TD Generation
Quick Start Guide

For the TD Generation:

- Portal 2 with PINpad

MERCHANT INFORMATION

Merchant Name . . . .

Merchant Number . . . .

Contents

About this Guide

This Guide provides an introduction to your TD Generation solution, hardware functionality, performing financial transactions, administration features and troubleshooting. For further information regarding its use and available features, please review our online documentation at *www.TDMerchantSolutions.com/ResourceCentre.*

Merchant Welcome Kit Contents

Quick Start Guide
Pamphlets

- *How to Help Prevent Fraud*
- *Payment Card Industry Data*
- *If you have a problem or concern*

Information sheets

- *What you need to know about chargebacks*
- *Payment card industry data security standard (PCI DSS)*

Miscellaneous

- Paper rolls (3 + 1 in the terminal)
- Cleaning card and instructions
- Card acceptance decals (Visa®, MasterCard®, Discover®, American Express®, Interac® Direct Payment)

The Portal 2 with PINpad

The terminal is solely for you, our Merchant. You will use the terminal to initiate transactions for customer's using credit, debit, loyalty or gift cards. Depending on your settings, some card types may not be accepted by your terminal. For loyalty and gift card information, please review our online documentation at *www.TDMerchantSolutions.com/ResourceCentre.*

- Please note, there are two versions of this terminal: the Portal with PINpad and Portal 2 with PINpad. Below are examples of the terminal screens to help you determine which version you use. This document covers the Portal 2.
- If you have the previous hardware version, please ensure that you download the Portal with PINpad documentation.

Portal with PINpad

Portal 2 with PINpad

The Terminal

1. **Paper chamber button**

2. **Touchscreen**
    All navigation and merchant data entry is done through the touchscreen.

Navigation

- The terminal uses a touchscreen for navigation. You can navigate screens by swiping left / right or tapping an onscreen option.

- Only use your finger when using the touchscreen as objects may damage it.

Changing the paper

1. Press the **paper chamber button** on the top-left corner of the terminal to open the panel and remove the empty paper roll tube.

2. 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.

3. Press down on the panel until it clicks shut and ensure there is a bit of paper sticking out from the chamber.
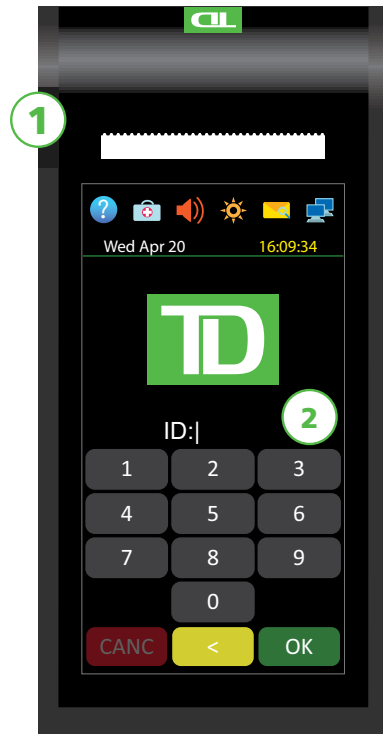
The PINpad

The PINpad is used by the customer to make transaction selections and entries.

1. **Dash keys**
    Use the ⬛ **/ dash** keys to navigate the screens and menus.

2. **Command keys**
    - ❌ = **Cancel**
    - ◀ = **Correction**
    - ⬤ = **OK** or **activate**

3. **Volume key**
    Use this key to adjust the PINpad volume.

4. **Card readers**
    a) Insert chip cards
    b) Contactless cards
    c) Swipe cards

The Communications Hub

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

- A power cable
- A power port
- A dialup port
- An Ethernet port
  Dual connection communications hubs are available upon special request.
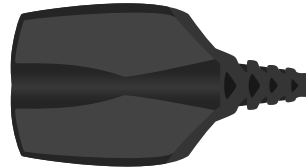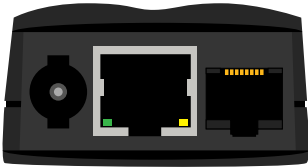
Terminal Screens

Icons

The icons on the terminal change from screen to screen. Below are the most common icons that you will use in your day-to-day business and which screen(s) they are available on. The PINpad has no interface icons.

Icon	Name	Description	Idle Screen	Home Screen
	Help	Tap this to access the *Help* screen.	✓	✓
	Service menu	This icon is only used by TD technicians.	✓	-
	Control panel	Tap this icon to access administration and configuration settings. This menu functionality is covered in our online Merchant Guide.	-	✓
	Speaker volume	Tap to access terminal's speaker volume.	✓	✓
	Screen brightness	Tap this to change terminal's screen brightness.	✓	✓
	Mail	Tap to review any priority emails.	✓	✓
	Internet status	These icons indicates if your terminal is connected to the Internet or not. If it isn't you will see 🚫 to the bottom right of the icon.	Possible	Possible
	Dial-up status	This icon indicates that your terminal is connected via dial-up.	Possible	Possible

Icon	Name	Description	Idle Screen	Home Screen
	PINpad disconnected	This icon indicates your PINpad is disconnected from the terminal. Please verify the PINpad is securely connected to the terminal.	Possible	Possible
	Lock / Log off	Tap this to log out the current user or, if you don't use login IDs, tap this icon to return to the *Idle* screen.	-	✓
	Home	Tap this to access the *Home* screen(s).	✓	✓
	Paper Advance	Tap this to advance the paper roll.	-	✓

Idle screens 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. If you require users to log on to use the terminal, your *Idle* screen will be the one on the left. After the terminal is unlocked, or if it doesn't require a login, it will appear as the screen on the right.

Terminal (locked)

Terminal (unlocked)

Home screen(s) and icons

The *Home* screen displays three or more icons that always include: **Purchase**, **Void** and **Day Close**.

- If your business requires more than 10 transaction types, there will be a second screen with the remaining icons.
- The **Service Menu** icon is replaced with the **Control Panel** icon.

Navigation

If you have more than one *Home* screen you can tell which screen you're on by looking at the two dots at the top of the screen. The red dot indicates the active screen. Place your finger on the touchscreen and swipe left or right to navigate to the desired screen.

If an icon has sub-menus, swipe up and down the screen to navigate.
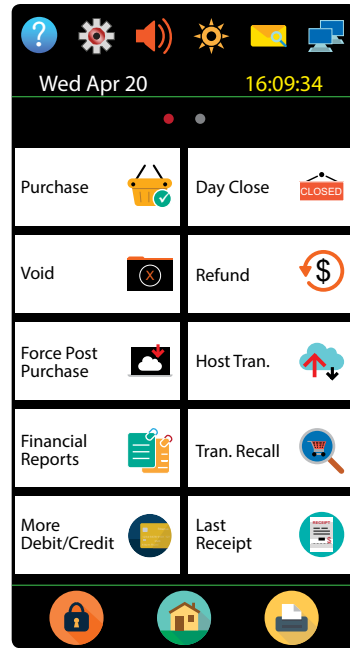
Cardholder Privacy and Security

Please refer to the *Cardholder Privacy* sheet in your Merchant Welcome Kit. It contains important information about your responsibilities to your customers and their personal and transaction information.

Terminal security

It is the Merchant's responsibility to secure their terminal and to prevent unauthorized use. The Merchant will be liable for any unauthorized use of the terminal or any user IDs or passwords. There are two user security settings:

No security (Default)

This setting does not use user IDs and passwords. 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.

Security

This option allows the user to enable a login for supervisors and operators with an ID and password or just ID login. The supervisor setup requires you to create a password. You can activate this by tapping the 🏠 / **Home** key → ⚙ **Control Panel** icon → **Logon Method**.

Fraud prevention

Please refer to the *How to Help Prevent Fraud* pamphlet in your Merchant Welcome Kit. You can also reduce fraudulent transactions on your terminal by enabling:

Force post fraud prevention

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

- Password protected — Request a supervisor or manager to enter their password.

Call for authorization fraud prevention

You can enable / disable call for authorization transactions. The default setting is OFF.

> If you want to use either of these fraud prevention features, you must enable them on each of your terminals. To do so, please call the TD Merchant Solutions Help Desk at **1-800-363-1163**.

Financial Transactions

The TD Generation terminal can perform the following transactions:

- Purchase
- Purchase (Phone / Mail)
- Force post
- Refund
- Void

- Cash*
- Pre-authorizations / Tabs*
- Gift card*
- Loyalty card / More Rewards® / Air Miles®*
- UnionPay*

* These optional transactions are covered in our online documentation at *www.TDMerchantSolutions.com/ResourceCentre.*

> Depending how you have set up your terminal, you may be required to enter a supervisor ID and password to proceed with any transaction.

Accepted card types

The terminal will accept whatever cards you indicated when you signed up. If you wish to adjust your accepted card list, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

Credit card purchase

> This transaction flow is used for credit card purchases where the credit card is present. If the purchase is via phone or mail, use the *Phone or mail purchase* instructions. If you use the incorrect purchase transaction you could incur extra charges.

1. Tap the 🏠 **/ Home** key → Purchase.
2. Enter the **dollar amount** on the terminal and tap **OK**.
3. Select one of the following payment methods: **Insert, Swipe**, **Contactless** or **Manual Entry**.

   Insert
   a) The customer enters their **PIN** and presses **OK**. Go to step 4.

   Swipe
   a) Verify the card info with what is on the screen and tap **OK**. Go to step 4.

   Contactless
   a) The customer **taps** their contactless-enabled credit card on the PINpad. In some cases the customer may be required to **swipe** or **insert** their card. Go to step 4.

   Manual entry
   a) Enter the **account number** on the PINpad and press **OK**.

b) Enter the **expiry date** on the PINpad and press **OK**.

c) A manual imprint of the credit card is required. Do you wish to continue (**NO** or **YES**)
If you selected **NO**, the transaction will be canceled.
If you selected **YES**, make an imprint of the card and continue below.

d) Enter the **CVD number** on the terminal and tap **OK**. This number is generally located on the back of the credit card. This is an optional step depending on your settings. Go to step 4.

4. The screen shows that the transaction is completed with an authorization number or approved message. If the credit card was manually entered or swiped, the customer **must** sign the receipt. Contactless transactions may prompt you to print them.

> If the purchase was for a low amount you may be offered the option to print the receipt. This receipt threshold can be set by calling the TD Merchant Solutions Help Desk at **1-800-363-1163**.

5. You can **REPRINT** the receipt or **FINISH** the transaction.

```
                          ENTER
                          AMOUNT
                            │
                            ▼
                         CONFIRM
                          AMOUNT
                            │
                            ▼
                          SELECT
                         PAYMENT
                          METHOD
        ┌─────────────┬─────┴───────┬─────────────┐
        ▼             ▼             ▼             ▼
   INSERT CARD    TAP CARD     SWIPE CARD     MANUALLY
                                              ENTER CARD
        │      YES    │     YES      ▲             │
        │       ┌─────┤      ┌───────┘             ▼
        │       ▼     ▼      │               ENTER # and
        │      DIFFERENT     │                EXP. DATE
        │      PAYMENT       │                    │
        │      REQUIRED?     │                    ▼
        ▼         │          │               IMPRINT CARD
   ENTER PIN      NO         │                 MESSAGE
        │         │          │                    │
        │         ▼          ▼                    ▼
        └───►   RECEIPTS   ◄───────────────   ENTER CVD?
                            │                  (optional)
                            ▼
                         FINISHED
```

7

Debit card purchase

1. Tap the 🏠 / **Home** key → Purchase.

2. Enter the **dollar amount** and tap **OK**.

3. Select one of the following payment methods: **Insert**, **Swipe** or **Contactless**.

    Insert / swipe
    a) The customer selects the account to use: **CHEQUING** or **SAVINGS**.
    b) The customer enters their **PIN** and presses **OK**. Go to step 4.

    Contactless
    a) The customer **taps** their contactless enabled credit card on the contactless card reader. Go to step 4.

        In some cases the customer may be required to **swipe** or **insert** their card.

4. The screen shows that the transaction is completed with an authorization number, or approved message, and the receipts print. Contactless transactions may prompt you to print them.

5. You can **REPRINT** the receipt or **FINISH** the transaction.

```
        ENTER
        AMOUNT
          │
          ▼
        CONFIRM
        AMOUNT
          │
          ▼
        SELECT
        PAYMENT
        METHOD
       ┌──┴───┐
       ▼      ▼
  INSERT or  TAP CARD
 SWIPE CARD
       │      │
       ▼      ▼ YES
  ENTER PIN  DIFFERENT
             PAYMENT
             REQUIRED?
       │       │ NO
       ▼       ▼
       RECEIPTS
          │
          ▼
       FINISHED
```

Phone or mail purchase

- These instructions are used for purchases where the card is **not** present. If the card is present at purchase, see *Credit card purchase*. If you use the incorrect purchase transaction you could incur extra charges.

- There are risks performing transactions when the credit card is not present. Ensure that you perform all of the available security checks for phone / mail purchases.

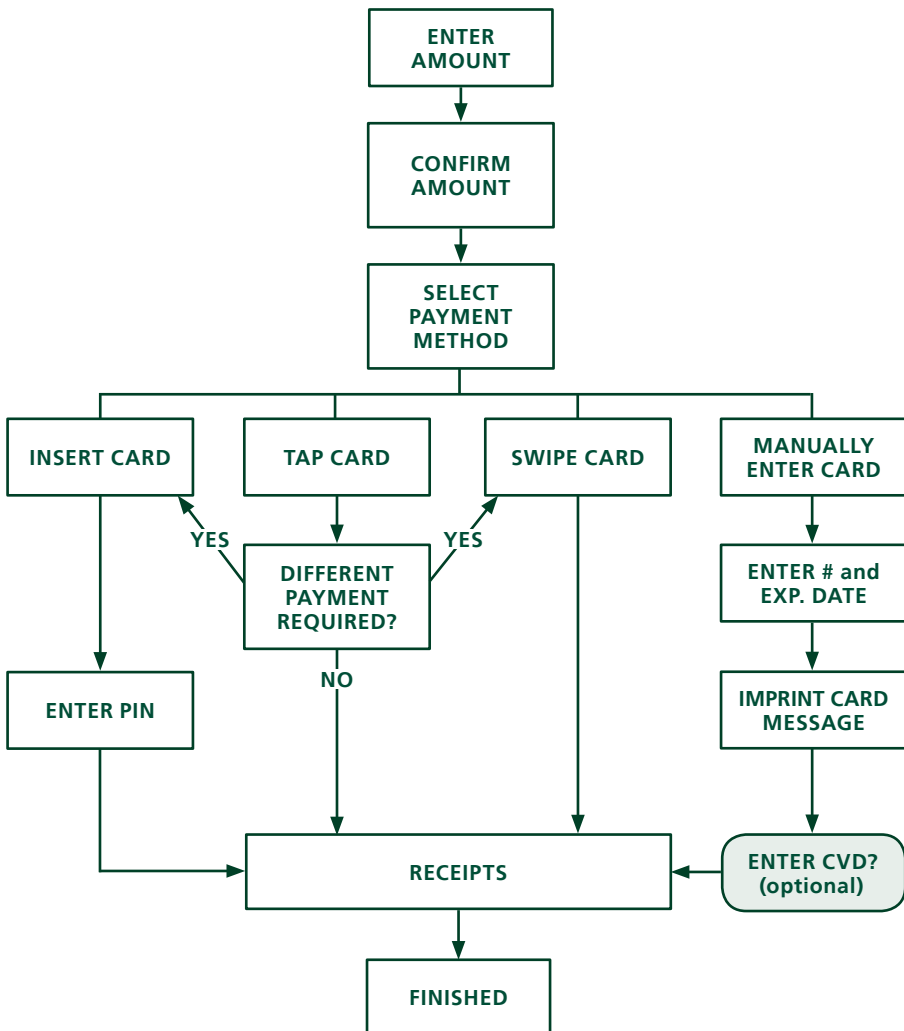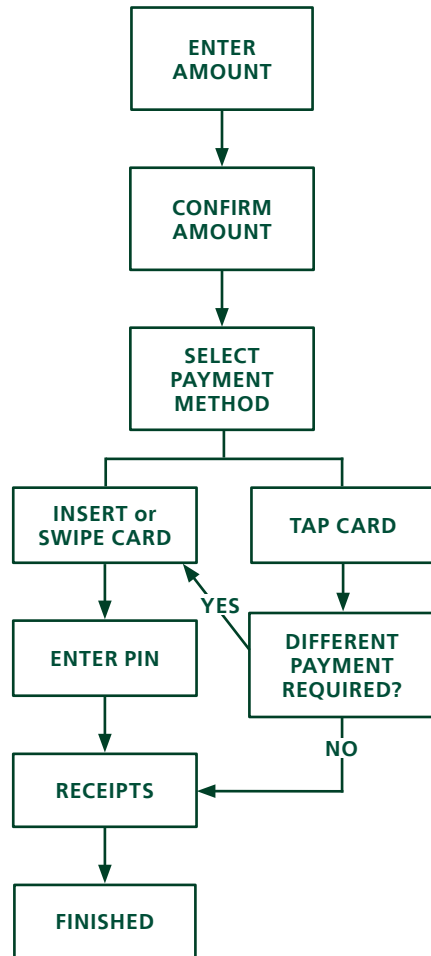1. Tap the 🏠 / **Home** key → Phone / Mail Purchase.

2. Enter the **dollar amount** and tap **OK**.

3. Enter the **account number** on the PINpad and press **OK**.

4. Enter the **expiry date** on the PINpad and press **OK** on the PINpad.

5. Enter the **CVD number** and tap on the PINpad. This step is dependent upon your settings.

6. The screen shows that the transaction is completed with an authorization number and the receipts print.

7. You can **REPRINT** the receipt or **FINISH** the transaction.

Force post purchase

This option is only used due to communication problem or that the force post is requested via the terminal.

> Before you perform this transaction you must call the TD Merchant Solutions Help Desk at **1-800-363-1163** and receive an authorization number.

1. Tap the 🏠 / **Home** key → Force Post Purchase.

2. Enter the **dollar amount** and tap **OK**.

3. Then enter the authorization number and tap **OK**. Please note, authorization numbers can include letters.

4. Select one of the following payment methods: **Insert**, **Swipe,** or **Manual Entry**.

   Insert
   a) Insert the card into the PINpad. Go to step 5.

   Swipe
   b) Swipe the card on the PINpad. Go to step 5.

   Manual
   a) Enter the **account number** and tap **OK**.
   b) Enter the **expiry date** and tap **OK**.
   c) Enter the **CVD number** and tap **OK**. Go to step 5.

5. The screen shows that the transaction is approved and the receipts print.

6. You can **REPRINT** the receipt or **FINISH** the transaction.

Void

This option recalls a transaction so that you can void it. The following instructions can access any transactions that were performed in the current open batch. If a day close has been completed you cannot recall transactions made prior to the day close and you must do a refund, not a void.

1. Tap the 🏠 / **Home** key → Void.

   Credit Card
   a) Enter the **trace #** from the receipt of the transaction to be voided and tap **OK**.
   b) Confirm that the transaction is to be canceled (**NO** or **YES**).
   c) The screen shows that the transaction is completed with an approved message and the receipts print. Go to step 2.

   Debit Card
   a) Enter the **trace #** from the receipt of the transaction to be voided and tap **OK**.
   b) Confirm that the transaction is to be canceled (**NO** or **YES**).
   c) Customer inserts their card, enters their PIN and presses **OK**.
   d) The screen shows that the transaction is completed with an approved message and the receipts print. Go to step 2.

2. You can **REPRINT** the receipt or **FINISH** the transaction.

Transaction recall

This option recalls a transaction so that you can view, void or complete / close it if it is a pre-authorization or tab. The following instructions access any transactions that were performed in the current open batch. If a day close has been completed you cannot recall transactions prior to the day close. Pre-authorization and tab transactions are covered in our online documentation at *www.TDMerchantSolutions.com/ResourceCentre*.

1. Tap the 🏠 / **Home** key → Transaction Recall.

2. Select one of the following:

   Recall all

   This recalls the details all of transactions in the open batch.
   a) A list of all transactions currently available on the terminal appear. Go to step 2.

   Recall by trace #

   This only recalls the transaction connected to the trace # in the open batch.
   a) Enter the **trace number** that you want to recall and tap **OK**. Go to step 4.

   Recall by amount

   This recalls any transaction for the entered dollar amount in the open batch.
   a) Enter the **dollar amount** and tap **OK**. Go to step 3.

   Recall by account #

   This recalls any transaction for the entered card account number in the open batch.
   a) **Swipe** or **Manually enter** the card. Go to step 3.

   Recall by invoice #

   This recalls the transaction for the entered invoice number.
   a) Enter the invoice number that you want to recall and tap **OK**. Go to step 4.

3. If there are multiple transactions, scroll to the desired one and tap **OK**.

4. Select **Void** to cancel the transaction or select **Completion** to close a pre-authorization. Tap **cancel** to leave this screen without making a selection.

Refund

You can only perform a refund on a transaction that has already been submitted for reimbursement.

> Debit refunds are disabled by default. If you wish to activate debit refunds on your terminal please call the TD Merchant Solutions Help Desk at **1-800-363-1163**.

1. Tap the 🏠 / **Home** key → Refund.

2. Enter the **dollar amount** and tap **OK**.

3. Select one of the following payment methods: **Insert / Swipe**, **Contactless** or **Manual Entry** (credit card only).

   Insert / swipe credit or debit card
   a) The customer **inserts** or **swipes** their card. Go to step 4.

   Contactless credit or debit card
   a) The customer **taps** their contactless-enabled card on the screen. Go to step 4.

Manual credit card
- a) Enter the **account number** on the PINpad and press **OK**.
- b) Enter the **expiry date** on the PINpad and press **OK**.
- c) Is this refund for a **phone / mail purchase** (**NO** or **YES**)?
  If you selected **NO**, continue below.
  If you selected **YES** got to step 4.
- d) A manual imprint of the credit card is required. Do you wish to continue (**NO** or **YES**)?
  If you selected **NO**, the transaction will be cancelled.
  If you selected **YES**, make an imprint of the card and go to step 4.

4. The screen shows that the transaction is completed with an approved message and the receipts print. Contactless transactions may prompt you to print them.

5. You can **REPRINT** the receipt or **FINISH** to complete the refund.

Receipts

Each transaction has a different receipt and most of the information is purely for record keeping. There are some points of **important information** you need to be aware of to ensure that your transactions have completed correctly.

Reprinting receipts

1. Tap the 🏠 / **Home** key → Reprint and select one of the following:

Last Receipt
- a) Confirm that you want to reprint the last receipt (**NO** or **YES**).
- b) The most recent receipt will reprint with the word **DUPLICATE** on it.

Past Receipt
- a) Swipe the card that the transaction was performed on. Any transactions that were done on the terminal by the swiped card will appear on the screen.
- b) Select the **transaction** that you want to reprint the receipt for and tap **OK**.
- c) Select **PRINT** if this is the correct transaction.
- d) The selected receipt will reprint with the word **DUPLICATE** on it.

Receipt examples

Transaction type			
C	Online chip card transaction	RF	Contactless transaction
CN	Chip card No Signature Required transaction	S	Swiped mag card transaction
CO	Off-line chip card transaction	SC	Swiped chip card fall back transaction
M	Manually entered mag card transaction	SN	Swiped No Signature Required transaction
MC	Manually entered fall back of a chip card transaction		

Card type

AM	American Express	**MD**	MasterCard Debit
DP	Debit	**PV**	Visa Debit
DS	Discover / Diners	**RC**	RCS
JC	JCB	**UP**	Union Pay*
MC	MasterCard	**VI**	Visa

* Union Pay transactions are covered in our online documentation at *www.TDMerchantSolutions.com/ResourceCentre*.

Important information

Trace #	The trace number associated with the transaction.
Inv #	The invoice number associated with the transaction.
Auth #	The authorization number associated with the transaction.
Signature	The card issuer determines when a signatures is required for a transaction so ensure that the client signs these receipts.
Approved	Always ensure that the transaction was approved as it could be **Declined**.

Credit Card   Debit Card

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

```
            Merchant Name
          Address, Postal Code
             City, Province
               2000000
             N10000000205

****      PURCHASE      ****

12-21-2015              12:29:12
Acct #  452001****5097        C
Exp Date 10/19      Card Type VI
Name: John Q Public
A00000000003101001  VISA CREDIT

Trace # 6
Inv. # 5
Auth # 75612
                    RRN 001006006
TVR 000000000000TST        F800
TC 0E19785C8DAA97AC

Total              $50.00

    (00) APPROVED THANK YOU

  Retain this copy for your records
          Merchant Copy

          Receipt Banner
          Receipt Banner
```

```
            Merchant Name
          Address, Postal Code
             City, Province
               2000000
             N10000000205

****      PURCHASE      ****

12-21-2015              12:29:12
Acct #  452001****5097        C
Account Chequing    Card Type  DP
A00000000003101001      INTERAC

Trace # 9
Inv. # 3
Auth # 75612
                    RRN 001006006
                           F800

Total              $50.00

    (00) APPROVED THANK YOU

  Retain this copy for your records
          Merchant Copy

          Receipt Banner
          Receipt Banner
```

Business Day Functions

Depending on the logon method, it may be as simple as a user performing transactions to entering a logon ID and password.

Performing day close

You have a deadline to perform a day close. This is called your balancing window and it is set on the system. If your day close is done before your balancing window ends, you'll receive same or next business day deposit for credit and debit card totals. Otherwise, they will be forwarded to the next business day.

> A day close is automatically performed on your terminal every three to five business days if one isn't performed sooner by you.

You must close your business day on **each terminal** in order to maintain accurate records and balance your accounts. Closing the business day is important as it:

- Sends any stored transactions (SAFs).
- Closes all open batches.
- Prints selected reports.

- Checks for mail, and downloads.
- Downloads available updates.
- Starts a new business day on the terminal by opening a new batch.

1. Tap the 🏠 **/ Home** key → Day Close.
2. Confirm that you want to close your business day (**NO** or **YES**). Once the process is started ensure that the terminal is not used until the day close is completed.
3. Select your report delivery method (**DISPLAY** or **PRINT**). Depending on how you have set up your day close, certain reports will print.
4. When it is completed you will see the *Business Day Closed* message.

Reprinting the day close report

1. Tap the 🏠 **/ Home** key → Reprint.
2. Select **Day Close Report**.
3. Confirm that this is correct (**NO** or **YES**).

Reporting

The following reporting options are split into two different groups, **business day** and **customized**. You have access to all of the business day reports, and these will be covered in this document. Please see our online documentation for customized reports at *www.TDMerchantSolutions.com/ResourceCentre*.

Business day reports

Tap 🏠 / **Home** key → Financial Reports → Business Day Reports and select a report.

Report	Instructions	Provides...
Terminal Detail	**DISPLAY** or **PRINT** your report.	...transaction details by card type for the current business day.
Terminal Balancing	**DISPLAY** or **PRINT** your report.	...transaction totals by card type for the current business day.
Business Day Subtotals	**DISPLAY** or **PRINT** your report.	...transaction totals by card type for the current business day. Theis report can be run without closing your business day.
Operator Detail	Select whether the report is for an individual ID (**Operator ID**), or tap the **0** key for all IDs, and tap **OK**. **DISPLAY** or **PRINT** your report.	...transaction details by card type for the current business day by operator ID.
Operator Balancing	Select whether the report is for an individual ID (**Operator ID**), or tap the **0** key for all IDs, and tap **OK**. **DISPLAY** or **PRINT** your report.	...transaction totals by card type for the current business day by operator ID.
Outstanding SAF	**DISPLAY** or **PRINT** your report.	...all stored transaction details that have not been sent for settlement.

Batch reports

Tap 🏠 / **Home** key → Reports → Batch Reports and select a report.

Report	Actions	Provides...
Transaction Details	Select which batch you want to review (**PREV** or **CURRENT**). **DISPLAY** or **PRINT** your report.	...transaction details by card type and for current or previous batch.
Totals	Select which batch you want to review (**PREV** or **CURRENT**). **DISPLAY** or **PRINT** your report.	...transaction totals by card type and for current or previous batch.

Administration

Adjusting terminal volume

1. Tap the 🔊 / **Terminal Volume** icon.

2. Drag the volume bar to the desired level and tap **TEST**.

3. When you are satisfied with the new volume level tap the ↩ / **back arrow** to exit.

Adjusting PINpad volume

1. Press 🔊 / **PINpad Volume** key.

2. Select **-** or **+** to adjust the PINpad volume by 10%.

3. When you're satisfied with the new volume level press **cancel** to exit.

Troubleshooting

If you're unable to resolve the problem after performing the following steps, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

What problems can I easily resolve?

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 problem card reader.
Display screen is blank	• Ensure that the power cable is firmly connected to the electrical outlet.
Display lighting is too bright or too dark	• Adjust the brightness setting to work with the lighting at the terminal location.
Bad Communication	• Tap **cancel** and try again.
Magnetic stripe card reader won't read cards	1. Try swiping the card more quickly, more slowly or from the top of the reader towards you.
	2. Request another form of payment. If this card can be read, the problem is with the first card.
	3. Use a cleaning card to clean the problem card reader.
Printer does not print	1. Is there is paper in the device? If there is, ensure that the paper is loaded correctly.
	2. Ensure that the paper feed is clear and that the paper roll is seated correctly.
	3. Ensure the printer lid is closed completely.
Printer jam	1. Ensure that the paper feed is clear and that the paper roll is seated correctly.
	2. Ensure the printer lid is closed completely.

Why isn't my terminal powering on?

1. Ensure that the electrical outlet has power.
2. Ensure that the power cord is fully inserted into the outlet.
3. Ensure the power cord is correctly connected to the communication adapter.
4. Power on the terminal.

Why do I see the Internet disconnected icon?

The icon will only appear when there is an Internet communication problem.

1. Is your Internet connection working properly? Verify this with another device.
2. Is your Internet cable connected properly? Unplug it and plug it back in again.
3. Is your modem / router working correctly? Unplug and plug back in your modem / router and wait for 3 to 4 minutes.

Why do I see the PINpad disconnected icon?

The icon will only appear when there is an communication problem between the PINpad and the terminal.

1. Is your PINpad disconnected from the terminal? Unplug it and plug it back in again.
2. Reboot your terminal and see if this resolves the problem.

Reference

Control panel menu

Menu option	Level 2	Level 3
User Management	Add User Change Password Remove User User List	--
Logon Method	--	--
Communications	Connection Type Setup IP Configuration Report	--
Parameter Download	Host 1 Parameters Host 2 Parameters	--
Purge Transaction Data	--	--
Receipt Banner	--	--
Reset Invoice #	--	--
Training Mode	--	
Language	--	--
Configuration Reports	Communications Host 1 Settings Host 2 Settings Card BIN Ranges EMV Parameters --------------------> EMV Public Keys	All Contact EMV Contactless EMV
Software Download	--	--
Date / Time Sync	--	--
Diagnostics Report	Upload Problem Log Print Diagnostics Report ------------>	Transactions Communications Memory General Log
System Information	--	--

Financial transactions menu

Icon	Level 2	Level 3
More Credit / Debit	Incremental Auth * Force Post Pre-Auth * Force Post Phone / Mail Purchase Force Post Incremental Auth *	--
Transaction Recall	Recall All Recall By Trace # Recall By Amount Recall By Account # Recall By Invoice # Recall Pre-Auth By Inv # * Recall All Open Pre-Auths *	--

* Pre-authorizations and tabs is covered in our online documentation at
www.TDMerchantSolutions.com/ResourceCentre.

Reports and reprint menus

Icon	Level 2	Level 3
Financial Reports	Business Day Reports	Terminal Detail Terminal Balancing Business Day Subtotals Operator Detail Operator Balancing Pre-Auth Status * Open Pre-Auth Status * Tip Totals * Outstanding SAF Cashback Totals *
Reprint	Last Receipt Past Receipt Day Close Report	--

* These functions are covered in our online documentation at *www.TDMerchantSolutions.com/ResourceCentre*.

Storing the terminal and PINpad

- They must be stored in temperatures between 0° and 50° Celsius.
- Do not leave them outdoors overnight, especially in the winter.

Maintaining the terminal and PINpad

- Don't place the terminal or PINpad on a magnetized pad — this will cause them to malfunction.
- Ensure that the Portal and PINpad are cleaned routinely with a damp cloth so that spills don't get into the inner workings.
- Use TD-approved cleaning cards for the chip and magnetic card readers.

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

Resource Centre

This Guide covers the most commonly used information in order for you to get you started, but has more features and functionality for you to explore. To find out more, please go to our resource center at *www.TDMerchantSolutions.com/ResourceCentre*.