TD Generation

Merchant Guide

For the TD Generation
- Portal 2 with PINpad

Contents

Welcome to TD Merchant Solutions

This is a new and exciting product that offers new functionality for you, the merchant. 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 Portal 2 and how it can support your business needs.

By now your terminal will be installed, initialized and configured. Now it's time for you to learn more about its features and capabilities. Section 1 outlines the terminal's basic functions. In section 2 you will learn about your responsibilities as a merchant. Financial transactions are covered in section 3 and section 4 covers reporting. Section 5 covers administration and the configuration of your terminal and troubleshooting steps are in section 6.

Who should use this guide?

You would use this guide if you perform transactions on a TD Generation Portal 2 with PINpad during the course of your daily business.

The TD Generation with PINpad

The terminal is solely for you, our Merchant. You will use the terminal to initiate transactions for customer's using credit, debit, loyalty or gift cards. Depending on your settings, some card types may not be accepted by your terminal. For loyalty and gift card information, please review our online documentation at *www.TDMerchantSolutions.com/ResourceCentre*.

> Please note, there have been some changes to the terminal hardware. The new hardware version has a much larger touchscreen versus the previous version which had a smaller touchscreen with a numeric touch pad below. If you have the previous hardware version, please ensure that you download the correct documentation for TD Generation Portal with PINpad.

Functionality

Name	Terminal	PINpad
Paper chamber button	✓	--
Navigation keys	✓	--
Paper advance icon		--
Command icons / keys	CANC < OK	X < O
Chip card reader	--	✓
Magnetic stripe reader	--	✓
Contactless reader	--	✓
Communications	Via dial-up or DSL connection	Connected to the terminal

Hardware

The terminal

1. **Paper chamber button**

2. **Touchscreen**
   All navigation and merchant data entry is done through the touchscreen.

Navigation

- The terminal uses a touchscreen for navigation. You can navigate screens by swiping left / right or tapping an onscreen option.

- Only use your finger when using the touchscreen as objects may damage it.

Changing the paper roll

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.
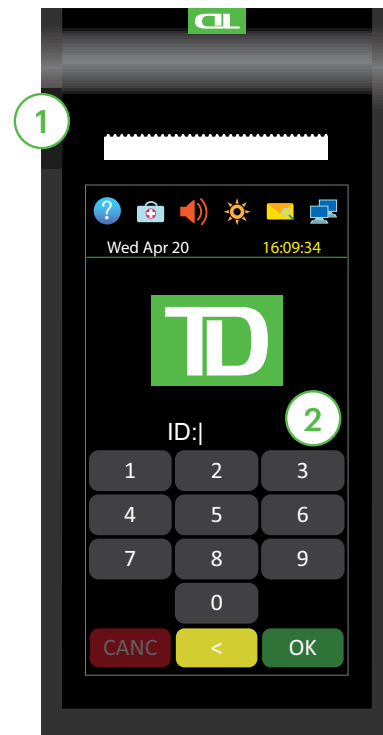
Screens

Idle screens and icons

The default screen is called the Idle screen. It displays a lot of important information and different ways to access your terminal's functionality. If you require users to login to the terminal, your Idle screen will be the one on the left. After the terminal is unlocked, or if it doesn't require a login, it will appear as the one on the right.
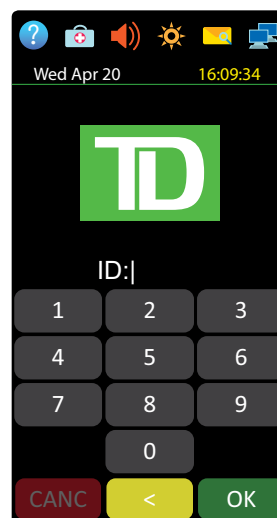
Terminal (locked)

Terminal (unlocked)

Home screen(s) and icons

The *Home* screen always displays three or more icons that include: **Purchase**, **Void** and **Day Close**.

- The **Service Menu** icon is replaced with the **Control Panel** icon.
- If your business requires more than 10 transaction types, there will be a second screen with the remaining icons.
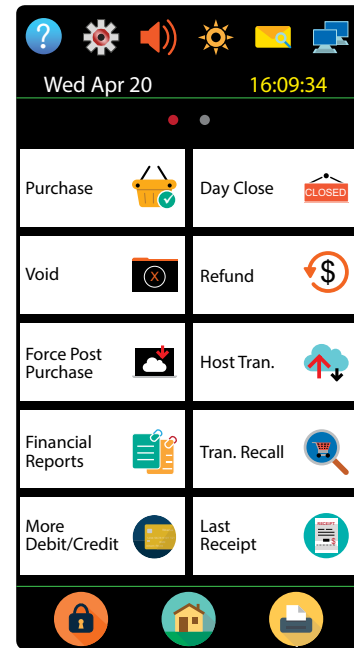
Navigation

If you have more than one *Home* screen you can tell which screen you're on by looking at the two dots at the top of the screen. The red dot indicates the active screen. Place your finger on the touchscreen and swipe left or right to navigate to the desired screen. If an icon has sub-menus, swipe up and down the screen to navigate the entire menu.

Icons

The icons on the terminal change from screen to screen. Below are the most common icons that you will use in your day-to-day business. The PINpad has no interface icons.

Icon	Name	Description	Idle Screen	Home Screen
	Help	Tap this to access the *Help* screen.	✓	✓
	Service menu	This icon is only used by TD technicians.	✓	-
	Control panel	Tap this icon to access administration and configuration settings.	-	✓
	Speaker volume	Tap to access terminal's speaker volume.	✓	✓
	Screen brightness	Tap this to change terminal's screen brightness.	✓	✓
	Mail	Tap to review any priority emails.	✓	✓
	Internet status	This icon indicates that your terminal is connected to the Internet. If it isn't connected you will see 🚫 to the bottom right of the icon.	✓	✓
	Dial-up status	This icon indicates that your terminal is connected via dial-up.	Possible	Possible
	PINpad disconnected	This icon indicates your PINpad is disconnected from the terminal. Please verify that the PINpad is securely connected to the terminal.	Possible	Possible

Icon	Name	Description	Idle Screen	Home Screen
🔒	Lock / Log off	Tap this to log out the current user or, if you don't use login IDs, tap this icon to return to the *Idle* screen.	-	✓
🏠	Home	Tap this to access the *Home* screen(s).	✓	✓
🖨	Paper Advance	Tap this to advance the paper roll in the terminal.	-	✓

The PINpad

The PINpad is used by the customer to make transaction selections and entries.

1. **Dash keys**
   Use the ⬭ keys to navigate the screens and menus.

2. **Command keys**
   - ⬛X⬛ = Cancel
   - ⬛<⬛ = Correction
   - ⬛O⬛ = OK or activate

3. **Volume key**
   Use this key to adjust the PINpad volume.

4. **Card readers**
   a) Insert chipped cards
   b) Contactless cards
   c) Swipe cards

Navigation

- Dash keys — the two ⬭ keys are used by the customer to select on screen options.

The Communications Hub

The Generation with PINpad comes with a hub to allow for easy power and Internet connectivity. It includes:

- A power cable
- A power port

- A dialup port
- An Ethernet port
- Dual connection communications hubs are available upon special request.
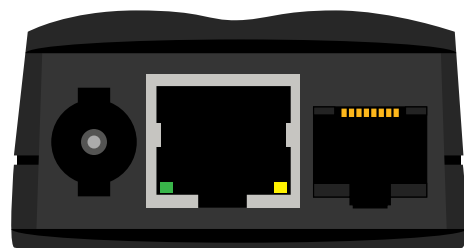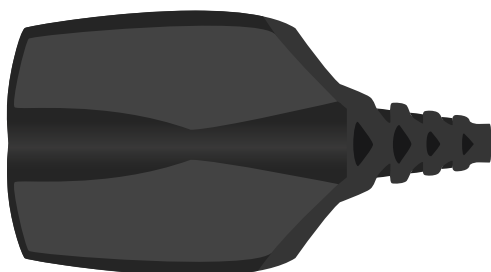
Cardholder Privacy and Security

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 🏠 **Home →** ⚙ **Control Panel →** Logon Method.

Override Passcode

This option allows the business owner to setup a passcode to bypass certain functionality. See page 6 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 funtions 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	✓	✓	✓
Force post purchase	✓		
Gift card balance	✓		
Loyalty award	✓		
Manual entry (credit card)	✓	✓	
Manual entry (gift card)	✓		
Payment	✓		
Phone/mail purchase	✓		
Pre-auth (completion)	✓		
Pre-auth (open)	✓		
Purchase	✓		
Purchase with tip	✓		
Refund	✓		
Split bill	✓		
Transaction recall sub-menu	✓		
Void	✓		
Receipt settings			
Cash transaction receipts	✓		
Last receipt	✓		
Print operator name	✓		
Day close			
Access day close		✓	
Close batch with open pre-authorizations	✓		

Functionality	Enable/Disable	Supervisor ID	Override Passcode
Day close	✓		
Terminal auto-close	✓		
Reporting			
Access batch reports		✓	
Access business day reports		✓	
Access customized reports		✓	
Access gift card reports		✓	
Access override passcode menu		✓	
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. 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. **OR** ...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.	**1.** Call for a voice authorization immediately. **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.

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

The TD Generation terminal can perform the following transactions:

- Purchase
- Purchase (Phone / Mail)
- Force post
- Refund
- Void

- Cash*
- Pre-authorizations / Tabs*
- Gift card*
- Loyalty card / More Rewards® / Air Miles®*
- UnionPay*

* These optional transactions are covered in our online documentation at *www.TDMerchantSolutions.com/ResourceCentre.*

- 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.

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 the TD Merchant Solutions Help Desk at **1-800-363-1163**.

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, use the *Phone or mail purchase* instructions. If you use the incorrect purchase transaction you could incur extra charges.

ENTER AMOUNT	→	SPLIT PAYMENT? (optional)	→	TIP? (optional)	→	PAYMENT METHODS	→	RECEIPTS and BALANCE?

1. Tap the 🏠 / **Home** key → 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

    d)   Enter the **account number** and press **OK**.

    e)   Enter the **expiry date** and press **OK**.

    f)   A manual imprint of the credit card is required. Make the imprint and press **OK.**

    g)   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.

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

> • 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**.

Debit card purchase

ENTER AMOUNT	SPLIT PAYMENT? (optional)	TIP? (optional)	PAYMENT METHODS	CASHBACK? (optional)	RECEIPTS & BALANCE?

1. Tap the 🏠 / **Home** key ➔ 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 made prior to the day close and you must do a refund, not a void.

1. Tap the 🏠 / **Home** key → Void.

2. Enter the **trace #** from the receipt of the transaction to be voided and tap **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. Go to step 2.

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. Tap the 🏠 / **Home** key → 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 or tab. 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. Tap the 🏠 / **Home** key → Transaction Recall.

2. Select one of the following:

    Recall all

    This recalls the details all of transactions in the open batch.

    a) A list of all transactions currently available on the terminal appear. Go to step 2.

    Recall by trace #

    This only recalls the transaction connected to the trace # in the open batch.

    a) Enter the **trace number** that you want to recall and tap **OK**. Go to step 4.

    Recall by amount

    This recalls any transaction for the entered dollar amount in the open batch.

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

    Recall by account #

    This recalls any transaction for the entered card account number in the open batch.

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

    Recall by invoice #

    This recalls the transaction for the entered invoice number.

    a) Enter the invoice number that you want to recall and tap **OK**. Go to step 4.

3. If there are multiple transactions, scroll to the desired one and tap **OK**.

4. Select **Void** to cancel the transaction or select **Completion** to close a pre-authorization. Tap **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. Tap the 🏠 / **Home** key → 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 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. Tap the 🏠 / **Home** key → Force Post Purchase.
2. Enter the **dollar amount** and tap **OK**.
3. Then enter the authorization number and tap **OK**. Please note, authorization numbers can include letters.
4. Select one of the following payment methods: **Insert**, **Swipe,** or **Manual Entry**.

   Insert credit or debit card / swipe credit card

   a) Insert the card into the PINpad. Go to step 5.

   Manual credit card

   a) Enter the **account number** and tap **OK**.

   b) Enter the **expiry date** and tap **OK**.

   c) Enter the **CVD number** and tap **OK**. Go to step 5.
5. The screen shows that the transaction is approved and the receipts print.
6. 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. Tap the 🏠 / **Home** key ➜ Force Phone / Mail Purchase.
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
• Print for every transaction (default)	• Print for every transaction (default)
• Individual receipts can be declined by the Merchant	• Print for every approved transaction
• Do not print any customer receipts	• Print for transactions over a set amount
	• Print only for a transaction that requires a signature

Reprinting receipts

1. Tap the 🏠 / **Home** key ➜ Reprint and select one of the following:

   Last Receipt
   a) Confirm that you want to reprint the last receipt (**NO** or **YES**).
   b) The most recent receipt will reprint with the word **DUPLICATE** on it.

   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 tap **OK**.
   c) Select **PRINT** if this is the correct transaction.
   d) The selected receipt will reprint with the word **DUPLICATE** on it.

Receipt examples

Credit Card	Debit Card

The information that you will use the most is noted on the receipts below.

```
            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
A000000000003101001       VISA CREDIT

Trace # 6
Inv. # 5
Auth # 75612
                      RRN 001006006
TVR 000000000000TST           F800
TC 0E19785C8DAA97AC


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
A000000000003101001         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
```

Transaction type

C	Online chip card transaction	RF	Contactless transaction
CN	Chip card No Signature Required transaction	S	Swiped mag card transaction
CO	Off-line chip card transaction	SC	Swiped chip card fall back transaction
M	Manually entered mag card transaction	SN	Swiped No Signature Required transaction
MC	Manually entered fall back of a chip card transaction		

Card type

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

* Union Pay transactions are covered in our online documentation at *www.TDMerchantSolutions.com/ResourceCentre*.

Important information	
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 signatures is required for a transaction so ensure that the client signs these receipts.
Approved	Always ensure that the transaction was approved as it could be **Declined**.

Business Day Functions

Depending on the logon method, it may be as simple as a user performing transactions to entering a logon ID and password.

Performing day close

You have a deadline to perform a 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. Tap the 🏠 / **Home** key → Day Close.
2. Confirm that you want to close your business day (**NO** or **YES**). 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, certain reports will print.
4. When it is completed you will see the *Business Day Closed* message.

Reprinting the day close report

1. Tap the 🏠 / **Home** key → Reprint.
2. Select **Day Close Report**.
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

Tap 🏠 / **Home** key → Financial 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

Tap 🏠 / **Home** key → 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

Tap 🏠 / **Home** key → 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**.
		Enter the From **Date**/**Time** and pres**s OK**.
Totals	...transaction totals by transaction type and card type for a maximum of 45 days	Enter the To **Date**/**Time** and pres**s OK**.
		DISPLAY or **PRINT** your report.
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.	

Administration and Configuration

The TD Generation with PINpad offers you numerous options to personalize the terminal while helping you to administer your business. 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 safely train new employees how to use the terminal)
- Receipts (changes to how and when they are printed)

Administering the terminal

By utilizing user types, you can help secure your terminal from fraudulent transactions and allows certain advanced functionality to trusted employees. Listed below are the user types available to you and what functionality is available to them.

User Type	Capabilities	Special Notes
Supervisor	• Can perform normal transactions • Can set up operator IDs	• Consists of an ID, password an user name • A maximum of 100 operators are allowed per terminal
Operator	• Can perform normal everyday financial transactions	• Consists of an ID, password an user name • A maximum of 100 operators are allowed per terminal

Login requirements for terminal functions

This option allows you to determine which functions require a supervisor to enter their login ID and password. Functions will only appear in the option list if they can be ID and password protected. The same steps are used to disable user id and password requirements.

Please see the following list of available functions and reports:

- Supervisor is the highest level that can be granted and has access to various administration functions so be aware of who you grant this access to.

Function	Settings	Explanation
Batch Reports Business Day Reports Customized Reports End of Day Force Post Gift Card Reports Manual Account Number Entry	On / Off	Enables / disables supervisor protection on this function.

Please call the Help Desk to have this feature enabled (**1-800-363-1163**) request these to be enabled.

User management

Add user

Use this option to create a unique user ID for them with the appropriate level of access to terminal features.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → User Management → Add User.
2. Enter the new **user name** and tap **OK**. This can be 13 characters in length.
3. Enter the new **user ID** and tap **OK**. This unique number can be up to five digits in length.
4. Enter the **new password** and tap **OK**. This can be up to seven digits in length.
5. Re-enter the **new password** and tap **OK**.
6. Select the authority level for this user: **Operator** or **Supervisor**.
7. The new user is added to the terminal.

Change password

This option allows you to change an existing password for security or personal reasons. It requires a higher level user to change it. For example, it would take a supervisor to change a supervisor or operator's password.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → User Management → Change Password.
2. Enter the **ID** that you want to change the password for and tap **OK**.
3. Enter the **old password** and tap **OK**.
4. Enter the **new password** and tap **OK**. Passwords up to seven digits in length.
5. Re-enter the **new password** and tap **OK**.
6. The password is now changed.

Remove user

This option allows you to delete an existing user.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → User Management → Remove User.
2. Select the **user** that you want to delete and tap **OK**. Only a Supervisor can delete a user from the terminal. You cannot delete the user that is logged into this terminal.
3. Confirm that you want to delete the user (**NO** or **YES**).
4. The user ID is now removed.

User list

This option creates a report that contains the user ID details with the option to print them.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → User Management → User List.
2. Display the list on the screen or print it (**DISPLAY** or **PRINT**).
3. The user list report either displays or prints. Each user will be listed by user ID, user name and level.

Logon method

This option allows you to determine whether a log on is required to access the terminal.

1. Tap the 🏠 / **Home** key ➜ ⚙ / **Control Panel** icon ➜ Logon Method.
2. Tap one of the following options: **ID And Password** (most secure), **ID Only** or **No Logon** (least secure).
3. The screen will display what method that you selected and confirm the change.

Downloads

Parameter download

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

Note: This function is automatically performed during the day close process. Below is what sort of information is contained by each host download.

Host 1 Params.DL

Use this option if you want to update anything dealing with financial information such as card types, transaction types.

Host 2 Params.DL

Use this option if you want to update anything dealing with non-financial information such as terminal settings.

1. Tap the 🏠 / **Home** key ➜ **Control Panel** icon ➜ Parameter Download.
2. Select which type of download you want to do: **Host 1 Parameters** or **Host 2 Parameters.**

    Host 1 Parameters

    a) Confirm that you want to start the download: **NO** or **YES**.
    b) The terminal begins the download and continues running until *Parameter Download Completed* appears on the screen. Go to step 3.

    Host 2 Parameters

    a) Select what type of download this is (**FULL** or **PARTIAL**).

        FULL: Performs a full download which takes longer than a partial. Partial: Only pulls down information changed by Help Desk.

    b) The terminal begins the download. It will show a percentage complete counter until complete when it shows the message *Host 2 Download Completed*.
    c) Your terminal will automatically reboot. Go to step 3.

3. Your terminal starts up and the parameter download is complete.

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.

> - The device must remain powered on for the full 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 window (scheduled download).
> - A software download must be done separately for each terminal.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → Software Download.
2. Tap **CONTINUE** to proceed.
3. The download is complete and your terminal will automatically reboot.

Configuration reports

Use this report to print a report of all your configuration settings.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → Configuration Report.
2. Select and automatically print one of the following reports:

> These reports can be large so print them at your own discretion.

Merchant reports

You can print these reports to compare settings between your different terminals.
- **Communications** – A report will print with all of your communication settings. See page 25 for more on communication settings.
- **Host 1 Settings** – A report will print with all of your Host 1 settings and their values. See page 23 for more on Host 1 settings.
- **Host 2 Settings** – A report will print with all of your Host 2 settings and their values. See page 23 for more on Host 2 settings.

Help Desk Reports

The following reports are generally only printed when requested by the Help Desk.
- **Card BIN Ranges** – A report will print with all of your BIN ranges accepted on the terminal.

> This option is only used when calling into Help Desk or to ensure that all your terminals have the same settings.

- **EMV Parameters** – You would select **All**, **Contact** or **Contactless** EMV parameters and a report will print with all of the values for the selected profile.
- **EMV Public Keys** – You would select an EMV profile and a report will print with all of your EMV values for the profile.

Communications

Use these options to change communication settings on your terminal.

> You must enter a valid supervisor ID and password to access this option.

Communications

Use this option to change the communications between direct dial-up and Ethernet.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → Communications → Connection Type Setup.

2. Select the desired option: **Direct Dial-up** or **High-Speed Internet**. Direct Dial-up uses your phone line while High-Speed Internet uses your DSL or cable internet connection via a router.

   The new communication mode is now active and screens requesting information will now appear based on your selection.

   Direct Dial-up

   a) Enter the **Host 2 Phone #** and tap **OK**.

   b) Enter the **dialing prefix** and tap **OK**.

   c) Go to step 3.

   High Speed Internet

   a) Select the desired option: **STATIC IP** or **DHCP**. If it is STATIC IP, proceed to step b. If it is DHCP, go to step 3.

   b) Enter the **Terminal IP Address** and tap **OK**.

   c) Enter the **Terminal Subnet Mask** and tap **OK**.

   d) Enter the **Terminal Default Gateway** and tap **OK**.

   e) Enter the **Terminal DNS** and tap **OK**.

   f) Go to step 3.

3. Your communications are now updated.

General options

Use these options to configure your terminal's volume, brightness and other settings.

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. When in training mode:

> * The screen will display the word **DEMO**.
> * Receipts and reports will be labelled with a Training Mode banner.
> * You will be unable to make configuration changes,
> * You will be unable to perform chip card transactions,

1. Tap the 🏠 / **Home** key → **Control Panel** icon → Training Mode.

2. Enter or exit training mode: **NO** or **YES**.

3. Training mode is now enabled / disabled depending upon your selection. You will return to the *Idle* screen and see the word **Training**. Perform these steps again when you wish to leave training mode.

Date / Time sync

This option corrects the date and time on the terminal by communicating with the TD host.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → Date / Time Sync.
2. The terminal creates a connection to the server and syncs date and time information.

Terminal volume

This option allows you to increase or decrease the terminal speaker volume.

1. Tap the 🔊 / **Terminal Volume** icon.
2. Drag the volume bar to the desired level and tap **TEST**.
3. When you're satisfied tap ↩ / **back arrow** to exit.

Terminal brightness

This option allows you determine how bright your terminal display is.

1. Tap the ☀ / **Brightness Level** icon.
2. Tap **-** or **+** to adjust the PINpad volume by one level (1 through 5).
3. When you're satisfied tap ↩ / **back arrow** to exit.

Priority mail

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 of the screen.

1. Tap the ✉ / **Mail** icon.
2. Select one of the following options: **Check Mail**, **Read Messages**, **Delete Messages** or **Delete All Messages**.
   a) **Check Mail** – Allows a user to download mail from the mail server.
   b) **Read Messages** – Allows the user to read messages downloaded from the mail server.
   c) **Delete Inbox Messages** – Allows a supervisor to delete a single message from the inbox. Once deleted they cannot be retrieved.
   d) **Delete All Messages** – Allows a supervisor to delete all messages in the inbox. Once deleted they cannot be retrieved.

PINpad volume

This option allows you to increase or decrease the PINpad speaker volume.

1. Press the 🔊 / **Speaker Volume** button.
2. Select **-** or **+** to adjust the PINpad volume by 10%.
3. When you're satisfied with the new volume level press **cancel** to exit.

Language

This option allows a supervisor to change the language of a terminal to English or French.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → Language.
2. Tap the desired language: **English** or **Français**.
3. The terminal language has now been set to your selection.

Voice prompts

The terminal has the ability to verbally provide certain audible prompts for the customer. The following voice prompts are available: *Present card*, *Transaction completed*, *Remove card* and *Thank you for your business*.

> You must call the Help Desk (**1-800-363-1163**) to request that the voice prompts be enabled.

Receipt options

Use these options to configure your receipts.

Receipt banner

This option allows you to add a short slogan or advertising to the bottom of all receipts printed from a 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 be significantly higher than what you're accustomed to.
> - It's 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.

1. Tap the 🏠 / **Home** key ➜ **Control Panel** icon ➜ Receipt Banner.
2. Enable the receipt banner: **NO** or **YES**.
3. Enter the number of lines to print on the receipt (**0 – 9**) and tap **OK**. If you set it to zero it will disable the receipt banner.
4. Select the **font size** for the displayed line (**SINGLE** or **DOUBLE**).
5. Single size can have 26 characters to a line and double will allow 20 characters.
6. Enter the **text** for the displayed line and when finished press **OK**.
7. If you press **OK** without entering anything, the line will be left blank.
8. Go to step 4 for each line in your receipt banner. When you tap **OK** after the final line, your changes are saved and will be applied to all future receipts.

Reset invoice #

Use this option to reset your invoice number to 1. This will be reflected on the printed receipts.

> You cannot reset the invoice number with an open batch. Close the existing batch and then reset the invoice number.

1. Tap the 🏠 / **Home** key ➜ **Control Panel** icon ➜ Reset Invoice #.
2. Confirm you want to reset the invoice number to 1: **NO** or **YES**.
3. The invoice number is now reset to 1.

Reprint last receipt

This option is used to reprint the last merchant or customer receipt before another transaction is processed.

1. Tap the 🏠 / **Home** key → Reprint → Last Receipt.

2. The last receipt reprints.

Reprint older receipt

This option is used to reprint a receipt printed before the last receipt since the last end of day close.

1. Tap the 🏠 / **Home** key → Reprint → Past Receipt.

2. Swipe the card that was used for the transaction or tap **Manual** and manually enter the account number.

3. Scroll to the desired transaction (if there is more than one) and tap **PRINT**.

4. The selected receipt reprints. The receipt will be a merchant copy with the word **REPRINT** displayed.

Functions enabled / disabled by TD Merchant Solutions

The following settings are available, but you must call the TD Merchant Solutions Help Desk to enable / disable them.

Function	Settings	Action
Auto Logoff Timer	Enabled / Disabled	Call in to change.
Cashback Prompt	Enabled / Disabled	Call in to change.
Cashback Type	Preset Merchant Entered	Call in to change.
Declined Credit Receipt	Print / Don't Print	Call in to change.
Invoice Number	On / Off	Call in to change.
Invoice Entry Method	Automatic / Manual	Call in to change.
Maximum Cash back Amount	Enter Value	Call in to change.
NSR Merchant Receipt	Never Print Print with Customer copy Always print	Call in to change.
Preset Cashback 1	Enter Value	Call in to change.
Preset Cashback 2	Enter Value	Call in to change.
Preset Cashback 3	Enter Value	Call in to change.
Purchase with Tip	On / Off	Call in to change.
Receipt Banner	On / Off	Call in or do it yourself. If you do it yourself your changes will be overwritten after a Host 2 download.
Receipt Order	Merchant Copy First Customer Copy First	Call in to change.
Tip Prompt	Enabled / Disabled	Call in to change.
Tip Type	Preset / Merchant Entered	Call in.

Troubleshooting

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.	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.	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.	Check your connections and retry the transaction. Verify that your Internet connection or phone line is working. If the problem persists contact the Help Desk.
Bad Communication Press CANC key And Try Again	Terminal detected a communication failure after the transaction was initiated.	Press **cancel** and try again.
Batch Cannot Be Closed With Open Pre-Auths	The terminal is configured so that Pre-authorized Transactions must be completed before a Batch Close can be performed.	Please complete all open Pre-Auth transactions, then close the batch.
Batch Cannot Be Closed With Open Tabs	The terminal is configured so that Open Tabs must be completed before a Batch Close can be performed.	Please complete all open Tab 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.	A Day Close must be processed to allow the terminal to continue processing. Once this message is displayed only administrative transactions and Pre-auth completions / Close Tab 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.	Please contact 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.	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.

"C" Error Codes	Explanation	Action Required
Card Error Please Try Again	The terminal failed to read the chip on the inserted card.	Remove the card and try inserting it again.
Card Error Use Magnetic Stripe	The terminal failed to read the chip on the inserted card.	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.	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.	Please enter another amount within the cashback limit.
Check Printer	The printer is not ready for printing.	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.	Retry the Day Close transaction. If the problem persists please contact the Help Desk.
Close Batch Soon	The terminal has almost reached the maximum number of transactions that can be accumulated for a batch.	A Batch Close must be processed before the next 20 transactions to allow the terminal to continue processing.
Close Business Day Soon	The terminal has almost reached the maximum number of transactions that can be accumulated for a business day. **OR** The Day Close transaction has reached the maximum number of days that it can be left open.	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.	Please insert the card into the chip reader on the terminal.

"D" Error Codes	Explanation	Action Required
Download Host 1 Parameter First	The terminal requires a Host 1 Parameter Download to be performed.	Download the Host 1 Parameter.
Download Full Host 2 Params First	The terminal requires a full Host 2 Parameter Download to be performed.	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.	Try swiping the card faster.
Function Not Allowed	The function selected is not setup for this terminal.	If you require the function, please contact the Help Desk.

"H" Error Codes	Explanation	Action Required
Host 1 Download Not Completed	The terminal attempted a Host 1 Download and it was successful.	Try the Host 1 Download again. If the problem persists, please contact the Help Desk.
Host 2 Download Not Completed	The terminal attempted a Host 2 Download and it was not completed successfully.	Try the Host 2 Download again. If the problem persists, please contact the Help Desk.

"I" Error Codes	Explanation	Action Required
ID Already Exists	The ID entered already exists on the terminal.	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.	Please enter at least 1 character.
Input Must Be At Least 3 Characters	Less than 3 characters were entered.	Please enter at least 3 characters.
Input Must Be At Least 9 Characters	Less than 9 characters were entered.	Please enter at least 9 characters.
Input Must Be Greater Than Zero	Value entered must be greater than zero.	Value entered must be greater than zero.
Input Not In Valid Range	The data entered was not within the required values.	Please reenter the data.
Internal Error Call Help Desk AAAAAAAAAAAAA NNNNNNNNNNNNN CCCCCCCCCCCCC	The terminal has encountered a fatal error. AA stands for component name NN stands for application information CC stands for error code	Please contact 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.	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.	Please enter a valid date.

"I" Error Codes	Explanation	Action Required
Invalid Expiry Date	The expiry date on the card is invalid.	Please enter a valid expiry date. **OR** Ask the customer for a different card.
Invalid ID	The user ID was not found on the terminal.	Enter a valid ID.
Invalid ID / Password	The ID / Password combination entered does not match any in the terminal's record.	Re-enter or try another ID / password.
Invalid Password	The password is not valid for the User ID entered.	Re-enter the password or try another ID.
Invalid Time	The time entered is not valid.	Please enter a valid time.
Invoice Tab First	The Close Tab transaction has been attempted on a Tab that hasn't been invoiced.	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.	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.	Please retry or enter new data.
No Response From Host	Terminal times out the host response.	Tap the **cancel** key and try again. If the problem persists contact the Help Desk.
No Transactions Found	A transaction cannot be found with the criteria entered.	Please enter new data.
Not Accepted	The card type entered is not supported on this terminal.	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.	Swipe the card on the terminal. If the card type is supposed to be setup for chip, please contact the Help Desk.
Not Allowed	The transaction selected is not setup for this terminal or it is not allowed with the card being used.	Try another card type. If the transaction is supposed to be setup for the terminal, please contact 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.	Please close the batch 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.).	Please process the outstanding transactions then try the function again.

"N" Error Codes	Explanation	Action Required
Not Available	The item requested is not available.	Please make another selection.
Not Completed	The attempted transaction or function did not complete successfully.	Re-attempt the transaction or function. If the problem persists please contact 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.	Please enter a valid number.
Number Not In The Range 1 — 65535	The entered host port number is not in a valid range.	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.	Please re-enter the password confirmation.
PINpad Has Been Replaced! Host 1 Parameter Download Is Required!	The terminal has detected that the PINpad has been replaced.	If a technician has not been onsite to replace the PINpad, please contact the Help Desk to report suspected tampering.
Processing Error	The terminal encountered an error when trying to process a chip transaction.	Try the action again. If the problem persists ask for another form of payment. If the problem occurs on multiple chip cards, please contact 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.	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.	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.	Please call the Help Desk immediately to have your terminal replaced.

"T" Error Codes	Explanation	Action Required
Transaction Already Voided	Void transaction is attempted on a transaction that has already been voided.	--
Transaction Cancelled	The transaction has been cancelled by the user.	--
Transaction Not Allowed	The transaction type is not supported for the card entered.	Please select another card type or transaction.

Purge transactions

This option allows a supervisor to clear all records from the terminal for specific transaction types.

- You should never do this without contacting Help Desk first and only perform this at their request
- When this is performed you will lose all the data contained within that specific terminal including transactions and the transactions history.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → Purge Transactions.
2. Confirm that you wish to continue: **NO** or **YES**.

Terminal information

This option displays the terminal ID of the device, the software version installed and the date it was installed / upgraded.

1. Tap the 🏠 / **Home** key → **Control Panel** icon → System Information.
2. Select how you would like the information to be displayed: **DISPLAY** or **PRINT**.
3. You will see the following information:

- Device
- Serial #
- Application
- Release Date
- Release Status

- System Software Version
- O/S
- EMV Kernel Version
- Security Software Version
- Free DRAM

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 jurisdiction

- Officer's contact information
- 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. See below for an easy to use information card to record the required information.

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

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 at
www.TDMerchantSolutions.com/ResourceCentre