD gift cards.
- The HSPA and Wi-Fi terminals accept TD and Givex gift cards.

TD and Givex

Activation	Cancel	Increment
Balance Adjustment	Certificate Registration	Post Auth
Balance Inquiry	Forced Cashback	Redemption
Balance Transfer	Forced Pre-Auth	Transaction Cashout

- Each transaction type has the option for a Supervisor Override.
- If your business subscribes to the Valuelink gift card program, please refer to the **TD Generation Valuelink Merchant Guide**.

How do I activate a gift card?

This transaction creates an account and loads an amount onto the gift card.

- Ensure that you offset the cost of the gift card with a financial transaction (i.e. debit, credit card or cash).
- This transaction cannot be used to add more money to an already activated gift card – only a new inactivated gift card.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Activation

PROMPT	DATA	EXPLANATION
Denominated Card?	You select one of the following: • **NO** • **YES**	Select **NO** if it is an open gift card that allows you to enter different dollar values. (Non-denominated). Select **YES** if it is a pre-set dollar amount. (Denominated).
NON-DENOMINATED GIFT CARD If you selected **NO** in the previous step follow these instructions.		
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	Enter how much you want to add to the new gift card.
$XX.XX Swipe Gift Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
Confirm Amount $XX.XX	Confirm that the amount is correct: • **NO** • **YES**	--

$XX.XX Swipe Gift Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		
$XX.XX Auth # ##### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I redeem a gift card?

This allows a cardholder to pay for goods or services with the funds available on an accepted gift card.

NAVIGATION

Desktop -> **G.C. Redeem**

OR

Desktop -> Main Menu -> **Gift Card** -> Gift Card Redeem

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	--
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Swipe Gift Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		
BALANCE REMAINING If there is a balance owing you will be prompted for the balance.		
$XX.XX Auth # Partially/Approved	--	The customer's gift card did not have enough funds to cover the entire transaction and a balance is left owing.
Amount Due: $XX.XX Select Payment Type	Select a payment type: • **Cash** • **Credit/Debit** • **Gift Card**	Select how the customer would like to pay the balance. Note that the customer must pay off the remaining balance with **one** of these options.
CASH If your transaction requires the steps for the cash option in the previous step.		
Operator To Collect Cash Amount $XX.XX	When finished collecting cash select **CONTINUE**.	Customer and merchant receipts print. The receipt shows any outstanding balance.
CREDIT/DEBIT CARD If your transaction requires the steps for credit/debit card entry, please refer to page 28.		
GIFT CARD This transaction is just like any other gift card purchase – follow the gift card steps earlier in this procedure.		

$XX.XX Auth # ##### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I create a manual gift card number?

This transaction generates a gift card number on the receipt to be used in place of a physical gift card.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Gift Certificate Register

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	Enter how much will be placed on the gift certificate.
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Auth # ####### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I check a gift card's balance?

This transaction allows a cardholder to check the balance on their gift card.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Balance Inquiry

PROMPT	DATA	EXPLANATION
Swipe Gift Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		
Auth ## Approved	--	The receipt prints showing the gift card balance. The transaction is now complete.

How do I provide a customer their gift card balance in cash?

This transaction allows the cardholder to receive cash for an available value on the gift card.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Forced Cashback

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	--
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Swipe Gift Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		
TURN UNIT TOWARDS OPERATOR		
$XX.XX Auth # ##### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipt prints showing new balance of the gift card after the forced cashback. Provide the cashback to the customer. The transaction is now complete.

How do I increase/decrease the balance of a gift card?

This transaction allows you to increase the value loaded on the gift card.

!

- Always offset the cost of the gift card with a financial transaction (i.e. debit, credit card or cash) when adding funds.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Increment

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	This is the amount that you want to adjust the Gift Card balance by.
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Swipe Gift Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		

TURN UNIT TOWARDS OPERATOR		
\$XX.XX Auth ###### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I transfer the balance from one gift card to another?

This transaction allows a cardholder to transfer a balance from one gift card to another.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Balance Transfer

PROMPT	DATA	EXPLANATION
Swipe Original Gift Card	Enter the card account you want to transfer funds from. • **Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		
Swipe New Gift Card	Enter the card account you want to transfer funds to. • **Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		
\$XX.XX Auth # ##### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete.

How do I void a gift card transaction?

This option allows you to void a gift card transaction that was done in error.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Cancel

PROMPT	DATA	EXPLANATION
Enter Transaction Trace Number	Enter the **transaction trace number** and press **OK**.	You can find this information on the receipt in question.
Swipe Gift Card	To enter the card account, choose between: • **Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		

Gift Card ########## Tran#: # OK?	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Auth # ##### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	--

How do I reserve funds on a gift card?

This transaction allows you to place a hold on available funds on the gift card. This essentially creates a pre-authorization on a gift card. See page 37 for more information on pre-authorizations.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Forced Pre-Auth

PROMPT	DATA	EXPLANATION
Amount $XX.XX	Enter the **dollar amount** and press **OK**.	--
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX	Confirm that the amount is correct: • **NO** • **YES**	--
$XX.XX Swipe Gift Card	To enter the card account, choose between: • **Swipe** • **Manual Entry**	--
MANUAL GIFT CARD ENTRY If your transaction requires the steps for manual gift card entry, please refer to page 31.		
TURN UNIT TOWARDS OPERATOR		
$XX.XX Auth # ###### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. The customer must sign the merchant's receipt.

How do I charge a customer's gift card after reserving funds?

This transaction charges the final amount after reserving funds on a gift card. It is essentially closing a pre-authorization on a gift card. See page 37 for more information on pre-authorizations.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Post Auth

PROMPT	DATA	EXPLANATION
Enter Transaction Trace #	Enter the **Trace #** and press **OK**.	This is located on the Pre-Auth receipt.

Amount $XX.XX	Enter the **dollar amount** and press **OK**.	--
TURN UNIT TOWARDS CUSTOMER		
Customer to Confirm $XX.XX	Confirm that the amount is correct: • **NO** • **YES**	--
Auth # #### Approved	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. The customer must sign the merchant's receipt.

What do I do if a transaction type isn't available in the gift card menu?

If this is the case, then please call the TD Merchant Solutions Help Desk at **1-800-363-1163** to have it added.

Loyalty Cards (Optional)

HSPA Wi-Fi

Loyalty cards are an optional feature on the terminal. If your business offers loyalty cards, then there are special transactions for using them. When performing any loyalty transactions, you must use the Loyalty Card icon.

Depending on the type of loyalty card being used, you will see different available transactions. HSPA and Wi-Fi terminals only accept Givex loyalty cards.

Givex

Award	Redemption	Balance Inquiry
Cancel		

- Each transaction type has the option for a Supervisor override.
- Loyalty card transactions are only available on the HSPA and Wi-Fi devices.

How do I award points to a customer?

This transaction allows the customer to assign points to the customers loyalty account.

NAVIGATION

Desktop -> Main Menu -> **Loyalty** -> Award

OR

Desktop -> **Loyalty Award**

PROMPT	DATA	EXPLANATION
Swipe Card	Enter the gift card that you want to transfer funds from. • **Insert/Swipe** • **Manual Entry**	--
MANUAL LOYALTY CARD ENTRY If your transaction requires the steps to manually enter a loyalty card, please refer to page 31.		
Amount	Enter the **dollar amount** and press **OK**.	--
Enter # of Units	Enter the **number of units purchased** associated with the code and press **OK**.	--

Enter Promotion Code	Enter the **promotion code** and press **OK**.	This can be up to 21 digits in length.
Approved Amount $XX.XX Accrued XX Balance XXX	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. The receipt shows how many points have been awarded.

How do I redeem points from a loyalty card?

This transaction allows the customer to use their loyalty points to pay for goods or services.

NAVIGATION

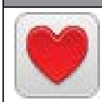
Desktop -> Main Menu -> **Loyalty** -> Redemption

PROMPT	DATA	EXPLANATION
Swipe Card	Enter the gift card that you want to transfer funds from. • **Insert/Swipe** • **Manual Entry**	--
MANUAL LOYALTY CARD ENTRY If your transaction requires the steps to manually enter a loyalty card, please refer to page 31.		
Enter Points	Enter the **number of points to redeem** and press **OK**.	--
Redeemed: ## Balance: ####	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. The receipt shows the loyalty card balance.

How do I check the balance of a customer's loyalty card?

This transaction allows a customer to check their points balance.

NAVIGATION



Desktop -> Main Menu -> **Loyalty** -> Balance Inquiry

PROMPT	DATA	EXPLANATION
Swipe Card	To enter the card account, choose between: • **Insert/Swipe** • **Manual Entry**	--
MANUAL LOYALTY CARD ENTRY If your transaction requires the steps to manually enter a loyalty card, please refer to page 31.		
Balance: ####	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. The receipt shows the loyalty card balance.

How do I void a loyalty transaction?

This transaction allows you to correct a mistake on the last loyalty transaction performed.

NAVIGATION

Desktop -> Main Menu -> **Loyalty** -> Cancel

PROMPT	DATA	EXPLANATION
Transaction <XXXXXXXXX> Auth # ###### <Loyalty Card Number> OK?	Confirm that the amount is correct: • **NO** • **YES**	--
MANUAL LOYALTY CARD ENTRY If your transaction requires the steps to manually enter a loyalty card, please refer to page 31.		
Balance: ####	You have two options: • **REPRINT** the receipt • **FINISH** and complete the transaction	The receipts print and the transaction is now complete. The receipt shows the loyalty card balance.

What do I do if a transaction type isn't available in the loyalty menu?

Please call the TD Merchant Solutions Help Desk at **1-800-363-1163** to have it added.

Receipts

Credit Card Receipt

Debit Card Receipt

The information that you will use the most is noted on the receipts below.

Credit Card Receipt

TD GENERATION
77 KING STREET WEST, M5K 1A2
TORONTO, ON
2000000
N10000000205

**** PURCHASE ****

12-21-2012 12:20:12
Acct # 452001****5097 C 1
Exp Date 10/14 Card Type VI 2
Name: John Q Public
A00000000003101001 VISA CREDIT

Trace # 6
Inv. # 5
Auth # 75612 3

RRN 001006006
TVR 000000000000TST F800
TC 0E19785C8DAA97AC

Total $50.00

(00) APPROVED THANK YOU 4

Retain this copy for your records
Merchant Copy

Receipt Banner
Receipt Banner

Debit Card Receipt

TD GENERATION
77 KING STREET WEST, M5K 1A2
TORONTO, ON
2000000
N10000000205

**** PURCHASE ****

12-21-2012 12:20:12
Acct # 452001****5097 C 1
Account Chequing Card Type DP 2
A00000000003101001 INTERAC

Trace # 6
Inv. # 5
Auth # 75612 3

RRN 001006006
F800

Total $50.00

(00) APPROVED THANK YOU 4

Retain this copy for your records
Merchant Copy

Receipt Banner
Receipt Banner

1 - Transaction Type

C – Online chip card transaction

CN – Chip card NSR transactions

CO – Off-line chip card transaction

M – Manually entered mag card transactions

MC – Manually entered fall back of chip card transaction

RF – RFID card transaction

S – Swiped mag card transactions

SC – Swiped fall back of chip card transaction. However, if this transaction is qualified as an NSR transaction, it prints SN

SN – Swiped NSR transactions

2 - Card Type

AM – American Express

DP – Debit

DS – Discover/Diners

HB – Hudson's Bay

JC – JCB

MC – MasterCard

PV – Visa Debit

RC – RCS

SR – Sears

VI – Visa

3 - Transaction Info

Trace # – Used in recalling the transaction on the terminal

Invoice # - The invoice number that is associated with this transaction

Auth # – The authorization number associated with this transaction

4 - Approval

*** Always ensure that the transaction was approved. ***

Note: If you use operator names, they will now be printed on a gift card and loyalty card receipts.

Summary

After reading this section you should be able to:

- Navigate to the *Desktop* and *Main Menu* screens to perform all the transactions on your terminal
- Perform the correct purchase transaction (Purchase vs. Phone/Mail Purchase)
- Perform other financial transactions regarding customer pre-authorizations, tabs, gift cards and more

Now that you know how to perform transactions you can now learn how to use the reporting features.

Section 5
Reporting

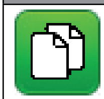
This section will teach you how to access and run the report features on the TD Generation terminal.

Using the TD Generation

All the transactions that you need can be accessed on the *Desktop* or the *Main Menu* screens and these can be accessed in various ways and the following are how you access them on the terminal.

How do I read the instructions?

The instructions are laid out in sections to help you find where the icon/menu is located on the terminal and then how to perform it. The following is an example on how to navigate the reports in this section.

<table>
<tr><th colspan="3">Title of the report</th></tr>
<tr><td>
</td><td colspan="2">Description of the transaction.
• Icons indication which terminals support this transaction
• Helpful tip
• Important information</td></tr>
<tr><th colspan="3">NAVIGATION</th></tr>
<tr><td></td><td colspan="2">Desktop -> Main Menu -> Reports -> Business Day Reports
The Navigation pane shows you how to locate the desired transaction. The bolded step is the last icon in the process – in this case Reports. The icon is also located to the left for your reference. Anything appearing after the bolded entry is a menu option that you would enter after selecting the icon.</td></tr>
<tr><th>PROMPT</th><th>DATA</th><th>EXPLANATION</th></tr>
<tr><td>This column will show you what will be seen on the screen.</td><td>This column will show what you must enter to proceed.</td><td>This column will provide an explanation or mention additional information that is required or beneficial to the step.</td></tr>
<tr><td colspan="3">OPTIONAL/DEPENDENT STEP
There are two reasons why you may see a light grey box like this:
1. This is an optional step. Some transactions may have optional steps depending on the circumstances or configuration of your system such as Supervisor Override.
2. This step is dependent upon a previous choice. A good example of this is you select one of many report options that you would like to view.
Note: This light grey box may also refer you to another transaction that has the steps already listed. They are comprised of multiple steps and would make transactions too long to include them in every procedure that offers them.</td></tr>
<tr><td colspan="3">If you see steps in a white box like this, it means that they are part of the optional/dependent step.</td></tr>
</table>

Performing Optional Instructions

Some options will only be seen if your system has certain features enabled (such as supervisor override codes) and you will become familiar with them very quickly. Optional instructions are located in *Section 4 – Financial Transactions* for your reference.

Printing Reports

The following reporting options are split into two different groups, **Business Day** and **Customized**. You will have access to all of the Business Day reports, but you may not have access to some or all of the Customized reports. If you have any questions about adding customized reports to your terminal please call TD Merchant Solutions Help Desk at **1-800-363-1163**.

Note: Please ensure you have adequate paper in the terminal prior to running your reports.

Business Day Reports

These reports are for all transactions performed in the current business day regardless of the number of batches that were closed.

NAVIGATION

Desktop -> Main Menu -> **Reports** -> Business Day Reports and then select one of the following:

- Terminal Detail
- Terminal Balancing
- Business Day Subtotals
- Operator Detail
- Operator Balancing
- Pre-Auth / Tab Status
- Open Pre-Auth / Tab
- Tip Totals
- Outstanding SAF
- Cashback Totals
- Discount Totals

PROMPT	DATA	EXPLANATION
TERMINAL DETAIL You will only see this option if you selected Terminal Detail.		
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	This report provides details on the transactions • By card type • For current business day
TERMINAL BALANCING You will only see this option if you selected Terminal Balancing.		
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	This report provides details on the transactions • By card type • For current business day
BUSINESS DAY SUBTOTALS You will only see this option if you selected Business Day Subtotals.		
Enter Operator ID Or Enter 0 For All Operators	Select one of the following: • **Operator ID** • **0** and press **OK**.	This report provides details on the transactions • By operator ID • For current business day
OPERATOR DETAIL You will only see this option if you selected Operator Detail.		
Enter Operator ID Or Enter 0 For All Operators	Select one of the following: • **Operator ID** • **0** and press **OK**.	This report provides details on the transactions • By card type (including gift card totals and details) • By operator ID • For current business day
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
OPERATOR BALANCING You will only see this option if you selected Operator Balancing.		
Enter Operator ID Or Enter 0 For All Operators	Select one of the following: • **Operator ID** • **0** and press **OK**.	This report provides details on the transactions • By card type (including gift card totals and details) • By operator ID • For current business day

Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
PRE-AUTH / TAB STATUS You will only see this option if you selected Pre-Auth / Tab Status.		
Enter Operator ID Or Enter 0 For All Operators	Select one of the following: • **Operator ID** • **0** and press **OK**.	This report provides the status of all Pre-Auth/Tab transactions for the current business day.
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
OPEN PRE-AUTH / TAB You will only see this option if you selected Open Pre-Auth / Tab.		
Enter Operator ID Or Enter 0 For All Operators	Select one of the following: • **Operator ID** • **0** and press **OK**.	This report provides details on all Pre-Auth/Tab transactions that have not been completed.
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
TIP TOTALS You will only see this option if you selected Tip Totals.		
Enter Operator ID Or Enter 0 For All Operators	Select one of the following: • **Operator ID** • **0** and press **OK**.	This report provides the totals of all tips obtained from transactions (including gift cards and cash) in the current business day on the terminal by operator ID.
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
OUTSTANDING SAF You will only see this option if you selected Outstanding SAF.		
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	This report provides details on all stored transactions that have not been sent to the Host for settlement.
CASHBACK TOTALS You will only see this option if you selected Cashback Totals		
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	Total of all cashbacks for the current business day.
DISCOUNT TOTALS You will only see this option if you selected Discount Totals		
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	Total of all discounts for the current business day.

Batch Reports

These reports are for all transactions performed since the last Batch Close / Day Close. This is generally used when you have multiple shifts using the same terminal. This allows you to pull reports at the end of a particular shift that acts like a shift close function. It closes the batch at the Host but it does not close the day on the terminal. Then it prints off a report showing transactions done on it since the last Day Close.

NAVIGATION

Desktop -> Main Menu -> **Reports** -> Batch Reports and then select one of the following:

- Batch Detail
- Batch Balancing

PROMPT	DATA	EXPLANATION
	BATCH DETAIL You will only see this option if you selected Batch Detail.	
Select Batch	Select one of the following: • **PREV** • **CURRENT**	This report provides details on the transactions: • By card type • For current or previous batch
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
	BATCH BALANCING You will only see this option if you selected Batch Balancing.	
Select Batch	Select one of the following: • **PREV** • **CURRENT**	This report provides details on the transactions: • By card type • For current or previous batch
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--

Customized Reports

These reports are for all transactions performed for the business days currently stored in the terminal.

NAVIGATION

Desktop -> Main Menu -> **Reports** -> Customized Reports and then select one of the following:

- Tran Detail
- Totals
- Pre-Auth / Tab Status

PROMPT	DATA	EXPLANATION
	TRAN DETAIL You will only see this option if you selected Tran Detail.	

This report provides details on the transactions done on the terminal:

- By card type
- Detailed transactions can be accessed for a maximum of 10 days

TOTALS You will only see this option if you selected Totals.		
This report provides details on the totals: • By transaction type • By card type • Totals can be accessed for a maximum of 45 days		
CUSTOMIZED DETAIL You will only see this option if you selected Customized Detail.		
This report provides the status of all transactions done on the terminal • By Pre-Auth/Tab transaction • For current business day		
Once you select the report, follow these instructions.		
Enter Operator ID Or Enter 0 For All Operators	Select one of the following: • **Operator ID** • **0** and press **OK**.	This report provides the totals of all tips obtained from transactions in the current business day on the terminal by operator ID.
From Date / Time MM/DD/YY – HH:MM	Enter the following: • **Date** • **Hour** and press **OK**.	Enter the date and time that you want the batch balancing report to start from.
To Date / Time MM/DD/YY – HH:MM	Enter the **Date/Time** and press **OK**.	Enter the date and time that you want the batch balancing report to end at.
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	The report will display on the screen or printed.

Creating Gift Card Reports (Optional)

Gift cards are an optional feature on the terminal. If your business offers gift cards, then there are special transactions for using them.

Gift Card Reports		
These reports are for transactions performed with Gift Cards. This option is only visible if the terminal you're using is allowed to perform Gift Card transactions.		
NAVIGATION		
Desktop -> Main Menu -> **Reports** -> Gift Card Reports and then select one of the following: • Totals • Details • Customized Totals • Customized Details		
PROMPT	**DATA**	**EXPLANATION**
TOTALS You will only see this option if you selected Totals.		
Select Batch	Select one of the following: • **PREV** • **CURRENT**	This report provides details on the overall totals and counts of the gift card transactions: • By transaction • For current business day

Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
DETAILS You will only see this option if you selected Details.		
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	This report provides details on the gift card transactions: • For current business day
CUSTOMIZED TOTALS You will only see this option if you selected Customized Totals.		
Enter Date (MM/DD/YYYY)	Enter the **Date** and press **OK**.	This report provides the status of all transactions done on the terminal • By transaction • For current business day
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--
CUSTOMIZED DETAILS You will only see this option if you selected Customized Details.		
Enter Date (MM/DD/YYYY)	Enter the **Date** and press **OK**.	This report provides the status of all transactions done on the terminal • For current business day
Select Report Option	Select your report delivery method: • **DISPLAY** • **PRINT**	--

Creating Air Miles Reports (Optional)

Air Miles cards are an optional feature on the terminal. If your business offers Air Miles rewards, then there are special transactions for using them.

Air Miles Reports

HSPA Wi-Fi

These reports are for transactions performed with Air Miles cards. This option is only visible if the terminal you're using is allowed to perform Air Miles transactions.

Air Miles is currently only available for HSPA and Wi-Fi terminals.

NAVIGATION

Desktop -> Main Menu -> **Air Miles** -> then select one of the following:

- Parameter Report
- Day Totals Report

PROMPT	DATA	EXPLANATION
PARAMETER REPORT You will only see this option if you selected Parameter Report.		
This report provides details on the existing Air Miles parameters: • Base offers • Bonus codes • Once you select **Parameters Report** it will automatically print. There is no option to view it on the screen.		

DAY TOTALS REPORT You will only see this option if you selected Day Totals Report.
This report provides details on Air Miles transactions for the current business day: • Base miles awarded • Bonus miles awarded • Once you select **Day Totals Report** it will automatically print. There is no option to view it on the screen.

Summary

After reading this section you should be able to:

- Navigate to the *Desktop* and *Main Menu* screens to access all the report options on your terminal
- Run all the reports available on your terminal

In the next section, you will learn how to administer and configure your terminal to your business preferences.

Section 6
Administration and Configuration

This section will cover the administration and configuration features on the terminal.

Using the TD Generation

All the transactions that you need can be accessed on the *Desktop* or the *Main Menu* screens and these can be accessed in various ways and the following are how you access them on the terminal.

How do I read the instructions?

The transactions are laid out in sections to help you find where the transaction icon/menu is located on the terminal and then how to perform it. The following is an example on how to navigate the transaction tables in this section.

Title of the transaction

Generation Wi-Fi

Description of the transaction.

- Icons indication which terminals support this transaction
- Helpful tip
- Important information

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> User Management

The Navigation pane shows you how to locate the desired transaction. The bolded step above is the last icon in the process – in this case **Control Panel**. The icon is also located to the left for your reference. Anything appearing after the bolded entry is a menu option that you would enter after selecting the icon.

PROMPT	DATA	EXPLANATION
This column will show you what will be seen on the terminal screen.	This column will show what you must enter to proceed.	This column will provide an explanation or mention additional information that is required or beneficial to the step.

OPTIONAL/DEPENDENT STEP

There are two reasons why you may see a light grey box like this:

1. This is an optional step. Some transactions may have optional steps depending on the circumstances or configuration of your system such as Supervisor override.
2. This step is dependent upon a previous choice. A good example of this is User management and you must decide whether you want to add or edit an existing profile.

Note: This light grey box may also refer you to another transaction that has the steps already listed. They are comprised of multiple steps and would make transactions too long to include them in every procedure that offers them.

If you see steps in a white box like this, it means that they are part of the optional/dependent step.

Performing Optional Instructions

Some options will only be seen if your system has certain features enabled (such as supervisor override codes) and you will become familiar with them very quickly. Optional instructions are located in *Section 4 – Financial Transactions* for your reference.

Business Day Functions

To start a business day, log onto a terminal that has had the Day Close function performed on it. Depending on the logon method, it may be as simple as a user performing transactions to entering a logon ID and password.

Closing the business day is important as it:

- Sends any stored transactions (SAFs)
- Closes open batches
- Prints selected reports
- Starts a new business day on the terminal

Your Balancing Window

Your balancing window is set into the system to reflect the time of the day you are most likely to do a **Close Day**. If your **Close Day** is done before your balancing window closes, you will receive same or next business day deposit for Visa, MasterCard and debit card totals. If it is done after this, all deposits to credit, debit, and other cards will be forwarded to the next business day.

How do I cash out a gift card batch? (Optional)

If you use gift cards on your terminal, you must perform this before you perform a business day close. This transaction the equivalent of a business day close but only for gift cards transactions.

- If you do not do this any gift card transactions will not be forwarded and reconciled.
- Be sure to do this before closing your day as gift card information may be "zeroed" out.

NAVIGATION

Desktop -> Main Menu -> **Gift Card** -> Transactions Cash Out

PROMPT	DATA	EXPLANATION
Cash Out?	Confirm that you want to cash out: • **NO** • **YES**	--
Auth # #### Approved	Select your report delivery method: • **DISPLAY** • **PRINT**	--

How do I perform a day close on a terminal?

You must close your business day on **each terminal** in order to maintain accurate records and balance your accounts. If by chance some transactions are still outstanding, such as a tab or a pre-authorization, you will be required to complete them before continuing with the day close.

- You should perform day close at the end of every business day to ensure that your financial records are up to date and void transactions are processed properly.
- A day close will be performed on your terminal automatically every three to five business days if one isn't performed sooner.

NAVIGATION

Desktop -> **Close Day**

PROMPT	DATA	EXPLANATION
Close Business Day?	Confirm that you want to continue: • **NO** • **YES**	If numerous transactions have been conducted during the day, this process may take awhile. Once the process is started, ensure no one interrupts it by processing any transactions or pressing any buttons on the terminal in question.
Printing <Report Name> Report	Select your report delivery method: • **DISPLAY** • **PRINT**	Depending on how you set up your Day Close, certain reports will print. See *Which reports can I customize for my end of day reporting?* as to what reports can be printed at this time.
Business Day Closed	--	--
Software Download Will Start as Instructed By Host Please Keep Power On!	--	--
Please Wait	--	--
This May Take More Than 10 Minutes	--	--

Which reports can I customize for my end of day reporting?

The following reports can be enabled or disabled for automatic printing during the **Day Close** transaction. To do this, you must contact the TD Help Desk at **1-800-363-1163**. For more information regarding Business Day Reports, please see *Section 5 – Reporting*.

PROMPT	DATA	EXPLANATION
Host Balancing Report	Enabled/Disabled	This report prints the Host and terminal net amounts, transaction counts and the difference between the terminal and the host for the current batch.
Terminal Details Report	Enabled/Disabled	This report prints transaction records' details per card type for the current business day.
Operator Detail Report	Enabled/Disabled	This report prints transaction details per card type and for individual operators.
Terminal Balancing Report	Enabled/Disabled	This report prints sales, returns and net totals per card type for the current business day.
Operator Balancing Report	Enabled/Disabled	This report prints sales, returns and net totals per card type for the current business day for individual operator.
Pre-Auth/Tab Status Report	Enabled/Disabled	This report prints the amounts and the status of all pre-auth (tab) transactions per operator ID for the current business day.

Open Pre-Auth/Tab Report	Enabled/Disabled	This report prints all the open pre-auth (tab) transactions per operator ID for the current business day.
Tip Totals Report	Enabled/Disabled	This report prints tip totals per operator ID for the current business day.
Cashback Totals Report	Enabled/Disabled	This report prints the terminal's cashback total amount for the current business day.
TD Discount Report	Enabled/Disabled	This report prints the terminal's total TD discount amount for the current business day.
Gift Card Totals Report	Enabled/Disabled	This report prints gift card totals per operator ID for the current business day.
Gift Card Details Report	Enabled/Disabled	This report prints gift card transaction details since the last gift card batch close.

Administering Your Terminal

How do I manage the users on a terminal?

The first step to administering your terminal(s) is to create users. The two types of users available are Supervisor and Operator. Supervisors can affect changes and access all merchant functionality on the terminal. Operators can perform any function on the terminal that is allowed to them by the terminal configuration.

This feature allows you to manage your terminal users by:

- Adding users
- Changing their passwords
- Removing users
- Displaying or printing a list of existing users

- The terminal can hold up to 100 Supervisors and Operators.
- To add a user you will need to use the on screen keyboard. To learn how to use this, go to *Appendix E – Entering Alpha-Numeric Characters* on page 104.
- Supervisor is the highest level that can be granted and has access to various administration functions. Be aware of who you grant this access to.
- You may be asked to enter the Supervisor ID and password to access some of these functions.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> User Management and select one of the following:

- Add user
- Change password
- Remove user
- User list

PROMPT	DATA	EXPLANATION
ADD USER You will only see this option if you selected Add User.		
Enter New User Name	Enter the **User Name** and press **OK**.	The User Name can be up to 13 digits in length.
Enter New User ID	Enter the **User ID** and press **OK**.	The User ID can be up to 5 digits in length.
Enter New Password	Enter the **Password** and press **OK**.	The password can be up to 7 digits in length.
Re-enter New Password	Re-enter the **Password**.	--
Select Authority Level	Select **OPERATOR** or **SUPER**.	This determines what level of access the user will have. Be cautious about who you assign Supervisor level access to.
New User Added	--	--
CHANGE PASSWORD You will only see this option if you selected Change Password		
Enter ID	Enter the **User ID** that you want to change the password for and press **OK**.	--
Enter Password	Enter the **old password** and press **OK**.	--
New Password	Enter the **new password** and press **OK**.	The password can be up to 7 digits in length.
Re-enter New Password	Re-enter the **new password** and press **OK**.	--
Password Changed	--	--
REMOVE USER You will only see this option if you selected Remove User		
User List	Select the User ID that you wish to delete.	Allows a Supervisor to delete a user from the terminal. You cannot delete the user that is logged into this terminal.
Remove ID ###?	Confirm that you want to remove the user: • **NO** • **YES**	--
User Removed	--	--
USER LIST You will only see this option if you selected User List		
Display or Print?	Select **DISPLAY** or **PRINT**.	A list of all User IDs, User Names and their Authority Level will appear on the terminal or be printed off.

How do I change the logon method for a terminal?

This option allows a supervisor to select method in which users can logon. The logon method will determine what sort of information is required for users to logon to the terminal.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Logon Method and select one of the following:

- ID And Password
- ID Only
- No Logon

PROMPT	DATA	EXPLANATION
ID And Password ID Only No Logon	Select one of the following options: • **ID And Password** • **ID Only** • **No Logon**	The most secure is ID and Password. The least secure is No Logon.
Logon Method Set To <Selected Logon Method>	--	The screen will display what method that you selected.

How do I download software to my terminal?

This function allows the terminal to download a new software application from the TD remote host without the need for a technician on site.

- The device must remain powered on for the full process.
- You must close your business day on the terminal before downloading software.
- A software download can also be initiated via a notification. In this case, the software may be downloaded in the background within a defined time window (scheduled download).
- A software download must be done separately for each terminal.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Software Download

PROMPT	DATA	EXPLANATION
Please Keep The Terminal Powered On During The Upgrade process	Select **CONTINUE** to proceed.	The download begins. Do not interrupt the download once it has begun as this may cause your TD generation product to stop working.
Download Completed. Terminal Will Shutdown To Complete The Upgrade.	--	The terminal will printout a report once the download is completed.
Software Upgrade in Progress Do Not Turn Off The Terminal	--	Terminal reboots to the Idle screen. The download is complete.

How do I download new parameters to the terminal?

This option downloads parameters from the TD Hosts for the operation of the terminal.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Parameter Download -> Host 1 Download or Host 2 Download

PROMPT	DATA	EXPLANATION
Host 1 Download Host 2 Download	Select one of the following options: • **Host 1 Download** • **Host 2 Download**	**Host 1 Download** Use this option if you want to update anything dealing with financial information such as: • Card types • Transaction types • Interac keys **Host 2 Download** Use this option if you want to update anything dealing with non-financial information such as: • Gift cards • Loyalty cards
HOST 1 DOWNLOAD You will only see this option if you selected Host 1 Download.		
Start Download?	Confirm that this is correct: • **NO** • **YES**	--
Host 1 Download Completed	--	--
HOST 2 DOWNLOAD You will only see this option if you selected Host 2 Download.		
Full or Partial Download?	Select one of the following options: • **FULL** • **PARTIAL**	You have an option to do a full or partial download. **Full:** Pulls down all information to the terminal. **Partial:** Only pulls down information changed by Help Desk.
Download Completed! Default Supervisor ID ##### Default Supervisor Password #######	--	--

How do I download the Air Miles parameters? (Optional)

HSPA Wi-Fi

This option downloads the Air Miles parameters to the terminal.

- You will only see the Air Miles icon if you have that functionality enabled on your system.
- The device must remain powered on for the full process.
- A parameter download must be done separately for each terminal.

NAVIGATION

Desktop -> Main Menu Screen -> **Air Miles** -> Parameter Download

PROMPT	DATA	EXPLANATION
--	--	The terminal will immediately begin to download any new Air Miles parameters to the terminal that this procedure is performed on.

How do I upload the Air Miles transactions? (Optional)

HSPA Wi-Fi

This option uploads the Air Miles transactions from a terminal. This can be done at any time during the business day, but is also performed during the business day close.

- You will only see the Air Miles icon if you have that functionality enabled on your system.
- The device must remain powered on for the full process.
- A parameter download must be done separately for each terminal.

NAVIGATION

Desktop -> Main Menu Screen -> **Air Miles** -> Transaction Upload

PROMPT	DATA	EXPLANATION
--	--	The terminal will immediately begin to upload any Air Miles transactions that have been done since the last day close.

How do I perform a date/time sync?

This option corrects the date and time on the terminal by communicating with the TD host.

NAVIGATION

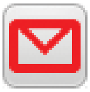
Desktop -> Main Menu -> **Control Panel** -> Date/Time Sync

PROMPT	DATA	EXPLANATION
Connecting ... Please Wait	--	The terminal creates a connection to the server and syncs date and time information.

How do I access priority mail?

Priority Mail is used to send important information to the merchant and should be checked daily. If there is any mail waiting for you, there will be an envelope icon in the top-right corner of the screen.

NAVIGATION



Desktop -> Main Menu -> **Priority Mail** and select one of the following:

- Check Mail
- Read Messages
- Delete Inbox Messages
- Delete All Messages

PROMPT	DATA	EXPLANATION
CHECK MAIL You will only see this option if you selected Check Mail.		
--	--	Allows a user to download mail from the mail server.
READ MESSAGES You will only see this option if you selected Read Messages.		
--	--	Allows the user to read messages downloaded from the mail server.
DELETE INBOX MESSAGES You will only see this option if you selected Delete Inbox Messages.		
	--	Allows a supervisor to delete a single message from the inbox. Once deleted they cannot be retrieved.
DELETE ALL MESSAGES You will only see this option if you selected Delete All Messages.		
--	--	Allows a supervisor to delete all messages in the inbox. Once deleted they cannot be retrieved.

How do I reset the invoice number on a terminal?

This option allows you to reset your invoice number that will be displayed on your receipts. If you select this option the invoice number is reset to "1".

NAVIGATION

Desktop -> Main Menu Screen -> **Admin** -> Reset Invoice #

PROMPT	DATA	EXPLANATION
Reset Invoice # to '1'?	Confirm that this is correct: • **NO** • **YES**	--
Invoice # Reset	--	The Invoice number has been reset to 1.

How do I reprint a receipt?

This transaction is used to reprint an existing receipt.

NAVIGATION

Desktop -> Main Menu -> **Reprint** and select one of the following:

- Last Receipt
- Past Receipt
- Day Close Report

PROMPT	DATA	EXPLANATION
LAST RECEIPT You will only see this option if you selected Last Receipt.		
Reprint Last Receipt?	Confirm that this is correct: • **NO** • **YES**	If you select YES, the last receipt will print.
PAST RECEIPT You will only see this option if you selected Past Receipt.		
Swipe Card	To reprint a receipt, **swipe the credit/debit card** that the transaction was performed on.	--
<XXXX Card Number> <XXXX Card Type> Amt Date	**Select the transaction** that you want to reprint the receipt for and press **OK**.	Any transactions that were done on the terminal by the swiped card will appear on the screen.
Trace # # <Type> <Credit Card Number> <Credit Card Type> Date Time Amount $XX.XX Inv: # ID: ### Auth: XXXXXXX	You have two options: • **BACK** • **PRINT**	If this is the correct receipt, select **PRINT** and the receipt will be reprinted.
DAY CLOSE REPORT You will only see this option if you selected Day Close Report.		
Reprint Day Close Report?	Confirm that this is correct: • **NO** • **YES**	The Day Close report is reprinted.

How do I recall a transaction?

This option recalls a transaction so that you can view, void or complete/close it.

NAVIGATION

Desktop -> Main Menu -> **Transaction Recall** and select one of the following:

- Recall By Trace #
- Recall By All
- Recall By Amount
- Recall By Account #
- Recall By Invoice #
- Recall By Pre-Auth/Open Tab by Inv #
- Recall By All Open Pre-Auths

PROMPT	DATA	EXPLANATION
RECALL BY TRACE # You will only see this option if you selected Recall By Trace #.		
Enter Trace #	Enter the **trace number** that you want to recall and press **OK**.	--
RECALL ALL You will only see this option if you selected Recall All.		
Card Number Card Type $XX.XX Date	Select the **desired transaction**.	If you only see/have one entry, proceed to the final step.
RECALL BY AMOUNT You will only see this option if you selected Recall By Amount.		
Enter Amount	Enter the **dollar amount** and press **OK**.	--
RECALL BY ACCOUNT # You will only see this option if you selected Recall By Account #.		
Swipe Card	To enter the card account, choose between: • **Swipe** • **Manual Entry**	This will display any transactions done on this terminal by the card. Go to the last step.
MANUAL CREDIT CARD ENTRY You will only see this option if you selected Manual Credit Card Entry.		
Enter Account #	Enter the **card account number** and press **OK**.	This can be up to 16 digits in length.
Card Number Card Type $XX.XX Date	Select the **desired transaction**.	If you only see/have one entry, proceed to the final step.
RECALL BY INVOICE # You will only see this option if you selected Recall By Invoice #.		
Enter Invoice #	Enter the **invoice number** that you want to recall and press **OK**.	If your invoice # contains alpha-numeric characters, see page 104 for information on how to enter them.
RECALL OPEN TAB/PRE-AUTHORIZATION BY INV # You will only see this option if you selected Recall Open Tab/Pre-Authorization By Inv #.		
Enter Invoice #	Enter the **invoice number** that you want to recall and press **OK**.	If your invoice # contains alpha-numeric characters, see page 104 for information on how to enter them.
RECALL ALL OPEN TABS/ PRE-AUTHORIZATIONS You will only see this option if you selected Recall All Open Tab/Pre-Authorization.		
Card Number Card Type $XX.XX Date	Select the **desired transaction** and press **OK**.	If you only see/have one entry, proceed to the final step.
Trace # XX Transaction Type Card Number Card Type Date Time $XX.XX Invoice Number Auth: XXXXX	Select one of the following options: • **VOID** • **COMPLETION**	**VOID** cancels the transaction. **COMPLETION** closes all Pre-auths or Open Tabs.

Configuring Your Terminal

How do I start training mode?

This option allows a supervisor to sign in and train another user on the functions of the terminal without impacting any live transactions or totals on the terminal. While in this mode the word DEMO will be displayed in the background of the terminal screen and a Training Mode banner will be printed on all receipts and reports.

While in Training Mode you will be unable to:

- Perform any configuration changes
- Perform any transactions with chip cards
- Print accurate gift card reports as you can’t modify this data

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Training Mode

PROMPT	DATA	EXPLANATION
Enter Training Mode?	Select one of the following: • **NO** • **YES**	Selecting **NO** will cancel your Training Mode request.
You are in Training Mode	--	To exit Training Mode, repeat the above steps. The message *Training Mode Ended* will appear and word DEMO will be removed from the background on the *Desktop* and *Main Menu* screens.

How do I adjust the speaker volume?

Allows a user to increase or decrease the volume by 10% increments using the left or right Dash keys.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Speaker Volume

PROMPT	DATA	EXPLANATION
##%	Select one of the following: • **-** • **+**	With each press of the button: • The volume will change by 10%. • The screen value will change by 10% increments. • You will hear a beep to indicate you how loud the new volume setting is.

How do I adjust the backlight level?

Allows a user to increase or decrease the backlight intensity by 5% increments using the left or right **dash** keys.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Backlight

PROMPT	DATA	EXPLANATION
##%	Select one of the following: • **-** • **+**	With each press of the button: • The screen brightness will change by 5%. • The screen value will change by 5% increments. • The screen will change to the new lighting level to indicate what the new setting will look like.

How do I check my battery level?

HSPA Wi-Fi

This option shows you the battery's current charge level and associated battery settings.

- This screen is static and cannot be manually changed. To change any of the settings that impact how the battery information is displayed, you must call the TD Merchant Solutions Help Desk at **1-800-363-1163**.

NAVIGATION

Desktop -> Main Menu-> **Control Panel** -> Battery Panel

PROMPT	DATA	EXPLANATION
Current = XX% Red Battery Icon = XX% Blinking Icon = XX%	--	**Current** The charge the battery currently has as a percentage. **Red Battery Icon** The percentage charge or less that will cause the battery icon on the screen to turn red. **Blinking Icon** The percentage charge or less that will cause the battery icon on the screen to blink.

How do I set up a receipt banner on a terminal?

HSPA Wi-Fi

This option allows you to add a short slogan or advertising to the bottom of all receipts printed from a terminal. The banner can be up to nine lines in length. The character options are alpha-numeric with a single or double font-size option.

- It is your responsibility to ensure that the content of any banner message complies with all applicable laws. By using this feature, you agree that you are solely responsible for any advertising messages displayed on the terminal.
- The receipt banner must be added to each terminal that you want to use it on.
- The more lines you add to the banner, the more paper will be used when you print a receipt.
- If you print a large number of receipts daily, your paper usage may be significantly higher than what you're accustomed to.

NAVIGATION

Desktop -> Main Menu -> **Admin** -> Receipt Banner

PROMPT	DATA	EXPLANATION
Set Receipt Banner?	Select one of the following: • **NO** • **YES**	The normal-sized font has a 26 character limit. The double-sized font has a 20 character limit. Set the number to zero if you wish to remove the banner.
# Of Print Lines For The Receipt (1 – 9)	Enter the number of lines and press **OK**.	Set the number to zero if you wish to remove the banner.
Line # Font Size	Select one of the following: • **SINGLE** • **DOUBLE**	This selects the height of the text. The normal-sized font has a 26 character limit. The double-sized font has a 20 character limit.
Line #	Enter your **receipt banner message**. When finished press **OK**.	See *Appendix E - How to Enter Alpha-Numeric Characters* on page 104 for more info.

This step will repeat as many times as you selected receipt banner lines. Once you're finished entering the receipt banner, press **OK**, without entering a new character to complete the entry.

How do I change the display language to English/French?

This option allows a supervisor to change the language of a terminal to English or French.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Language

PROMPT	DATA	EXPLANATION
English Francais	Select the desired **language**.	--

How do I set up voice prompts on a terminal?

HSPA Wi-Fi

The terminal has the ability to verbally provide certain audible prompts for the customer. The following voice prompts are available:

- Present Card
- Transaction Completed
- Remove Card
- Thank You For Your Business

NAVIGATION

You must call the **Help Desk 1-800-363-1163** to have this feature enabled.

PROMPT	DATA	EXPLANATION
Present Card Transaction Completed Remove Card Thank You For Your Business	--	These are the voice prompts that the customer will hear.

How do I change my terminal's connection type?

Generation

This option allows you to assign a dynamic IP (DHCP) or a static IP to your Handover terminal.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Communications -> Connection Type Setup

PROMPT	DATA	EXPLANATION
Terminal IP Address Assignment Mode	Select one of the following options: • **Static IP** • **DHCP**	Select which communication type you wish to use.
STATIC IP You will only see this option if you selected Static IP.		
Enter Terminal IP Address 000.000.000.000	Enter the **IP address** and press **OK**.	The static IP address is supplied by your Internet service provider (ISP). and is 12 digits long.
Enter Terminal Subnet Mask 000.000.000.000	Enter the **subnet mask address** and press **OK**.	The subnet mask is supplied by your Internet service provider (ISP). and is 12 digits long.
Enter Terminal Default Gateway 000.000.000.000	Enter the **default gateway address** and press **OK**.	The default gateway address is supplied by your Internet service provider (ISP).and is 12 digits long.
Enter Terminal DNS 000.000.000.000	Enter the **DNS address** and press **OK**.	The DNS address is supplied by your Internet service provider (ISP). and is 12 digits long.

IP: xxx.xxx.xxx.xxx Subnet Mask: xxxx.xxxx.xxxx.xxxx Default GW: xxxx.xxxx.xxxx.xxxx DNS: xxxx.xxxx.xxxx.xxxx	Is this correct? • **CORR (Redo)** • **OK (Confirm)**	Confirm whether this is the correct information.
DHCP You will only see this option if you selected DHCP.		
Please wait...	--	The system will detect your IP address and then return you to the previous menu.

What functions can only be enabled/disabled by Help Desk?

The following settings are available, but you must call the TD Merchant Solutions Help Desk at **1-800-363-1163** to enable them.

PROMPT	SETTINGS	EXPLANATION
Application Scheme	Pre-Auth Tab	Call in.
Invoice Number	On Off	Call in.
Invoice Entry Method	Automatic Manual	Call in.
Purchase with Tip	Enabled/Disabled	Call in.
Receipt Order	Merchant Copy First Customer Copy First	Call in.
Receipt Banner	Enabled/Disabled	Call in or do it yourself. A nine line customizable message printed at the bottom of the receipts. **HSPA and Wi-Fi terminals only.**
Pre-Auth/Open Tab Receipt	Print Don't Print	Call In.
Pre-Auth Completion / Close Tab Receipt	Print Don't Print	Call In.
NSR Merchant Receipt	Never Print Print with Customer copy Always Print	Call In.
Declined Credit Receipt	Print Don't Print	Call in.

Pre-Auth Completion with Tip	Enabled/Disabled	Call in. **Enabled** The transaction will prompt for a tip to be added to the pre-authorized amount. **Disabled** The transaction will request for the final amount of the transaction to be entered.
Close Batch with Pre-Auth Open	Enabled/Disabled	Call in.
Pre-Auth Days	10, 15, 20 25, 30	The number of days that a pre-auth can be stored in the terminal before being deleted. The default is 10 days, any value higher than 10 requires approval from TD Merchant Solutions. If you want this value to be changed to greater than 10 days, you must call in.
Cashback Prompt	Enabled/Disabled	Call in.
Cashback Type	Preset Merchant Entered	Call in.
Maximum Cashback Amount	Enter Value	Call in.
Preset Cashback 1	Enter Value	Call in.
Preset Cashback 2	Enter Value	Call in.
Preset Cashback 3	Enter Value	Call in.
Auto Logoff Timer	Enabled/Disabled	Call in.

What functions can be protected by a supervisor password?

The following functions can be Supervisor protected.

PROMPT	SETTINGS	EXPLANATION
Manual Account Number Entry	Enabled/Disabled	Enables/disables Supervisor protection on this function.
Business Day Reports	Enabled/Disabled	See above.
Batch Reports	Enabled/Disabled	See above.
Customized Reports	Enabled/Disabled	See above.
Day Close	Enabled/Disabled	See above.
Priority Mail	Enabled/Disabled	See above.
Gift Card Reports	Enabled/Disabled	See above.

Summary

After reading this section you should be able to:

- Manage users, the logon method and download software updates
- Configure and print the terminal's basic settings

In the next section, you will learn how to troubleshoot any problems that you may encounter with your TD Generation package.

Section 7
Troubleshooting

This section will cover basic TD Generation package troubleshooting steps that you should perform before contacting Help Desk. If you do not find the error message or problem that you're encountering in this section, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

Troubleshooting Your Terminal

Sometimes you may experience a problem and an error message will be displayed on screen with a short description of the issue. Listed below are all the error messages that could be displayed.

What error messages could I see on the terminal?

Below is a list of error messages that you could see on the terminal screen and the actions required to resolve them.

- Some errors are easily identifiable and can be resolved by you immediately. Others will require that you contact the TD Merchant Help Desk at **1-800-363-1163**.
- Some error codes may require you to call Help Desk. These will have an icon in the **Action Required** column. Be sure to follow the instructions in the **Action Required** column before calling Help Desk.

"A" ERROR CODES	EXPLANATION	ACTION REQUIRED
Already In Training Mode	The user tried to enter Training mode when they were already in it.	Either proceed with Training Mode or repeat the steps and exit Training Mode.
Amount $0.00 Not Allowed	An amount higher than 0.00 must be entered.	Please enter a new amount and press **OK**.

"B" ERROR CODES	EXPLANATION	ACTION REQUIRED
Bad Communication	Terminal detected a communication failure after the transaction is initiated.	Check your connections and retry the transaction. If the problem persists contact the Help Desk. If there is no signal strength, reboot the access point by disconnecting and reconnecting the power cord. Wait 2 minutes and check then check the signal strength again. If the problem persists contact the Help Desk.
Bad Communication **Press CANC key** **And Try Again**	Terminal detected a communication failure after the transaction was initiated (to Bell Mobility Tower / host).	Press **Cancel** and try again.
Batch Cannot Be Closed **With Open Pre-Auths**	The terminal is configured so that Pre-authorized Transactions must be completed before a Batch Close can be performed.	Please complete all open Pre-Auth transactions, then close the batch.
Batch Cannot Be Closed **With Open Tabs**	The terminal is configured so that Open Tabs must be completed before a Batch Close can be performed.	Please complete all open Pre-Auth transactions, then close the batch.
Business Day Full **Close Business Day Now**	The terminal has reached the maximum number of transactions that can be accumulated for a business day.	A Day Close must be processed to allow the terminal to continue processing. Once this message is displayed only administrative transactions and Pre-auth completions / Close Tab transactions can be performed.

"C" ERROR CODES	EXPLANATION	ACTION REQUIRED
Cannot Reset Invoice # to 1 When Set to Manual	The terminal has invoice number entry set to manual entry, and this option is not allowed in this mode.	Please contact the Help Desk if you wish to change the entry mode to automatic.
Card Error **Please Try Again**	The terminal failed to read the chip on the inserted card.	Remove the card and try reinserting it, ensuring that it is entered correctly. If the problem persists, please ask the card holder for another form of payment.
Card Error **Please Try Again**	The terminal failed to read the chip on the inserted card.	Remove the card and try inserting it again.
Card Error **Use Magnetic Stripe**	The terminal failed to read the chip on the inserted card.	Remove the card from the chip reader and swipe it through the magnetic strip reader.
Card Removed Too Soon **Try Again**	The chip card was removed from the terminal before the transaction was completed.	Process the transaction again, while instructing the cardholder not to remove the card until instructed by the terminal.
Cashback Amount **Exceeds Limit**	The cashback amount entered exceeds the maximum allowed for this terminal.	Please enter another amount within the cashback limit.
Check Printer	The printer is not ready for printing.	Verify that the printer has paper and that the cover is closed properly.
Close Batch Failed **End Of Business Day** **Not Complete**	The terminal failed to complete a Batch Close transaction during the Day Close.	Retry the Day Close transaction. If the problem persists please contact the Help Desk.
Close Batch Soon	The terminal has almost reached the maximum number of transactions that can be accumulated for a batch.	A Batch Close must be processed before the next 20 transactions to allow the terminal to continue processing.
Close Business Day Soon	The terminal has almost reached the maximum number of transactions that can be accumulated for a business day. OR The Day Close transaction has reached the maximum number of days that it can be left open.	A Day Close must be processed as soon as possible to allow the terminal to continue processing.
Customer to Insert **Chip Card**	The cardholder attempted to swipe a chip card on the terminal.	Please insert the card into the chip reader on the terminal.

"D" ERROR CODES	EXPLANATION	ACTION REQUIRED
Day Cannot Be Closed With Open Pre-Auths	The terminal is configured so that Pre-authorized Transactions must be completed before a Day Close can be performed.	Please complete all open Pre-Auths transactions, then close the day.
Day Cannot Be Closed With Open Tabs	The terminal is configured so that Open Tab Transactions must be completed before a Batch Close can be performed.	Please complete all open Open Tab transactions, then close the Day.
Download Host 1 Parameter First	The terminal requires a Host 1 Parameter Download to be performed.	Download the Host 1 Parameter.
Download Full Host 2 Params First	The terminal requires a full Host 2 Parameter Download to be performed.	Download the Host 2 Parameter.
"E" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
End of Business Day Already Completed	The Day Close transaction has already been completed successfully.	—
End of Day Process Cancelled	The Day Close transaction was cancelled.	—
"F" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
Faulty Card	The card was swiped too slowly.	Try swiping the card faster.
Function Not Allowed	The function selected is not setup for this terminal.	If you require the function, please contact the Help Desk.
"H" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
Host 1 Download Not Completed	The terminal attempted a Host 1 Download and it was not completed successfully.	Try the Host 1 Download again. If the problem persists, please contact the Help Desk.
Host 2 Download Not Completed	The terminal attempted a Host 2 Download and it was not completed successfully.	Try the Host 2 Download again. If the problem persists, please contact the Help Desk.
"I" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
ID Already Exists	The ID entered already exists on the terminal.	Please enter another ID.
ID Table Empty	There are no IDs defined in the terminal.	—
Inbox Empty	There are no messages in the Mail Inbox.	—
Input Must Be At Least 1 Character	No data was entered in a required field.	Please enter at least 1 character.
Input Must Be At Least 3 Characters	Less than 3 characters were entered.	Please enter at least 3 characters.

Input Must Be At Least 9 Characters	Less than 9 characters were entered.	Please enter at least 9 characters.
Input Must Be Greater Than Zero	Value entered must be greater than zero.	Please enter a value greater than zero.
Input Not In Valid Range	The data entered was not within the required values.	Please reenter the data.
Internal Error **Call Help Desk** **AAAAAAAAAAAA** **NNNNNNNNNNNN** **CCCCCCCCCCCC**	The terminal has encountered a fatal error. AA...... stands for component name NN...... stands for application information CC.......stands for error code	Please contact the Help Desk and provide the information on the screen.
Invalid Account #	The card used failed a security check or the card number length is invalid for the card type.	Enter the card again, if the problem persists ask the cardholder for another form of payment.
Invalid Date	The date entered on the terminal is not valid or occurs in the future.	Please enter a valid date.
Invalid Expiry Date	The expiry date on the card is invalid.	Please enter a valid expiry date. OR Ask the customer for a different card.
Invalid ID	The user ID was not found on the terminal.	Enter a valid ID.
Invalid ID/Password	The ID/Password combination entered does not match any in the terminal's record.	Re-enter or try another ID/password.
Invalid Password	The password is not valid for the User ID entered.	Re-enter the password or try another ID.
Invalid Time	The time entered is not valid.	Please enter a valid time.
Invoice Tab First	The Close Tab transaction has been attempted on a Tab that hasn't been invoiced.	Process an Invoice Tab transaction for the invoice number entered.
"L" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
Limit Reached! Upload AIR MILES From Menu!	The terminal has reached the maximum number of Air Miles transactions that can be held.	Process an Air Miles Transaction Upload.
"M" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
Maximum # of Entries Reached	The maximum number of User IDs (100) has been reached.	To enter additional IDs, some IDs will have to be deleted.

"N" ERROR CODES	EXPLANATION	ACTION REQUIRED
No Match	A match cannot be found for the data entered or selected.	Please retry or enter new data.
No Response From Host	Terminal times out the host response.	Press **CANC (X)** key And Try Again. If the problem persists contact the Help Desk.
No Transactions Found	A transaction cannot be found with the criteria entered.	Please enter new data.
Not Accepted	The card type entered is not supported on this terminal.	Please select another card.
Not Accepted **Use Magnetic Stripe**	The card was inserted, but the terminal does not have the card type defined for chip.	Swipe the card on the terminal. If the card type is supposed to be setup for chip, please contact the Help Desk.
Not Allowed	The transaction selected is not setup for this terminal or it is not allowed with the card being used.	Try another card type. If the transaction is supposed to be setup for the terminal, please contact the Help Desk.
Not Allowed To Reset **Inv# with Open Batch**	An attempt was made to reset the invoice number, however the batch was open.	Please close the batch and then Reset the Invoice #.
Not Allowed To **Reset Invoice #** **With Open Pre-Auths**	An attempt was made to reset the invoice number however there are open pre-auths in the terminal.	Please complete the pre-auths and then Reset the Invoice #.
Not Allowed With **Trans Outstanding**	A function cannot be run if there are any transactions outstanding (pre-auth, transactions in the open batch, etc.).	Please process the outstanding transactions then try the function again.
Not Available	The item requested is not available.	Please make another selection.
Not Completed	The attempted transaction or function did not complete successfully.	Re-attempt the transaction or function. If the problem persists please contact the Help Desk.
Number Not In The **Range 1 – 9**	The input # does not fall in the range of print lines allowed for the receipt banner.	Please enter a valid number.
Number Not In The **Range 1 — 65535**	The entered host port number is not in a valid range.	Please enter a valid number.
Not In Training Mode	If the user is not in training mode and tries to exit it.	—

"P" ERROR CODES	EXPLANATION	ACTION REQUIRED
Passwords Do Not Match	The password confirmation does not match the original password entered.	Please re-enter the password confirmation.
PIN pad Has Been Replaced! **Host 1 Parameter Download Is Required!**	The terminal has detected that the PIN pad has been replaced.	If a technician has not been on-site to replace the PIN pad, please contact the Help Desk to report suspected tampering.
Processing Error	The terminal encountered an error when trying to process a chip transaction.	Try the action again. If the problem persists ask for another form of payment. If the problem occurs on multiple chip cards, please contact the Help Desk.
"R" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
Receipt Not Printed! **Imprint Card and Complete Sales Draft Manually**	The transaction was approved however the terminal is unable to print a receipt.	Manually imprint the card, record the authorization code and have the customer sign the receipt.
Reset Date And Time From Main Menu	The terminal requires the date to be synchronized with the host date and time.	Perform the Date/Time Sync function on the terminal.
"S" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
System Error Contact Help Desk	The terminal has encountered a system error.	Please call the Help Desk immediately to have your terminal replaced.
"T" ERROR CODES	**EXPLANATION**	**ACTION REQUIRED**
Tab Already Closed	Close Tab transaction is attempted on an open tab transaction that has already been closed.	—
Tab Already Invoiced	Invoice Tab transaction is attempted on a transaction that has already been invoiced.	—
Transaction Already Voided	Void transaction is attempted on a transaction that has already been voided.	—
Transaction Already Completed	Pre-auth completion is attempted on a pre-auth that has already been completed.	—
Transaction Cancelled	The transaction has been cancelled by the user.	—
Transaction Not Allowed	The transaction type is not supported for the card entered.	Please select another card type or transaction.

What hardware error messages could I see on the terminal?

HARDWARE PROBLEM	ACTION REQUIRED
Chip cards cannot be processed	**1.** Try inserting a different card. If this card can be read, the problem is with the first card. **2.** Use a Cleaning Card to clean the card reader. If you need cleaning cards, contact the TD Help Desk to purchase. **3.** If problem persists, contact the TD Help Desk.
Display screen is blank	**1.** Ensure that the power cable is firmly connected to the power port and the wall jack. **2.** If problem persists, contact the TD Help Desk.
Display lighting is too bright or too dark	**1.** The contrast setting is too high or too low. Check the brightness setting and increase or decrease it to work with the lighting at the terminal location. **2.** If problem persists, contact the TD Help Desk.
Bad Communication Press CANC key And Try Again	**1.** Terminal detected a communication failure after the transaction was initiated. **2.** Press **Cancel** and try again. **3.** If the problem persists, contact the TD Help Desk.
Magnetic Stripe Card reader won't read cards.	**1.** Try swiping the card more quickly or more slowly or from the front of the reader towards the back. **2.** Try swiping a different card. If this card can be read, the problem is with the first card. **3.** Request another form of payment. **4.** Use a Cleaning Card to clean the card reader. If you need cleaning cards, contact the TD Help Desk to purchase. **5.** If problem persists, contact the TD Help Desk.
Printer does not print	**1.** Ensure there is paper in the device; if yes, ensure the paper roll is inserted correctly. **2.** If problem persists, contact the TD Help Desk.
Printer Jam	**1.** Open the printer and check that the paper feed is clear and that the paper roll is seated correctly. **2.** Close the printer lid and ensure that it is closed completely. **3.** If problem persists, contact the TD Help Desk.
Voice Prompts not working	**1.** Check the terminal volume. **2.** Contact the TD Help Desk.

How do I access the terminal information?

This option displays the terminal ID of the device, the software version installed and the date it was installed or upgraded.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> System Information

PROMPT	DATA	EXPLANATION
Display or Print?	The user selects **DISPLAY** or **PRINT**.	This option will display or print the following information: • Device • Serial # • Application • Release Date • Release Status • System Software Version • O/S • EMV Kernel Version • Security Software Version • Free DRAM

How do I purge transaction data?

This option allows a Supervisor to clear all records from the terminal for specific transaction types.

!

- You should never do this without contacting Help Desk first and only perform this at their request
- When this is performed you will lose all the data contained within that specific terminal including transactions and the transactions history.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Purge Transaction Data

PROMPT	DATA	EXPLANATION
All Records Will be Cleared Continue?	Confirm that this is correct : • **NO** • **YES**	The terminal will now purge this data.

How do I run configuration reports?

This option allows you to print a report that shows which configurable options have been enabled on a specific terminal.

- Generally this option is used when calling into Help Desk.
- It is also a good way to ensure that all your terminals have the same settings.

NAVIGATION

Desktop -> Main Menu -> **Control Panel** -> Configuration Reports

PROMPT	DATA	EXPLANATION
Communications Host 1 Settings Host 2 Settings Card BIN Ranges EMV Parameters EMV Public Keys	Select the **desired report**.	Select the configuration report you want to print.
Print Configuration Report?	Select one of the following: • **NO** • **YES**	--

Troubleshooting Signal Strength

The following troubleshooting information is for the TD Generation terminals. If you're uncertain as to which terminal you're using, please refer to *Section 3 - Introducing TD Generation*.

Generation Terminal

What do I do if I see the Internet Disconnected icon?

This icon will only appear on the terminal screen when there is a communication problem between the terminal and Internet connection. This can be caused when:

- the Internet cable becomes unseated from your router or damaged
- your Internet service is down

Please perform the following:

1. Is your Internet connection working properly?
   - **a.** If it is not working, contact your Internet service provider.
   - **b.** If it is working correctly, proceed to **Step 2**.
2. Is your Internet cable connected properly? To check this, unplug and plug back it in the Internet cable on the router and/or modem.
   - **a.** If it is now working, you've resolved the problem.
   - **b.** If it still is not working correctly, proceed to **Step 3**.
3. Is your modem/router working correctly? To verify that this is not the problem, reboot your modem/router.
   - **a.** If it is not working, you've resolved the problem.
   - **b.** If it still is not working correctly, proceed to **Step 4**.
4. If it still is not working, please call the TD Merchant Solutions Help Desk at **1-800-363-1163**.

What do I do if there's a power outage?

Generation terminals will not be able to process transactions without power. Once the power has been restored, you do not need to take any steps to restart your terminal. It will automatically come online.

If a transaction was interrupted due to power failure, please perform the transaction again when power is restored.

HSPA Terminal

What do I do if there's a power outage?

HSPA terminals with battery power will most likely still work and be able to perform transactions unless the local cell tower does not have power as well.

What happens if I have a low or no signal strength?

The terminal has one or two icons that display the current wireless network status and its strength.

Wireless Network Status

The wireless network signal is represented by an icon in the top-right corner of the screen that shows the connection status. It can be in one of three states.

Connected	Searching for connection	Cannot find connection

If you're unable to get a green icon, please contact the Help Desk.

Signal Strength

The signal strength is represented by zero to four bars. Your terminal should always show at least one in order to be able to complete transactions. Ideally it should be at minimum two bars.

100% Signal Strength	75% Signal Strength	50% Signal Strength	25% Signal Strength	No Signal Strength

If the terminal is experiencing low signal or no signal strength, check the following:

Have you moved the terminal?

If you have made physical changes to your location, such as adding a new wall or installing an electronic device next to where you use the terminal, you may have inadvertently reduced the wireless signal strength. Please contact the TD Merchant Solutions Help Desk.

Wi-Fi Terminal

Signal Strength

The signal strength is represented by four to zero bars. Your terminal should always show at least one in order to be able to complete transactions. Ideally it should be at minimum two bars.

100% Signal Strength	75% Signal Strength	50% Signal Strength	25% Signal Strength	No Signal Strength

If the terminal is experiencing low or no signal strength, check the following:

Has the access point/repeater become loose or unplugged?

Ensure the access point is securely plugged into an electrical outlet.

Is the access point/repeater antenna connected tightly?
Just finger tighten the antenna into the antenna port on the back of the access point /repeater. Also, adjust the antenna angle to see if this provides a better signal to the terminal.

Have any obstacles or electronic equipment been placed around the access point/repeater or the terminal?
If you have made physical changes to your location, such as adding a new wall, you may need to have the access point/repeaters moved to accommodate this change. Please contact the TD Merchant Solutions Help Desk to assist with this if necessary.

What do I do if there's a power outage?
Wi-Fi terminals will not be able to process transactions without power. Once the power has been restored, you do not need to take any steps to restart your access point. It will automatically come online and create a connection with any terminals in range.

If a transaction was interrupted due to battery/power failure, please perform the transaction again when power is restored.

Troubleshooting Power and Charging

Generation

Why isn't my terminal powering on?
There are three possibilities:

1. **Ensure that the electrical outlet has power.** Try another electronic device in the outlet to see if it is powered. If it is, go to the next step.
2. **Ensure that the power pack is fully inserted into the electrical outlet.** Then, try to power on the terminal. If it doesn't, go to the next step.
3. **Ensure that the charging cable is fully inserted and locked into the power port on the hub.** The power cord has two tabs on it to show how it needs to be inserted into the hub power port. Once inserted, twist the power cord gently to the right until it clicks into place. Then, try to power on the terminal. If it doesn't, please contact the Help Desk.

HSPA and Wi-Fi

Why isn't my terminal charging when it's plugged into an electrical outlet?
There are three possibilities:

1. **Ensure that the electrical outlet has power.** Try another electronic device in the outlet to see if it is powered. If it is, go to the next step.
2. **Ensure that the power pack is fully inserted into the electrical outlet.** Then, check to see if the charging icon appears in the top-right corner of the screen. If it doesn't, go to the next step.
3. **Ensure that the charging cable is fully inserted into the power port on the terminal.** Then, check to see if the charging icon in the top-right of the terminal screen. If it doesn't, please contact the Help Desk.

Why isn't my terminal charging when it's in the charger base?
There are four possibilities:

1. **Ensure that the electrical outlet has power.** Try another electronic device in the outlet to see if it is powered. If it is, go to the next step.
2. **The terminal isn't seated properly in the charger base.** Adjust the terminal so that it is centered in the charger base. Then, check to see if the charging icon appears in the top-right of the screen. If it doesn't, go to the next step.
3. **Ensure that the power pack is fully inserted into the power outlet.** Then, check to see if the charging icon appears in the top-right corner of the terminal screen. If it doesn't, go to the next step.

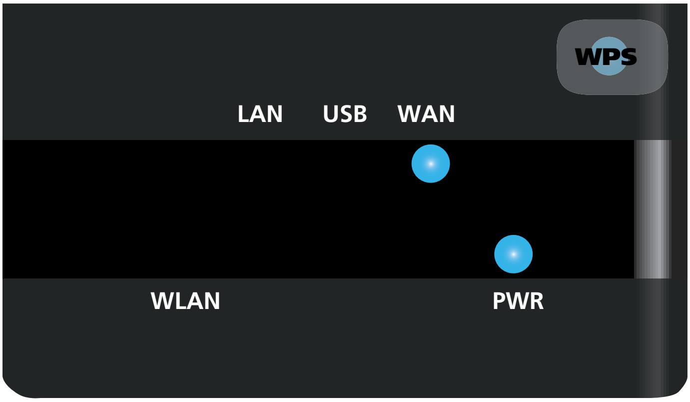
4. **Ensure that the power cable is fully inserted into the charger base.** Then, check to see if the charging icon in the top-right of the terminal screen. If it doesn't, please contact the Help Desk.

Troubleshooting Your Access Point / Repeater

Wi-Fi

Your access points and repeaters can tell you basic information just by looking at their lights. There are only three lights that you should be concerned with and they are the:

Light	What you should see	Explanation
PWR	Solid blue	The access point / repeater is powered.
WAN	Solid blue	The access point has a connection.
Access Point WPS	Quick flashing blue light and a pause.	The access point is searching for a connection.
	Slow flashing blue light.	The access point is connected.
Repeater WPS	Slow flashing blue light and a pause	The number of flashes indicates the strength of the signal reaching the repeater. Five is the strongest and one is the weakest.



How do I reconnect an access point/repeater?

You do not have to do anything beyond reconnecting the access point to your Internet and plugging the power back in. It will automatically come online and create a connection with any of your terminals that are in range. It takes two minutes for the access point to sync with the terminal(s).

Contacting Help Desk

To contact TD Merchant Solutions Help Desk, please call us at **1-800-363-1163**.

Summary

After reading this section you should be able to perform basic troubleshooting on:

- Common error codes
- Terminal specific troubleshooting
- Hardware problems (terminals, access points, etc.)

You should now have all the knowledge you will need to use the terminal in your day-to-day business.

Appendices

Appendix A – Changing the Paper Roll

The frequency in which you have to change terminal paper rolls will depend on the frequency that you use your terminal for business. If you notice that the receipts start to show a red line along the edge, this means that the paper roll is running out and should be changed soon.

How do I change the terminal paper?

Changing the paper roll is easy and should not take you long at all. To change the paper roll, just follow these instructions:

1. On the terminal you will see a tab along the left side just above where the paper comes out.
2. Press the tab. You will hear a click and a panel will open on the top of the terminal.
3. Open the panel so that you have access to the paper chamber. Remove the empty paper roll tube.
4. Unwrap a new paper roll and place it in the paper chamber so that the loose end of the paper feeds up from under the paper roll towards you.
5. Pull out enough paper from the chamber so that it can touch the top of the terminal screen.
6. Press down on the panel so that it clicks shut and there is a bit of loose paper sticking out from the chamber.

The paper has been replaced and you can now continue with your day to day use of the terminal.

- You can roll our more paper from the terminal by pressing **Paper Feed**. Every time you press the key 1 cm of paper will spool out.

How do I store terminal paper?

All terminal paper should be stored in a cool, dry, dark, place. Improperly stored paper could produce illegible receipts or cause paper jams when printing receipts or reports.

How do I order more terminal paper?

If you want to order more paper for your terminals, please contact us at **1-800-363-1163** and we'll help you with your resupply options.

Appendix B – Charging the Terminal

How do I charge the terminal?

HSPA Wi-Fi

The terminal can be charged by either connecting the power cord directly to the terminal or by placing the terminal on a plugged in charging cradle. For optimum battery use, charge the terminal when not in use.

- This terminal uses a lithium ion battery, so it cannot be overcharged.
- If the battery cannot maintain a charge, or you're having issues charging it, please contact our Help Desk at **1-800-363-1163** and we'll order another one for you.
- If the battery becomes drained at any time, it will require six hours to fully charge.
- Do not remove the battery. It has delicate pins and they can be easily damaged if handled improperly.

Appendix C – Equipment Care

How do I store the terminal?

- The terminal must not be stored in temperatures below 0° Celsius or temperatures above 50° Celsius.
- Do not leave the terminal outdoors overnight, especially in the winter.

Appendix D – Lost or Stolen Equipment

What if my device has been stolen?

If your device has been lost or stolen, please:

- Contact the TD Merchant Solutions Help Desk immediately to report the incident.
- Contact the police to file a report.

What should I do when the police arrive regarding the stolen device?

If a police officer arrives on site please record the following:

- Officer's name
- Officer's jurisdiction
- Officer's contact information
- Stolen device's serial number

The officer should provide you with a **report number**.

After obtaining the above from the officer, please contact the TD Merchant Solutions Help Desk and provide this information so that you can receive a replacement device. See below for an easy to use information card to record the required information.

Stolen Device Information Card

Police Information	
Name	______________________
Jurisdiction	______________________
Contact Information	*PH#*______________ *EXT #*______
	FAX# ______________________
	Email ______________________
Report Number	______________________
Device Information	
Stolen Device Serial Number	______________________

Please feel free to photocopy this for your own use.

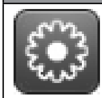
Appendix E – Entering Alpha-Numeric Characters

How do I enter alpha-numeric characters?

It is very easy to enter numerical data into the terminal. You just use the numeric keypad. But, what happens when you want to enter alpha-numeric data or special characters (@, &, *)? In these cases you must enter this information with an on screen keyboard. To do this, we'll use the Add User function under the Control Panel icon. There are other processes that require this information such as creating a receipt banner.

In the example below, you will create a user called **C *1**.

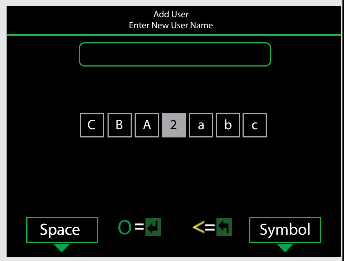
NAVIGATION



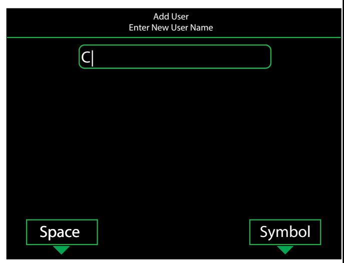
Desktop -> Main Menu -> **Control Panel** -> User Management -> Add User

INSTRUCTIONS / SCREEN

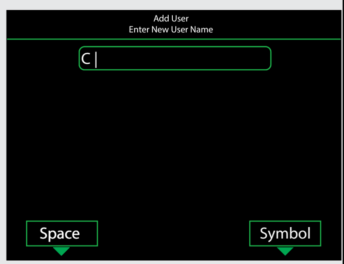
1. To start adding a user name, select the key on the numeric keypad that has the first letter of the user name on it. To create **C *1** you would press **2** as it has the letter **C** on it. The character options will appear on the screen. The User Name can be a maximum of 14 characters and spaces.



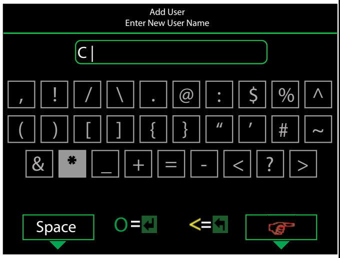
2. You will have all the character options from the **2** key which are: **C, B, A, 2, a, b, c**. Scroll to C and press **OK**. The letter **C** appears in the *User Name* box.



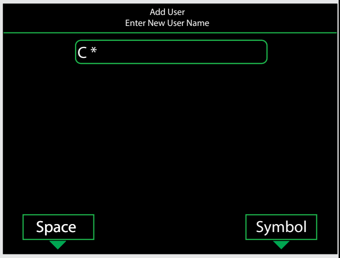
3. Press the left **Navigation** key to create a space. A space appears after the **C** in the User Name box.



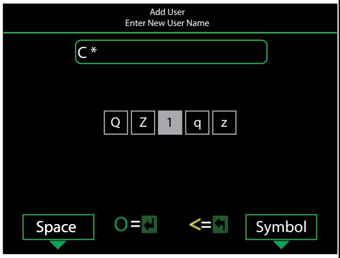
4. Press the right **Navigation** key. The *Symbol* screen appears. From here you can access available special characters, accented French letters and symbols.



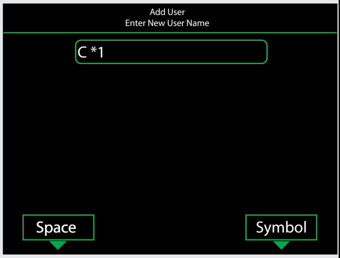
5. Scroll to the * press **OK**. An * appears after the space in the *User Name* box.



6. Press **1**. The character options will appear on the screen.



7. You will have all the character options from key 1 which are: Q, Z, 1, z, q. Scroll to 1 and press **OK**. A **1** appears in the *User Name* box after **C ***.



8. Press **OK**. You've finished entering the user name with the on screen alphabetic keyboard.

Follow the remaining steps for entering a new user name.

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