*Android paired screen shown
<table>
<thead>
<tr>
<th>MERCHANT INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merchant Name</td>
</tr>
<tr>
<td>Merchant Number</td>
</tr>
<tr>
<td>Terminal ID</td>
</tr>
<tr>
<td>Section</td>
</tr>
<tr>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>Welcome Kit and Setup</td>
</tr>
<tr>
<td>About the TD Mobile POS Solution</td>
</tr>
<tr>
<td>Financial Transactions</td>
</tr>
<tr>
<td>Administration and Configuration</td>
</tr>
<tr>
<td>Merchant Portal</td>
</tr>
<tr>
<td>Troubleshooting</td>
</tr>
</tbody>
</table>
## Section 1
### Welcome Kit and Setup

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview of the TD Mobile POS Solution</td>
<td>2</td>
</tr>
<tr>
<td>The Purpose of this Guide</td>
<td>2</td>
</tr>
<tr>
<td>What is the TD Mobile POS solution?</td>
<td>2</td>
</tr>
<tr>
<td>The Smartphone App and the PINPad</td>
<td>2</td>
</tr>
<tr>
<td>The Merchant Portal</td>
<td>2</td>
</tr>
<tr>
<td>Welcome Kit Contents</td>
<td>3</td>
</tr>
<tr>
<td>What is provided?</td>
<td>3</td>
</tr>
<tr>
<td>What do I need to do to use the TD Mobile POS solution?</td>
<td>3</td>
</tr>
<tr>
<td>Missing any components?</td>
<td>3</td>
</tr>
<tr>
<td>Setting up the TD Mobile POS</td>
<td>3</td>
</tr>
<tr>
<td>Activate your account</td>
<td>3</td>
</tr>
<tr>
<td>Charge your PINPad</td>
<td>3</td>
</tr>
<tr>
<td>Download and install the smartphone app</td>
<td>3</td>
</tr>
<tr>
<td>Enable Bluetooth® on your smartphone</td>
<td>4</td>
</tr>
<tr>
<td>Pair your Android smartphone to the PINPad</td>
<td>4</td>
</tr>
<tr>
<td>Pair your iOS smartphone to the PINPad</td>
<td>4</td>
</tr>
<tr>
<td>Confirm pairing is complete</td>
<td>4</td>
</tr>
<tr>
<td>Initialize your PINPad</td>
<td>5</td>
</tr>
<tr>
<td>How can I secure my product?</td>
<td>5</td>
</tr>
<tr>
<td>Summary</td>
<td>5</td>
</tr>
</tbody>
</table>
Overview of the TD Mobile POS Solution

The Purpose of this Guide
This guide will provide 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 the TD Mobile POS and how it can support your business needs.

This guide provides instruction on the use and functionality of the TD Mobile POS solution. The provision of Visa®, MasterCard®, Discover®, American Express® and/or Interac® Direct Payment merchant services to you (the user) by TD Merchant Solutions is governed by the Merchant Services Agreement and any other agreement(s) that govern the services that we may provide to you.

The use of the TD Mobile POS solution with respect to the provision of merchant services by a third party is governed by any agreement(s) with such third party.

What is the TD Mobile POS solution?
The TD Mobile POS solution is comprised of three components. They are the:

1. **Smartphone app** that allows you to:
   - Enter financial transactions
   - Review transactions
2. **PINPad** that allows customers to:
   - Pay for their transactions with credit or debit cards
3. **Merchant portal** website that allows you to:
   - Review prior transactions
   - Configure your receipts
   - Manage card readers and sub-merchants

The Smartphone App and the PINPad
The smartphone app and the PINPad work together as one solution.

- The smartphone app is like your electronic cash register where you enter the total dollar value (including tax) of the customer's purchase.
- The PINPad is the payment device where the customer pays for their purchase with their credit or debit card.

The Merchant Portal
The merchant portal is a website that mimics the administration capabilities of the smartphone app and is accessible via web browser.

- Merchant can review transactions and administer their account.
Welcome Kit and Setup

Welcome Kit Contents

What is provided?
The physical kit has a:

- TD Mobile POS PINPad
- Installation guide and
- USB Cable (Black)

What do I need to do to use the TD Mobile POS solution?

1. Provide an Android™ smartphone that:
   a. Has an operating system version 2.3.6 or higher
   b. Has a data plan and connectivity to an active cellular network or Wi-Fi
   c. Is Bluetooth® wireless technology capable

OR

1. Provide an iPhone™ mobile digital device that:
   a. Is a 4, 4S, 5, 5C, 5S or 6 model
   b. Has iOS operating system version 6.1.3 or higher
   c. Has a data plan and connectivity to an active cellular or Wi-Fi network
   d. Is Bluetooth® wireless technology capable

2. Download and install the TD Mobile POS app from the Google Play™ or iTunes stores onto your smartphone.

3. (Optional) Provide a computer with:
   a. Internet access
   b. Acrobat® Reader® software (most current version)
   c. An Internet browser (Chrome®, Firefox®, Safari or Opera®) or Internet Explorer® (version 9 or higher)
   d. Adobe® Flash® platform
   e. A screen resolution 1024 x 768 or greater

Missing any components?
If something is missing from your welcome kit please contact TD Merchant Solutions Help Desk at 1-877-375-7331.

Setting up the TD Mobile POS

Activate your account
By now, you will have received a welcome email with: instructions how to download the smartphone app, your username, and temporary password.
First you must activate your TD Mobile POS account from the Merchant Portal so that you can link it to your PINPad.

1. Go to the URL in your Welcome Email. If you don’t see the email in your inbox check your spam folder.
2. Enter the username and password provided in the email and select Login. The Terms and Conditions screen appears.
3. Read the terms and conditions, check I have read and accept the above Terms & Conditions, and click Activate Account. The Account Setup screen appears.
4. Enter your personal email, create your password, security questions and click Submit.
5. Click on the Manage Hardware tab. The Manage Readers screen appears.
6. Write down the Terminal ID under the Nickname column. You will need this to initialize your PINPad.

Charge your PINPad

1. Take the provided USB cable plug it into a USB power source such as a computer or a power bar with a USB charging port.
2. Plug the other end into the mini-USB port on the right side of the PINPad.
Your PINPad is now powered on and charging.

Download and install the smartphone app

1. Download and install the TD Mobile POS app from Google Play or the App Store onto your smartphone.
Enable Bluetooth® on your smartphone

1. Tap Settings -> Bluetooth -> Enable Bluetooth. Refer to the owner’s manual if your settings aren’t located here. Remain on the Bluetooth screen as you will need it for pairing your smartphone.

Pair your Android smartphone to the PINPad

1. On the PINPad
   b. A Waiting for Pairing... message appears with your device information.

2. On your smartphone
   a. Your Bluetooth screen should be open from the last step. Tap the iCMP PINPad under the Available Devices list when it appears.
   b. If you don’t see the PINPad, tap Scan for devices and tap it when iCMP appears.

3. Confirm your pairing information
   a. PINPad - A six-digit passkey appears. Confirm it is identical to the one displayed on your smartphone and press the F1 key.
   b. Android - A six-digit passkey appears. Confirm it is identical to the one displayed on your PINPad and tap Pair.
   c. PINPad - Press the x/Cancel button until you return to the Main screen - it’s the one with the TD logo.

4. Complete the pairing
   a. Log in to the TD Mobile POS app.
   b. Tap the icon in the top-left corner to access the Settings screen.
   c. Tap Manage card readers. The Manage card readers screen appears.
   d. Tap the card reader you want to connect to via Bluetooth.
   e. A green check mark appears beside the PINPad name.
   f. PINPad Main Screen - A code appears beneath BLUETOOTH line and the icon stops flashing.

Pair your iOS smartphone to the PINPad

1. On the PINPad
   a. Press F1 -> 1 (iOS Device) -> 1 (Device Discovery). The Searching... message appears.
   b. Your iOS device will appear on the screen after about five seconds. Select it and press Enter/OK.

2. On your smartphone
   a. Your Bluetooth screen should be open from the last step.

3. Confirm your pairing information
   a. PINPad - A six-digit passkey appears. Confirm it is identical to the one displayed on your smartphone and press the F1 key.
   b. iOS - A pop-up message appears with the six-digit passkey. Confirm it is identical to the one displayed on your PINPad and tap Pair.
   c. iOS - The PINPad name will appear under the devices list, and be labelled Connected.
   d. PINPad - Press the x/Cancel button until you return to the Main screen - which has a TD logo.
   e. iOS - Log onto the TD Mobile POS app.

Confirm pairing is complete
Go to the Main screen of the PINPad to confirm you’re connected.

Android
1. Bluetooth
A line of code appears beneath the BLUETOOTH label and the wireless connectivity symbol (🌎) stops flashing.
On the phone app the 📱 icon and the ✅ icon appear.

**iOS**

[Image of Bluetooth settings on iOS]

1. Bluetooth
Two computer icons appear to the left of the BLUETOOTH label and the wireless connectivity symbol (🌎) flashes.
On the phone app the 📱 icon and the ✅ icon appear.

**Initialize your PINPad**

1. Please go to the Merchant Portal. To do this use the URL provided in your Welcome Email.
2. Once there, go to Manage Hardware and in the nickname column record the terminal ID.
4. It will prompt you to enter the terminal ID. It always starts with GR. See below how to enter alpha-numeric characters.
   a. To enter the G, press 📱/F4 and then the 📱/F key. The 4 will change to a G.
   b. To enter the R press 📱/F4 and then the 📱/F key. The 7 will change to a R.
   c. The balance of the terminal ID is numbers. Finish entering the terminal ID and press 📱/OK.

**How can I secure my product?**

The TD Mobile POS PINPad is able to perform unauthorized transactions including debits to the merchant’s account due to fraudulent usage. It’s the merchant’s responsibility to take whatever steps are necessary to secure the PINPad, any usernames or passwords and to prevent unauthorized use. In any event, the merchant will be liable for any unauthorized use of the PINPad or any usernames or passwords.

You can create a PIN for the TD Mobile POS app by going to 📱 -> App PIN.
For more information see “How do I secure the app?” on page 29.

**Summary**

After reading this section you now know:

- The overall working relation of the smartphone app, PINPad and Merchant Portal
- The contents of the Welcome Kit
- The Welcome Email with your login information
- How to setup and pair the smartphone app and the PINPad
- How to protect cardholder security
- How to secure your smartphone app

In the next section you’ll learn more about each of the components mentioned in this section as well as their functions.
Section 2
About the TD Mobile POS Solution

Legend ................................................................. 8
The App ................................................................. 8
 The Screens ......................................................... 8
 Log In Screen ...................................................... 8
 Transaction Screen .......................................... 9
 Settings Screen ............................................... 9
 Transaction History .......................................... 9
 Tip Screen ........................................................ 9
 Merchant Profile ................................................. 9
 Application PIN ............................................... 10
 Change Password ............................................. 10
 Troubleshoot ...................................................... 10
 Manage card readers ....................................... 10
 Choose Language ............................................. 10
 View Terms and Conditions ......................... 10
 FAQs ............................................................... 10
 Sign Out ........................................................ 10

The PINPad .......................................................... 11
 Front of PINPad .................................................. 11
 Bottom of PINPad .............................................. 11
 Right side of PINPad ......................................... 11
 Contactless Light ............................................. 12
 Screen, Icons and Contactless card reader ........ 12
 Standby Screen .................................................. 12
 Ecomode Screen .............................................. 12
 Main Screen ...................................................... 12
 Contactless card reader .................................. 13
 Function Keys .................................................... 13
 Alpha-numeric / Command Keypad .................. 13
 Power Button .................................................... 13
 Mini-USB Port ................................................... 13

Continued on next page
Admin Menu ................................................................. 13
Card Readers ............................................................. 14

The Merchant Portal ................................................... 14
Summary .................................................................. 14
Legend

There are a few terms we use in the guide that you should know to optimize your interactions with the TD Mobile POS solution.

Admin Menu

This menu contains all the administration and configuration functions for the PINPad. It is accessed via the key.

Function Keys

The function Keys (F1, F2, F3 and F4) are used for various transactions on the PINPad.

The function keys perform the following actions:

- F1/F4 - These keys are used as option keys. For example, when given a choice, the options are listed over these keys.
- F1 is the shortcut for the Pairing screen.
- F2/F3 - Use these keys to scroll down and up on screen menus.
- F4 is the shortcut to start the Initialization process. This is only used once during initial setup.
- F Key - Press this key during alpha-numeric data entry to toggle between numeric and alpha characters.

Command Keys

The OK, Change and Cancel keys are the command keys. They are found along the right-side of the PINPad and are used extensively.

- Press OK to confirm information or an action.
- Press Change to change an entry before you press the OK key.
- Press Cancel to cancel most transactions midstream and it takes you back one screen for each press.

Card Reader/iCMP/PINPad

These terms are used interchangeably throughout the document, to refer to the PINPad.

Merchant

This is the term used for the account holder/business owner of the TD Mobile POS solution. They are responsible for administering and configuring the TD Mobile POS solution.

Sub-Merchant

This is the term used for an employee that works for the merchant’s business.

Smartphone App

This is the TD Mobile POS smartphone app that you download and use on your smartphone. It is also referred to as the smartphone app or app.

The App

The smartphone app is used by the merchant to initiate financial transactions, configure the receipts and perform various other functions.

The smartphone app includes:

- Transaction software
- Administration and configuration settings for the smartphone app

The Screens

The app has four main screens. They are the:

Log In Screen

This is the first screen that appears when you open the smartphone app. From here you will log in to the smartphone app and be able to perform financial transactions and administrative functions. To log in:

1. Tap the Username text box and enter the username provided in your welcome email.
2. Tap the Password text box and enter the password provided in your welcome email.
3. Tap Log In.
**Transaction Screen**
Once you log in to the app you will be taken to the Transaction screen. From this screen you can initiate financial transactions or access the Settings screen on the app.

- Pairing status between your smartphone app and the PINPad is displayed along the top bar via two icons. The Android or the iOS icon indicates that your smartphone device’s Internet connection is active. Otherwise this icon will appear.

  The solid icon indicates that your PINPad is paired with your smartphone as in the example below. If it’s shaded it means they are unpaired.

- Initiate financial transactions by entering a dollar amount and then tap the + button to add another amount for another item or tap Next to proceed to the next step.

  You can enter a total amount for the entire purchase, but remember each dollar entry has its own entry on the receipt. This amount must be the total amount including tax.

- Tap the icon in the top-left corner to access the Settings screen for administrative functions.

**Settings Screen**
From this screen you can configure and administer the following:

- Transaction History
- Tip
- Merchant Profile
- Application PIN
- Change Password
- Troubleshoot
- Manage card readers
- Choose Language
- View Terms and Conditions

Transaction History
This option shows you a list of up to the last 1000 transactions done on the smartphone app and PINPad.

Tip Screen
From this screen you can enable or disable tips on your TD Mobile Solution.

Merchant Profile
From here you can manage the following receipt information:

- Logo image
- Banner message
- Business email

* Android version shown
• Phone number
• Business website URL
• Business Facebook info
• Business Twitter account

Application PIN
This allows you to protect your app with a PIN after thirty seconds, one minute or five minutes of inactivity.

Change Password
From here you can change your smartphone app / web portal password.

Troubleshoot
From here you can:
  • Retrieve your last card transaction
  • Clear or send your application logs to the TD Help Desk for troubleshooting

Manage card readers
This is used when you must pair your PINPad with your phone.

Choose Language
This option allows you to select English or French for the smartphone app. The PINPad has its own setting.

View Terms and Conditions
Review the terms and conditions attached to this product.

FAQs
Use this option to access the FAQs.

Sign Out
Select this option and you are returned to the Log In screen.

This option is not available on iOS.
The PINPad

The PINPad is used by the merchant to accept the customer debit and credit card payments. It includes the following:

1. Contactless light
2. Screen, Icons and Contactless card reader
3. Function Keys
4. Alpha-numeric/command keypad
5. Magnetic stripe reader
6. Power button
7. Mini-USB/Power port
8. Chip card reader

* Android version shown
Contactless Light

This light will flash green when contactless transactions are enabled.

Screen, Icons and Contactless card reader

Standby Screen

The Standby screen is seen when the PINPad goes into idle mode and happens after approximately 60 seconds. The PINPad will automatically exit the Standby screen when a transaction is performed on the smartphone app.

We do not recommend changing the delay amount as it will increase the drain on the battery.

Ecomode Screen

The Ecomode screen is blank and appears after approximately eight minutes of inactivity in Standby mode.

The merchant must press the Power button on the right-side of the PINPad to awaken it.

Main Screen

This is the default activity screen. This screen displays important information.

iOS

1. Battery is charging
The battery icon has a pulsing line beneath it and the plug icon beside it to show when it is charging. The battery icon is always visible; charging or not.

2. Bluetooth
This area on the screen will have two states: not paired or paired. Paired means that the PINPad is connected wirelessly to the app on your smartphone.

a. Paired
A line of code appears beneath BLUETOOTH and the wireless connectivity symbol stops flashing.

b. Not Paired
The space beneath BLUETOOTH is blank and the wireless connectivity symbol flashes.

3. Security
The lock icon and number indicates that the PINPad has PCI PED Level 3 security.

Android

1. Battery is charging
The battery icon has a pulsing line beneath it and the plug icon beside it to show when it is charging. The battery icon is always visible; charging or not.

2. Bluetooth
This area on the screen will have two states: not paired or paired. Paired means that the PINPad is connected wirelessly to the app on your smartphone.

a. Paired
Two computer icons appear to the left of the BLUETOOTH label and the wireless connectivity symbol flashes.

b. Not Paired
The space to the left of the
3. **Security**
   The lock icon and number indicates that the PINPad has PCI PED Level 3 security.

**Contactless Card Reader**
This is located under the PINPad screen. To make a contactless payment the customer must tap their card against the screen. See *Card Readers* on page 14 for more information.

**Function Keys**
These keys are used to access certain screens and make on screen selections.

- **F1 Key** 
  Select the left option on the screen and this is the shortcut key for the pairing menu.

- **F2 Key** 
  Scroll down one menu selection.

- **F3 Key** 
  Scroll up one menu selection.

- **F4 Key** 
  Select the right option on the screen.
  To start the initialization process.

**Alpha-numeric / Command Keypad**
The command keys allow you to cancel, correct and confirm actions. The keys are:

- **F KEY**
- **CANCEL**
- **CHANGE**
- **OK**

**Power Button**
This button is used to power the PINPad on. You can reboot your PINPad by holding down the power button until the screen starts the reboot process.
To power it off, press and hold both the **/Change** and **/Change** buttons simultaneously.

---

**Mini-USB Port**
Use this port to charge your PINPad with a USB power source such as a computer and the cable provided.

**Admin Menu**
Press the **/Change** key to access the *Admin Menu*. The functionality available on this menu is further described in *Section 6 - Administration and Configuration*.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Sub-menu</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup Menu</td>
<td>Customization</td>
<td>Language Options</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transaction Options</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hardware Options</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Idle Timer</td>
</tr>
<tr>
<td></td>
<td>Bluetooth</td>
<td>Pair Device</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unpair Device</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Paired Device</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Security Mode</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Host 1 Param DL</td>
<td>--</td>
</tr>
<tr>
<td>Menu</td>
<td>Host 2 Param DL</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Reset Menu</td>
<td>Reset Invoice #</td>
</tr>
<tr>
<td></td>
<td>System Info</td>
<td>--</td>
</tr>
<tr>
<td>Other Functions</td>
<td>Service Menu</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>EMV Reports</td>
<td>--</td>
</tr>
<tr>
<td></td>
<td>Recent Error Rep.</td>
<td>--</td>
</tr>
</tbody>
</table>
Card Readers
Use the chip reader along the bottom of the PINPad for chip cards, the screen for contactless cards and the slot along the top for magnetic stripe cards. Below are the card readers and their PINPad location.

The Merchant Portal
To further personalize your TD Mobile POS to your business needs, there is a merchant portal website. This website will allow you to:

- Review transactions and receipts
- Edit merchant information such as phone number, email, social media accounts, etc.
- Create/edit/deactivate sub-merchants

Please see page 32 for more information.

Summary
After reading this section you now know the:

- Smartphone app screens and features
- PINPad with its screens, keys, features and card readers
- Merchant Portal

In the next section you’ll learn more the financial transactions available on the TD Mobile POS solution.
### Section 3
Financial Transactions

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protecting Cardholder Privacy</td>
<td>16</td>
</tr>
<tr>
<td>How should I store cardholder receipts?</td>
<td>16</td>
</tr>
<tr>
<td>Financial Transactions</td>
<td>16</td>
</tr>
<tr>
<td>Accepted Card Types</td>
<td>16</td>
</tr>
<tr>
<td>Payment Methods</td>
<td>16</td>
</tr>
<tr>
<td>Purchase</td>
<td>17</td>
</tr>
<tr>
<td>Cash</td>
<td>17</td>
</tr>
<tr>
<td>Credit Card (Insert)</td>
<td>17</td>
</tr>
<tr>
<td>Credit Card (Contactless)</td>
<td>18</td>
</tr>
<tr>
<td>Credit Card (Swipe)</td>
<td>18</td>
</tr>
<tr>
<td>Credit Card (Manual Entry)</td>
<td>19</td>
</tr>
<tr>
<td>Debit Card (Insert)</td>
<td>20</td>
</tr>
<tr>
<td>Debit Card (Contactless)</td>
<td>20</td>
</tr>
<tr>
<td>Debit Card (Swipe)</td>
<td>21</td>
</tr>
<tr>
<td>What do I if there is a dispute over a debit transaction?</td>
<td>21</td>
</tr>
<tr>
<td>Refunds</td>
<td>21</td>
</tr>
<tr>
<td>Cash and Credit</td>
<td>21</td>
</tr>
<tr>
<td>Void Last Transaction</td>
<td>22</td>
</tr>
<tr>
<td>Credit and Debit</td>
<td>22</td>
</tr>
<tr>
<td>Receipts</td>
<td>22</td>
</tr>
<tr>
<td>HTML and PDF Copies</td>
<td>22</td>
</tr>
<tr>
<td>Merchant Receipts</td>
<td>23</td>
</tr>
<tr>
<td>Customer Receipts</td>
<td>23</td>
</tr>
<tr>
<td>Receipt Types</td>
<td>23</td>
</tr>
<tr>
<td>Purchase Receipts</td>
<td>23</td>
</tr>
<tr>
<td>Refund Receipt</td>
<td>23</td>
</tr>
<tr>
<td>Last Transaction Void Receipt</td>
<td>24</td>
</tr>
<tr>
<td>Declined Receipt</td>
<td>24</td>
</tr>
<tr>
<td>Day Close</td>
<td>24</td>
</tr>
<tr>
<td>Close the business day</td>
<td>24</td>
</tr>
<tr>
<td>Summary</td>
<td>24</td>
</tr>
</tbody>
</table>
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 card holder’s account and transaction information including:

- Names
- Account numbers, CVD/CID/CVV, etc. CVD are 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 of printed 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 / MasterCard to inspect your premises and ensure that we can inspect the premises of any third party that is in compliance with the Visa Account Information Security Standards.

The Visa Account Information Security Standards Manual is available at www.visa.com, while the equivalent for MasterCard is available 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.

Note: The Merchant Portal retains the most recent 1000 receipts.

Financial Transactions

The TD Mobile POS solution allows you to do the following transactions:

- Purchases (Cash, Credit, Debit)
- Refunds (Cash, Credit)
- Void Last Transaction (Credit, Debit)
- End of Day or Close Business Day

Accepted Card Types

The card types accepted by the TD Mobile POS solution are:

- American Express®
- American Express® Pay
- Discover®
- Interac® Direct payment
- Interac® Flash™
- MasterCard®
- MasterCard® PayPass™
- VISA®
- Visa® Debit
- Visa payWave®

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

Payment Methods

There are three types of credit/debit card readers on the PINPad:

- Insert chipped card,
- Tap contactless card,
- Swipe the card’s magnetic stripe or
- Manually enter the credit card information

See Section 2 - About the TD Mobile POS Solution - Card Readers on page 14 for more information.
Purchase

Cash
You would use these instructions whenever a customer wants to pay for their purchase with cash.

Step 1 - Smartphone App Navigation:
1. Enter the dollar amount for each item or one total for the purchase and tap Next.
2. Review the Subtotal and Total amounts and tap Next if everything is correct.
3. Select Cash and tap Next.
4. Optional - Select the desired tip option and tap Next.
5. Enter the amount of cash that the customer gave you and tap Next.
   Provide change to the customer if necessary.
6. Enter the customer’s email address for their receipt and tap Done.

Credit Card (Insert)
You would use these instructions whenever a customer wants to insert their credit card to make a purchase.

Step 1 - Smartphone App Navigation:
1. Enter the dollar amount for each item or one total for the purchase and tap Next.
2. Review the Subtotal and Total amounts and tap Next if everything is correct.
3. Select Card payment and tap Next.
4. Confirm the dollar amount and tap Next.
5. Optional - Select the desired tip option and tap Next.

Step 2 - PINPad Navigation:
1. Customer inserts their credit card.
2. Customer confirms the amount and presses □/OK.
3. Customer enters their PIN and presses □/OK.
4. Approved.

Step 3 - Smartphone App Navigation:
1. Enter the customer’s email address for their receipt and tap Done. (Optional)
   Be sure to ask if they still want a receipt. If the client doesn’t want to provide an email address tap Skip.
   Hand written receipts are acceptable, but ensure that all the information from the phone receipt is transferred to the written receipt.
2. Tap Continue. The Additional Details screen appears.
3. Enter purchase notes, the invoice number and whether or not to include the invoice number on the receipt.
   Tap Skip to not enter this information.
4. Tap Done when finished entering the information.
   The transaction is now fully completed and the smartphone app returns to the transaction screen.
Credit Card (Contactless)

You would use these instructions whenever a customer wants to tap their credit card to make a purchase.

The total transaction amount must be equal to or less than the maximum Contactless Dollar Value. If it doesn’t, the customer will must insert their card and enter their PIN.

Step 1 - Smartphone App Navigation:

1. Enter the dollar amount for each item or one total for the purchase and tap Next.
2. Review the Subtotal and Total amounts and tap Next if everything is correct.
3. Select Card payment and tap Next.
4. Confirm the dollar amount and tap Next.
5. Optional - Select the desired tip option and tap Next.

Step 2 - PINPad Navigation:

1. Customer taps their credit card against the PINPad screen.
   The customer may be prompted to insert their credit card and enter their PIN if the amount of the purchase is higher than the upper limit for a contactless purchase.

Step 3 - Smartphone App Navigation:

1. Enter the customer’s email address for their receipt and tap Done. (Optional)
   Be sure to ask if they still want a receipt. If the client doesn’t want to provide an email address tap Skip.

Hand written receipts are acceptable, but ensure that all the information from the phone receipt is transferred to the written receipt.

2. Tap Continue. The Additional Details screen appears.
3. Enter purchase notes, the invoice number and whether or not to include the invoice number on the receipt.
   Tap Skip to not enter this information.
4. Tap Done when finished entering the information.
   The transaction is now fully completed and the smartphone app returns to the transaction screen.

Credit Card (Swipe)

You would use these instructions whenever a customer wants to swipe their credit card to make a purchase.

A signature is required for this credit card transaction. Always verify that the card holder’s signature on the receipt matches the signature on the reverse of the card.

Step 1 - Smartphone App Navigation:

1. Enter the dollar amount for each item or one total for the purchase and tap Next.
2. Review the Subtotal and Total amounts and tap Next if everything is correct.
3. Select Card payment and tap Next.
4. Confirm the dollar amount and tap Next.
5. Optional - Select the desired tip option and tap Next.

Step 2 - PINPad Navigation:

1. Customer swipes their credit card.
   Customer is requested to return the PINPad to the merchant.
2. Merchant verifies the card info. If correct, presses ▼/OK.
3. A screen appears stating the authorization number and that a signature is required.

Step 3 - Smartphone App Navigation:

1. The Signature screen appears. Hand the smartphone device to the customer to sign the onscreen receipt. Customer then taps Next and returns the smartphone to the merchant.
2. Enter the customer’s email address for their receipt and tap Done. (Optional)
   Be sure to ask if they still want a receipt. If the client doesn’t want to provide an email address tap Skip.

Hand written receipts are acceptable, but ensure that all the information from the phone receipt is transferred to the written receipt.

3. Tap Continue and the Additional Details screen appears.
4. Enter purchase notes, the invoice number and whether or not to include the invoice number on the receipt.
   Tap Skip to not enter this information.

5. Tap Done when finished entering the information. The transaction is now completed and the smartphone app returns to the transaction screen.

Credit Card (Manual Entry)
You would use these instructions whenever it is necessary to enter a customer’s credit card information.

Note: There is no prompt to enter information manually, but the ability is still there. Just enter it at the same screen where you are prompted to insert, tap or swipe the credit card.

A signature is required for this credit card transaction. Always verify that the card holder’s signature on the receipt matches the signature on the reverse of the card.

Step 1 - Smartphone App Navigation:
1. Enter the dollar amount for each item or one total for the purchase and tap Next.
2. Review the Subtotal and Total amounts and tap Next if everything is correct.
3. Select Card payment and tap Next.
4. Confirm the dollar amount and tap Next.
5. Optional - Select the desired tip option and tap Next.

Step 2 - PINPad Navigation:
1. Merchant enters the credit card number and presses □/OK.
2. Merchant enters the expiry date and presses □/OK.
4. Merchant enters the CVD and presses □/OK.

If you can’t read the CVD press □/OK without entering anything. You will then have two options: Unreadable or Not Present. Select the one which best describes why you can’t enter the CVD and proceed with the rest of the transaction.

5. A screen appears stating the authorization number and that a signature is required.

6. If the card is present, imprint the card and press □/OK.

Step 3 - Smartphone App Navigation:
1. The Signature screen appears. Hand the smartphone device to the customer to sign the onscreen receipt. Customer then taps Next and returns the smartphone to the merchant.

If the customer is not present during the transaction simply write “Customer not present”.

2. Enter the customer’s email address for their receipt and tap Done. (Optional)

Be sure to ask if they still want a receipt. If the client doesn’t want to provide an email address tap Skip.

Hand written receipts are acceptable, but ensure that all the information from the phone receipt is transferred to the written receipt.

3. Tap Continue and the Additional Details screen appears.

4. Enter purchase notes, the invoice number and whether or not to include the invoice number on the receipt.
   Tap Skip to not enter this information.

5. Tap Done when finished entering the information. The transaction is now completed and the smartphone app returns to the transaction screen.
Debit Card (Insert)

You would use these instructions whenever a customer wants to insert their debit card to make a purchase.

**Step 1 - Smartphone App Navigation:**

1. Enter the **dollar amount** for each item or one total for the purchase and tap **Next**.
2. Review the **Subtotal** and **Total** amounts and tap **Next** if everything is correct.
3. Select **Card payment** and tap **Next**.
4. Confirm the dollar amount and tap **Next**.
5. Optional - Select the desired tip option and tap **Next**.

**Step 2 - PINPad Navigation:**

1. Customer inserts their **debit card**.
2. Customer **confirms the amount** and presses **YES**.
3. Customer selects account **CHQ (F1)** or **SAV (F4)**.
4. Customer enters their **PIN** and presses **/OK**.

**Step 3 - Smartphone App Navigation:**

1. Enter the customer’s email address for their receipt and tap **Done**. (Optional)
   
   *Be sure to ask if they still want a receipt. If the client doesn’t want to provide an email address tap Skip.*

   *Hand written receipts are acceptable, but ensure that all the information from the phone receipt is transferred to the written receipt.*

2. Tap **Continue** and the **Additional Details** screen appears.
3. Enter **purchase notes**, the **invoice number** and whether or not to include the invoice number on the receipt.
   
   **Tap Skip to not enter this information.**

4. Tap **Done** when finished entering the information.
   
   The transaction is now fully completed and the smartphone app returns to the transaction screen.

Debit Card (Contactless)

You would use these instructions whenever a customer wants to tap their debit card to make a purchase.

**The total transaction amount must be less than the maximum allowed Contactless Dollar Value. If it exceeds it, the customer must insert their card and enter their PIN to verify their identity.**

**Step 1 - Smartphone App Navigation:**

1. Enter the **dollar amount** for each item or one total for the purchase and tap **Next**.
2. Review the **Subtotal** and **Total** amounts and tap **Next** if everything is correct.
3. Select **Card payment** and tap **Next**.
4. Confirm the dollar amount and tap **Next**.
5. Optional - Select the desired tip option and tap **Next**.

**Step 2 - PINPad Navigation:**

1. Customer taps their **debit card** against the PINPad screen.
   
   The customer may be prompted to insert their credit card and enter their PIN if the amount of the purchase is higher than the upper limit for a contactless purchase.

**Step 3 - Smartphone App Navigation:**

1. Enter the customer’s email address for their receipt and tap **Done**. (Optional)
   
   *Be sure to ask if they still want a receipt. If the client doesn’t want to provide an email address tap Skip.*

   *Hand written receipts are acceptable, but ensure that all the information from the phone receipt is transferred to the written receipt.*

2. Tap **Continue**. The **Additional Details** screen appears.
3. Enter **purchase notes**, the **invoice number** and whether or not to include the invoice number on the receipt.
   
   **Tap Skip to not enter this information.**

4. Tap **Done** when finished entering the information.
   
   The transaction is now fully completed and the smartphone app returns to the transaction screen.
Debit Card (Swipe)
You would use these instructions whenever a customer wants to swipe their debit card to make a purchase.

Step 1 - Smartphone App Navigation:
1. Enter the dollar amount for each item or one total for the purchase and tap Next.
2. Review the Subtotal and Total amounts and tap Next if everything is correct.
3. Select Card payment and tap Next.
4. Confirm the dollar amount and tap Next.
5. Optional - Select the desired tip option and tap Next.

Step 2 - PINPad Navigation:
1. Customer swipes their debit card.
2. Customer confirms the amount and presses YES.
3. Customer selects account CHQ (F1) or SAV (F4).
4. Customer enters their PIN and presses ▼/OK.

Step 3 - Smartphone App Navigation:
1. Enter the customer’s email address for their receipt and tap Done. (Optional)
   Be sure to ask if they still want a receipt. If the client doesn’t want to provide an email address tap Skip.
   Handwritten receipts are acceptable, but ensure that all the information from the phone receipt is transferred to the written receipt.
   Tap Skip to not enter this information.
2. Tap Continue and the Additional Details screen appears.
3. Enter purchase notes, the invoice number and whether or not to include the invoice number on the receipt.
4. Tap Done when finished entering the information. The transaction is now fully completed and the smartphone app returns to the transaction screen.

What do I if there is a dispute over a debit transaction?
If a customer questions an alleged erroneous debit card transaction, you must refer them to their 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.

Refunds
You would use these instructions whenever a customer wants to return a purchase.
You cannot refund a transaction that was declined/cancelled or already refunded.

Cash and Credit
On the app ➔ Transaction History

Step 1 - Smartphone App Navigation:
1. Tap the transaction that you want to refund. The Transaction screen appears.
2. Tap Refund. The Refund Amount screen appears.
3. Enter the amount to refund and tap Refund.
   You cannot refund more than the total amount of the purchase, but partial refunds are allowed.
4. Select the appropriate refund payment type from below.

Step 2 - CASH Refund PINPad Navigation:
1. There are no steps on the PINPad for a cash refund as cash from your register drawer is being used.

Step 2 - CREDIT Refund PINPad Navigation:
1. Take the credit card used in the transaction and:
   » Manually enter the credit card number and expiry date
   » Swipe the credit card
   » Insert the credit card card or
   » Tap the credit card.

Step 3 - Smartphone App Navigation:
1. You will see Refund for $XX.XX Approved. Tap OK to continue.
   a. If the refund is for cash, refund the cash to the customer now.
   b. An updated receipt is emailed to the...
customer if an email was previously entered for the refunded purchase.

If an email was not provided initially, retrieve refund transaction from transaction history and enter their email address and email the receipt.

c. The Transaction History screen will be updated with a refunded transaction for the amount that you entered.

Receipts

When a transaction is completed, receipts are generated for the merchant and for the customer, if the customer opted to receive one. Please use the chart below to determine what receipts are sent out.

<table>
<thead>
<tr>
<th>Purchase Type</th>
<th>HTML</th>
<th>PDF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>✓</td>
<td>-</td>
</tr>
<tr>
<td>Credit</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Debit</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

HTML and PDF Copies

The merchant and customer receive two receipts copies each via email: an HTML copy and a PDF copy. The HTML copy is displayed in the body of the email and has the following information:

- Business name, contact information and logo
- Date of the transaction and transaction ID
- Payment method (Cash, Credit or Debit) and amount
- The map with the transaction location
- Purchase notes
- List of items purchased or the total dollar amount
- Receipt banner if it is being used
- SubTotal and Total

Please note that there is a finite amount of space on the receipt. Receipt banners, individual items with photos, etc. all take up room. To ensure that you and the customer receive legible receipts, be aware of how much information you are adding to your receipts.

The PDF copy contains more transaction information than the HTML version. It contains the following:

- Transaction type
- Transaction information
- Total
- The signature required field appears on the merchant receipt if the payment method was a swiped or manually entered credit card. The digital signature will not appear on the electronic receipts, but it is stored on the Merchant Portal copy of the receipt.
- Approval

Void Last Transaction

This option allows you to void the last credit/debit card transaction that was successfully performed. This must be performed before the End of Day process takes place otherwise the transaction cannot be voided.

Credit and Debit

On the app → Transaction History

Step 1 - Smartphone App Navigation:

1. Tap the last credit/debit transaction. The Transaction screen appears.
2. Tap the Void button. The Void Transaction message appears.
3. Tap Yes.

Step 2 - PINPad Navigation:

1. If it was a debit transaction, the customer will be prompted to insert/swipe or tap their debit card.
2. Customer selects Yes to confirm the amount of the transaction. The Void screen appears.
3. Customer selects Void to proceed.
   If the transaction was on a debit card, the customer selects the account the transaction came from (CHQ or SAV), enters the PIN presses OK.

Step 3 - Smartphone App Navigation:

1. The Void approved message appears. Tap Continue.
2. If an email address was provided initially, an updated receipt is sent to the customer and the Transaction History screen will be updated with the transaction showing a ☑ on the payment type icon.
Receipt Types

Receipts are payment method dependent as each shows different information. The receipt types are purchase, refund, void and declined.

**Purchase Receipts**

There are three different purchase receipts they are cash, credit and debit with each one shows its respective payment method.

**Cash**

![Cash Receipt Example]

**Credit**

![Credit Receipt Example]

**Debit**

![Debit Receipt Example]

**Refund Receipt**

The only difference between a purchase and a refund receipt is that the refund receipt has **Refund Amount:** $XX.XX at the bottom of the receipt.

The refunded amount does not have to be the entire amount of the original purchase transaction. It can be a partial refund.
**Last Transaction Void Receipt**
Void receipts are identical to the refund receipt with the line **Refund Amount: $XX.XX** at the bottom of the receipt. This amount will be for the entire original purchase amount. See the example under Refund Receipt.

**Declined Receipt**
Declined transactions will have a red box at the top of the receipt with white text.

Attention,
This transaction was declined.
Please contact your merchant to resolve this issue

**Day Close**
In order for you to settle your transactions on the TD Mobile POS solution, you must close your business day on your smartphone app.

If you don’t close your day, the card companies will not settle your accounts.

**Close the business day**

*On the app ➔ Transaction History*

**Step 1 - Smartphone App Navigation:**
1. Tap Close sales. The Close Sales confirmation pop-up appears.
2. Tap OK to continue. A Closing sales/Closing Batch message appears.

**Step 2 - PINPad Navigation:**
1. The Close Batch/Closing Batch message appears. Select Yes to continue.
2. The batch/business day is closed. Press ☐/OK to continue.

**Summary**
After reading this section you should be able to:

- Understand the different card purchase types (insert, contactless, swipe and manual entry)
- Understand the different roles that the smartphone app and PINPad play in financial transactions
- Perform a cash, credit and debit purchases
- Perform refunds and voids

Now that you know how to perform transactions you can now learn how to administer and configure the TD Mobile POS solution.
Section 4
Administration and Configuration

Pairing.............................................................. 26
  What is pairing?.......................................................... 26
  How do I pair the PINPad to my Android Smartphone?..... 26
  How do I pair the PINPad to my iOS Smartphone? ............ 26
  How do I unpair my smartphone from the PINPad?.......... 26
  How do I verify the smartphone is paired to my PINPad? ... 26

PINPad Administration........................................... 26
  How do I download the PINPad Host 1 or 2 parameters? ... 26
  How do I verify the PINPad’s system information? .......... 27

PINPad Customization ........................................... 27
  How do I select my PINPad language? .......................... 27
  How can I prevent duplicate transactions? ....................... 27
  How do I turn on/off key beeps? ................................. 27
  How do I set the idle timer? ...................................... 27
  How do I set the PINPad sleep timer? .......................... 27

Receipts .............................................................. 28
  How do I view a customer receipt? ............................... 28
  How do I resend a customer receipt? ............................. 28
  How do I change the receipt information? ...................... 28

App Administration .............................................. 29
  How do I view the transaction history? ........................ 29

App Customization ............................................... 29
  How do I select the language? .................................... 29
  How do I manage my card readers? (Android Only) ......... 29
  How do I secure the app? ......................................... 29
  How do I change the password? .................................. 29
  How do I enable tips? ............................................. 29
  How do I view terms and conditions? .......................... 30
  How do I view the FAQs? ....................................... 30

Summary ................................................................ 30
Pairing

What is pairing?
Pairing is an essential step that connects your smartphone to the PINPad via Bluetooth so that they can communicate with one another. There are different steps for connecting an Android smartphone versus an iOS iPhone.

1. Scroll to the device you wish to unpair and press OK or press the number that corresponds to your smartphone.
2. Your smartphone device will display SUCCEEDED when they are unpaired.
3. You may have to unpair the Android or iOS smartphone before it can be paired with the PINPad. This process will vary from smartphone to smartphone so refer to the device’s owner’s manual to learn how to unpair a Bluetooth wireless technology enabled device.

How do I verify the smartphone is paired to my PINPad?
Allows you to view the name of the paired device and its address.

On the PINPad F1 -> Setup Menu -> Bluetooth -> Paired Device Info
1. Scroll to the device you wish to review and press OK or press the number that corresponds to the on screen device.
2. Your smartphone’s name and MAC address will be displayed.
Verify that the wireless icon and the PINPad icon at the top of the app screen are white to show that they are connected.

How do I unpair my smartphone from the PINPad?
Allows you to remove a paired device from the PINPad’s Bluetooth address book. When you unpair a phone from the PINPad, unpair the PINPad from your smartphone as well.

On the PINPad F1 -> Setup Menu -> Bluetooth -> Unpair Device
If your PINPad has been paired with a device it will appear here.

1. Device Discovery. Searching...

How do I pair the PINPad to my iOS Smartphone?
Allows you to set up an iOS smartphone device to be linked via Bluetooth to the PINPad. In order to use this product you must have it paired with a smartphone device.

On the PINPad F1/F1 -> iOS Device
1. Device Discovery. Searching...

How do I download the PINPad Host 1 or 2 parameters?
This option downloads parameters from the TD Hosts for the operation of the PINPad. This function is also automatically performed during the end of day process.

On the PINPad F1 -> Maintenance Menu -> Host 1 Param.DL or Host 2 Param.DL

Host 1 Params.DL
Use this option if you want to update anything dealing with financial information such as:
- Transaction types
- Interac keys

Host 2 Params.DL
Use this option if you want to update anything dealing with non-financial information such as:
- Card types
- PINPad settings
How do I verify the PINPad’s system information?

Allows a user to verify the PINPad’s system information such as operating system version. You would only need this information when contacting TD Merchant Solutions Help Desk and they would guide you through this.

On the PINPad → Maintenance Menu → System Info

1. Displays the following device information: SDK Version, OS Version, Manager Version and TDAPP Version.

How do I set the idle timer?

Allows a user to dictate how long a PINPad will sit unused before going to the Standby screen.

We recommend that you don’t change your timers as they are set to maximize your battery life.

1. Enter the number of seconds before the PINPad goes into idle mode. The default is 2 minutes.

This setting will be overwritten every time you do a Host 2 Download. If you want this to be permanent, please call TD Merchant Solutions Help Desk at 1-877-375-7331.

How do I set the PINPad sleep timer?

Allows a user to dictate how long a PINPad will sit unused before going to sleep.

We recommend that you don’t change your timers as they are set to maximize your battery life.

1. Enter the number of seconds before the PINPad goes into sleep mode. If you never want it to enter sleep mode, enter 999. The default is 45 seconds.

How can I prevent duplicate transactions?

When activated, this option helps prevent duplicate transactions from occurring on the PINPad due to user errors.

On the PINPad → Setup Menu → Customization → Transaction Options → Duplicate Trans Check

1. Turn this option ON or Off.

How do I verify the PINPad’s system information?

How do I select my PINPad language?

On the PINPad → Setup Menu → Customization → Language Options

You can select the language that is used to display messages on the PINPad.

1. Select the language option you want for your PINPad. It is either Eng/French or French/Eng.

This setting will be overwritten every time you do a Host 2 Download. If you want this to be permanent, please call TD Merchant Solutions Help Desk at 1-877-375-7331.

How can I prevent duplicate transactions?

On the PINPad → Setup Menu → Customization → Transaction Options → Duplicate Trans Check

1. Turn this option ON or Off.

How do I turn on/off key beeps?

Allows a user to enable or disable the beeps when keys are pressed or when certain conditions are met.

On the PINPad → Setup Menu → Customization → Hardware Options → Key Beep
Receipts

How do I view a customer receipt?
This option allows you to review an existing receipt on the phone app.

**On the app ➤ Transaction History**
1. Tap on the transaction that you want to view the receipt for. The Transaction Information screen appears.
2. Tap Send Receipt. The Choose a Receipt pop-up screen appears.
3. Tap Display Card Receipt Info. The Card Receipt screen appears with the transaction receipt.
4. Tap Back to exit the screen. The Transaction Information screen appears.

How do I resend a customer receipt?
This option allows you to resend the customer’s receipt to the email previously sent to or a new address.

**On the app ➤ Transaction History**
1. Tap on the transaction that you want to resend the receipt for. The Transaction Information screen appears.
2. Tap Send Receipt. The Choose a Receipt pop-up screen appears.
3. Tap Issue E-mail Receipt. The Send Receipt pop-up screen appears.
4. Enter the email address where the receipt is to be sent and tap Send. The Receipt Sent screen appears.
   
   **If an email address has already been provided, the field will already contain that address. It can be modified if the customer wants it sent to a different address.**

5. Tap OK. You are returned to the Transaction Information screen and the receipt has been resent.

How do I change the receipt information?
This option changes certain information that is displayed on your business’ HTML receipts.

If you don’t have anything to include in some of the entries, such as a Twitter account for your business, just leave them blank and they won’t appear on the receipt.

**On the app ➤ Merchant Profile**
1. Tap your logo/image placeholder.
2. Tap new photo or existing photo. Either take a new photo or select one from your smartphone.

   **The image must be a PNG or JPG file, no greater than 100 pixels high and 600 pixels in width and smaller than 5 MB in size. Your logo can only be 100 pixels by 100 pixels but can be cropped from a larger image.**

3. Crop the image until the portion of the image that you want to use is fully enclosed in the cropping area.
4. Click Save. The cropped image is now saved as your new logo.
5. Edit the message.

   **Be sure to spell check it before you save it as any spelling mistakes here will be displayed on every receipt until the message is changed again.**

   **The message content has a 140 character limit.**

6. Edit your:
   a. Email Address Support
   b. Contact Phone Number
   c. Website URL
   d. Facebook page
   e. Twitter account
7. Tap Save. You will receive an email confirming a change has been made.
App Administration

How do I view the transaction history?

**On the app** ➡️ **Transaction History**

1. The **Transaction History** screen appears. You will see up to the last 1000 transactions that have occurred. They’re organized by:
   - **Date** (most recent first)
   - **Transaction type** icons
   - Refunds have a ☺ beside it
   - Declined/cancelled transactions have an ✗ on it
   - Voided transactions have a ☻ beside them
   - Dollar amount
2. Tap a transaction to get more information.

**Every time you deactivate and reactivate this option you must create and re-enter your PIN. The software will not remember your past PINs.**

How do I change the password?

This allows you to change the smartphone app password.

**On the app** ➡️ **Change Password**

1. Enter your **Current Password**.
2. Enter the **New Password**.
3. Re-enter the password and tap **Submit**.
4. You will receive an email informing you of the change. Your new password is not included in the email. Ensure that the password is something you can easily remember.

How do I enable tips?

**On the app** ➡️ **Tip**

This allows you to enable/disable tips on your TD Mobile POS solution.

1. Turn the tip option **On** or **Off**.

App Customization

How do I select the language?

This allows you to change the language displayed on the smartphone app.

**On the app** ➡️ **Choose Language**

1. The **Choose Language** screen appears.
2. Tap an available **language** option.

How do I manage my card readers? (Android Only)

This function is necessary for you to pair your smartphone to your PINPad.

How do I secure the app?

This allows you set your app to lock after 30 seconds, one minute or five minutes of inactivity. The app is then protected by a four-digit PIN.
How do I view terms and conditions?
This allows you to review the terms and conditions for using the TD Mobile POS smartphone app.

**On the app 📱 -> Terms and Conditions**
1. The Terms and Conditions screen appears. You may review them at your leisure.
2. Tap Done to return to the Settings screen.

How do I view the FAQs?

**On the app 📱 -> FAQs**
This option will provide answers to some of your questions. Just tap on the appropriate question to view its answer.

Summary
After reading this section you should be able to:

- View, resend and modify receipts
- Configure and administer the PINPad’s settings

In the next section, you will learn how to use the online Merchant Portal.
<table>
<thead>
<tr>
<th>Section 5</th>
<th>Merchant Portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Merchant Portal</td>
<td>32</td>
</tr>
<tr>
<td>Recent Activity Tab</td>
<td>33</td>
</tr>
<tr>
<td>How do I search for a specific transaction?</td>
<td>34</td>
</tr>
<tr>
<td>How do I export transaction records?</td>
<td>34</td>
</tr>
<tr>
<td>What do all payment type icons mean?</td>
<td>34</td>
</tr>
<tr>
<td>How do I review a transaction?</td>
<td>34</td>
</tr>
<tr>
<td>How do I review or resend a receipt?</td>
<td>34</td>
</tr>
<tr>
<td>My Account Tab</td>
<td>35</td>
</tr>
<tr>
<td>Edit User Information</td>
<td>35</td>
</tr>
<tr>
<td>Edit Email Receipt</td>
<td>35</td>
</tr>
<tr>
<td>How do I edit the receipt information?</td>
<td>35</td>
</tr>
<tr>
<td>Edit Business Information</td>
<td>36</td>
</tr>
<tr>
<td>How do I edit business information?</td>
<td>36</td>
</tr>
<tr>
<td>Manage Sub-Merchants Tab</td>
<td>37</td>
</tr>
<tr>
<td>How do I add a sub-merchant?</td>
<td>37</td>
</tr>
<tr>
<td>What can sub-merchants see on the Merchant Portal?</td>
<td>38</td>
</tr>
<tr>
<td>How do I edit a sub-merchant’s level of access?</td>
<td>38</td>
</tr>
<tr>
<td>How do I change a sub-merchant password?</td>
<td>38</td>
</tr>
<tr>
<td>How do I edit a sub-merchant?</td>
<td>39</td>
</tr>
<tr>
<td>How do I deactivate or reactivate a sub-merchant?</td>
<td>39</td>
</tr>
<tr>
<td>Manage Hardware Tab</td>
<td>40</td>
</tr>
<tr>
<td>How do I deactivate a stolen or lost PINPad?</td>
<td>40</td>
</tr>
<tr>
<td>What does the Nickname column signify?</td>
<td>40</td>
</tr>
<tr>
<td>Support Tab</td>
<td>40</td>
</tr>
<tr>
<td>Summary</td>
<td>40</td>
</tr>
</tbody>
</table>
The Merchant Portal

The Merchant Portal is an online website is another way for merchants to make monitor and update their account. It has similar functionality to the smartphone app, just via the web. Some of the things you can do are:

- Review transactions and their receipts - merchant receipts are only available on the portal
- Edit merchant information such as phone number, email, social media accounts, etc.
- Create/edit/deactivate sub-merchants or other users

The information is arranged into tabs and they are the:

- Recent Activity tab
- My Account tab
- Manage Sub-Merchants tab
- Manage Hardware tab and
- Support tab
Recent Activity Tab

The Recent Activity screen is the first screen that you’ll see when you log onto the Merchant Portal.

From here you can:

1. **Navigate** to other pages via these tabs:
   - **Recent Activity** displays transaction information and allows receipts to be reviewed and/or resent.
   - **My Account** allows you to change email, business account and administration account information.
   - **Manage Sub-Merchants** allows you to add, delete and administer PINPad user accounts.
   - **Manage Hardware** allows you to deactivate any lost or stolen PINPads.
   - **Support** contains documentation, FAQs, terms of usage.

2. **Filter** by PINPad if you have more than one.

3. **Filter** by sub-merchant/user if you have more than one.

4. **Export** the transactions to a CSV file, PDF or just view them on screen as one page or print.

5. **Search** for a specific or group of transactions by a search criteria such as amount, transaction ID, trace #, etc..

6. **Filter** visible transactions by a date range.

7. **Review basic transaction information**. You can see the date it was performed on, the unique transaction ID, how it was paid for, the total transaction dollar amount and the associated receipts.
   
   To see a more details on a transaction just click on it. It will expand and display more details.

8. **Determine how many transactions are displayed** on the screen.

9. **Navigate** available activity pages.
How do I search for a specific transaction?

1. If you want to search all transactions change View Sub-Merchant to All Lines otherwise change it to the appropriate setting for the merchant or sub-merchant’s transactions that you need to search through.

2. In the Search Transactions text box type the search criteria. Below are some examples:
   - Transaction type (cash, Interac, etc.)
   - Transaction amount
   - Last 4 digits of the card number
   - Any word(s) that may be on the receipt such as an email address.
   - OR
   - Enter a date range in the Filter by Date Range boxes.

How do I review a transaction?

1. Click the transaction in question. The transaction expands.

2. Transaction Information, Payment Information, Order Summary and Related Transactions (if any) are all displayed in their own sections.

   The Related Transactions section displays any transactions associated with selected transaction. For example, a refund or void transaction would have the original purchase in this section.

3. Click on the transaction again to collapse the expanded information.

How do I review or resend a receipt?

1. Click the Receipt button beside the transaction in question. The Receipt window expands. You will see the HTML version of the receipt.

   a. Print icon
      The Print dialogue screen appears. Print the receipt as you would any other document to your printer.

   b. Resend a receipt icon
      The email address that the receipt was initially sent to is shown in the top-left corner. Ensure it is correct and click Email Receipt.

   c. Customer or Merchant receipt details icons
      Click either of these options and the appropriate financial receipt appears.

How do I export transaction records?

1. Apply any desired search or date filters on your transaction before exporting the information.

2. Click Export to CSV or Export to PDF. The Save As window appears.

3. Decide where to save the file, name it and click Save.

What do all payment type icons mean?

There is a different icon for every payment type that is accepted by the TD Mobile POS solution. They are:

- American Express
- Cash
- Interac
- MasterCard
- Visa
- Discover

As well, some transactions have an icon beside them that indicates it was either declined, refunded or voided.

- 🔴 Decline or Cancel - A red circle with an X.
- ✅ Refund - A yellow circle with a left pointing arrow.
- ❌ Void - A red circle with a line through it.
My Account Tab

From the Account tab you can change various information that is associated with your account and what appears on your receipts. Any changes made on the portal will immediately be reflected on the smartphone app and vice versa.

There are three options in the drop-down menu:

- Edit Email Receipt
- Edit Business Information
- Edit User Information (default)

Edit User Information

How do I edit my user information?
Allows the modification of primary user / business owner information.

This will not allow changes to sub-merchants. To edit sub-merchants, see How do I edit sub-merchant information? on page 37.

My Account -> Edit User Information

Step 1 - Contact Information
1. Enter the primary email address.

2. Enter the mobile phone number.

Step 2 - Security Settings
1. Enter your personal email address where security notifications will be sent.
2. Enter your password.
3. Confirm your password.
4. Select a security question from the Security Question 1 drop-down menu.
5. Enter your response to the Security Question 1 selection.
6. Select a security question from the Security Question 2 drop-down menu.
7. Enter your response to the Security Question 2 selection.
8. Verify all the information is entered correctly and click Submit.

Edit Email Receipt

How do I edit the receipt information?
Allows the user to edit what information is displayed on the receipt that is emailed to the customer after a transaction is completed.
My Account -> Edit Email Receipt
There are three sections that can be modified. They are:

- Business Logo
- Receipt Details and
- Connect With Your Customers

Step 1 - Your business logo

2. Do one of the following:
   a. Click and drag an image from your computer onto the dotted square. OR
   b. Click Choose Image File. A window opens.
   c. Select an image from your computer and click Open.
3. Drag the crop marks until the portion of the image that you want to use is framed by the cropping area.
4. Click Set Logo. The cropped image is now displayed under the Business Logo heading.
5. If this is all that you needed to change, scroll to the bottom of the screen and click Submit.

Step 2 - Your receipt details

You can create a personalized message that will appear at the bottom of every customer receipt. This is a great way to advertise upcoming sales, thank your customers for their business or place your slogan.

1. Enter the desired message in the text box provided.
   *There is a 140 character limit on the message content. Ensure you verify the information before you save it.*
2. If this is all that you needed to change, scroll to the bottom of the screen and click Submit.

Step 3 - Connect with your customers

This section allows you to optionally list all your contact and social networking information that is to be included at the top of each emailed receipt.

1. Enter your Email address (optional).
2. Enter your Phone number (optional).
3. Enter your Website URL (optional).
4. Enter your company Facebook page (optional).
5. Enter your LinkedIn URL (optional).
6. Enter your Twitter account (optional).
7. Click Submit to save your changes.

Edit Business Information

How do I edit business information?
Allows the user to edit general business information such as business email and phone number.

My Account -> Edit Business Information

1. Enter your Business Email.
2. Enter your Business phone.
3. Verify the information is entered correctly and click Submit.

Contact the TD Merchant Solutions Help Desk at 1-877-375-7331 to make any further changes.
Manage Sub-Merchants Tab

From the Manage Sub-Merchants tab you can create, modify and activate/deactivate sub-merchants. Sub-merchants are users (other than the business owner) that will have access to various aspects of the TD Mobile POS solution.

**Sub-Merchants** screen. A message appears stating that Sub-merchant Username1 was created successfully. The user will be shown in the list below with their Status as Pending. It will change to Active once they log into the Merchant Portal or App.

**Step 2 - Sub-Merchant Actions**

The following actions must be taken by the sub-merchant that was just created.

1. The sub-merchant will receive an email at the one entered in Step 1 - Merchant Actions.
2. They must log on to the Merchant Portal/App with the sub-merchant information provided in the email.
3. Read the terms and conditions, check I have read and accept the above Terms & Conditions, and click Activate Account. The Account Setup screen appears.
4. Enter their Personal Email address.
5. Enter their new password.
6. Re-enter the new password.
7. Select a question from the Security Question 1 drop-down menu and enter the answer.
8. Select a question from the Security Question 2 drop-down menu and enter the answer.
9. Verify all the information is correct and click Submit.

An email will be sent to them indicating that the changes have been made and their status will now change to Active.

**How do I add a sub-merchant?**

**Step 1 - Merchant Actions**

1. Enter the user’s **First Name**.
2. Enter the user’s **Middle Name**. (Optional)
3. Enter the user’s **Last Name**.
4. Enter their **Primary Email**.
5. Create their **User Name**.
6. Enter the user’s **Mobile Phone** number.
7. Enter the **Business Phone** number.
8. Click **Submit**. You are returned to the Manage

**Manage Sub-Merchants -> Click Add Sub-Merchant**
**What can sub-merchants see on the Merchant Portal?**

Once the sub-merchant has activated their account they can log in to the Merchant Portal and see the following tabs:

1. **Recent Activity Tab** - Sub-merchants can review their transaction history but cannot view anyone else’s activities. For more information see page 33.
2. **My Account Tab** - Sub-merchants can modify their own basic account information. For more information see page 35.
3. **Support Tab** - Sub-merchants can view all options under this tab. For more information see page 40.

**How do I edit a sub-merchant’s level of access?**

You can provide or restrict access to certain features for existing sub-merchants by clicking on their username.

*Manage Sub-Merchants* -> *Click Sub-Merchant Username*

1. Go to the **Sub-Merchant Settings** section.
2. You have three options:
   - **Can Access TD Mobile POS**
     The sub-merchant can access the Merchant Portal. The default is **ON**.
   - **Can Use Virtual Terminal**
     Not currently available.
   - **Send Receipt to Sub-Merchant**
     The sub-merchant will receive an emailed transaction receipt (PDF) for each transaction they complete. The default is **OFF**.
   - **Send Receipt to Merchant**
     The merchant will receive an emailed transaction receipt (PDF) for each transaction the sub-merchant completes. The default is **OFF**.

**How do I change a sub-merchant password?**

Allows you to change a sub-merchants password.

*Manage Sub-Merchants* -> *Click Sub-Merchant Username*
1. Go to the Password section.
2. Reset the password automatically or manually:
   Automatically
   a. Click Reset Password. A confirmation pop-up appears.
   b. Confirm the request. A pop-up appears stating that the password has been changed and an email has been sent to the sub-merchant with a new temporary password. They must click the link in the email as if they were a new sub-merchant.
   Manually
   a. Enter a new password.
   b. Retype the password.
   c. Click Submit. Your changes are now saved.
   The sub-merchant will not receive an email but can now log on with the password you just created.

How do I edit a sub-merchant?

Manage Sub-Merchants -> Click the Sub-Merchant Username
1. Go to the Account Information section.
2. Edit any of the following sub-merchant information:
   a. First name
   b. Middle name (Optional)
   c. Last name
   d. Primary Email
   e. Mobile Phone
   f. Business phone.
3. Click Submit.

How do I deactivate or reactivate a sub-merchant?

Manage Sub-Merchants -> Click Sub-Merchant Username
1. Go to the Sub-Merchant Settings section.
2. Click the appropriate box to Deactivate or Activate the sub-merchant. A confirmation pop-up appears.
3. Confirm the request. The sub-merchant and merchant will receive emails confirming the changes have been made.

Once the sub-merchant is deactivated you will no longer be able to edit their profile.
You can also reactivate/deactivate sub-merchants from the Manage Sub-Merchant landing page.
If a sub-merchant is being reactivated, they will have to reply to the activation email before they are fully active.
Manage Hardware Tab

From the Manage Hardware tab you can deactivate your PINPad(s) in case they are lost or stolen.

**How do I deactivate a stolen or lost PINPad?**

**Manage Hardware**

1. In the Actions column for the PINPad to be deleted, click Deactivate. A Notes pop-up appears.
2. Enter the reason why you’re deactivating the PINPad and click Deactivate. You will now see that the PINPad status shows as Deactivated.

**What does the Nickname column signify?**

The Nickname column represents your unique terminal ID. You need this information when initializing your PINPad.

Support Tab

From the Support tab you can access:

- Helpful Documents
- Terms of Usage
- FAQs

**Summary**

After reading this section you now know:

- How to use the Merchant Portal / App
- How to administer and customize your account
- How to create sub-merchants

In the next section, you will learn how to troubleshoot the Mobile POS solution.
Section 6
Troubleshooting

Troubleshooting Bluetooth ................................................................. 42
  Why can’t I pair my smartphone with the PINPad? ................. 42
  What can interfere with Bluetooth connectivity? ................. 42
  Pair your Android smartphone to the PINPad ....................... 43
  Pair your iOS smartphone to the PINPad ............................... 43
  Confirm pairing is complete ................................................... 43

Troubleshooting the App ................................................................. 44

Troubleshooting Your PINPad ....................................................... 47
  What PINPad hardware problems could I experience? ....... 53

Contacting Help Desk ................................................................. 53

Summary .................................................................................. 54
Troubleshooting Bluetooth

Why can’t I pair my smartphone with the PINPad?

There could be various reasons for why your smartphone is unable to pair with the PINPad. Below are some common reasons and their resolution:

1. Is your smartphone’s Bluetooth turned on?
   You should see the ® symbol at the top of your smartphone screen. If you don't, go into the settings to enable it.
2. Is your smartphone in discoverable mode?
   In order to pair Bluetooth you have to make your smartphone visible or discoverable to the PINPad.
   Once the devices discover one another, the PINPad will display a numeric code that you must confirm or enter on your smartphone. After you do this, the smartphone and PINPad are paired.
   Note: Your smartphone only stays in discoverable mode for a few minutes. If you take too long you will need to re-enter discoverable mode.
3. Delete the PINPad from your smartphone and rediscover it.
   If you have paired your smartphone with the PINPad initially and are now having problems reconnecting them, remove or forget the PINPad on your smartphone and re-add it.
   Go to your Bluetooth screen on your smartphone and either forget the device or remove it from the list of connected devices.
4. Restart the PINPad and smartphone.
   Resetting the devices sometimes resolves the issue.
5. Is the PINPad and your smartphone close to one another when trying to pair them?
   Ensure that both your smartphone and the PINPad are near one another when attempting to pair them. Side-by-side is ideal.

What can interfere with Bluetooth connectivity?

The biggest issue is that the frequency range (2.4GHz) used by Bluetooth is shared by other equipment and can be blocked by certain materials. There are steps that you can take that will minimize Bluetooth connectivity issues. They are:

1. Distance between the devices
   Ensure that you keep your smartphone and PINPad in the same room if possible. Obstacles like walls, ceilings/floors or furniture may block or weaken the Bluetooth signal.
2. Signal interference
   Bluetooth uses the 2.4GHz frequency range which is shared by other devices such as:
   » Microwaves
   » Wi-Fi devices (routers, VoIP phones, wireless cameras)
   » Fluorescent office lighting
   » Some cordless phones and baby monitors
   To avoid connectivity and data issues, avoid going near these devices when using the TD Mobile POS solution. Of course, you can’t always avoid sources of interference such as Wi-Fi or fluorescent lighting.
   To accommodate this, Bluetooth is able to adapt to some interference from multiple sources depending on its strength. But, if you encounter too many sources of interference at once, your devices may not be able to adapt and they could lose connectivity.
3. Your body
   Your body doesn’t generate a frequency that interferes with Bluetooth, but it can actually block Bluetooth signals. For example, if you carry your smartphone in your back pocket and the PINPad in your chest pocket, you may cause the Bluetooth connection between the two devices to drop.
Pair your Android smartphone to the PINPad

1. On the PINPad
   b. The Waiting for Pairing... message appears with your device information.

2. On your smartphone
   a. Tap Settings -> Bluetooth -> and tap the iCMP PINPad under the Available Devices list.

   If you don’t see the iCMP PINPad, tap Scan for devices.

   b. Tap the PINPad when it appears.

3. Confirm your pairing information
   a. PINPad - Confirm that the passkey number onscreen is the same as on the smartphone and select YES (F1).
   b. Smartphone - Confirm that the passkey number onscreen is the same as on the PINPad and tap PAIR.
   c. PINPad - The Pairing Succeeded message appears on the PINPad.

4. Manage your PINPad / card reader
   a. Log in to the smartphone app.
   b. Tap the icon in the top-left corner to access the Settings screen.
   a. Tap Manage card readers. The Manage card readers screen appears.
   b. Tap the card reader you want to connect to via Bluetooth.

   A green check mark appears beside the connected PINPad. Your smartphone is now connected to the PINPad via Bluetooth.

Pair your iOS smartphone to the PINPad

1. On the PINPad
   b. The Device Discovery screen appears with the Searching... message.
   c. Your iOS device will appear on the screen after about five seconds. Select it and the Start Pairing message appears.
   d. IOS Pairing screen appears with a request to confirm the passkey.

2. On your smartphone
   a. The Bluetooth Pairing Request pop-up screen appears.

3. Confirm your pairing information
   a. PINPad - Confirm that the passkey number onscreen is the same as on the smartphone and select YES (F1).
   b. Smartphone - Confirm that the passkey number onscreen is the same as on the PINPad and tap PAIR.
   c. The Pairing Succeeded message appears on the PINPad.

Confirm pairing is complete
Go to the Main screen to confirm that your PINPad and smartphone are connected.

Android

1. Bluetooth

A line of code appears beneath the BLUETOOTH label and the wireless connectivity symbol ( ≡ ) stops flashing.

1. Bluetooth

Two computer icons appear to the left of the BLUETOOTH label and the wireless connectivity symbol ( ≡ ) flashes.
## Troubleshooting the App

The smartphone app has a limited number of self-explanatory error messages that you could potentially see. Some errors are easily identifiable and can be resolved by you immediately. Others will require that you contact the TD Merchant Solutions Help Desk at 1-877-375-7331. These will have an icon in the **Action Required** column. Be sure to follow the instructions in the **Action Required** column before calling the TD Merchant Solutions Help Desk.

### “C” Error Messages

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card reader connection failed</td>
<td>Please ensure that it is turned on and paired with your smartphone.</td>
</tr>
<tr>
<td>Card Reader Not Connected</td>
<td>1. Press the power button. If the PINPad powers on, tap Continue on the smartphone app and continue with the transaction.</td>
</tr>
<tr>
<td></td>
<td>2. If it doesn’t power on, charge your PINPad.</td>
</tr>
<tr>
<td></td>
<td>3. If your PINPad doesn’t accept a charge, call the TD Merchant Solutions Help Desk at 1-877-375-7331.</td>
</tr>
<tr>
<td>Card reader Not Paired</td>
<td>Please refer to “Pairing” on page 26 for information on how to pair your smartphone with the PINPad for the first time.</td>
</tr>
<tr>
<td>Cart Empty</td>
<td>The cart was already empty when you tapped the icon.</td>
</tr>
<tr>
<td>Connection Required</td>
<td>1. You don’t have an Internet connection and one is required in order for the TD Mobile POS to work.</td>
</tr>
<tr>
<td></td>
<td>2. Please review your connection and contact your Internet service provider if necessary to resolve the lost connection.</td>
</tr>
</tbody>
</table>

### “D” Error Messages

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Declined</td>
<td>1. Please have ask the customer try another account or card or use cash if possible.</td>
</tr>
<tr>
<td></td>
<td>2. Please press /OK to continue when alternate form of pay is available or /Cancel to cancel the transaction.</td>
</tr>
</tbody>
</table>
### “E” Error Messages

<table>
<thead>
<tr>
<th>Error</th>
<th>Action Required</th>
</tr>
</thead>
</table>
| At least one field must have information provided. | 1. You must enter either a message for the purchase or an invoice number to press **Next**.  
2. If you want to skip this step tap **Skip**. |

### “I” Error Messages

<table>
<thead>
<tr>
<th>Error</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invalid E-mail Address</td>
<td>If you’re sending the customer a receipt via email, the email address must follow the proper email format and greater than five characters in length: <a href="mailto:Email_Name@Service_Provider.Domain">Email_Name@Service_Provider.Domain</a></td>
</tr>
<tr>
<td>Your e-mail address must contain a minimum of five characters. Please enter a valid e-mail address.</td>
<td>The email address must have at least five characters.</td>
</tr>
<tr>
<td>Invalid E-mail Address</td>
<td>If you’re sending the customer a receipt via email, the email address must follow the proper email format and greater than five characters in length. <a href="mailto:Email_Name@Service_Provider.Domain">Email_Name@Service_Provider.Domain</a></td>
</tr>
<tr>
<td>A valid e-mail address is required to send a receipt.</td>
<td></td>
</tr>
<tr>
<td>Invalid image format</td>
<td>Your company logo must be a PNG or JPG.</td>
</tr>
<tr>
<td>Please try again.</td>
<td></td>
</tr>
</tbody>
</table>

### “L” Error Messages

<table>
<thead>
<tr>
<th>Error</th>
<th>Action Required</th>
</tr>
</thead>
</table>
| Login Failed                               | Please check that your smartphone is connected to your service provider. Some things that can prevent this are:  
- Airplane mode is engaged.  
- Your data connection is engaged and the smartphone cannot connect to the Internet.  
- You’re in a location with no service. |
| Action cannot be completed. Please check your connectivity and try again. | If you can’t create a connection, power cycle your phone. If that does not resolve the issue, contact your smartphone service carrier. |
| Login Failed                               | You have entered an incorrect username and/or password.  
Please recheck your username is correct and ensure that you enter the correct password. Please check that you do not have the CAPS lock on. The password is case sensitive.  
If you are unable to remember your username or password, please follow username and password reset procedure. |
### “M” Error Messages

<table>
<thead>
<tr>
<th>Error Messages</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Too Long</td>
<td>The message must be 140 characters or less.</td>
</tr>
<tr>
<td>Customer message too long.</td>
<td></td>
</tr>
<tr>
<td>Missing Credentials</td>
<td>A valid password is expected and must be entered at the</td>
</tr>
<tr>
<td>Please enter a password.</td>
<td>Mobile POS app logon screen.</td>
</tr>
<tr>
<td>Missing Credentials</td>
<td>Please ensure you are entering the correct password for</td>
</tr>
<tr>
<td>Please enter a username and</td>
<td>the username in the correct field on the logon screen.</td>
</tr>
<tr>
<td>password.</td>
<td></td>
</tr>
</tbody>
</table>

### “N” Error Messages

<table>
<thead>
<tr>
<th>Error Messages</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Connection Detected</td>
<td>Please check that you have a connection to your service</td>
</tr>
<tr>
<td>It seems that you’ve lost</td>
<td>provider, i.e. airplane mode is not engaged, data</td>
</tr>
<tr>
<td>connectivity. You must have</td>
<td>connection is engaged and that the smart phone can</td>
</tr>
<tr>
<td>a network connection in order</td>
<td>connect to the Internet. If there is no connection:</td>
</tr>
<tr>
<td>to continue. Please check your</td>
<td>• Please check that isn’t disabled on your smartphone. If</td>
</tr>
<tr>
<td>network settings and try again.</td>
<td>it is disabled, re-enable and see if there is signal.</td>
</tr>
<tr>
<td>No Network Connection</td>
<td>• If there still isn’t a signal, please power cycle your</td>
</tr>
<tr>
<td>Passwords cannot be changed</td>
<td>smartphone.</td>
</tr>
<tr>
<td>offline mode. Please try again</td>
<td>• If there still isn’t a signal, move to an area that you</td>
</tr>
<tr>
<td>later.</td>
<td>are receiving signal or check with your carrier for any</td>
</tr>
<tr>
<td></td>
<td>issues they may be experiencing.</td>
</tr>
</tbody>
</table>

### “P” Error Messages

<table>
<thead>
<tr>
<th>Error Messages</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please enter a valid username.</td>
<td>Please ensure you have entered a valid username in the</td>
</tr>
<tr>
<td>Please click Try Again and then</td>
<td>correct field on the app logon screen.</td>
</tr>
<tr>
<td>enter a valid username to</td>
<td></td>
</tr>
<tr>
<td>continue.</td>
<td></td>
</tr>
<tr>
<td>Password Error</td>
<td>Enter the correct password. If you have forgotten your</td>
</tr>
<tr>
<td>The password entered does not</td>
<td>password you will have to request that it be reset from</td>
</tr>
<tr>
<td>match the password on file.</td>
<td>the app.</td>
</tr>
</tbody>
</table>

### “R” Error Messages

<table>
<thead>
<tr>
<th>Error Messages</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reader Not Paired</td>
<td>You have tried to do a card payment transaction and your</td>
</tr>
<tr>
<td>Your mobile device must be</td>
<td>smartphone isn’t paired with the PINPad.</td>
</tr>
<tr>
<td>paired with an iCMP before you</td>
<td>Please pair your smartphone with the PINPad.</td>
</tr>
<tr>
<td>can process payments.</td>
<td></td>
</tr>
</tbody>
</table>
"S" Error Messages

Security Question Error
Please select two different security questions from the menu.

Session Expired
You have been logged out due to inactivity.

"U" Error Messages

Unauthorized Reader
You are not authorized to use the reader that is connected. Please connect to a different reader or contact technical support.

"V" Error Messages

Void Transaction Declined
Your void request cannot be completed because the transaction has already been settled.

Troubleshooting Your PINPad

With any equipment, sometimes there will be a problem. With the TD Mobile POS PINPad, error messages are displayed on screen. Below is a list of error messages that you could see 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 Solutions Help Desk at 1-877-375-7331. These will have an icon in the Action Required column. Be sure to follow the instructions in the Action Required column before calling TD Merchant Solutions Help Desk.

"A" Error Codes

Amount $0.00 Not Allowed
Amount entered was $0.00.

"B" Error Codes

Bad Communication
A communication failure was detected after the transaction was initiated.

Action Required

You cannot choose the same Security Question for the first and the second question.

Your smartphone app has been idle too long. The server has logged you out. You will have to log back in using valid username and password.

Please connect to a different reader. If you don’t have another reader, or the problem persists, call the TD Merchant Solutions Help Desk at 1-877-375-7331.

You cannot void the last transaction after it has been settled. You must now perform a refund.

Please enter a new amount that is greater than zero and press /OK.

Please press /Cancel and try the transaction again. If the problem persists, ensure your internet connection is working correctly.
### “C” Error Codes

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Card Error</strong></td>
<td>Please remove the card and try inserting it again. Allow three consecutive attempts of the card insertion before asking for another payment method.</td>
</tr>
<tr>
<td><strong>Please Try Again</strong></td>
<td></td>
</tr>
<tr>
<td>The PINPad failed to read the chip on the inserted card.</td>
<td></td>
</tr>
<tr>
<td><strong>Card Error</strong></td>
<td>Please remove the card from the chip reader and swipe it through the magnetic strip reader.</td>
</tr>
<tr>
<td><strong>Use Magnetic Stripe</strong></td>
<td></td>
</tr>
<tr>
<td>The PINPad failed to read the chip on the inserted card.</td>
<td></td>
</tr>
<tr>
<td><strong>Card Removed</strong></td>
<td>Please process the transaction again, while instructing the cardholder not to remove the card until indicated by the PINPad.</td>
</tr>
<tr>
<td><strong>Too Soon</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Try Again</strong></td>
<td></td>
</tr>
<tr>
<td>The chip card was removed from the PINPad before the transaction was completed.</td>
<td></td>
</tr>
<tr>
<td><strong>Close Batch Failed</strong></td>
<td>Please retry the End of Business Day transaction.</td>
</tr>
<tr>
<td><strong>End Of Business Day</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Not Complete</strong></td>
<td></td>
</tr>
<tr>
<td>The PINPad failed to complete a Batch Close transaction during the End of Business Day.</td>
<td></td>
</tr>
<tr>
<td><strong>Close Batch Now</strong></td>
<td>Please perform a Day Close immediately. See “Day Close” on page 24 for more information.</td>
</tr>
<tr>
<td>The PINPad has reached the maximum number of transactions that can be stored before the business day must be closed.</td>
<td></td>
</tr>
<tr>
<td><strong>Close Batch Soon</strong></td>
<td>A Batch Close must be processed before the next 20 transactions to allow the PINPad to continue processing. Please perform a Day Close immediately. See “Day Close” on page 24 for more information.</td>
</tr>
<tr>
<td>The PINPad has almost reached the maximum number of transactions (1000) that can be accumulated for a batch.</td>
<td></td>
</tr>
<tr>
<td><strong>Customer to Insert</strong></td>
<td>Please press ▼/Cancel or ▲/OK to cancel the display and Insert the card into the chip reader on the PINPad.</td>
</tr>
<tr>
<td><strong>Chip Card</strong></td>
<td></td>
</tr>
<tr>
<td>The cardholder attempted to swipe a chip card on the PINPad.</td>
<td></td>
</tr>
</tbody>
</table>

### “D” Error Codes

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Download</strong></td>
<td>Please perform a Host 1 Parameter Download. See page 26 for more information.</td>
</tr>
<tr>
<td><strong>Host 1 Parameter First</strong></td>
<td></td>
</tr>
<tr>
<td>The PINPad requires a Host 1 Parameter Download.</td>
<td></td>
</tr>
</tbody>
</table>
### Download

**Full Host 2 Params First**

The PINPad requires a full Host 2 Parameter Download.

Please perform a Host 2 Parameter Download. See page 26 for more information.

### Troubleshooting

#### “E” Error Codes

<table>
<thead>
<tr>
<th>Error Description</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Business Day</td>
<td>Please press [Cancel] or [OK] to return to idle screen.</td>
</tr>
<tr>
<td>Already Completed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The end of day transaction has already been completed successfully.</td>
</tr>
<tr>
<td>End of Day Process</td>
<td>Please retry the day close.</td>
</tr>
<tr>
<td>Cancelled</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Day Close transaction was cancelled.</td>
</tr>
</tbody>
</table>

#### “F” Error Codes

<table>
<thead>
<tr>
<th>Error Description</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faulty Card</td>
<td>Please try swiping the card again. If that fails, ask the customer to use another card or form of payment.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### “H” Error Codes

<table>
<thead>
<tr>
<th>Error Description</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host 1 Download Not</td>
<td>Please try the Host 1 Download again.</td>
</tr>
<tr>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the problem persists, call the TD Merchant Solutions Help Desk at 1-877-375-7331.</td>
</tr>
<tr>
<td>Host 2 Download Not</td>
<td>Please try the Host 2 Download again.</td>
</tr>
<tr>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the problem persists, call the TD Merchant Solutions Help Desk at 1-877-375-7331.</td>
</tr>
</tbody>
</table>

#### “I” Error Codes

<table>
<thead>
<tr>
<th>Error Description</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insert Card In Chip</td>
<td>Please ask the customer to insert the credit/debit card into the PINPad chip reader.</td>
</tr>
<tr>
<td>Reader</td>
<td></td>
</tr>
</tbody>
</table>
### “I” Error Codes

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Description</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Error</td>
<td>Call Help Desk AAAAAAAAAAAAA AA…… stands for component name</td>
<td>Internal Error Call Help Desk NNNNNNNNNNNN NN…… stands for app information CCCCCCCCCCCC CC…… stands for error code Call the TD Merchant Solutions Help Desk at 1-877-375-7331.</td>
</tr>
<tr>
<td>Invalid Date</td>
<td>You have entered an invalid date in the Service menu.</td>
<td>Please enter a correct date.</td>
</tr>
<tr>
<td>Invalid Expiry Date</td>
<td>The customer’s card has expired.</td>
<td>Please have the customer provide a valid card or different form of payment.</td>
</tr>
<tr>
<td>Invalid Password</td>
<td>The password entered is incorrect.</td>
<td>Please re-enter and try again. If the problem persists, call the TD Merchant Solutions Help Desk at 1-877-375-7331.</td>
</tr>
<tr>
<td>Invalid Time</td>
<td>You have entered an invalid time in the Service menu.</td>
<td>Please enter a correct time.</td>
</tr>
</tbody>
</table>

### “M” Error Codes

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Description</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merchant Setup Incomplete</td>
<td>Occurs when attempting a financial transaction when the Host 1 Parameters have not been successfully downloaded.</td>
<td>Please perform a Host 1 Parameters download.</td>
</tr>
<tr>
<td>Must Close Business Day</td>
<td>A Host 1 download cannot be performed if there are outstanding transactions.</td>
<td>Please perform an end of day/business day close.</td>
</tr>
</tbody>
</table>

### “N” Error Codes

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Description</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Match</td>
<td>An Interac card was used and the account type selected (CHQ or SAV) does not match what exists on the account.</td>
<td>Please retry the transaction with the correct account type or another form of payment.</td>
</tr>
<tr>
<td>No Response From host</td>
<td>The PINPad has timed out while trying to contact the host.</td>
<td>Please resubmit the transaction.</td>
</tr>
</tbody>
</table>
### "N" Error Codes

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Accepted</td>
<td>Please have the customer use another card.</td>
</tr>
<tr>
<td>The card type entered is not supported on this PINPad.</td>
<td></td>
</tr>
<tr>
<td>Not Accepted</td>
<td>Please have the customer use another card.</td>
</tr>
<tr>
<td>Remove Card</td>
<td>Please have the customer use another card.</td>
</tr>
<tr>
<td>The card type entered is not supported on this PINPad.</td>
<td></td>
</tr>
<tr>
<td>Not Allowed With</td>
<td>Please process the outstanding transactions then try the function again.</td>
</tr>
<tr>
<td>Trans Outstanding</td>
<td></td>
</tr>
<tr>
<td>A Host 2 Download cannot be run if there are any transactions outstanding.</td>
<td></td>
</tr>
<tr>
<td>Not Allowed Until</td>
<td>Please perform an end of day/close business day.</td>
</tr>
<tr>
<td>EOD Completed &amp;</td>
<td></td>
</tr>
<tr>
<td>No Trans Outstanding</td>
<td></td>
</tr>
<tr>
<td>The Host 2 Parameter download cannot be performed if there are outstanding transactions.</td>
<td></td>
</tr>
<tr>
<td>Not Completed</td>
<td>Please re-attempt the transaction or function.</td>
</tr>
<tr>
<td>The attempted transaction or function did not complete successfully.</td>
<td></td>
</tr>
<tr>
<td>Not Completed</td>
<td>Please request a different card or form of payment.</td>
</tr>
<tr>
<td>Obtain Card</td>
<td></td>
</tr>
<tr>
<td>The PINPad cancelled the transaction as the attempted transaction or function did not complete successfully.</td>
<td></td>
</tr>
<tr>
<td>Not Completed</td>
<td>Please remove the card.</td>
</tr>
<tr>
<td>Remove Card</td>
<td></td>
</tr>
<tr>
<td>Transaction was not completed.</td>
<td></td>
</tr>
</tbody>
</table>

### "P" Error Codes

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parameter Init &amp; Download Cancelled</td>
<td>Please restart the download.</td>
</tr>
<tr>
<td>The download was cancelled.</td>
<td></td>
</tr>
<tr>
<td>Processing...</td>
<td>Please wait until the PINPad finishes processing.</td>
</tr>
<tr>
<td>The PINPad needs to carry out some processing in the background before the next prompt can be displayed.</td>
<td></td>
</tr>
</tbody>
</table>
### Processing Error

**OK to Re-select**
The PINPad has timed out.

**Transaction Not Completed**
The PINPad encountered an error when trying to process a chip transaction.

---

<table>
<thead>
<tr>
<th>&quot;S&quot; Error Codes</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Error</td>
<td>Please call the TD Merchant Solutions Help Desk at <strong>1-877-375-7331</strong> to have your PINPad replaced.</td>
</tr>
<tr>
<td>Contact Help Desk</td>
<td></td>
</tr>
</tbody>
</table>

The PINPad has encountered a system error.

---

<table>
<thead>
<tr>
<th>&quot;T&quot; Error Codes</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Not Allowed</td>
<td>Please choose a different transaction type.</td>
</tr>
<tr>
<td>Transaction Cancelled</td>
<td>Please re initiate the transaction if that is the intent.</td>
</tr>
</tbody>
</table>

The transaction type is not allowed.

The transaction has been cancelled by the customer or the merchant.

---

<table>
<thead>
<tr>
<th>&quot;U&quot; Error Codes</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Chip Reader</td>
<td>Please insert the card into chip reader.</td>
</tr>
</tbody>
</table>

A chip card was swiped.
### What PINPad hardware problems could I experience?

<table>
<thead>
<tr>
<th>Hardware Problem</th>
<th>Solution/Action Required</th>
</tr>
</thead>
</table>
| 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, please call the TD Merchant Solutions Help Desk.                         
|                                           | 3. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**.                                                              |
| Display screen is blank                   | 1. Press **Power** on the right-side of the PINPad. If the display does not light up, go to Step 2.                                                      
|                                           | 2. Plug the PINPad into a USB power source via the charging cable and press **Power**. If the screen illuminates and the PINPad becomes functional, the battery was depleted. Charge the PINPad until the battery indicator shows it is full. If the PINPad has to be used immediately, attempt to charge it between uses. 
|                                           | 3. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**.                                                              |
| Bad comms                                | 1. PINPad detected a communication failure after the transaction was initiated.                                                                          
|                                           | 2. Press **Enter/Cancel** and try again.                                                                                                               
|                                           | 3. Ensure that you have connectivity.                                                                                                                  
|                                           | 4. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**.                                                              |
| Magnetic Stripe Card reader won’t read cards | 1. Try swiping the card more quickly or more slowly or from the left of the reader towards the right.                                      
|                                           | 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 it persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**.                                                                    |
| Transaction not going through            | 1. Check you Internet connection to ensure that it is working.                                                                                           
|                                           | 2. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**.                                                              |

### Contacting Help Desk

To contact TD Merchant Solutions Help Desk, please call us at **1-877-375-7331**.
Summary
After reading this section you now know:

- Smartphone app error codes
- PINPad error codes
- Hardware problems and their solutions
- How to use the TD Mobile POS solution in your day-to-day business