

# TD Generation

## Quick Start Guide



### For the TD Generation:

- All-In-One
- HSPA
- and Wi-Fi

*\* Image shown is the HSPA terminal*



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**MERCHANT INFORMATION**

Merchant Name .....

Merchant Number .....

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# About this Guide

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

## Merchant Welcome Kit Contents

### Quick Start Guide Pamphlets

- *How to Help Prevent Fraud*
- *If you have a problem or concern*

### Information sheets

- *What you need to know about chargebacks*

### Miscellaneous

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

# The TD Generation Terminals

The terminal is solely for you, our Merchant. You will use the terminal to initiate transactions for customer's using credit and debit cards. Depending on your settings, some card types may not be accepted by your terminal. For loyalty and gift card information, and pre-authorizations, please go to our online documentation at [www.TDMerchantSolutions.com/ResourceCentre](http://www.TDMerchantSolutions.com/ResourceCentre).

## Differences between terminals

The following are the differences between the All-in-One, HSPA and Wi-Fi terminals.

#	Name	All-in-One	HSPA	Wi-Fi
3	Paper advance key			
4	Power key			
--	Access Point / Repeater	No	No	Yes / Optional
--	Charger Base	No	Optional	Optional
--	Communications	Hub via phone line or Ethernet	Cell towers	Access point

# The terminals

## 1. Paper chamber button

## 2. Dash keys and direction pad

Use the  keys and the direction pad to navigate the screens and menus.

## 3. Paper advance key

Press  or  to advance the paper roll in the terminal.

## 4. Power key

Press  or  to power the terminal on.

Press and hold for 3 seconds to power the terminal off.

## 5. Command keys

-  = Cancel
-  = Correction
-  = OK or activate

## 6. Card readers

- Insert chipped cards
- Contactless cards
- Swipe cards



## Navigating the different screens

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

- Dash keys: the two  keys are used to:
  - Move between the *Idle*, *Main Menu* and the *Desktop* screens.
  - Quickly take you to the top or bottom menu option.
  - Select an on screen option.
- Direction pad: use the direction pad to navigate screens and menus. Once you find the desired icon or menu option, highlight it and press **OK**.
- Icon number: press the number assigned to the icon on the screen. For example, press **1** to select **Purchase** in the image to the right.

## Changing the paper

1. Press the **paper chamber button** on the top-left corner of the terminal to open the panel and remove the empty paper roll tube.
2. Unwrap a new paper roll and place it in the paper chamber so that the loose end of the paper feeds up from under the paper roll towards you.
3. Press down on the panel until it clicks shut and ensure there is a bit of paper sticking out from the chamber that it touches the top of the terminal screen.

# Adjusting the screen brightness and terminal volume

1. Press the left  → Desktop → Main Menu → **Control Panel** → Backlight or Speaker Volume.
2. Press the appropriate  to increase or decrease the brightness / volume by 5% / 10%.

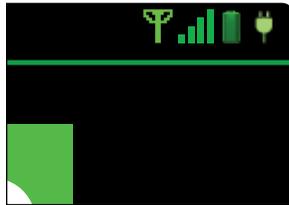
## Terminal screens

### Idle screen and icons

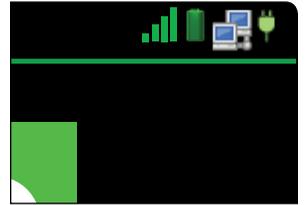
The default screen is called the Idle screen. It displays important information and different ways to access your terminal's functionality. If your terminal has a blank screen it has gone to sleep mode. Press any key to wake it and the *Idle* screen will display.



All-in-One



HSPA



Wi-Fi

Icon	Name	All-in-One	HSPA	Wi-Fi
	Battery charging	-	✓	✓
	Battery level	-	✓	✓
	Internet status	✓	-	✓
	Signal	-	✓	-
	Signal strength	-	✓	✓

### Battery charging

Indicates that the terminal is charging.

### Battery level

Indicates the terminal power level.

### Internet status

Indicates whether your terminal is connected to the Internet. If it isn't you will see  on top of the computer icon.

### Signal

Indicates whether the terminal is:

- Not connected (red),
- Trying to connect (orange), or
- Connected (green).

### Signal strength

You need at least two bars in order to reliably process transactions.

## Desktop screen

This screen displays three icons: **Purchase**, **Void** and **Day Close**. Any other icons that you will use will be displayed on the *Main Menu* screen.

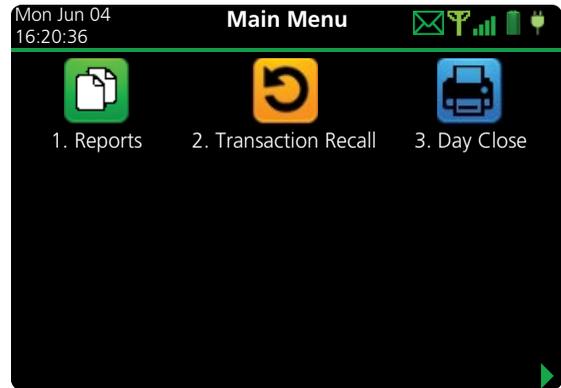
- Only the HSPA and Wi-Fi terminals can have more than three icons on this screen.
- The icon bar along the top will show different icons for each terminal type.



## Main menu screen

There may be more than one *Main Menu* screen on your terminal. The number of screens depend on the number of available icons.

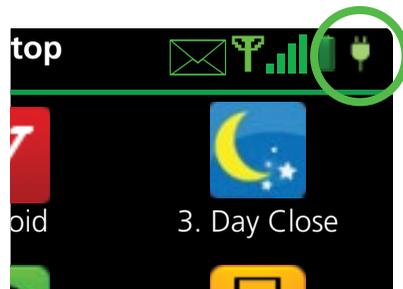
- The icon bar along the top will show different icons for each terminal type.



## Supporting hardware

### The Charger Base (HSPA and WiFi)

This is an option that allows you to recharge a HSPA or Wi-Fi terminal by placing it in the charger base. The charger base has four connection points near the top. The charging icon will appear when the terminal is properly seated.



## The Access Point / Repeater (WiFi)

The access point acts like a router that connects your Wi-Fi terminal to the network. Repeaters are additional routers extend the terminal's range over larger areas.

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



## The Generation Hub (All-in-One)

The All-In-One terminal comes with a hub to allow for easy power and Internet connection. It includes:

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

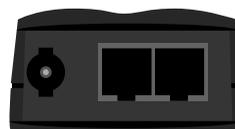
There are two different hubs available; each with their own port configurations. They are the:

### Single Ethernet

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

### Dual Phone Line

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



# Cardholder Privacy and Security

## Terminal security

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

### No security (Default)

This setting does not use user IDs and passwords. Merchants that choose to use no security still have the option to setup a store/manager override ID and password to access areas of the terminal that have a mandatory requirement for supervisor password.

### Security

This option allows the user to setup supervisors and operators with an ID login. The supervisor setup requires you to create a password. You can activate this by going to Desktop → Main Menu → **Control Panel** → Logon Method.

### Override Passcode

This option allows the business owner to setup a passcode to bypass certain functionality. See page 7 for the list of functionality that can be bypassed with this passcode.

## *Administering the terminal*

By utilizing the user types, you can help secure your terminal by setting what terminal functionality that each of your employees can access. Listed below are the user types and their functionality.

**Note:** There is a user hierarchy that determines who can access certain functionality:

- Administrator (TD Technician only),
- Manager,
- Supervisor, and
- Operator.

TD Merchant Solutions strongly suggests that you create and use a manager ID for your day-to-day business needs and only use the administrator ID when absolutely necessary. Some functions that require an administrator ID are.

- Adding, editing, deleting or unlocking manager IDs
- Any functionality that you have protected with an administrator login

TD Merchant Solutions strongly suggests that when you create your manager IDs that you record and store them in a safe place for future reference.

The TD Generation offers you a variety of options to personalize the terminal while helping you to administer your business. Some standard administration features are:

- User Management (creating, editing, deleting and unlocking locked user IDs)
- Parameter Updates (updating your settings on the terminal to reflect new information such as new accepted payment types)
- Communications (changes to your terminal’s communication method)
- Training Mode (enable/disable this setting to train new employees on how to use the terminal)
- Receipts (changes to how and when they are printed)

Any changes that you make on the terminal will be overwritten the next time that you perform a Host 1 or Host download after a settlement request. Please contact the TD Merchant Solutions Help Desk to make any permanent changes to your terminal.

### *Terminal functionality and security*

The following is a list of terminal functions that can be enabled or disabled (on or off), protected by supervisor ID or protected by an override passcode.

Functionality	Enable/Disable	Supervisor ID	Override Passcode
<b>Generic settings</b>			
Voice prompts	✓		
<b>Financial Transactions</b>			
Call for authorization	✓	✓	✓
Cash transaction	✓	✓	✓
Cashback prompt	✓		
Force post	✓	✓	✓
Manual entry (credit card)	✓	✓	
Manual entry (gift card)	✓		
Purchase with tip	✓		
Split bill	✓		
Transaction recall	✓		
Void	✓		
<b>Receipt settings</b>			
Cash transaction receipts	✓		
Print operator name	✓		
<b>Day close</b>			
Access day close		✓	
Close batch with open pre-authorizations	✓		
Terminal auto-close	✓		

Functionality	Enable/Disable	Supervisor ID	Override Passcode
<b>Reporting</b>			
Access batch reports		✓	
Access business day reports		✓	
Access customized reports		✓	
Access gift card reports		✓	
Access override passcode menu		✓	
<b>End of day reports</b>			
Cash back totals report		✓	
Gift card host details report		✓	
Gift card host totals report		✓	
Host balancing report		✓	
Open pre-auth report		✓	
Operator balancing report		✓	
Operator detail report		✓	
Pre-auth status report		✓	
TD discount report		✓	
Terminal balancing report		✓	
Terminal details report		✓	
Tip totals report		✓	

## Fraud prevention

The following information will help you protect yourself from fraudulent transactions.

### *Manually entered credit card transactions*

There is an inherent risk associated with these transactions as they have an increased rate of fraud. If you do manually enter a credit card transaction which is deemed fraudulent, you will be held responsible for any chargebacks associated with it. Manually entered credit card transactions include mail order and telephone order transactions.

If you are uncomfortable manually entering credit card information, as a business owner, you can request another form of payment (another credit card, debit, cash, etc.).

## Force post transactions are disabled by default

The force post function allows prior authorization numbers to be manually keyed in. For your protection, this capability is disabled by default on your terminal. If you need to process a force post transactions, please call the TD Merchant Solutions Help Desk at **1-800-363-1163** to enable the capability after being authenticated. It is strongly recommended that you protect the Force Post function with a password. Please see the *Merchant Guide* for more information.

## Call for authorization

Sometimes, due to a communication or security issue, a transaction cannot or should not be completed. See the list of messages and events below that will cause you to call for authorization.

**Note:** You must call for authorization for **every** force post transaction performed on your terminal.

Whenever	Action
...the card number on the screen does not match the number embossed on the card.	<ol style="list-style-type: none"><li>1. Call for a voice authorization immediately.</li><li>2. Request a <b>CODE 10</b> authorization. In this situation, you may be dealing with a fraudulent card and <b>CODE 10</b> will alert the financial institution to this possibility.</li></ol>
<b>OR</b>	
...the cardholder signature on the receipt does not match the signature on the reverse of the card.	
<b>OR</b>	
...you have any doubts about the validity of a card or a transaction.	

## Storing cardholder receipts

Merchants are responsible for retaining all receipts to respond to cardholder inquiries. The following are guidelines you should use when storing them. Store receipts:

- ...in a dark, secure area with limited access for at least 18 months
- ...in envelopes arranged by date in a secured filing cabinet works well. If you have several terminals use a separate envelope(s) for each terminal.
- ...as long as you retain cash register tapes for direct payment transactions

Your receipts could become unreadable if you store receipts in plastic coated containers or expose them to direct heat or cold sources.

- If TD needs a receipt copy, please send it within eight days and retain a copy for your records.
- The required storage and response times are for TD Merchant Solutions only and may vary by financial institution.

# Financial Transactions

- Depending how you have set up your terminal, you may be required to enter a supervisor ID and password to proceed with any transaction.
- If the customer's receipt has a signature line on it, the customer **must** sign it.

The TD Generation terminal can perform the following transactions:

- Purchase
- Purchase (Phone / Mail)
- Force post
- Refund
- Void
- Cash\*
- Pre-authorization\*
- Gift card\*
- Loyalty card / Air Miles®\*

\* These optional transactions and others are covered in our online documentation at [www.TDMerchantSolutions.com/ResourceCentre](http://www.TDMerchantSolutions.com/ResourceCentre).

## Accepted card types

The terminal will accept whatever cards you indicated when you signed up. If you wish to adjust your accepted card list, please contact your sales rep.

## Credit card purchase

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



1. Press the left  → Desktop → **Purchase**.
2. Enter the **dollar amount** on the terminal and press **OK**.
3. Select **SPLIT** or **PAY**. If the customer is paying the entire amount with one payment select **PAY**. Otherwise, select **SPLIT**.

### Split payment (optional)

- a) Enter the **payment amount** and press **OK**. Enter the partial payment amount.
- b) Select the **back arrow** or **OK**. If correct, select **OK**. Otherwise, select the **back arrow**.
- c) Select the payment method and press **OK**. The customer selects how they are paying for the partial amount. Gift card appears only if you accept them.

- d) Select the **back arrow** or **YES**. If the amount and payment type are correct select **YES**. Otherwise, select the **back arrow**. Go to step 4.
4. The customer confirms the amount: back arrow or **OK**.

#### Tip (optional)

If you have tips enabled on your terminal you will follow these steps:

- a) The customer selects / enters one of the **tip options** offered on screen.
- b) The customer confirms the amount: **NO** or **YES**.
5. Perform one of the following payment methods: **Insert, Swipe, Contactless** or **Manual Entry**.

#### Insert

- a) The customer enters their **PIN** and presses **OK**. Go to step 6.

#### Swipe

- b) Verify the card info with what is on the screen and press **OK**. Go to step 6.

#### Contactless

- c) The customer **taps** their contactless-enabled credit card on the contactless card reader. In some cases the customer may be required to **swipe** or **insert** their card. Go to step 6.

#### Manual entry

- a) Enter the **account number** and press **OK**.
- b) Enter the **expiry date** and press **OK**.
- c) A manual imprint of the credit card is required. Make the imprint and press **OK**.
- d) Enter the **CVD number** and press **OK**. This number is generally located on the back of the credit card. Go to step 6.
6. The screen shows that the transaction is completed with an authorization number or approved message. The receipts will print. If the customer's copy has a signature line on it, the customer **must** sign the receipt. You can **REPRINT** the receipt or **FINISH** the transaction.

- The amount paid by the customer may only be partially authorized depending on the card company. If a partial authorization occurs, the screen will display the amount still outstanding. The transaction will then request another payment method for the balance.
- If the purchase was for a low amount you may be offered the option to print the receipt. This receipt threshold can be set by calling the TD Merchant Solutions Help Desk at **1-800-363-1163**.

7. If there is a balance left owing, go to the **Split Payment** instructions in step 3.

# Debit card purchase



1. Press the left  → Desktop → **Purchase**.
2. Enter the **dollar amount** and press **OK**.
3. Select **SPLIT** or **PAY**. If the customer is paying the entire amount with one payment select **PAY**. Otherwise, select **SPLIT**.
4. The customer confirms the amount: back arrow or **OK**.

## Split payment (optional)

- a) Enter the **payment amount** and press **OK**. Enter the partial payment amount.
- b) Select the **back arrow** or **OK**. If correct, select **OK**. Otherwise, select the **back arrow**.
- c) Select the payment method and press **OK**. The customer selects how they are paying for the partial amount. Gift card appears only if you accept them.
- d) Select the **back arrow** or **YES**. If the amount and payment type are correct select **YES**. Otherwise, select the **back arrow**. Go to step 4.

## Tip (optional)

If you have tips enabled on your terminal you will follow these steps:

- a) The customer selects / enters one of the **tip options** offered on screen.
- b) The customer confirms the amount: **NO** or **YES**.

## Cashback (optional)

You will only see these steps if you have cashback enabled on your terminal.

- a) The customer indicates whether they want cashback (**NO** or **YES**).
- b) The customer enters or selects the cashback amount and presses **OK**.
- c) Customer confirms that the amount is correct (**NO** or **YES**).

## Payment method

5. Perform one of the following payment methods: **Insert** or **Tap**.

### Insert

- a) The customer inserts their debit card.
- b) The customer selects the account to use: **CHEQUING** or **SAVINGS**.
- c) The customer enters their **PIN** and presses **OK**. Go to step 5.

## Contactless

- a) The customer **taps** their contactless-enabled debit card on the screen. In some cases the customer may be required to enter their **PIN**. Go to step 5.
6. The screen shows that the transaction is completed with an authorization number or approved message and the receipts print. You can **REPRINT** the receipt or **FINISH** the transaction.
7. If there is a balance left owing, go to the **Split Payment** instructions in step 3.

## Void

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

1. Press the left  → Desktop → **Void**.
2. Enter the **trace #** from the receipt of the transaction to be voided and press **OK**.
3. Confirm that the transaction is to be canceled (**NO** or **YES**).
4. If this is a debit card, the customer inserts their card, enters their **PIN** and presses **OK**.
5. The screen shows that the transaction is completed with an approved message and the receipts print.
6. You can **REPRINT** the receipt or **FINISH** the transaction.

## Refund

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

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

1. Press the left  → Desktop → **Debit / Credit** → Refund.
2. If refunds have been password protected on your device, or this is a debit card refund, you must:
  - a) Enter a **Supervisor ID** and press **OK**.
  - b) Enter the **Supervisor Password** and press **OK**.
3. Enter the **dollar amount** and press **OK**.
4. Select one of the following payment methods: **Insert**, **Swipe**, **Contactless** or **Manual Entry**.

### Insert credit or debit card / swipe credit card

- a) The customer enters their **PIN** and presses **OK**. Go to step 5.

### Contactless credit or debit card

- a) The customer **taps** their contactless-enabled card on the screen. Go to step 5.

### Manual credit card

- a) Enter the **account number** and press **OK**.
- b) Enter the **expiry date** and press **OK**. This is four digits in length.
- c) Is a manual imprint required (**NO** or **YES**)? If you select **NO**, the transaction will be canceled.
- d) Enter the **CVD number** and press **OK**. This can be up to four digits in length. Go to step 5.

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

## Transaction recall

This option recalls a transaction so that you can view, void or complete / close it if it is a pre-authorization. The following instructions access any transactions that were performed in the current open batch.

If a day close has been completed you cannot recall transactions prior to the day close. Pre-authorization and tab transactions are covered in our online documentation at [www.TDMerchantSolutions.com/ResourceCentre](http://www.TDMerchantSolutions.com/ResourceCentre).

1. Press the left  → Desktop → Main Menu → **Transaction Recall**.
2. Select one of the following:

### Recall by trace #

- a) Enter the **trace number** that you want to recall and press **OK**. Go to step 3.

### Recall all

- a) A list of all transactions currently available on the terminal appear. Go to step 3.

### Recall by amount

- a) Enter the **dollar amount** and press **OK**. Go to step 3.

### Recall by account #

- a) **Swipe** or **Manually enter** the card. Go to step 3.

### Recall by invoice #

- a) Enter the **invoice number** that you want to recall and press **OK**. Go to step 3.

3. If there are multiple transactions, scroll to the desired one and press **OK**.
4. Select **Void** to cancel the transaction or select **Completion** to close a pre-authorization. Press **Cancel** to leave this screen without making a selection.

# Phone or Mail purchase

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

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

1. Press the left  → Desktop → Main Menu → **Phone / Mail Purchase**.  
If you have both Phone Orders and Mail Orders enabled, you will have the option to select which one you want to use: **PHONE** or **MAIL**.
2. Enter the **invoice number** (if enabled).
3. Enter the **dollar amount** and press **OK**.
4. Enter the **account number** and press **OK**.
5. Enter the **expiry date** and press **OK**.
6. If this is a phone order, enter the **CVD** and press **OK**.
7. Enter customer's **house number** and press **OK** (if enabled).
8. Enter the customer's **postal code** and press **OK** (if enabled).
9. The screen shows that the transaction is completed with an authorization number and the receipts print.
10. You can **REPRINT** the receipt or **FINISH** the transaction.

# Force post purchase

This option is only used when you can't process a credit card purchase normally through the network whether due to communication problem or that the force post is requested via the terminal.

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

1. Press the left  → Desktop → **FP Purchase**.
2. Enter the **dollar amount** and press **OK**.
3. Enter the authorization number and press **OK**.
4. Confirm the authorization number and press **OK**.

### Insert credit or debit card / swipe credit card

- a) The customer enters their **PIN** and presses **OK**. Go to step 5.

### Manual credit card

- a) Enter the **account number** and press **OK**.

- b) Enter the **expiry date** and press **OK**. This is four digits in length.
  - c) Is a manual imprint required (**NO** or **YES**)? If you select **NO**, the transaction will be canceled.
  - d) Enter the **CVD number** and press **OK**. This can be up to four digits in length. Go to step 5. (optional)
5. You can **REPRINT** the receipt or **FINISH** the transaction.

## Force post phone / mail purchase

This option is only used when you can't process a credit card purchase normally through the network whether due to communication problem or that the force post is requested via the terminal.

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

1. Press the left  → **Debit / Credit** → Force Post → Pre-Auth.
2. Enter the **dollar amount** and press **OK**.
  - a) Enter the **account number** and press **OK**.
  - b) Enter the **expiry date** and press **OK**.
  - c) If this is a phone order, enter the **CVD** and press **OK**. This can be up to four digits in length.
3. Enter the authorization number and press **OK**.
4. Confirm the authorization number and press **OK**.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

## Receipts

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

### *Receipt print options*

You can select which receipts print and when by calling the TD Merchant Solutions Help Desk. The options available to you are:

Customer receipts	Merchant receipts
<ul style="list-style-type: none"> <li>• Print for every transaction (default)</li> <li>• Individual receipts can be declined by the Merchant</li> <li>• Do not print any customer receipts</li> </ul>	<ul style="list-style-type: none"> <li>• Print for every transaction (default)</li> <li>• Print for every approved transaction</li> <li>• Print for transactions over a set amount</li> <li>• Print only for a transaction that requires a signature</li> </ul>

## Reprinting receipts

1. Press the left  → Desktop → Main Menu → **Reprint** and select one of the following:

### Last Receipt

- a) Confirm that this is correct (**NO** or **YES**). The most recent receipt will reprint.

### Past Receipt

- a) Swipe the card that the transaction was performed on. Any transactions that were done on the terminal by the swiped card will appear on the screen.
- b) Select the **transaction** that you want to reprint the receipt for and press **OK**.
- c) Select **PRINT** if this is the correct transaction.

## Receipt examples

### Card entry method

<b>C</b>	Chip card transaction
<b>CN</b>	Chip card NSR transactions
<b>CO</b>	Off-line chip card transaction
<b>M</b>	Manually entered transaction and the card was present.
<b>MC</b>	Manually entered fallback of a chip card transaction
<b>RF</b>	Contactless transaction
<b>S</b>	Swiped mag card transaction
<b>SC</b>	Swiped chip card fall back transaction
<b>SN</b>	Swiped NSR transaction

### Card Type

<b>AM</b>	American Express
<b>DP</b>	Debit
<b>DS</b>	Discover / Diners
<b>JC</b>	JCB
<b>MC</b>	MasterCard
<b>MD</b>	MasterCard Debit
<b>PV</b>	Visa Debit

## Card Type

RC	RCS
UP	UnionPay*
VI	Visa

## Important Information

<b>Transaction Type</b>	This shows what type of transaction was done (Purchase, Void, etc.) and whether it is a duplicate receipt.
<b>Card Type</b>	This shows what kind of card was used for the transaction.
<b>Trace #</b>	The trace number associated with the transaction.
<b>Inv #</b>	The invoice number associated with the transaction.
<b>Auth #</b>	The authorization number associated with the transaction.
<b>Signature</b>	The card issuer determines when a signature is required for a transaction.
<b>Approved</b>	Always ensure that the transaction was approved as it could be <b>DECLINED</b> .

## Credit card purchase

## Debit card purchase

The information that you will use the most is noted above and explained above.

Merchant Name		Address, Postal Code		City, Province		2000000		N10000000205	
****	<b>PURCHASE</b>	****							
12-21-2015		12:29:12							
Acct # 452001****5097								<b>C</b>	
Exp Date 10/19								<b>Card Type VI</b>	
A0000000003101001								VISA CREDIT	
<b>Trace # 6</b>									
<b>Inv. # 5</b>									
<b>Auth # 75612</b>									
TVR 000000000000TST		RRN 001006006							
TC 0E19785C8DAA97AC		F800							
<b>Total</b>									<b>\$50.00</b>
(00) <b>APPROVED</b> THANK YOU									
Retain this copy for your records Merchant Copy									
Receipt Banner Receipt Banner									

Merchant Name		Address, Postal Code		City, Province		2000000		N10000000205	
****	<b>PURCHASE</b>	****							
12-21-2015		12:29:12							
Acct # 452001****5097								<b>C</b>	
Account Chequing								<b>Card Type DP</b>	
A0000000003101001								INTERAC	
<b>Trace # 9</b>									
<b>Inv. # 3</b>									
<b>Auth # 75612</b>									
		RRN 001006006							
		F800							
<b>Total</b>									<b>\$50.00</b>
(00) <b>APPROVED</b> THANK YOU									
Retain this copy for your records Merchant Copy									
Receipt Banner Receipt Banner									

# Business Day Functions

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

## *Performing the day close*

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

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

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

- Sends any stored transactions (SAFs)
- Checks for mail, and downloads
- Closes all open batches
- Downloads available updates
- Prints selected reports
- Starts a new business day on the terminal by opening a new batch

1. Press the left  → Desktop → **Day Close**.
2. Confirm that you want to **Continue**. Once the process is started ensure that the terminal is not used until the day close is completed.
3. Select your report delivery method (**DISPLAY** or **PRINT**). Depending on how you have set up your day close process, certain reports will print.
4. When it is completed you will see the *Business Day Closed* message.

## *Reprinting the day close report*

1. Press the left  → Desktop → Main Menu → **Reprint**.
2. Select **Day Close Report** and press **OK**.
3. Confirm that this is correct (**NO** or **YES**).

# Reporting

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

## Business day reports

Press the left  → Desktop → Main Menu → **Reports** → Business Day Reports and select a report.

Report	Provides...	Instructions
Terminal Detail	...transactions by operator ID and for the current business day.	<b>DISPLAY</b> or <b>PRINT</b> your report.
Terminal Balancing	...transactions by operator ID and for the current business day.	
Business Day Subtotals	...transactions by operator ID and for the current business day.	
Outstanding SAF	...all stored transaction details that have not been sent for settlement.	
Cashback Totals	...a total of all cashbacks for the current business day.	
Operator Detail	...transactions by card type (including gift card totals and details) operator ID and for the current business day.	Select whether the report is for a individual ID (Operator ID) or all IDs (0) and press <b>OK</b> . <b>DISPLAY</b> or <b>PRINT</b> your report.
Operator Balancing	...transactions by card type (including gift card totals and details) operator ID and for the current business day.	
Tip Totals	...all tips obtained from transactions (including gift cards and cash) in the current business day on the terminal by operator ID.	

## Batch reports

Press the left  → Desktop → Main Menu → **Reports** → Batch Reports and select a report.

Report	Provides...	Instructions
Batch Detail	...transaction details by card type and for current or previous batch.	Select which batch you want to review ( <b>PREV</b> or <b>CURRENT</b> ). <b>DISPLAY</b> or <b>PRINT</b> your report.
Batch Balancing	...transaction details by card type and for current or previous batch.	

## Customized reports

Left  → Desktop → Main Menu → **Reports** → Customized Reports and select a report.

Report	Provides...	Instructions
Tran Detail	...transaction details by card type for a maximum of 10 days	Select whether the report is for a individual ID (Operator ID) or all IDs (0) and press <b>OK</b> .
Totals	...transaction totals by transaction type and card type for a maximum of 45 days	Enter the From <b>Date/Time</b> and press <b>OK</b> . Enter the To <b>Date/Time</b> and press <b>OK</b> .
Tips Totals	...all tips obtained from transactions (including gift cards and cash) in the current business day or up to 45 days in the past on the terminal by operator ID.	<b>DISPLAY</b> or <b>PRINT</b> your report.

# Troubleshooting

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

## What problems can I easily resolve?

Problem	Action Required
Bad Communication Press CANC key And Try Again	<ol style="list-style-type: none"><li>1. There was a communication failure after the transaction was initiated.</li><li>2. Press <b>Cancel</b> and try again.</li></ol>
Chip cards cannot be processed	<ol style="list-style-type: none"><li>1. Try inserting a different card. If this card can be read, the problem is with the first card.</li><li>2. Use a cleaning card to clean the card reader.</li></ol>
Display is too bright or too dark	<ol style="list-style-type: none"><li>1. Adjust the brightness setting to work with the lighting at the terminal location.</li></ol>
Display screen is blank	Please try the following: <ol style="list-style-type: none"><li>1. Press any button on the terminal to see if it is in power saving mode. <b>(All)</b></li><li>2. Ensure that the power cable is properly seated in the terminal's power port and the electrical outlet. <b>(All-in-One)</b></li><li>3. Place the terminal in the charger base in case the battery is drained. <b>(HSPA and Wi-Fi)</b></li></ol>
Magnetic stripe card reader won't read cards	<ol style="list-style-type: none"><li>1. Try swiping the card more quickly or more slowly or from the top of the reader towards you.</li><li>2. Request another form of payment. If this card can be read, the problem is with the first card.</li><li>3. Use a cleaning card to clean the problem card reader.</li></ol>
Printer does not print	<ol style="list-style-type: none"><li>1. Is there is paper in the device? If there is, ensure that the paper is loaded correctly.</li></ol>
Printer jam	<ol style="list-style-type: none"><li>1. Ensure that the paper feed is clear and that the paper roll is loaded correctly.</li><li>2. Ensure the printer lid is closed completely.</li></ol>

## Why isn't my terminal powering on?

All-in-One	HSPA and Wi-Fi
<ol style="list-style-type: none"><li>1. Ensure that the electrical outlet has power.</li><li>2. Ensure that the power cord is properly inserted into the outlet.</li><li>3. Re-insert the power cable into the hub's power port and twist it gently to the right until it clicks.</li><li>4. Ensure that the power cord is inserted properly into the terminal.</li><li>5. Power on the terminal.</li></ol>	<ol style="list-style-type: none"><li>1. Ensure that the terminal's power cord is properly inserted into the electrical outlet.</li><li>2. Ensure that the power cord is properly inserted into the terminal / charging base.</li><li>3. Verify that the charging icon appears on the terminal screen.</li></ol>

## Why do I see the Internet disconnected icon? (All-in-One and Wi-Fi)

The Internet disconnected icon  will only appear on the **All-in-One** and **Wi-Fi** terminal screen when there is an Internet communication problem.

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

## Why is my terminal signal strength low? (HSPA and Wi-Fi)

Your **HSPA** and **Wi-Fi** terminal should always show at least one bar in order to be able to complete transactions, but it should be a minimum two bars to complete transactions reliably.

Ideal signal strength	Low signal strength	No signal
		

Check the following to troubleshoot the issue:

1. Has your environment changed? (**HSPA and Wi-Fi**)  
Changes to your place of business, such as adding a new wall or installing an electronic device near your terminal or between the access point and terminal, could reduce its wireless signal strength.
2. Is your access point / repeater working? (**Wi-Fi only**)
  - a) Ensure the access point is securely plugged into an electrical outlet.
  - b) Finger tighten the antenna into the antenna port on the back of the access point / repeater.
  - c) Adjust the antenna angle to see if this provides a better signal to the terminal.

## *Why won't my terminal connect? (HSPA)*

The **HSPA** wireless network signal is represented by the  in the top-right corner of the screen. If the icon is red it means it can't connect to the network.

### **Has your environment has changed?**

1. Physical changes to your place of business, such as adding a new wall or installing an electronic device, may reduce the wireless signal strength and prevent the connection.
2. Physical changes outside your place of business may impact the signal strength such as a new building or infrastructure. Try moving your terminal in your place of business to see if it can connect in a new location. The icon will turn green when it's connected.

## *What do I do if the terminal displays a security alert?*

If your terminal displays the message **Security Alert**, it means that your terminal has been damaged and must be replaced. Please contact the TD Merchant Solutions Help Desk immediately.

# Reference

## Charging terminals (HSPA and Wi-Fi)

At the end of the day, it's a good idea to do a quick inspection of the terminal to ensure that it will be ready for the next business day.

### Charging your HSPA or Wi-Fi terminal

1. Ensure that the battery has sufficient charge, or that it's charging if the battery icon turns red. 
2. When recharging the terminal, ensure that:
  - the charging cord is fully inserted into the back of the charger base or terminal
  - OR
  - the terminal is seated properly in the optional charging base.
3. When the terminal is charging, you will see an icon in the top-right corner. 

## Storing terminals

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

## Maintaining terminals

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

## Entering letters and special characters

Whenever you have are requested to enter a letter or special character, such as a receipt banner or creating a user ID, follow these steps. Press the **correction** key to change any entry.

### Entering... Steps

- |         |   |
|---------|---|
| Letters | <ol style="list-style-type: none"><li>1. Press the <b>number key</b> that has the desired letter on it. For example, press <b>2</b> to enter C.</li><li>2. Scroll to <b>desired letter</b> and press <b>OK</b>.</li></ol> |
|---------|---|

## Entering... Steps

Spaces	1.	Press the <b>left</b>  to create a space.
Special characters	1.	Press the <b>right</b>  .
	2.	Scroll to the desired character and press <b>OK</b> .

## Transaction shortcuts

Action	Icon	Navigation
Logon / Logoff		Desktop → <b>Log Off</b>
Purchase (Credit / Debit)		Desktop → <b>Purchase</b>
Purchase (Phone / Mail)		Desktop → Main Menu → <b>Phone / Mail Purchase</b>
Force Post		Desktop → Main Menu → <b>Debit / Credit</b> → Force Post and then: <ul style="list-style-type: none"> <li>• Purchase,</li> <li>• Pre-Authorization,</li> <li>• Phone Purchase, or</li> <li>• Mail Purchase</li> </ul>
Refund		Desktop → Main Menu → <b>Debit / Credit</b> → Refund
Void		Desktop → <b>Void</b>
Start Pre-Authorization		Desktop → <b>Pre-Authorization</b>
Charge Pre-Authorization		Desktop → <b>Pre-Auth Completion</b>
Reporting		Desktop → Main Menu → <b>Reporting</b> and then: <ul style="list-style-type: none"> <li>• Business Day Reports,</li> <li>• Batch Reports,</li> <li>• Customized Reports, or</li> <li>• Gift Card Reports</li> </ul>
Day Close		Desktop → <b>Day Close</b>

# Call Centre Information

Please call the TD Merchant Solutions Help Desk at **1-800-363-1163** if you have any questions.

## *Authorization:*

24 hours a day, seven days a week

## *Terminal Inquiries:*

24 hours a day, seven days a week

## *General Merchant Inquiries:*

Monday – Friday, 8 a.m. – 8 p.m. ET

## *Printer / Stationery Supplies:*

Monday – Friday, 8 a.m. – 5 p.m. ET

# Documentation Portal

This guide covers the most commonly used information in order to get you started. Your terminal has more features and functionality to explore on our documentation portal which you can find at [www.TDMerchantSolutions.com/ResourceCentre](http://www.TDMerchantSolutions.com/ResourceCentre).

