

TD Generation

Merchant Guide



For the TD Generation

- All-in-One,
- HSPA,
- and WiFi

* Image shown is the HSPA terminal



UPDATE Copyright date

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Welcome to TD Merchant Solutions

The following materials 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 Generation terminals and how they can support your business needs.

By now your terminal is installed and now it's time for you to learn more about its features and capabilities.

Who should use this guide?

You would use this guide if you use a TD Generation (All-in-One, HSPA and WiFi) during the course of your daily business.

The TD Generation family

The terminal is solely for you, the Merchant. You will use the terminal to initiate transactions for customer's using credit or debit cards (Visa®, Mastercard®, Discover®, American Express®, Interac® Direct Payment, UnionPay®, etc.) and mobile wallets. Depending on your settings, some card types may not be accepted by your terminal.

To learn how to use other cards, please go to our online documentation at www.TDMerchantSolutions.com/ResourceCentre.









Hardware terminology

There are a few hardware terms we use in the guide that you should know to optimize your interactions with the TD Generation package.

- **Access point / Repeater** - For every site that uses one or more WiFi terminals, it will also include an access point to allow the terminals to perform financial transactions. If that access point's wireless signal range is unable to cover the entire work space – such as a very large restaurant – a repeater will be added. This repeater will cover the remaining work space and must overlap with the access point's wireless coverage area to facilitate communication.
- **All-In-One (AIO) terminal** - This is a wired terminal connected to the Internet via an Ethernet cable or a dial-up phone line through the Hub.
- **Charger base** - A charger base is used for the HSPA and WiFi terminal to keep it charged when it is not in use. This is an optional piece of equipment as either terminal can be connected to the included power cord and recharged via an electrical outlet.
- **HSPA terminal** - This terminal uses the same cell towers that a mobile phone would use in order to perform financial transactions and does not require cabling to connect to the Internet.
- **Hub** - A hub is always paired with the All-In-One terminal as it connects the terminal to an electrical outlet and the Internet.
- **WiFi terminal** - This is a wireless terminal that uses a specialized router called the access point. As this device does not require cabling to connect to the Internet, this terminal can be used within a large area as long as it is within the signal range of the access point. If the area is too large for the access point, repeaters will be added to provide coverage.







The TD Generation Terminals

The terminal

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**
 - a) Insert chipped cards
 - b) Contactless cards
 - c) Swipe cards



Differences between the terminals

#	Name	All-in-One	HSPA	WiFi
1	Paper chamber button		--- Same ---	
2	Dash keys and direction pad		--- Same ---	
3	Paper advance key			
4	Power key			
5	Command keys		--- Same ---	
6a	Chip card reader		--- Same ---	
6b	Contactless reader		--- Same ---	
6c	Magnetic stripe reader		--- Same ---	
--	Access Point / Repeater	No	No	Yes / Optional
--	Charger Base	No	Optional	Optional
--	Communications	Hub via phone line or Ethernet	Cell towers	Access point

Communications

All-in-One terminal

The All-In-One terminal communicates via a phone line or an wired ADSL Internet connection. The image shown is the phone line version of the hub.

The hub shown is the dual phone line hub. Depending on your installation, you may have an Ethernet hub with a single line.



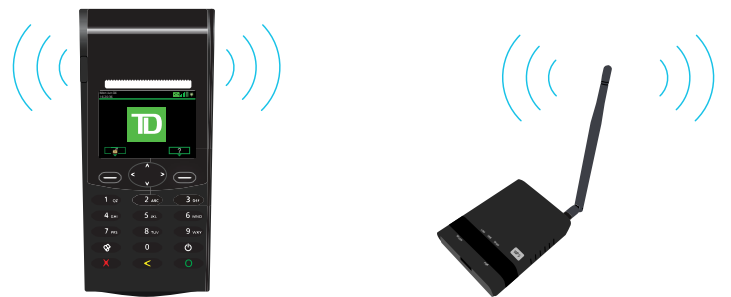
HSPA terminal

The HSPA terminal communicates via the same cell towers that your mobile phone uses. The HSPA terminal must be within a tower's range in order to function.



WiFi terminal

The WiFi terminal communicates via a router called an access point. The access point is connected to your Internet connection and receives financial transactions wirelessly from your terminal. You must have an active Internet connection in order to use the WiFi terminal.



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



WiFi

Differences between the terminal screens

Icon	Name	All-in-One	HSPA	WiFi
	Indicates that the terminal is charging.	-	✓	✓
	Indicates the terminal power level.	-	✓	✓
	Indicates whether your terminal is connected to the Internet. If it isn't you will see  on top of the computer icon.	✓	-	✓
	Indicates whether the terminal is: <ul style="list-style-type: none">• Not connected (red),• Trying to connect (orange), or• Connected (green).	-	✓	-
	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.

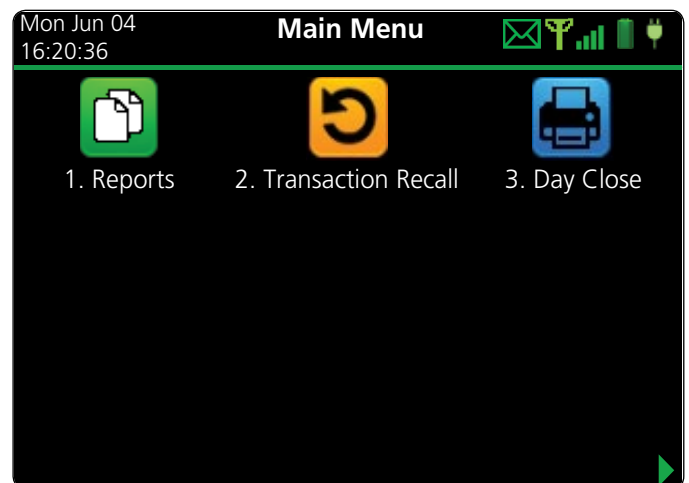
- Only the HSPA and WiFi terminals can have more than three icons on this screen.
- The icon bar along the top will show different icons for each terminal type.



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 depending on the terminal type (All-in-One, HSPA or WiFi).



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)
- A power port



Ports

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

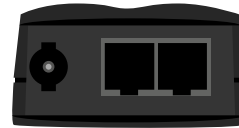
Single Ethernet

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.



The WiFi Access Point / Repeater

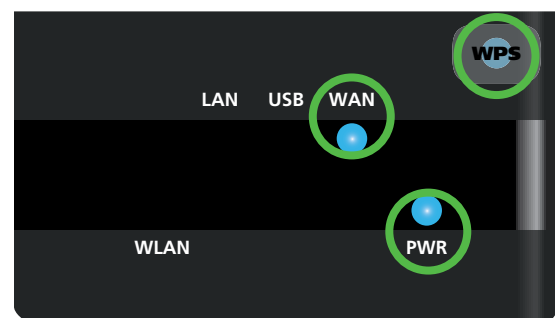
The access point is the second component of the TD Generation WiFi package. The access point acts like a router by receiving any transactions sent wirelessly from your terminal(s) and then forwards them to the payment system. Repeaters are additional routers that extend the terminal's range over larger areas.



Lights

There are five lights on the access point, but only the **WAN**, **PWR** and **WPS** are used. You will use these to troubleshoot any communication problems between the terminal and the access point/repeater.

- Be sure not to move it or place barriers around your existing access point / repeaters after the installation as any changes may interfere with the signal strength.
- The access point is the first one installed at a site. Additional access points are referred to as repeaters.
- Don't worry, no one can access the WiFi signal via their laptop or smartphone.



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 Charger Base (Optional for HSPA and WiFi)

The charger base is a great option for businesses that require mobile terminals (restaurants, etc.).

Just plug the power cord into the charger base and the other end into an electrical outlet. When you want to recharge an HSPA or WiFi terminal, just place it in the charger base with the terminal's charge connectors (the rectangle with eight circles) aligned to the base's charge connectors (the rectangle with four metal pins).



- Ensure that the charger base's power cord is inserted completely. If it isn't the terminal won't charge.
- Placement of the charger base is important. Make sure it is convenient, but not in a high traffic area where the terminal could be accidentally knocked or pushed off the base.

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
Generic settings			
Voice prompts	✓		
Financial Transactions			
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	✓		
Receipt settings			
Cash transaction receipts	✓		
Print operator name	✓		
Day close			
Access day close		✓	
Close batch with open pre-authorizations	✓		
Terminal auto-close	✓		
Reporting			
Access batch reports		✓	
Access business day reports		✓	
Access customized reports		✓	
Access gift card reports		✓	
Access override passcode menu		✓	

Functionality	Enable/Disable	Supervisor ID	Override Passcode
End of day reports			
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.

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.	1. Call for a voice authorization immediately.
OR	2. Request a CODE 10 authorization. In this situation, you may be dealing with a fraudulent card and CODE 10 will alert the financial institution to this possibility.
...the cardholder signature on the receipt does not match the signature on the reverse of the card.	
OR	
...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.


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.



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

Split payment (optional)

- Enter the **payment amount** and press **OK**. Enter the partial payment amount.
 - Select the **back arrow** or **OK**. If correct, select **OK**. Otherwise, select the **back arrow**.
 - 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.
 - 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.
- 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

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

Contactless

- a) 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**.

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

4. 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.
5. 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.
 6. 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.

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.

1. Press the left  → Desktop → **FP Purchase**.

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

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

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

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.

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

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**

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

Card Type

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

Important Information

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

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	
****	****
PURCHASE	
12-21-2015	12:29:12
Acct # 452001****5097	C
Exp Date 10/19	Card Type VI
A00000000003101001	VISA CREDIT
Trace # 6	
Inv. # 5	
Auth # 75612	
TVR 000000000000TST	RRN 001006006
TC 0E19785C8DAA97AC	F800
Total	\$50.00
(00) APPROVED THANK YOU	
Retain this copy for your records	
Merchant Copy	
Receipt Banner	
Receipt Banner	

Merchant Name	
Address, Postal Code	
City, Province	
2000000	
N10000000205	
****	****
PURCHASE	
12-21-2015	12:29:12
Acct # 452001****5097	C
Account Chequing	Card Type DP
A00000000003101001	INTERAC
Trace # 9	
Inv. # 3	
Auth # 75612	
	RRN 001006006
	F800
Total	\$50.00
(00) APPROVED THANK YOU	
Retain this copy for your records	
Merchant Copy	
Receipt Banner	
Receipt Banner	

Business Day Functions

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

1. 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.

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.	DISPLAY or PRINT 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 OK .
Operator Balancing	...transactions by card type (including gift card totals and details) operator ID and for the current business day.	DISPLAY or PRINT your report.
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 (PREV or CURRENT).
Batch Balancing	...transaction details by card type and for current or previous batch.	DISPLAY or PRINT your report.

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 OK .
Totals	...transaction totals by transaction type and card type for a maximum of 45 days	Enter the From Date/Time and press OK .
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.	Enter the To Date/Time and press OK . DISPLAY or PRINT your report.

Administration and Configuration

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.

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 (highest),
- Manager,
- Supervisor, and
- Operator (lowest).

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 administrator and manager IDs that you record and store them in a safe place for future reference.

User Type	Capabilities	Special Notes
Administrator	<ul style="list-style-type: none"> • Can access all features and functions, including transaction processing, reports and menus • Can set up manager, supervisor and operator IDs • Only administrators have access to the Activity Log 	<ul style="list-style-type: none"> • A maximum of 9 administrators IDs are allowed per terminal • IDs are 1 to 10 digits in length (#) • Passwords are case sensitive, 7 to 12 characters in length using at least one number AND one letter (#####A)

User Type	Capabilities	Special Notes
Manager	<ul style="list-style-type: none"> Can access features and functions, including transaction processing, all reports and all menus Can set up supervisor and operator IDs 	<ul style="list-style-type: none"> A maximum of 10 manager IDs are allowed per terminal Be aware of who you grant Manager access to IDs are 1 to 7 digits in length (#) Passwords are case sensitive, 4 to 7 characters (alpha-numeric) in length (####)
Supervisor	<ul style="list-style-type: none"> Can perform normal transactions Can set up operator IDs 	<ul style="list-style-type: none"> A maximum of 10 supervisor IDs are allowed per terminal IDs are 1 to 7 digits in length (#) Passwords are case sensitive, 4 to 7 characters (alpha or numeric) in length (####)
Operator	<ul style="list-style-type: none"> Can perform normal everyday financial transactions 	<ul style="list-style-type: none"> A maximum of 200 operator IDs are allowed per terminal Operator (default) can be renamed to Clerk, Server or Cashier by a manager IDs are 1 to 6 digits in length (#) Passwords are 4 to 7 digits in length (####) An optional name can be added (up to 20 alpha or numeric characters in length)

User management

Create a new user

Use this option to add a new administrator ID to the terminal. You log in as an administrator to initiate this process.

1. Desktop → Main Menu → **Control Panel** → User Management → Add User.
2. Enter the **User ID** and press **OK**. The User ID can be up to 5 digits in length.
3. Enter the **Password** and press **OK**. The password can be up to 7 digits in length.
4. Re-enter the **Password**.
5. Select **OPERATOR** or **SUPER**. This determines what level of access the user will have. Be cautious about who you assign Supervisor level access to.

Change user password

Use this option change a user's password.

1. Desktop → Main Menu → **Control Panel** → User Management → Change Password.
2. Enter the **User ID** that you want to change the password for and press **OK**.
3. Enter the **old password** and press **OK**.
4. Re-enter the **new password** and press **OK**.
5. Enter the **new password** and press **OK**.

Remove user

Use this option to have a Supervisor delete an existing user IDs from a terminal. You cannot delete the user that is currently logged into this terminal.

6. Desktop → Main Menu → **Control Panel** → User Management → Remove User.
7. Select the User ID that you wish to delete.
8. Confirm that you want to remove the user (**NO or YES**).
9. Confirm how many administrator IDs you wish to delete (**All or One**).

All

- a) Confirm this action (**Yes or No**). Select **Yes** if you wish to delete all operators from this terminal.

All administrator IDs are now deleted from the terminal except the original administrator ID that came with the terminal. This can never be deleted by you.

One

- b) Enter the **User ID** to be deleted.
- c) Confirm your decision (**Yes or No**).
- d) You will be offered the option to delete another ID if one exists.

Display existing user IDs

Use this option to display a list of existing IDs on the terminal.

1. Desktop → Main Menu → **Control Panel** → User Management → User List.
2. Select **DISPLAY** or **PRINT**. A list of all User IDs, User Names and their Authority Level will appear on the terminal or be printed off.

Change login method

Use this option to select the user logon method. The logon method will determine what sort of information is required for users to logon to the terminal. This can only be done by a Supervisor.

1. Desktop → Main Menu → **Control Panel** → Logon Method.
2. Select one of the following options:
 - **ID And Password**
 - **ID Only**
 - **No Logon**
3. The most secure is ID and Password and the least secure is No Logon.

General customization

Adjust speaker volume

Use this option to increase or decrease the volume by 10% increments using the left or right Dash keys.

1. Desktop → Main Menu → **Control Panel** → Speaker Volume.
2. Select one of the following (+ or -). With each press of the button the volume will change by 10%. You will hear a beep to indicate you how loud the new volume setting is.

Adjust backlight level

Use this option to increase or decrease the backlight intensity.

1. Desktop → Main Menu → **Control Panel** → Backlight.
2. Select one of the following (+ or -). With each press of the button the screen brightness will change by 5%. The screen will change to the new lighting level to indicate what the new setting will look like.

Change screen language

Use this option to change the language of a terminal to English or French. Only Supervisors may change the language settings.

1. Desktop → Main Menu → **Control Panel** → Language.
2. Select the desired **language (ENGLISH or FRENCH)**.

Sync the time on the terminal

Use this option to sync the date and time on the terminal by communicating with the TD host.

1. Desktop → Main Menu → **Control Panel** → Date/Time Sync.
2. The terminal creates a connection to the server and syncs date and time information.

Reset invoice number

This option allows you to reset your invoice number that will be displayed on your receipts. If you select this option the invoice number is reset to "1".

1. Desktop → Main Menu Screen → **Admin** → Reset Invoice #.
2. Confirm that you want to reset the invoice number (**NO** or **YES**).

Access messages on the terminal

Priority Mail is used to send important information to the merchant and should be checked daily. If there is any mail waiting for you, there will be an envelope icon in the top-right corner of the screen.

1. Desktop → Main Menu → **Priority Mail**.
2. Select one of the following: Check Mail, Read Messages, Delete Inbox Messages or Delete All Messages.

Check Mail

Allows a user to download mail from the mail server.

Read Messages

Allows the user to read messages downloaded from the mail server.

Delete Inbox Messages

Allows a supervisor to delete a single message from the inbox. Once deleted it cannot be retrieved.

Delete All Messages

Allows a supervisor to delete all messages in the inbox. Once deleted they cannot be retrieved.

Enable training mode

This option allows a supervisor to sign in and train another user on the functions of the terminal without impacting any live transactions or totals on the terminal. While in this mode the word DEMO will be displayed in the background of the terminal screen and a Training Mode banner will be printed on all receipts and reports.

While in Training Mode you will be unable to:

- Perform any configuration changes
- Perform any transactions with chip cards
- Print accurate gift card reports as you can't modify this data

1. Desktop → Main Menu → **Control Panel** → Training Mode.

2. Select one of the following (**NO** or **YES**).

To exit Training Mode, repeat the above steps. The message *Training Mode Ended* will appear and word DEMO will be removed from the background on the *Desktop* and *Main Menu* screens.

View battery level (HSPA and WiFi only)

Use this option to review the battery's current charge level and associated battery settings. This is a static that provides the current power level and the settings for the battery icon.

You must call the TD Merchant Solutions Help Desk at **1-800-363-1163** to change any of the settings that impact how the battery information is displayed.

1. Desktop → Main Menu → **Control Panel** → Battery Panel.

- **Current**
This is the current battery charge shown as a percentage.
- **Red Battery Icon**
This is the percentage charge or less that will cause the battery icon on the screen to turn red.
- **Blinking Icon**
This is the percentage charge or less that will cause the battery icon on the screen to blink.

Enable terminal voice prompts (HSPA and WiFi only)

The terminal has the ability to verbally provide certain audible prompts for the customer. You must call the Help Desk **1-800-363-1163** to have this feature enabled.

The following voice prompt is available:

- Remove Card

Receipts

Reprint receipt

Use this option to reprint an existing receipt.

1. Desktop → Main Menu → **Reprint** and select one of the following:
2. Select one of the following options (**Last Receipt**, **Past Receipt** or **Day Close Report**).

Last Receipt

- a) Confirm that this is correct (**NO** or **YES**).
- b) The last receipt is reprinted.

Past Receipt

- a) To reprint a receipt, **swipe the credit / debit card** that the transaction was performed on.
- b) **Select the transaction** that you want to reprint the receipt for and press **OK**.
- c) Select **BACK** or **PRINT**. If you select **PRINT**, the receipt is reprinted.

Day Close Report

- a) Confirm that this is correct (**NO** or **YES**).
- b) The day close report is reprinted.

Receipt banner (HSPA and WiFi)

Use this option to add a short slogan or advertising to the bottom of all receipts printed from a terminal. The banner can be up to nine lines in length. The character options are alpha-numeric with a single or double font-size option.

- It is your responsibility to ensure that the content of any banner message complies with all applicable laws. By using this feature, you agree that you are solely responsible for any advertising messages displayed on the terminal.
- The receipt banner must be added to each terminal that you want to use it on.
- The more lines you add to the banner, the more paper will be used when you print a receipt.
- If you print a large number of receipts daily, your paper usage may increase.

1. Desktop → Main Menu → **Admin** → Receipt Banner.
2. Do you wish to set your receipt banner? (**NO** or **YES**).
3. Enter the number of lines and press **OK**. Set the number to zero if you wish to remove the banner.

Line #

- a) Select the font size for this line (**SINGLE** or **DOUBLE**). The single font has a 26 character limit per line while the double-sized font has a 20 character limit.
- b) Enter your **receipt banner message** and press **OK** when finished.
- c) This step will repeat as many times as you selected receipt banner lines. Once you're finished entering the receipt banner, press **OK**, without entering a new character to complete the entry.

Downloads

Software download

This function allows the terminal to download a new software application from the TD remote host without the need for a technician on site.

1. Desktop → Main Menu → **Control Panel** → Software Download.
2. Select **CONTINUE** to proceed.
 - a) The download begins. Do not interrupt the download once it has begun as this may cause your terminal to stop working.
 - b) The terminal will print out a report.
 - c) When the terminal reboots, and the Idle screen appears, the download is complete.

- The device must remain powered on for the entire process.
- You must close your business day on the terminal before downloading software.
- A software download can also be initiated via a notification. In this case, the software may be downloaded in the background within a defined time frame (scheduled download).
- A software download must be done separately for each terminal.

Parameter download

Use this option downloads parameters from the TD Hosts for the operation of the terminal.

1. Desktop → Main Menu → **Control Panel** → Parameter Download → Host 1 Download or Host 2 Download.
2. Select one of the following options (**Host 1 Download** or **Host 2 Download**).

Host 1 Download updates anything dealing with financial information such as (card types, transaction types, Interac keys).

Host 2 Download updates anything dealing with non-financial information such as (gift cards and loyalty cards).

Host 1 Download

- a) Confirm that this is correct (**NO** or **YES**).

Host 2 Download

- a) Select one of the following options (**FULL** or **PARTIAL**). You have an option to do a full or partial download.

Full: Pulls down all information to the terminal.

Partial: Only pulls down information changed by Help Desk.

Communications

Change IP connection (All-in-One only)

Use this option to assign a static IP or a dynamic IP (DHCP) to your terminal.

1. Desktop → Main Menu → **Control Panel** → Communications → Connection Type Setup.
2. Select one of the following options (**Static IP** or **DHCP**).

Static IP

- a) Enter the **IP address** and press **OK**. The static IP address is supplied by your Internet service provider (ISP).and is 12 digits long.
- b) Enter the **subnet mask address** and press **OK**. The subnet mask is supplied by your Internet service provider (ISP).and is 12 digits long.
- c) Enter the **default gateway address** and press **OK**. The default gateway address is supplied by your Internet service provider (ISP).and is 12 digits long.
- d) Enter the **DNS address** and press **OK**. The DNS address is supplied by your Internet service provider (ISP).and is 12 digits long.
- e) Is this correct: (**CORR / Redo** or **OK / Confirm**)?

DHCP

- a) The system will detect your IP address and then return you to the previous menu.

Troubleshooting

With any equipment, sometimes problems occur. With the TD Generation, error messages are displayed on screen with a short description. Below is a list of error messages that you could see on the terminal screen and the actions required.

Error codes

"A" Error codes	Explanation	Action required
Already In Training Mode	The user tried to enter Training mode when they were already in it.	<ul style="list-style-type: none"> Either proceed with Training Mode or repeat the steps and exit Training Mode.
Amount \$0.00 Not Allowed	An amount higher than 0.00 must be entered.	<ul style="list-style-type: none"> Please enter a new amount and press OK.
"B" Error codes	Explanation	Action required
Bad Communication	Terminal detected a communication failure after the transaction is initiated.	<ul style="list-style-type: none"> Check your connections and retry the transaction. If the problem persists call the Help Desk. If there is no signal strength, reboot the access point by disconnecting and reconnecting the power cord. Wait 2 minutes and check then check the signal strength again. If the problem persists call the Help Desk.
Bad Communication Press CANC key And Try Again	Terminal detected a communication failure after the transaction was initiated (to Bell Mobility Tower / host).	<ul style="list-style-type: none"> Press Cancel and try again.
Batch Cannot Be Closed With Open Pre-Auths	The terminal is configured so that pre-authorization transactions must be completed before a Batch Close can be performed.	<ul style="list-style-type: none"> Please complete all open pre-authorization transactions, then close the batch.
Business Day Full Close Business Day Now	The terminal has reached the maximum number of transactions that can be accumulated for a business day.	<ul style="list-style-type: none"> A Day Close must be processed to allow the terminal to continue processing. Once this message is displayed only administrative transactions and pre-authorization completions transactions can be performed.

"C" Error codes	Explanation	Action required
Cannot Reset Invoice # to 1 When Set to Manual	The terminal has invoice number entry set to manual entry, and this option is not allowed in this mode.	<ul style="list-style-type: none"> Please call the Help Desk if you wish to change the entry mode to automatic.
Card Error Please Try Again	The terminal failed to read the chip on the inserted card.	<ul style="list-style-type: none"> Remove the card and try reinserting it, ensuring that it is entered correctly. If the problem persists, please ask the card holder for another form of payment.
Card Error Please Try Again	The terminal failed to read the chip on the inserted card.	<ul style="list-style-type: none"> Remove the card and try inserting it again.
Card Error Use Magnetic Stripe	The terminal failed to read the chip on the inserted card.	<ul style="list-style-type: none"> 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 terminal before the transaction was completed.	<ul style="list-style-type: none"> Process the transaction again, while instructing the cardholder not to remove the card until instructed by the terminal.
Cashback Amount Exceeds Limit	The cashback amount entered exceeds the maximum allowed for this terminal.	<ul style="list-style-type: none"> Please enter another amount within the cashback limit.
Check Printer	The printer is not ready for printing.	<ul style="list-style-type: none"> Verify that the printer has paper and that the cover is closed properly.
Close Batch Failed End Of Business Day Not Complete	The terminal failed to complete a Batch Close transaction during the Day Close.	<ul style="list-style-type: none"> Retry the Day Close transaction. If the problem persists please call the Help Desk.
Close Batch Soon	The terminal has almost reached the maximum number of transactions that can be accumulated for a batch.	<ul style="list-style-type: none"> A Batch Close must be processed before the next 20 transactions to allow the terminal to continue processing.
Close Business Day Soon	<p>The terminal has almost reached the maximum number of transactions that can be accumulated for a business day.</p> <p>OR</p> <p>The Day Close transaction has reached the maximum number of days that it can be left open.</p>	<ul style="list-style-type: none"> A Day Close must be processed as soon as possible to allow the terminal to continue processing.
Customer to Insert Chip Card	The cardholder attempted to swipe a chip card on the terminal.	<ul style="list-style-type: none"> Please insert the card into the chip reader on the terminal.

“D” Error codes	Explanation	Action required
Day Cannot Be Closed With Open Pre-Auths	The terminal is configured so that Pre-authorized Transactions must be completed before a Day Close can be performed.	<ul style="list-style-type: none"> • Please complete all open Pre-Auths transactions, then close the day.
Download Host 1 Parameter First	The terminal requires a Host 1 Parameter Download to be performed.	<ul style="list-style-type: none"> • Download the Host 1 Parameter.
Download Full Host 2 Params First	The terminal requires a full Host 2 Parameter Download to be performed.	<ul style="list-style-type: none"> • Download the Host 2 Parameter.
“E” Error codes	Explanation	Action required
End of Business Day Already Completed	The Day Close transaction has already been completed successfully.	—
End of Day Process Cancelled	The Day Close transaction was cancelled.	—
“F” Error codes	Explanation	Action required
Faulty Card	The card was swiped too slowly.	<ul style="list-style-type: none"> • Try swiping the card faster.
Function Not Allowed	The function selected is not setup for this terminal.	<ul style="list-style-type: none"> • If you require the function, please call the Help Desk.
“H” Error codes	Explanation	Action required
Host 1 Download Not Completed	The terminal attempted a Host 1 Download and it was not completed successfully.	<ul style="list-style-type: none"> • Try the Host 1 Download again. • If the problem persists, please call the Help Desk.
Host 2 Download Not Completed	The terminal attempted a Host 2 Download and it was not completed successfully.	<ul style="list-style-type: none"> • Try the Host 2 Download again. • If the problem persists, please call the Help Desk.
“I” Error codes	Explanation	Action required
ID Already Exists	The ID entered already exists on the terminal.	<ul style="list-style-type: none"> • Please enter another ID.
ID Table Empty	There are no IDs defined in the terminal.	—
Inbox Empty	There are no messages in the Mail Inbox.	—
Input Must Be At Least 1 Character	No data was entered in a required field.	<ul style="list-style-type: none"> • Please enter at least 1 character.
Input Must Be At Least 3 Characters	Less than 3 characters were entered.	<ul style="list-style-type: none"> • Please enter at least 3 characters.
Input Must Be At Least 9 Characters	Less than 9 characters were entered.	<ul style="list-style-type: none"> • Please enter at least 9 characters.

“I” Error codes	Explanation	Action required
Input Must Be Greater Than Zero	Value entered must be greater than zero.	<ul style="list-style-type: none"> • Please enter a value greater than zero.
Input Not In Valid Range	The data entered was not within the required values.	<ul style="list-style-type: none"> • Please reenter the data.
Internal Error Call Help Desk AAAAAAAAAAAAA NNNNNNNNNNNN CCCCCCCCCCCCC	<p>The terminal has encountered a fatal error.</p> <p>AA..... stands for component name</p> <p>NN..... stands for application information</p> <p>CC.....stands for error code</p>	<ul style="list-style-type: none"> • Please call the Help Desk and provide the information on the screen.
Invalid Account #	The card used failed a security check or the card number length is invalid for the card type.	<ul style="list-style-type: none"> • Enter the card again, if the problem persists ask the cardholder for another form of payment.
Invalid Date	The date entered on the terminal is not valid or occurs in the future.	<ul style="list-style-type: none"> • Please enter a valid date.
Invalid Expiry Date	The expiry date on the card is invalid.	<ul style="list-style-type: none"> • Please enter a valid expiry date. OR • Ask the customer for a different payment method.
Invalid ID	The user ID was not found on the terminal.	<ul style="list-style-type: none"> • Enter a valid ID.
Invalid ID/Password	The ID/Password combination entered does not match any in the terminal's record.	<ul style="list-style-type: none"> • Re-enter or try another ID/ password.
Invalid Password	The password is not valid for the User ID entered.	<ul style="list-style-type: none"> • Re-enter the password or try another ID.
Invalid Time	The time entered is not valid.	<ul style="list-style-type: none"> • Please enter a valid time.
Invoice Tab First	The Close Tab transaction has been attempted on a Tab that hasn't been invoiced.	<ul style="list-style-type: none"> • Process an Invoice Tab transaction for the invoice number entered.
“M” Error codes	Explanation	Action required
Maximum # of Entries Reached	The maximum number of User IDs (100) has been reached.	<ul style="list-style-type: none"> • To enter additional IDs, some IDs will have to be deleted.
“N” Error codes	Explanation	Action required
No Match	A match cannot be found for the data entered or selected.	<ul style="list-style-type: none"> • Please retry or enter new data.
No Response From Host	Terminal times out the host response.	<ul style="list-style-type: none"> • Press CANC (X) key And Try Again. If the problem persists call the Help Desk.
No Transactions Found	A transaction cannot be found with the criteria entered.	<ul style="list-style-type: none"> • Please enter new data.

“N” Error codes	Explanation	Action required
Not Accepted	The card type entered is not supported on this terminal.	<ul style="list-style-type: none"> • Please select another card.
Not Accepted Use Magnetic Stripe	The card was inserted, but the terminal does not have the card type defined for chip.	<ul style="list-style-type: none"> • Swipe the card on the terminal. • If the card type is supposed to be setup for chip, please call the Help Desk.
Not Allowed	The transaction selected is not setup for this terminal or it is not allowed with the card being used.	<ul style="list-style-type: none"> • Try another card type. • If the transaction is supposed to be setup for the terminal, please call the Help Desk.
Not Allowed To Reset Inv# with Open Batch	An attempt was made to reset the invoice number, however the batch was open.	<ul style="list-style-type: none"> • Please close the batch and then Reset the Invoice #.
Not Allowed To Reset Invoice # With Open Pre-Auths	An attempt was made to reset the invoice number however there are open pre-auths in the terminal.	<ul style="list-style-type: none"> • Please complete the pre-auths and then Reset the Invoice #.
Not Allowed With Trans Outstanding	A function cannot be run if there are any transactions outstanding (pre-auth, transactions in the open batch, etc.).	<ul style="list-style-type: none"> • Please process the outstanding transactions then try the function again.
Not Available	The item requested is not available.	<ul style="list-style-type: none"> • Please make another selection.
Not Completed	The attempted transaction or function did not complete successfully.	<ul style="list-style-type: none"> • Re-attempt the transaction or function. • If the problem persists please call the Help Desk.
Number Not In The Range 1 – 9	The input # does not fall in the range of print lines allowed for the receipt banner.	<ul style="list-style-type: none"> • Please enter a valid number.
Number Not In The Range 1 — 65535	The entered host port number is not in a valid range.	<ul style="list-style-type: none"> • Please enter a valid number.
Not In Training Mode	If the user is not in training mode and tries to exit it.	—
“P” Error codes	Explanation	Action required
Passwords Do Not Match	The password confirmation does not match the original password entered.	<ul style="list-style-type: none"> • Please re-enter the password confirmation.
PIN pad Has Been Replaced! Host 1 Parameter Download Is Required!	The terminal has detected that the PIN pad has been replaced.	<ul style="list-style-type: none"> • If a technician has not been on-site to replace the PIN pad, please call the Help Desk to report suspected tampering.

“P” Error codes	Explanation	Action required
Processing Error	The terminal encountered an error when trying to process a chip transaction.	<ul style="list-style-type: none"> Try the action again. If the problem persists ask for another form of payment. If the problem occurs on multiple chip cards, please call the Help Desk.
“R” Error codes	Explanation	Action required
Receipt Not Printed! Imprint Card and Complete Sales Draft Manually	The transaction was approved however the terminal is unable to print a receipt.	<ul style="list-style-type: none"> Manually imprint the card, record the authorization code and have the customer sign the receipt.
Reset Date And Time From Main Menu	The terminal requires the date to be synchronized with the host date and time.	<ul style="list-style-type: none"> Perform the Date/Time Sync function on the terminal.
“S” Error codes	Explanation	Action required
System Error Contact Help Desk	The terminal has encountered a system error.	<ul style="list-style-type: none"> Please call the Help Desk immediately to have your terminal replaced.
“T” Error codes	Explanation	Action required
Tab Already Closed	Close Tab transaction is attempted on an open tab transaction that has already been closed.	—
Tab Already Invoiced	Invoice Tab transaction is attempted on a transaction that has already been invoiced.	—
Transaction Already Voided	Void transaction is attempted on a transaction that has already been voided.	—
Transaction Already Completed	Pre-auth completion is attempted on a pre-auth that has already been completed.	—
Transaction Cancelled	The transaction has been cancelled by the user.	—
Transaction Not Allowed	The transaction type is not supported for the card entered.	<ul style="list-style-type: none"> Please select another card type or transaction.

Hardware troubleshooting


What problems can I easily resolve?

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

Why isn't my terminal powering on?


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

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

The HSPA wireless network signal is represented by the connection icon  in the top-right corner of the screen. If it is green, your terminal is connected to the network. If it is red, your terminal isn't connected. If you can't establish a connection:

1. Has your environment has changed? Physical changes to your place of business, such as adding a new wall or installing an electronic device may have reduced the wireless signal strength.
2. It may be that something has changed outside you place of business that is impacting the signal strength such as a new building or obstacle. Try moving your terminal around your place of business to see if it can connect in a new location.

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

The Internet disconnected icon  will only appear on the All-in-One and WiFi 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 the terminal signal strength low?

Your HSPA and WiFi 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.



If your terminal is experiencing low or no signal strength, check the following:

1. Has your environment changed? **(HSPA and WiFi)**
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? **(WiFi)**
 - 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.

Appendices

Lost or stolen equipment

If your device has been lost or stolen, please:

1. Contact the TD Merchant Solutions Help Desk immediately to report the incident. (Stolen or lost)
2. Contact the police to file a report. (Stolen only)

What should I do when the police arrive regarding the stolen device?

If a police officer arrives on site please record the following:











- Officer's name
- Officer's contact information
- Officer's jurisdiction
- Stolen device's serial number

The officer should provide you with a **report number**. After obtaining the above from the officer, please contact the TD Merchant Solutions Help Desk and provide this information so that you can receive a replacement device.

Please see the template below to ensure that you record all the required information.



Police Information	
Name	_____
Jurisdiction	_____
Contact Information	PH# _____ EXT # _____
	FAX# _____
	Email _____
Report Number	_____
Device Information	
Serial Number of the Stolen Device	_____

Transaction shortcuts

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

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"> 1. Press the number key that has the desired letter on it. For example, press 2 to enter C. 2. Scroll to desired letter and press OK.
Spaces	<ol style="list-style-type: none"> 1. Press the left  to create a space.
Special characters	<ol style="list-style-type: none"> 1. Press the right . 2. Scroll to the desired character and press OK.

Terminal care

Maintaining your terminal

- Don't place it on a magnetized pad — this will cause it to malfunction.
- Routinely clean it 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.

Storing your terminal

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

Charging your terminal (HSPA and WiFi)

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 shift.

Charging your HSPA or WiFi terminal

1. Ensure that the battery has sufficient charge, or that it's charging if the battery icon turns red like this:



2. When recharging the terminal, ensure that:
 - the charging cord is fully inserted into the back of the terminal

OR

 - ensure the terminal is sitting properly in the charging base

3. When the terminal is charging, you will see an icon in the top-right corner like this:



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.

Call Centre Information

Please call the TD Merchant Solutions Help Desk at **1-800-363-1163**. We would be happy to answer any questions you may have.

Authorization:

24 hours a day, seven days a week

Terminal Inquiries:

24 hours a day, seven days a week

General Merchant Inquiries:

Monday – Friday, 8 a.m. – 8 p.m. ET

Printer / Stationery Supplies:

Monday – Friday, 8 a.m. – 5 p.m. ET

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.

