

TD Generation Quick Reference Guide

Portal PINPad



Merchant Number

The following is your merchant number.

How do I access the...

Desktop screen?

From the *Idle* screen:

- Tap the **Unlock** icon.
OR
- Tap **OK**.

Main Menu screen?

From the *Desktop* screen:

- Place your finger on the right side of the touchscreen and swipe it to the left.



The *Idle* screen has the TD logo on it. It's the default screen that is shown on the terminal when it isn't in use.

Please note, that the following icons may be located on the *Main Menu* screen. For brevity, we've shown them on the *Desktop* screen.

Action	Icon	Navigation
Logon/Logoff		Desktop -> Log Off
Purchase (Credit/Debit)		Desktop -> Purchase
Purchase (Phone/Mail)		Desktop -> Main Menu -> Debit/Credit -> Phone/Mail Purchase
Force Post		Desktop -> Main Menu -> Debit/Credit -> Force Post -> and then: Purchase, Pre-Auth/Open Tab, Incremental Auth/Top Up Tab or Phone/Mail Purchase
Void		Desktop -> Void
Refund		Desktop -> Main Menu -> Debit/Credit -> Refund
Start Pre-Authorization/Open tab		Desktop -> Pre-Authorization or Open Tab
Increase Limit or Amount of Pre-Authorization/Tab		Desktop -> Incremental Authorization or Top Up Tab
Charge Pre-Authorization/Tab		Desktop -> Pre-Auth Completion or Close Tab
Invoice Tab		Desktop -> Main Menu -> Debit/Credit -> Invoice Tab
Day Close		Desktop -> Day Close
Reporting		Desktop -> Main Menu -> Reporting -> and then: Business Day Reports, Batch Reports, Customized Reports or Gift Card Reports

Troubleshooting

If you encounter any issues please refer to the Merchant Guide for error code resolutions. If you encounter anything that can't be resolved by the Merchant Guide or the on screen instructions, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

How do I change the paper in the Portal?

1. On the Portal you will see a tab along the left side, circled in green, just above where the paper comes out.
2. Press the tab. The top panel will open.
3. Lift the panel and remove the empty paper roll.
4. Place a new, unwrapped paper roll in the paper chamber. Be sure to insert it 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 Portal screen.
6. Close the panel so that it clicks shut and there is a bit of loose paper sticking out from the chamber.



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

How do I close out my business day?

Closing out your business day is very easy. Just tap the **Day Close** icon. Closing the business day is important as it:



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

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

Note: If a **Day Close** is not done, totals will remain in the terminal and are added to the following day's transactions. They will accumulate until a **Day Close** is done.

How do I maintain the Portal and PINPad?

To ensure that your terminal functions optimally, be sure to do the following:

- Only use your finger when using the Portal. Don't use sharp or hard objects on the Portal touchscreen or touchpad, otherwise you'll damage it.
- Don't place the Portal 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.
- The terminal must not be stored in temperatures below 0° Celsius or temperatures above 50° Celsius.