TD Mobile POS

Merchant Guide

*Android paired screen shown

MERCHANT INFORMATION

Merchant Name . . . .

Merchant Number . . . .

Terminal ID . . . .

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Welcome Kit and Setup

Section 1

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.

» Merchant enters the transaction on the smartphone app.

» Customer then selects their card payment method on the PINPad.

* Android paired screen shown

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 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**
   a. Press ▭/**F1** -> **2** (Android) -> **2** (Display Pairing Info).
   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 ☒/**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 ▪/**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 ☒/**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
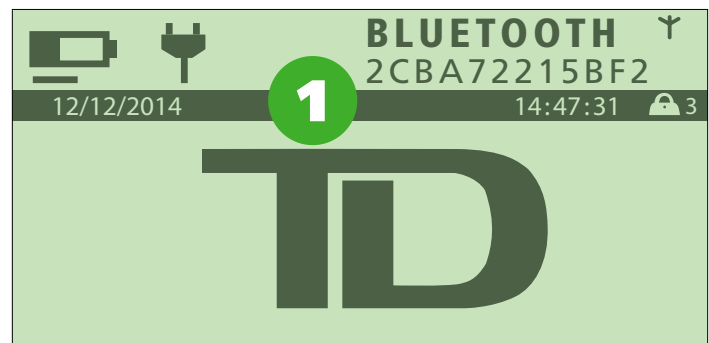
4

1.   **Bluetooth**

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

On the phone app the (((ᵀ))) icon and the ▤ icon appear.
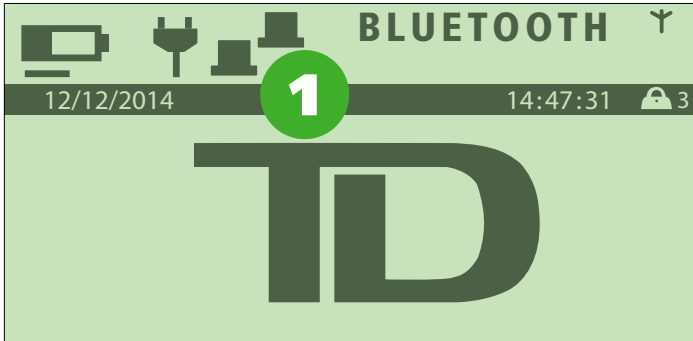
iOS

1.   **Bluetooth**

Two computer icons appear to the left of the BLUETOOTH label and the wireless connectivity symbol (ᛣ) flashes.

On the phone app the (((ᵀ))) 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.

3.   On the PINPad press ▤/**F4**.

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 ④ and then the ▣/**F** key. The **4** will change to a **G**.

   b.   To enter the **R** press ⑦ 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

Continued on next page

Section 2

Section 2

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* X 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 X/**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
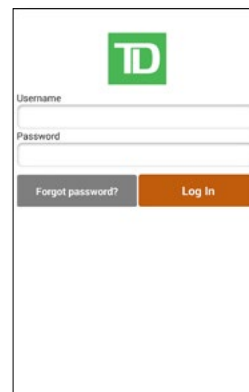
The Screens

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**.

Android   **iOS**

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.

* Android version shown

SETTINGS SCREEN

From this screen you can configure and administer the following:
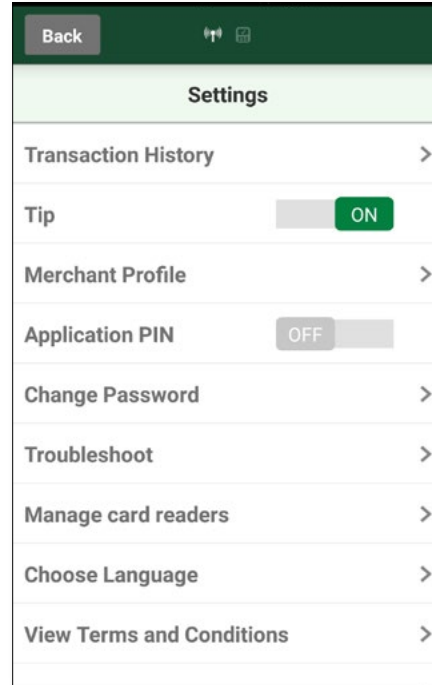
* Android version shown

- Transaction History
- Tip
- Merchant Profile
- App PIN
- Change Password
- Troubleshoot
- Manage card readers (Android only)
- Choose Language
- View Terms and Conditions
- FAQs
- Sign Out

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

- 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.

> *This option is not available on iOS.*

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.

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

Front of PINPad

* Android version shown

Right side of PINPad

Bottom of PINPad

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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 will increase the drain on the battery.

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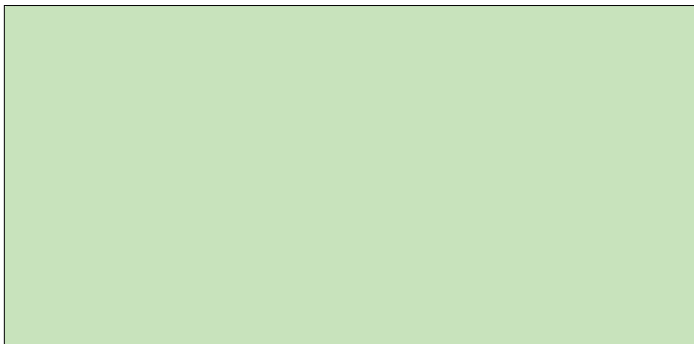
The *Ecomode* screen is blank and appears after approximately eight minutes of inactivity in *Standby* mode.

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.

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**

        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.

iOS
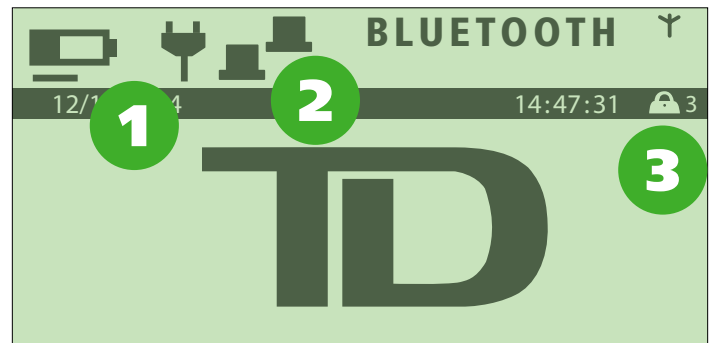
1. **Battery is charging**

    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**

        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

BLUETOOTH label 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.

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.

F3 Key ⌃
Scroll up one menu selection.

F2 Key ▿
Scroll down 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**   F
- **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 ▦ 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 ▦ key to access the **Admin Menu**. The functionality available on this menu is further described in *Section 6 - Administration and Configuration*.

Menu	Sub-menu	Option
Setup Menu	Customization	Language Options
		Transaction Options
		Hardware Options
		Idle Timer
	Bluetooth	Pair Device
		Unpair Device
		Paired Device
		Security Mode
Maintenance Menu	Host 1 Param DL	--
	Host 2 Param DL	--
	Reset Menu	Reset Invoice #
	System Info	--
Other Functions	Service Menu	--
	EMV Reports	
	Recent Error Rep.	

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.

CHIP

CONTACTLESS

* Android screens shown

MAGNETIC STRIPE

DEBIT CARD

5533 1569 4563 5432

A credit card has been used in the examples above, but the PINPad also accepts debit cards.

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

Section 3

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 Solutionsor Visa/MasterCard to inspect your premises and ensure that we can inspect the premises of any third party to verify that printed information is securely stored and processed. 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

The swipe option is generally used when the PINPad cannot read the credit/debit card's chip.

- 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 desied 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**.

   > 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.

7. Tap **Continue** and the *Additional Details* screen appears.
8. 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.

9. Tap **Done** when finished entering the information.

   The transaction is now fully completed and the smartphone app returns to the *Transaction* screen.

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 desied 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 a*nd *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 desied 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 desied 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 desied 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**.

3. A *Manual Imprint of Card Is Required* message appears. Press ▣/**OK** to continue.

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 desied 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 desied 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 desied 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***.*
   >
   > *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.

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 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.

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.

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.

Purchase Type	HTML	PDF
Cash	✓	-
Credit	✓	✓
Debit	✓	✓

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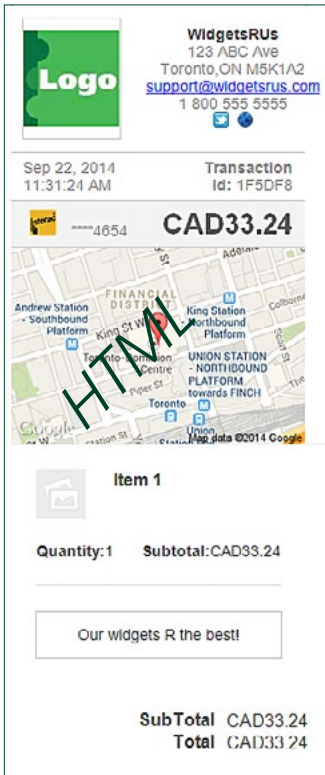
- Business name, contact information and logo
- Date of the transaction and transaction ID
- Payment method (Cash, Credit or Debit) and amount
- The map with the transaction location
- Purchase notes
- List of items purchased or the total dollar amount
- Receipt banner if it is being used
- SubTotal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

MERCHANT RECEIPTS

CUSTOMER RECEIPTS

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

Credit

> VISA is only used as an example. Each credit card company has their own icon.

Debit

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.
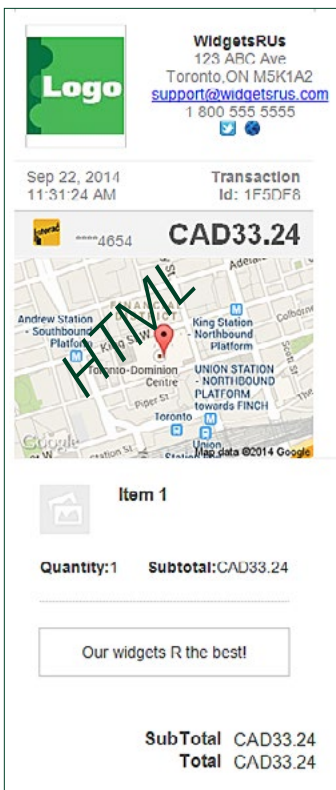
The refunded amount does not have the be the entire amount of the original purchase transaction. It can be a partial refund.

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.

Step 3 - Smartphone App Navigation:

1. The *Closed sales success/Closing Batch* message appears. Tap **OK** to continue.

> *The closed transactions still appear on the Merchant Portal and your smartphone app for record keeping.*

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

Section 4

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.

How do I pair the PINPad to my Android Smartphone?

Allows you to set up an Android 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 -> Android Device -> Display Pairing Info

1. Pairing info is displayed on the screen. The information of note is the *Bluetooth* PIN code. It will display as PIN: followed by nine digits. This is the information that you must enter on your Android smartphone device to pair the two devices.

Your smartphone device will then state when it and the PINPad are paired.

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 -> iOS Device

1. Device Discovery. Searching...

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

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 ▣ -> 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.

PINPad Administration

How do I download the PINPad Host 1 or 2 parameters?

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

Host 1 Params.DL	*Host 2 Params.DL*
Use this option if you want to update anything dealing with financial information such as:	Use this option if you want to update anything dealing with non-financial information such as:

- Transaction types
- Interac keys

- 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.

PINPad Customization

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?

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 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

1. Select one of the following options: **AllOff**, **AllOn** or **InvalidOnly** and press ▣**/OK**.

   Default is **AllOn**.

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.*

On the PINPad ⌨ -> Setup Menu -> Customization -> Idle Timer

This setting dictates how long a PINPad will sit unused before returning to the idle screen. We recommend that this be set to 60 seconds, otherwise you may experience more transactions timing out which will require you to restart from the beginning.

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.*

On the PINPad ⌨ -> Setup Menu -> Customization -> Hardware Options -> Sleep Timer

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.*

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:

   a. **Date** (most recent first)

   b. **Transaction type** icons

   c. Refunds have a ← beside it

   d. Declined/cancelled transactions have a Ⓧ on it

   e. Voided transactions have a ⊘ beside them

   f. **Dollar amount**

2. Tap a **transaction** to get more information.

> Tap the **Refunds** button to only show refunds which are indicated with a ←.

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.

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

On the app ≣ -> App PIN

1. The switch flips to *ON* and the *Set/Change App PIN* screen appears.

2. Select the time delay before the app locks. Your options are:

   a. After 30 seconds

   b. After 1 minute

   c. After 5 minutes

3. Enter a **4-digit PIN**.

4. Re-enter a **4-digit PIN**. If the PINs match, a ✔ appears.

5. Tap **Done** to save your changes.

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**.

> *The new password must be 5 to 64 characters in length, no spaces and is case sensitive.*

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*.

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.

Section 5
Merchant Portal

Section 5

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.

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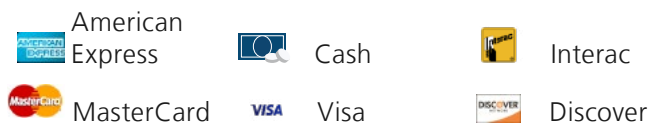
As well, some transactions have an icon beside them that indicates it was either declined, refunded or voided.

•   ⊗ 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.

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 you 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**.

       > *You can enter a different email address than what was used for the original transactions.*

   👤 🏢   **c.   Customer or Merchant receipt details icons**

       Click either of these options and the appropriate financial receipt appears.

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

1. Click **Upload New Logo**. A dotted square will appear.

2. Do one of the following:
   a. Click and drag an image from your computer onto the dotted square. OR
   a. Click **Choose Image File**. A window opens.
   b. 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.

> *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.*

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 you **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.

How do I add a sub-merchant?

Manage Sub-Merchants -> Click Add 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*

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**.

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:

Account Setup

Dear User,

You have not setup your security questions. We need you to complete setup to better protect your information. Please update the following items.

* Required field

Set Up Personal Email

Your email address will be used to reset your password.

* Personal Email   username1@ISP.ca

Enter a New Password

Please create a new password to access your mobile application as well as TD Mobile POS . This will replace your previo[us]

ⓘ Password Requirements
- 5 to 64 characters
- No whitespace
- include special characters (!#$%&+-/=?^_~.().@[])

* Choose Password   •••••••••

Password Strength: medium

* Retype Password   •••••••••

Choose Your Security Questions

Please select two security questions from the options below and answer each question. You cannot select the same quest[ion]

* Security Question 1   What is the name of your favorite childhood friend?

* Answer   Jacques

* Security Question 2   What street did you live on in third grade?   ⌄

* Answer   Main Street

Submit

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 -> Edit User Information** - 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

Sub-Merchant Settings
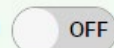
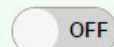Sub-Merchant Status   Active   Deactivate

Can Access TD Mobile POS   ◉

Can Use Virtual Terminal   OFF

Send Receipt to Sub-Merchant   OFF

Send Receipt to Merchant   OFF

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

Section 6

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 is 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**

   You 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**
    a. Press ⟨.#*⟩ -> Setup -> Bluetooth -> Pair Device -> Android -> Display Pairing Info.
    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**
    a. Press ⟨.#*⟩ -> Setup -> Bluetooth -> Pair Device -> iOS Device -> Device Discovery.
    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.
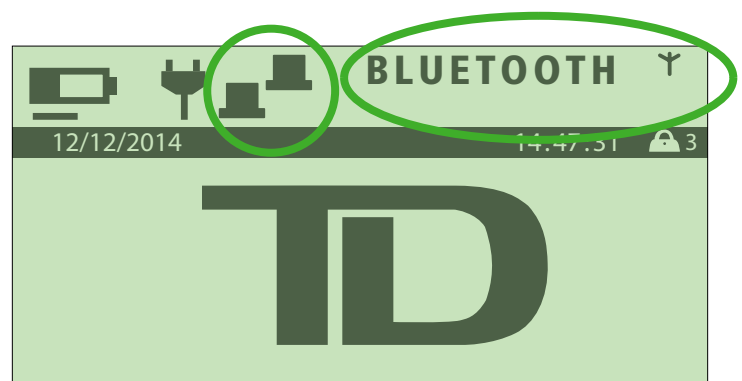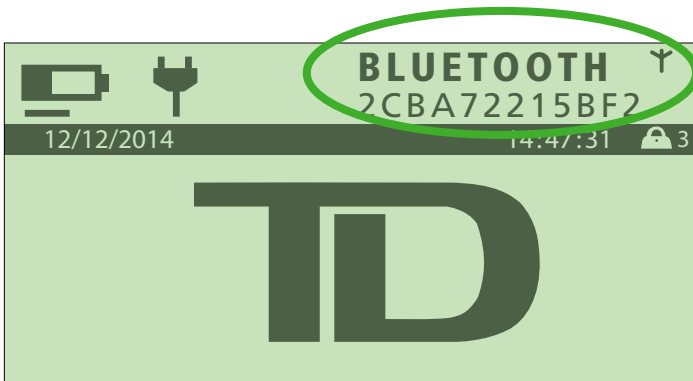
Android

1. **Bluetooth**

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

1. **Bluetooth**

    Two computer icons appear to the left of the BLUETOOTH label and the wireless connectivity symbol (ᛘ) 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	Action Required
Card reader connection failed Your attempt to connect with the card reader failed.	Please ensure that it is turned on and paired with your smartphone.
Card Reader Not Connected Your PINPad has either run out of power or has gone into sleep mode to conserve power.	1. Press the **power** button. If the PINPad powers on, tap **Continue** on the smartphone app and continue with the transaction. 2. If it doesn't power on, charge your PINPad. 3. If your PINPad doesn't accept a charge, call the TD Merchant Solutions Help Desk at **1-877-375-7331**.
Card reader Not Paired Your PINPad is not paired with your smartphone. Your mobile device must be paired with an iCMP before you can process payments.	Please refer to "Pairing" on page 26 for information on how to pair your smartphone with the PINPad for the first time.
Cart Empty The cart is already empty.	The purchase cart was already empty when you tapped the ⊗ icon.
Connection Required You must have a valid connection to continue.	1. You don't have an Internet connection and one is required in order for the TD Mobile POS to work. 2. Please review your connection and contact your Internet service provider if necessary to resolve the lost connection.

"D" Error Messages	Action Required
Declined The transaction has been declined. This may be due to there are issues with the card or funds are not available or on hold pending release.	1. Please have ask the customer try another account or card or use cash if possible. 2. Please press /**OK** to continue when alternate for of pay is available or /**Cancel** to cancel the transaction.

"E" Error Messages	*Action Required*
Error 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	*Action Required*
Invalid E-mail Address Your e-mail address must contain a minimum 5 characters. Please enter a valid e-mail address.	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: Email_Name@Service_Provider.Domain
Invalid E-mail Address Your e-mail address must contain a minimum of five characters. Please enter a valid e-mail address.	The email address must have at least five characters.
Invalid E-mail Address A valid e-mail address is required to send a receipt.	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. Email_Name@Service_Provider.Domain
Invalid image format Please try again.	Your company logo must be a PNG or JPG.

"L" Error Messages	*Action Required*
Login Failed Action cannot be completed. Please check your connectivity and try again.	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. 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 Invalid username / password combination. Please try again.	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	*Action Required*
Message Too Long Customer message too long.	The message must be 140 characters or less.
Missing Credentials Please enter a password.	A valid password is expected and must be entered at the Mobile POS app logon screen. Please ensure you are entering the correct password for the username in the correct field on the logon screen.
Missing Credentials Please enter a username and password.	A valid user name and password is required for logon to the Mobile POS app. Please ensure you have entered both the valid username and password in the correct fields on the app logon screen.

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

"P" Error Messages	*Action Required*
Please enter a valid username. Please click Try Again and then enter a valid username to continue.	Please ensure you have entered a valid username in the correct field on the app logon screen.
Password Error The password entered does not match the password on file. Please re-enter your current password.	Enter the correct password. If you have forgotten your password you will have to request that it be reset from the app.

"R" Error Messages	*Action Required*
Reader Not Paired Your mobile device must be paired with an iCMP before you can process payments.	You have tried to do a card payment transaction and your smartphone isn't paired with the PINPad. Please pair your smartphone with the PINPad.

"S" Error Messages	*Action Required*
Security Question Error Please select two different security questions from the menu.	You cannot choose the same Security Question for the first *and* the second question.
Session Expired You have been logged out due to inactivity.	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.

"U" Error Messages	*Action Required*
Unauthorized Reader You are not authorized to use the reader that is connected. Please connect to a different reader or contact technical support.	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**.

"V" Error Messages	*Action Required*
Void Transaction Declined Your void request cannot be completed because the transaction has already been settled.	You cannot void the last transaction after it has been settled. You must now perform a refund.

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	*Action Required*
Amount $0.00 **Not Allowed** Amount entered was $0.00.	Please enter a new amount that is greater than zero and press /**OK**.

"B" Error Codes	*Action Required*
Bad Communication A communication failure was detected after the transaction was initiated.	Please press **/Cancel** and try the transaction again. If the problem persists, ensure your internet connection is working correctly.

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

"D" Error Codes	*Action Required*
Download **Host 1 Parameter** **First** The PINPad requires a Host 1 Parameter Download.	Please perform a Host 1 Parameter Download. See page 26 for more information.

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Download **Full Host 2 Params** **First** The PINPad requires a full Host 2 Parameter Download.	The PINPad requires a full Host 2 Parameter Download. Please perform a Host 2 Parameter Download. See page 26 for more information.

"E" Error Codes	Action Required
End of Business Day **Already Completed** The end of day transaction has already been completed successfully.	Please press █x/**Cancel** or █o/**OK** to return to idle screen.
End of Day Process **Cancelled** The Day Close transaction was cancelled.	Please retry the day close.

"F" Error Codes	Action Required
Faulty Card The swiped card is faulty.	Please try swiping the card again. If that fails, ask the customer to use another card or form of payment.

"H" Error Codes	Action Required
Host 1 Download **Not Completed** The PINPad attempted a Host 1 Download and it was not completed successfully.	Please try the Host 1 Download again. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**. 📞
Host 2 Download **Not Completed** The PINPad attempted a Host 2 Download and it was not completed successfully.	Please try the Host 2 Download again. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**. 📞

"I" Error Codes	Action Required
Insert Card **In Chip Reader** A chipped card was used in the magnetic stripe reader.	Please ask the customer to insert the credit/debit card into the PINPad chip reader.

"I" Error Codes	Action Required
Internal Error **Call Help Desk** **AAAAAAAAAAAAA** **NNNNNNNNNNNNN** **CCCCCCCCCCCCC** The system has encountered a serious error.	AA…… stands for component name NN…… stands for app information CC……. stands for error code Call the TD Merchant Solutions Help Desk at **1-877-375-7331**. 📱
Invalid Date You have entered an invalid date in the *Service* menu.	Please enter a correct date.
Invalid Expiry Date The customer's card has expired.	Please have the customer provide a valid card or different for of payment.
Invalid Password The password entered is incorrect.	Please re-enter and try again. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**. 📱
Invalid Time You have entered an invalid time in the *Service* menu.	Please enter a correct time.

"M" Error Codes	Action Required
Merchant Setup Incomplete Occurs when attempting a financial transaction when the Host 1 Parameters have not been successfully downloaded.	Please perform a Host 1 Parameters download.
Must Close Business Day A Host 1 download cannot be performed if there are outstanding transactions.	Please perform an end of day/business day close.

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

"N" Error Codes	Action Required
Not Accepted The card type entered is not supported on this PINPad.	Please have the customer use another card.
Not Accepted **Remove Card** The card type entered is not supported on this PINPad.	Please have the customer use another card.
Not Allowed With **Trans Outstanding** A Host 2 Download cannot be run if there are any transactions outstanding.	Please process the outstanding transactions then try the function again.
Not Allowed Until **EOD Completed &** **No Trans Outstanding** The Host 2 Parameter download cannot be performed if there are outstanding transactions.	Please perform an end of day/close business day.
Not Completed The attempted transaction or function did not complete successfully.	Please re-attempt the transaction or function. If the problem persists, call the TD Merchant Solutions Help Desk at **1-877-375-7331**. 📞
Not Completed **Obtain Card** The PINPad cancelled the transaction as the attempted transaction or function did not complete successfully.	Please request a different card or form of payment.
Not Completed **Remove Card** Transaction was not completed.	Please remove the card.

"P" Error Codes	Action Required
Parameter **Init & Download** **Cancelled** The download was cancelled.	Please restart the download.
Processing... The PINPad needs to carry out some processing in the background before the next prompt can be displayed.	Please wait until the PINPad finishes processing.

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Processing Error OK to Re-select The PINPad has timed out.	Please press ▣/OK to go back to app selection.
Processing Error **Transaction Not Completed** The PINPad encountered an error when trying to process a chip transaction.	Please remove the card and press ▣/**Cancel**, the try the action again. If the problem persists ask for another form of payment. If the problem continues after this, call the TD Merchant Solutions Help Desk at **1-877-375-7331**. 📞

"S" Error Codes	*Action Required*
System Error **Contact Help Desk** The PINPad has encountered a system error.	Please call the TD Merchant Solutions Help Desk at **1-877-375-7331** to have your PINPad replaced. 📞

"T" Error Codes	*Action Required*
Transaction **Not Allowed** The transaction type is not allowed.	Please choose a different transaction type.
Transaction Cancelled The transaction has been cancelled by the customer or the merchant.	Please re initiate the transaction if that is the intent.

"U" Error Codes	*Action Required*
Use Chip Reader A chip card was swiped.	Please insert the card into chip reader.

What PINPad hardware problems could I experience?

Hardware Problem	Solution/Action Required
Chip cards cannot be processed	1. Try inserting a different card. If this card can be read, the problem is with the first card.
	2. Use a *cleaning card* to clean the card reader. If you need cleaning cards, 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 ▨/**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**.

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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