

# TD Move 5000

## Quick Start Guide



### For the TD Move 5000

- Standalone and Semi-Integrated terminals



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### MERCHANT INFORMATION

Merchant Name \_\_\_\_\_

Merchant Number \_\_\_\_\_

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# About this Guide

This Guide provides an introduction to your TD Move 5000 terminal for both standalone and semi-integrated modes and covers hardware functionality, performing financial transactions, administration features and troubleshooting. For more information regarding its use and available features, please review the *TD Move 5000 Merchant Guide*.

## Merchant Welcome Kit Contents

Quick Start Guide Pamphlets	Miscellaneous
<ul style="list-style-type: none"><li>• <i>How to Help Prevent Fraud</i></li><li>• <i>Payment Card Industry Data</i></li><li>• <i>If you have a problem or concern</i></li></ul>	<ul style="list-style-type: none"><li>• Paper rolls (3 + 1 in the terminal)</li><li>• Cleaning card and instructions</li><li>• Card acceptance decals (Visa®, Mastercard®, Discover®, American Express®, Interac®, Direct Payment, UnionPay®, etc.)</li></ul>
Information sheets	
<ul style="list-style-type: none"><li>• <i>What you need to know about chargebacks</i></li><li>• <i>Payment card industry data security standard (PCI DSS)</i></li></ul>	

# The Terminal

## The TD Move 5000

The terminal is for you, the Merchant. You will use the terminal to initiate transactions for customers using credit or debit cards. Depending on your settings, some card types may not be accepted by your terminal. To learn how to use UnionPay cards, please review the *TD Move 5000 Merchant Guide*.

### *Standalone vs. semi-integrated*

The TD Move 5000 has two setups: a standalone terminal or a semi-integrated terminal. The only physical difference between the two is the *Home* screens. Please see the following to help you identify which terminal you have.

## Standalone Terminal

The **standalone** terminal requires that you enter the transaction information into the terminal and then the customer enters their payment information on the terminal. It has only one mode so you will not see an icon in the top-right corner.

For more information on the standalone terminal, see page 3.



## Semi-Integrated Terminal

The **semi-integrated** terminal has the transaction information fed to it (usually from an electronic cash register) and the customer enters their payment information on the terminal. It has two modes. You can tell which mode is active by the terminal's *Home screen* and the icon with the arrow in the top-right corner of the screen.

- For more information on the semi-integrated terminal see page 6.
- For more information on changing modes see page 21.

### Semi-Integrated Mode Home Screen



### Standalone Mode Home Screen



# Standalone Terminal

1. **Command keys**
  - Application key
  - Cancel
  - Correction
  - OK (or Enter)
2. **Touchscreen**  
All terminal navigation is performed through the touchscreen.
3. **Paper advance key**
4. **Paper chamber panel**
5. **Card readers**
  - a) Insert chipped cards
  - b) Swipe cards
  - c) Contactless cards (Tap the card on the contactless icon, not the touchscreen.)



## Home screen and icons

The default screen is called the *Home screen*. It displays important information, icons and different ways to access terminal functionality. They are:

1. **Communication icons**  
The icons on this bar will be different depending on which setup or comms method is chosen. See below for explanations on each icon type.
2. **Power**  
The battery icon in the top-right corner indicates the terminal battery level. When the lightning bolt appears on top of the battery icon, it means it is charging.
3. **Admin**  
This icon will open the *Admin Menu*.
4. **Language**  
This icon will open the *Language Menu*.



This screen will show six transaction icons – or four if you have the clock function enabled. You can request to have the following icons enabled for the *Home* screen: **Sale, Settlement, Report, Reprint, Logon** and **Logoff. Return, Void, Force Post, Pre-Auth**, and **P-A Comp** can be added if they are enabled on your terminal.

### Terminal communication modes

The TD Move 5000 terminal has up to three different communication modes and the differences are displayed on the *Home* screen header described below. The communication methods are:

Version	Hardware	Communication Method
Bluetooth (short range)	<ul style="list-style-type: none"><li>Terminal and a Bluetooth base</li></ul>	<ul style="list-style-type: none"><li>Uses the Bluetooth base to connect to the Payment Card Network via the Merchant's Internet connection</li></ul>
WiFi (short range)	<ul style="list-style-type: none"><li>Terminal, charging base, and a wireless router / modem supplied by the Merchant</li></ul>	<ul style="list-style-type: none"><li>Uses a WiFi signal that connects to the Payment Card Network via the Merchant's router</li></ul>
4G (long range)	<ul style="list-style-type: none"><li>Terminal and a charging base</li></ul>	<ul style="list-style-type: none"><li>Uses the 4G cellular towers to connect to the Payment Card Network</li></ul>

### Bluetooth communication mode

1.

**Ethernet connection icon**  
The Ethernet icon in the top-left corner indicates that the Bluetooth base's connection to the Internet. It will be one of two colours: grey (disconnected), or green (connected).



2.

**Bluetooth connection icon**  
The Bluetooth icon in the top-left corner indicates the terminal's connection to the Bluetooth base. It will be one of three colours: grey (disconnected), orange (searching for connection) or green (connected).



The grey icon indicates that Bluetooth is active on the terminal but not connected to a Bluetooth base.



The orange icon indicates that the terminal is connecting to a Bluetooth base.






The green icon indicates that the terminal is connected to a Bluetooth base.



WiFi communication mode

1. WiFi signal strength icon

The WiFi icon in the top-left corner indicates the terminal's connection to a WiFi network. It will be one of three colours: grey (disconnected), orange (searching for connection) or green (connected). When connected, it will display the WiFi signal strength with zero to three bands with three being the best signal strength.

-  The grey icon indicates that WiFi is present but not activated on the terminal.
-  The orange icon indicates that the terminal is connecting to a router / modem.
-  The green icon indicates that the terminal is connected to a router / modem.



4G communication mode

1. 4G signal strength icon

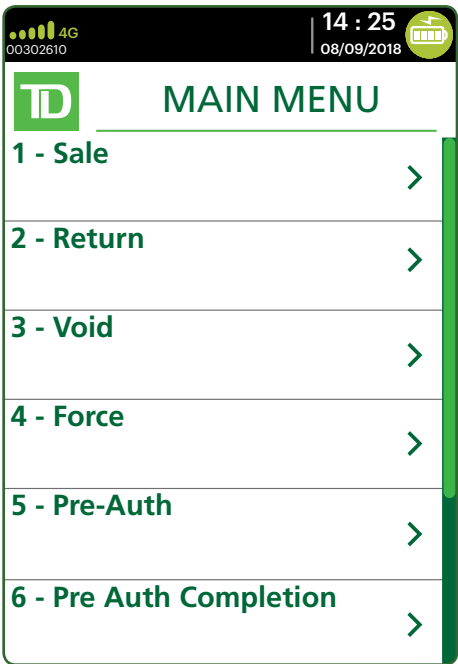
This icon in the top-left corner indicates the terminal's connection and signal strength to a 4G network. It will be one of two colours: green (connected) or grey (disconnected). When connected, it will display the 4G wireless signal strength with zero to five bars with five being the best connection. It can display, and connect to, a 3G or a 2G signal if 4G is not currently available. Below the icon is the 4G carrier name.



Main menu screen

From the *Home screen*, press the **OK** key and the *Main Menu* screen appears. The *Main Menu* screen displays the following transactions:

- Sale
- Return
- Void
- Force
- Pre-Auth
- Pre-Auth Completion
- Settlement
- Reprint Menu
- Reports Menu / Log In

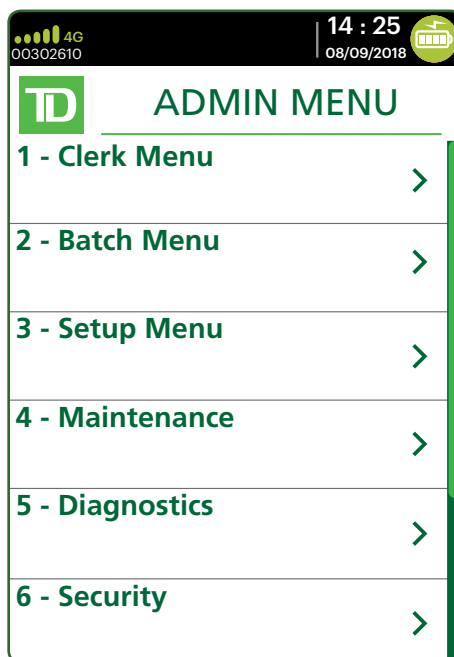


## Admin menu screen

From the *Home screen*, press the **Admin** key and the *Admin Menu* screen appears. It displays the following options:

- Clerk Menu
- Batch Menu
- Setup Menu
- Maintenance
- Diagnostics
- Security
- Terminal Info
- Host Management

For a list of all the administrator functions available on the terminal, refer to page 27 for a menu breakdown.



## Accessibility features

The TD Move 5000 has numerous accessibility features which reflect TD's commitment to our customers. It has such features as:

- Backlit keypad and adjustable screen brightness to create visual contrast
- Adjustable font size
- Adjustable key stroke sound when a key is pressed
- A stylus is supplied with each terminal to aid on screen navigation
- A raised identifier on the:
  - **5** key,
  - **Main Menu** key,
  - **Cancel** key,
  - **Correction** key, and
  - **OK** key

## Changing the paper roll

1. Gently pull up on the paper chamber panel along the top of terminal and remove the old paper roll.
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 enough paper sticking out from the chamber that it touches the top of the terminal screen.

# Semi-Integrated Terminal

## Home screen and icons

The default screen is called the *Home* screen. It displays important information, icons and different ways to access your terminal's functionality. They are:

- 1. Communication icons**  
The icons on this bar will be different depending on which setup or comms method is chosen.
- 2. Power**  
The battery icon in the top-right corner indicates that the terminal battery level. When the lightning bolt appears on top of the battery icon, it means it is charging.
- 3. Mode**  
This icon switches the mode that the semi-integrated terminal is in (standalone or semi-integrated).
- 4. Admin**  
This icon opens the *Admin Menu*.
- 5. Language**  
This icon opens the *Language Menu*.



## Software

### Applications on the TD Move 5000

The TD Move 5000 can accept a wide range of third-party applications to meet your business needs. These applications are very similar in idea to the applications on your smart phone. For example, if you want to accept gift cards after your initial terminal setup, you would have to:

1. Sign up for the appropriate program with the application provider.
2. Contact TD Merchant Solutions to enable it and have the application downloaded to your terminal.
3. To learn more about which applications are accepted, review the application creator's documentation.

Once downloaded to your terminal, these applications are accessed outside the standard TD Move 5000 menus.

**Note:** If you accept gift cards it will appear as a payment option during a Sale.

To access an application:

1. Press the silver **Application** key (above the red **Cancel** key).
2. Select the desired third-party application.
3. Follow the instructions provided by the application creator.

To use these third-party applications, you must follow the instructions in their documentation.

To return to the TD application:

1. Press the silver **Application** key (above the red **Cancel** key).
2. Select the TD application.



## Peripherals

### *The Bluetooth base*

The Bluetooth base is used with the TD Move 5000 when wired Internet is available. It acts as a connection to the payment network and as a short range wireless base for your terminal. This base also acts as a charging station for the terminal.

#### Ports

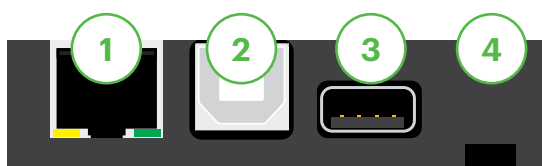
The base has four ports on the back but you are only using the Ethernet port and the power port:

1. Ethernet port
2. Printer port
3. USB port
4. Power cord  
You must remove the back plate to unplug the cord.



#### Communication options

The TD Move 5000 Bluetooth base offers an Ethernet connection. You can set this however you wish to suit your existing place of business' setup. To learn more about communication options see page 4.



*The charging base (optional)*

The charging base is physically identical to the Bluetooth base, but only has a power cord (#4).

# Cardholder Privacy and Security

## Terminal security

It is the Merchant’s responsibility to secure the terminal, any user IDs or passwords and 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 four available user settings:

<b>Admin</b>	No access restriction to terminal functionality; assign this level of access with extreme caution.
<b>Manager</b>	Access is restricted to certain features by a manager ID and password.
<b>Supervisor</b>	Access is restricted to certain features by a supervisor ID and password.
<b>Clerk</b>	Access is restricted to certain features by a clerk ID.

The following functions can be individually protected:

- |                          |                                 |
|--------------------------|---------------------------------|
| • Financial transactions | • Manual transactions           |
| • Settlement / Day close | • Standalone mode               |
| • Reprinting receipts    | • Various menus on the terminal |
| • Reports                |                                 |

For more information, please refer to the *TD Move 5000 Merchant Guide*.

## Fraud prevention

Please refer to the *How to Help Prevent Fraud* pamphlet in your Merchant Welcome Kit. 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 a credit card it’s within your rights as a business owner to request another form of payment (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, 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.	Press the <b>Cancel</b> key and call for a voice authorization immediately.  Request a <b>CODE 10</b> authorization. In this situation, you may be dealing with a fraudulent card and <b>CODE 10</b> will alert the financial institution to this possibility.
...the cardholder signature on the receipt does not match the signature on the reverse of the card.	Call for a voice authorization.  Request a <b>CODE 10</b> authorization. The financial institution will be able to advise whether or not the correct individual is using the card. They will also tell you how to proceed.
...you have any doubts about the validity of a card or a transaction.	Call for a voice authorization.  Request a <b>CODE 10</b> authorization. The financial institution will be able to advise whether or not the correct individual is using the card. They will also tell you how to proceed.

Financial Transactions (Standalone)

The TD Move 5000 standalone solution can perform the following transactions:

- Sale (purchase)
  - Phone / Mail sale
  - Force post (Sale, Void, Pre-Auth)
  - Return (refund)
- Void
  - Pre-authorization\*
  - Pre-authorization Completion\*

\* These transactions and others, such as cashback and tips are covered in the *TD Move 5000 Merchant Guide*.

- All sales must be completed with one card; there are no split payment options.
- To perform a mail order or telephone order (MOTO) transaction, indicate that the card was not present. There are risks performing transactions when the credit card is not present. Ensure that you perform **all** of the available security checks for a mail / phone sale. See page 9 for more information regarding manually entered credit card transactions.

## Accepted card types

Your terminal(s) will accept whatever cards you indicated when you signed your contract with TD Merchant Solutions. If you wish to adjust your accepted card list, please contact the TD Merchant Solutions Help Desk to discuss.

## Sale (credit card)

Use these instructions to process a credit card purchase on the terminal for card present and card not present transactions (mail order and phone orders).

1. Tap the **Sale** icon.
2. Enter the **total dollar amount** for the sale and press **Enter**.
3. The customer confirms the dollar amount (**Yes** or **No**).
4. Perform one of the following payment methods: **Insert, Swipe, Tap** or **Key (Manual Entry)**. If you accept gift cards the payment option will appear here.

### Insert card

- a) The customer inserts their credit card.
- b) The customer enters their **PIN** and presses **OK**.
- c) The screen shows that authorization number, the transaction total and the receipts print. Go to step 5.

### Swipe card

- a) Swipe the credit card.
- b) The customer indicates if the card is **<Other Card>** or **UnionPay** press **OK**. Select Visa for Mastercard and American Express cards as well.

If you don't accept UnionPay cards, you will not see step b. Go to step c.

If **<Other Card>** is selected go to step c.

If **UnionPay** is selected, enter the **PIN** and press **OK**. The customer may bypass the PIN but if it is requested again, they **must** enter it.

- c) Perform a fraud check on the card and signature.
- d) Verify the card info with what is on the terminal screen and press **OK**. Go to step 5.

### Tap

- a) The customer **taps** their contactless-enabled credit card on the contactless card reader. The customer may be required to insert or swipe their card in some cases. Go to step 5.

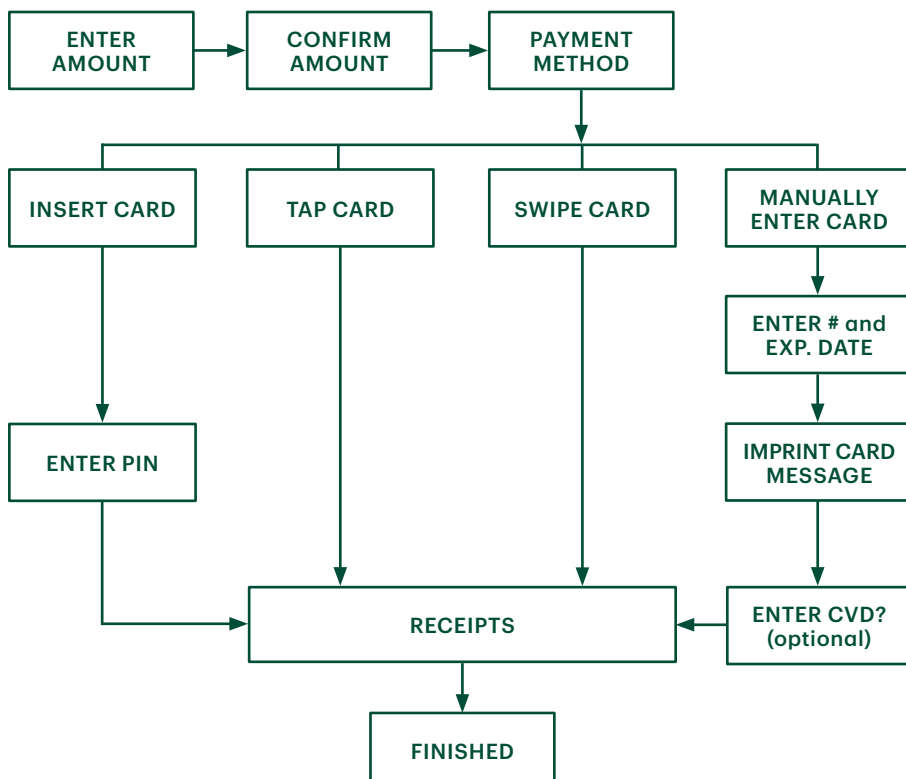
### Manually enter card

There is an inherent fraud risk for manually entered transactions. Please see page 9 for more information.

- a) Enter the **account number** and press **OK**.
- b) Enter the **expiry date** and press **OK**.
- c) Enter the **CVD number** and press **OK**. This number is generally located on the back of the credit card. This can be an optional step depending on your settings.
- d) If prompted, indicate if the card was present for the transaction (**Yes** or **No**). Go to step 5.

5. The screen shows that authorization number, the transaction total and the receipts print.

If it is a UnionPay transaction, the customer may be required to sign the receipt. Review the receipt to see if a signature is requested.





# Sale (debit card)

Use these instructions to process a debit card purchase on the terminal.

1. Tap the **Sale** icon.
2. Enter the **total dollar amount** for the sale and press **Enter**.
3. The customer confirms the dollar amount (**Yes** or **No**).

## Tips (optional)

4. The customer selects a **tip option** and presses **OK**.
5. The customer confirms the total amount (**Accept** or **Change**).

## Payment method

6. Perform one of the following payment methods: **Insert** or **Tap**. The swipe option will be displayed, but it is not allowed for a debit sale.

### Insert card

- a) The customer inserts their debit card. Go to step 7.

### Tap

- a) The customer **taps** their contactless-enabled debit card on the contactless card reader. The customer may be required to insert or swipe their card in some cases. Go to step 10.

## Cashback (optional)

7. The customer indicates whether they want cashback (**Yes** or **No**).
8. The customer enters or selects the cashback amount and presses **OK**.
9. The customer accepts the new total (**Accept** or **Change**).

If you don't use cashback, you will not see step 7, 8, or 9.

## Debit surcharge (optional)

10. The customer agrees to the debit surcharge (**Yes** or **No**).

If you don't use debit surcharge, you will not see step 10.

## Account selection

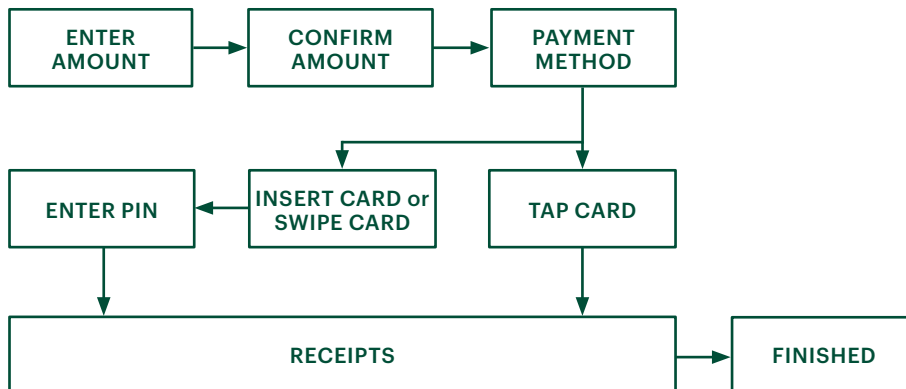
11. The customer selects which account they want to use (**Chq** or **Sav**).

If this is a UnionPay transaction, you will not see step 11.

12. The customer enters their **PIN** and presses **OK**.

If this is a UnionPay transaction, the customer may not be required to enter a PIN and can bypass this step. If the customer bypasses the step, and the terminal requests a PIN again, then the customer must enter their PIN.

13. The screen shows that authorization number, the transaction total and the receipts print.
- If cashback was requested and authorized, ensure that the correct amount is provided to the customer.
  - If this is a UnionPay transaction, the customer may be required to sign the receipt. Review the receipt to see if a signature is requested.



## Return (credit)

You use this option to fully or partially return any sale transaction that is in a settled batch. If this is a correction, you must perform a void for the full amount of the transaction (see page 15).

- Tap the **Return** icon or press **2** on the keypad.
- Enter the **total return** amount.
- Customer selects to method to read the card that the initial sale was done on (**Tap**, **Insert**, **Swipe**, or **Key**).

### Insert card

- Verify the card info with what is on the screen and press **OK**.
- The customer may be required to enter their PIN. Go to step 5.

### Swipe card

- Verify the card info with what is on the screen and press **OK**. Go to step 5.

### Manually enter card

- Enter the **account number** and press **OK**.
  - Enter the **expiry date** and press **OK**. This is four digits in length.
- The transaction is approved and the receipts are printed.

# Return (debit)

You use this option to fully or partially return any sale transaction that is in a settled batch. If the transaction is in an open batch you must perform a Void.

Debit returns are disabled by default. If you wish to activate debit returns on your terminal please call the TD Merchant Solutions Help Desk at **1-800-363-1163**. If you are concerned about enabling debit returns, you can password protect all returns on your terminal.

1. Tap the **Return** icon or press **2** on the keypad.
2. Enter the **total return** amount.
3. Customer selects to method to read the card that the initial sale was done on (Insert or Swipe).

## Insert / swipe card

- a) Customer confirms amount (**Yes** or **No**).
  - b) Customer selects account (**Chq** or **Sav**).
  - c) Customer enters **PIN** and taps **Enter**.
4. The transaction is approved and the receipts are printed.

# Void / Transaction Recall

You use this option to pull up any transaction that is in an open batch on a terminal and review it with the option of voiding it. If the transaction is in a closed batch you must perform a return. See page 14 for more information on returns.

- A batch is a group of transactions that you must submit to the issuer to accept in order for you to be paid.
- Once you close the batch or perform settlement, these transactions are sent to the issuer for settlement and then they will deposit the funds into your account.

1. **Void:** Tap the **Void** icon or press **3** on the keypad and go to step 2.  
**Transaction Recall:** Press **6** on the keypad and go to step 3.
2. Verify if you are voiding a pre-authorization (**Yes** or **No**). This will filter the transaction records to make it easier to search. This will be visible only if pre-authorizations are enabled on this terminal.
3. Select how you wish to look up the transaction (**All**, **Reference #**, **Clerk #**, **Invoice #**, **Account #**, **RRN** or **Approval Code**).
  - **All** displays every transaction on the terminal.
  - **Reference #** displays a transaction by its reference number. You can find this information on the receipt.
  - **Clerk #** displays every transaction performed by a specific clerk number in the open batch on this terminal.
  - **Invoice #** displays a transaction by its invoice number. You can find this information on the receipt.
  - **Account #** displays every transaction by the last four numbers on the card

that was used. You can find this information on the receipt or this can be provided by the customer.

- **RRN** displays a transaction by its RRN number. You can find this information on the receipt.
  - **Approval Code** displays a transaction by its approval code. You can find this information on the receipt.
4. Enter the information you wish to use to search for a transaction and press **OK**.
  5. If multiple transactions are displayed, use the arrow keys on the screen to scroll to the desired one and press **OK**.
  6. The transaction is displayed with all the information. Press **OK** to void this transaction.
  7. Confirm this selection (**Yes** or **No**). The transaction is voided.

## Force post

Use these instructions to process a force post credit card transaction on the terminal for card present, card not present transactions (mail order and phone orders) and pre-authorizations.

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

1. Press **OK** → Force Post → Force Sale or Force Ph/Mail.
2. Enter the **dollar amount** and press **OK**.
3. Perform one of the following payment methods for the credit card in question: **Swipe** or **Manual entry**.

### Swipe card

- a) Verify the card info with what is on the screen and press **OK**. Go to step 4.

### Manually enter card

- 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**. Go to step 4.
4. Then enter the authorization number and press **OK**.
  5. The screen shows that authorization number, the transaction total and the receipts print. The customer **must** sign the signature field on the merchant copy for a Force post sale transaction.

# Receipts

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

## *Printing receipts*

1. Press **9** on the keypad.
2. Select which receipt you want to reprint (**Last Receipt** or **Search**). If you select **Last Receipt**, go to step 5. If you select **Search**, go to step 3.
3. If pre-authorizations are enabled on your terminal you will be asked if the receipt is from a pre-authorization (**Yes** or **No**). This will help the terminal filter through the transactions and reduce the number of receipts returned.
4. Swipe the card used in the transaction or select the criteria that you want to search by (**All**, **Reference #**, **Clerk #**, **Invoice #**, **Account #**, **Customer #** or **RRN**).
  - **All** displays every transaction on the terminal.
  - **Reference #** displays a transaction by its reference number. You can find this information on the receipt.
  - **Clerk #** displays every transaction performed by a specific clerk number in the open batch on this terminal.
  - **Invoice #** displays a transaction by its invoice number. You can find this information on the receipt.
  - **Account #** displays every transaction by the last four numbers on the card that was used. You can find this information on the receipt or this can be provided by the customer.
  - **RRN** displays a transaction by its RRN number. You can find this information on the receipt.
5. Scroll through the **available receipts**, select the desired one and press **OK**.
6. Select which receipt you want to reprint (**Merchant Copy**, **Customer Copy** or **Both**).
7. The receipt reprints and is noted as a duplicate.

## *Receipts options (semi-integrated mode only)*

You use this option to select which device or devices print the receipts. This function is protected by the administrator ID and password.

1. Press the **Admin** key, select **Misc. Options**, select **Semi-Integrated** and then **Receipt Options**.
2. Select how you want to print receipts (**ECR**, **Terminal** or **Both**) and press **Enter**.
  - **ECR** means receipts are only printed on the electronic cash register.
  - **Terminal** means receipts are only printed on the terminal.

Receipt example

The information that you will use the most is explained below.

Merchant Name  
Address  
City, Province  
Merchant Number  
Terminal ID

SALE

Manager: 1234567890  
Server #: 01 B Smith  
Table 3: 1234  
Batch#: 003  
MM/DD/YY  
AVS: N  
Invoice #: 1234567890  
APPR CODE 12345678  
\*\*\*\*\*7892 M  
VISA  
AID: AAAAAAAAAA  
TVR: XX XX XX XX XX  
TSI: XX XX  
TC: 007B6441F0A45DEE

# Customers: 1234  
RRN: 1234567890  
HH:MM:SS  
CVC: X  
REF#: 12345678  
TCD XXXX  
Manual Entry CP  
\*\*/\*

AMOUNT  
TIP  
CASH BACK  
TOTAL

\$XX.XX  
\$XX.XX  
\$XX.XX  
\$XX.XX

XXX APPROVED

X

(PIN VERIFIED)

I AGREE TO PAY THE ABOVE TOTAL  
AMOUNT ACCORDING TO THE CARD  
ISSUER AGREEMENT

RETAIN THIS COPY FOR YOUR  
RECORDS

RECEIPT FOOTER LINE 1  
RECEIPT FOOTER LINE 2  
RECEIPT FOOTER LINE 3  
RECEIPT FOOTER LINE 4  
RECEIPT FOOTER LINE 5  
RECEIPT FOOTERLINE 6  
RECEIPT FOOTERLINE 7

MERCHANT COPY

Card entry method	
C	Chip card transaction
CM	Chip card transaction that was forced to become a manually entered transaction
CNP	Manually entered transaction and the card was not present. This is a mail or telephone transaction
CP	Manually entered transaction and the card was present.
CS	Chip card transaction that was forced to become a swipe transaction
M	Manually entered transaction and the card was present
P	Contactless transaction
S	Swiped transaction

Important information	
Manager	Manager ID
Clerk	Clerk ID
Batch#	Batch number the transaction is located in
Invoice #	Invoice number
APPR CODE	The approval code for this transaction
RRN	The retrieval reference number
REF#	The reference number
Signature	The card issuer determines when a signatures is required for a transaction
Host Response	Always ensure that the transaction was <b>APPROVED</b> as it could be <b>DECLINED</b> or <b>NOT COMPLETED</b>

# Business Day Functions

## *Performing a settlement (day close)*

A settlement must be performed on **each terminal** in order to maintain accurate records and balance your accounts. This is important as it:

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

There are two options for settlements:

- **Automatic daily settlement** (the system settles each night at 11:59 ET) if you have this set up through TD Merchant Solutions.
- **Manual settlement** is managed by yourself and is best performed daily. You have a deadline to perform a manual settlement. This is called your balancing window and it is set on the system. If your manual settlement is completed 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.

**Forced settlement** occurs if a manual settlement is not performed on a terminal every three business days. Forced settlements will incur a higher cost per transaction so it is in your best interest to manually settle your terminal every day.

To perform a manual settlement:

1. Tap the **Settlement** icon.
2. Confirm that you want to close the business day (**Yes** or **No**).
3. Confirm that you want to print the settlement reports (**Yes** or **No**).
4. The terminal reboots.

- Performing a settlement will not close any third party applications on your terminal. You must go into the application and perform a day close separately for it.
- This process may take a while if a lot of transactions have been conducted during the day.
- Do not process any transactions, press any buttons, or disconnect your Internet service, until the settlement process is complete.

# Reporting

The following **business day** reporting options are listed below.

## Business day reports

1. Press the **OK** key, then **Reports**, and then select one of the following:

Report	Instructions	Provides...
Detail	<ol style="list-style-type: none"><li>2. <b>PRINT</b> or <b>DISPLAY</b> your report.</li><li>3. Sort transactions by <b>Reference #</b>, <b>Invoice #</b> or <b>Card Type</b>.</li></ol>	... all transactions for the current business day. This report will not show Pre-Auth transactions.
Summary	<ol style="list-style-type: none"><li>2. <b>PRINT</b> or <b>DISPLAY</b> your report.</li></ol>	...all transactions by card type showing the grand total transaction amount and the number of transactions of that card type.
Clerk	<ol style="list-style-type: none"><li>2. Select whether the report is a <b>Summary Report</b> or a <b>Tip Report</b>.</li><li>3. Select whether Is it for <b>All Clerks</b> or <b>Single Clerk</b>. If it is a single clerk enter the <b>ID</b>.</li><li>4. <b>PRINT</b> or <b>DISPLAY</b> your report.</li></ol>	...all transactions by card type showing the grand total transaction amount and the number of transactions of that card type by Clerk ID. <b>OR</b> ...tip total for all or single clerk.
Open Pre-Auth	<ol style="list-style-type: none"><li>2. <b>PRINT</b> or <b>DISPLAY</b> your report.</li><li>3. Sort the information by <b>Date/Time</b>, <b>Invoice #</b> or <b>Card Type</b>.</li></ol>	...transactions by card type, operator ID for the current business day sorted by date/time, invoice # or card type.
Recent Error	<ol style="list-style-type: none"><li>2. <b>PRINT</b> your report.</li></ol>	...any system, application, and host errors that have occurred on this terminal over the last 10 days.



# Administration

## Changing terminal mode (semi-integrated terminals only)

You use this option to change your terminal between semi-integrated mode and standalone mode. You would only do this if you are experiencing issues with your electronic cash register that prevents you from processing transactions or an agent at the TD Merchant Solutions Help Desk requested that you do so.

1. Go to the *Home* screen and tap the mode icon in the top-right of the screen.
2. Confirm that you wish to continue (**Yes** or **No**).
3. Enter a valid **Admin ID** and **password** and tap **Enter**.



## More features and functionality

There are more ways to configure your terminal such as:

- User management
- Software downloads
- Communication options
- Terminal settings
- Transaction options

For more information, please refer online to the *Merchant Guide* at [www.TDMerchantSolutions.com/ResourceCentre](http://www.TDMerchantSolutions.com/ResourceCentre).

# Troubleshooting

If you're unable to resolve the problem after performing the following steps, please refer to the *Merchant Guide* for more troubleshooting tips.

## What problems can I easily resolve?

Problem	Action Required
Bad Communication	<ol style="list-style-type: none"><li>1. There was a communication failure after the transaction was initiated.</li><li>2. Verify your connections.</li><li>3. Press <b>Cancel</b> and try again.</li></ol>
Chip cards cannot be processed	<ol style="list-style-type: none"><li>1. Try inserting a different card. If this card can be read, the problem is with the first card.</li><li>2. Use a cleaning card to clean the problem card reader.</li></ol>
Display screen is blank	<ol style="list-style-type: none"><li>1. Ensure that the power cable is firmly connected to the power port and the electrical outlet.</li></ol>
Magnetic stripe card reader won't read cards	<ol style="list-style-type: none"><li>1. Try swiping the card more quickly or more slowly or from the top of the reader towards you.</li><li>2. Request another form of payment. If this card can be read, the problem is with the first card.</li><li>3. Use a cleaning card to clean the problem card reader.</li></ol>
Printer does not print	<ol style="list-style-type: none"><li>1. Is there paper in the device? If there is, ensure that the paper is loaded correctly.</li></ol>
Printer jam	<ol style="list-style-type: none"><li>1. Ensure that the paper feed is clear and that the paper roll is seated correctly.</li><li>2. Ensure the printer lid is completely closed.</li></ol>
Terminal isn't powering on	<ol style="list-style-type: none"><li>1. Ensure that the power cord is properly inserted into the Bluetooth base / charging base and an electrical outlet. Then ensure that the terminal is properly seated in the base.</li></ol> <p><b>OR</b></p> <ol style="list-style-type: none"><li>1. Ensure that the power cord is properly inserted into the terminal and a power source.</li></ol>
Transaction is not going through	<ol style="list-style-type: none"><li>1. Ensure that the terminal is connected to the network via one of the three communication types (Bluetooth, WiFi or 4G).</li><li>2. Check your Internet connection to ensure that it is working. (Bluetooth and WiFi)</li></ol>

# Why isn't my terminal connecting to the network?

## Bluetooth

If you don't see the green network icon , you can quickly check the following:


1. Is your Bluetooth base powered? Ensure that the electrical outlet has power.
2. Is your Internet connection working properly? Verify this with another device.
3. Is your Bluetooth base working correctly? Unplug and plug the Ethernet cable back into the base and wait for one minute.

## WiFi

If you don't see the green WiFi icon , you can quickly check the following:

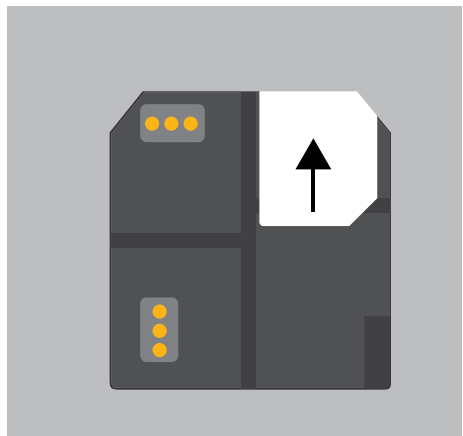
1. Is your router / modem powered? Ensure that the electrical outlet has power.
2. Is your Internet connection working properly? Verify this with another device.
3. Is your modem / router working correctly? Unplug and plug back in your modem / router and wait for three to four minutes.

## 4G

If you don't see this icon , you can quickly check the following:

1. Have you made physical changes to your location? New walls or electronic devices near the terminal may prevent a connection.  
Has something changed to the environment outside your place of business? A new building may block or reduce the signal strength.  
Try walking around your place of business to see if you are able to receive a signal.
2. Is there an issue with the wireless phone network? Your terminal uses the Bell network.
3. Is your terminal's SIM card seated properly? To check this:

- a) Turn over your terminal so that you can see the black, back panel
- b) There is a latch along the bottom-edge of the panel. Push it upwards so that it unlocks the back panel.
- c) Lift up the panel's lower edge. You will now see the SIM card for your terminal. It should look like the image to the right.



4. If the SIM card has become dislodged, you will have to reinsert it. When you do this, ensure that:

- a) the gold design-side is facing downward,
- b) the clipped corner is positioned as it is in the diagram (bottom-right), and
- c) you slide it upward, following the direction of the black arrow.

If the issue is not resolved after trying the above, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

## Signal Strength

The signal strength is represented differently for each communication method.

### Bluetooth



### WiFi



### Bluetooth and WiFi Interference

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

1. **Distance between the terminal and the base / wireless router**  
Ensure that you keep your terminal and base in the same room if possible. Obstacles such as walls or furniture may weaken or block the signal.
2. **Signal interference**  
Bluetooth and WiFi uses the 2.4GHz frequency range which is shared by other devices such as:
  - Microwaves
  - WiFi devices (routers, VoIP phones, wireless cameras)
  - Fluorescent office lighting
  - Some cordless phones and baby monitors
  - Human bodies in between the Bluetooth base / wireless router and the terminal

To avoid connectivity and data issues, avoid going near these devices when using the TD Move 5000 solution. Of course, you can't always avoid sources of interference. To accommodate this, Bluetooth and WiFi is able to adapt to some interference from multiple sources depending on its strength. But, if you encounter too many sources of interference at once, your devices may not be able to adapt and they could lose connectivity.

4G



4G Interference

The 4G (cell towers) signal is blocked by certain materials. Buildings (new or existing) have a large amount of concrete or brick and may cause signal strength issues. As well, new physical barriers added to your workplace (walls with metal frameworks and electrical wires) may also cause interference for your terminal. Be aware when modifying your workplace that you may be introducing signal interference.

Why isn't my terminal charging?

Bluetooth base or charging base	Charging cord
<div>1. Ensure the terminal is seated firmly in the base? Then, check to see if the charging icon appears in the top-right of the screen. If it doesn't, go to step 2.</div> <div>2. Ensure that the base's electrical outlet has power. If it does, go to step 3.</div> <div>3. Ensure that the power pack is fully inserted into the power outlet. Is the terminal charging? If not, go to step 4.</div> <div>4. Use charging cord included in your welcome kit. Plug this into an electrical outlet and plug the other end into the charging port on the left side of the terminal. It is covered by a grey rubber flap that can easily be lifted with your thumbnail.</div> <div>5. If this doesn't address the charging issue, it may be the terminal's battery. Please contact the TD Merchant Solutions Help Desk for the next steps.</div>	<div>1. Ensure that the electrical outlet has power. If it doesn't, go to step 2.</div> <div>2. Plug the charging cord into a different electrical outlet. Then, check to see if the charging icon appears in the top-right of the screen. If it doesn't, go to step 3.</div> <div>3. If this doesn't address the charging issue, it may be the terminal's battery. Please contact the TD Merchant Solutions Help Desk for the next steps.</div>

# What do I do if there's a power outage?

The terminal will not be able to process transactions without power. If a transaction was interrupted due to battery/power failure, please perform the transaction again when power is restored.

## *Bluetooth*

Once the power has been restored, you do not need to take any steps to restart your Bluetooth base. It will automatically come online and create a connection with your terminal if it is within range.

## *WiFi*

You may need to reboot your modem / router to reconnect.

## *4G*

A terminal with battery power will still work and be able to perform transactions unless the local cell tower has lost power.

# Reference

## 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	_____

## Charging your terminal

- If you are using a Bluetooth or charging base, ensure that your terminal is properly seated.
- If you are using a charging cord, ensure that it is connected properly to your terminal and to the electrical outlet.

## 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.



# Admin menu structure

Access all of the following menus by tapping the **Admin** icon on the *Home screen*.

## Clerk Menu

Add ID	Setting
Edit ID	Setting
Delete ID	Setting
Print ID List	Setting
AutoAddClk	On/Off
ClkPrompt	Setting
ClkWording	Setting
ClkLogOnOff	On/Off
Display Params	Setting

## Batch Menu

Batch Totals	Info
View History	Info
Host Batch Inquiry	Print Display

## Setup Menu

Communications	ComsPriority Ethernet	Setting	
		Current Setup	Info
		Ethernet Setup	Setting
	WiFi	Timer Setup	Setting
		WiFi Easy Conn	
		Advanced Setup	Networks
			IP Settings
	Mobile Data		WiFi
			Display Params
		Access Point1 - 6	APN
			Login
			Password
			Setting
	Bluetooth	APN Preference	
		SIM Code	
		Operation Mode	Setting
		New Base	
		Select Base	
Display Params		Remove Base	
		Remove All Bases	
		Print Bases	
		Info	

## Setup Menu

<b>Receipts</b>	Headers	Setting	
	Footers	Setting	
	Receipt Options	RecptDelay	Setting
		DescriptLines	On/Off
		PrintMID	Setting
		PreAuthRcpt	Setting
		RcptCopies	Setting
		DebitSigLine	On/Off
		PrintTID	Setting
		RcptSeq	On/Off
		PrinterErrRcpt	On/Off
	Display Params	Info	
<b>Trans Options</b>	Debit	Cashback	Setting
		Cashback Setup	Setting
	Prompts	DupTran	On/Off
		DbDupTran	On/Off
		Invoice	Setting
		Partial Auth	Setting
		Imprint Card	Setting
	Settlement	Table	On/Off
		SettleRpt	Setting
		ReportTrunc	Tip Guide
		PrtStlResult	Tip Guide Values
	Tip Options	Tip	Setting
		Tip Guide	Setting
		TipAuto	Setting
		TipExcess	Setting
		TipMode	Setting
	High Amt Tran	HighAmtTran	Setting
		HighAmtLmt	Setting
		HighAmtTranRet	Setting
		HighAmtLmtRet	Setting
		PWHighAmt	Setting
	Display Params	PWHighAmtRet	Setting
		Info	
<b>Term Settings</b>	Idle Timer	Setting	
	Printer	On/Off	
	Term HW	KeyBeep	Setting
		Backlight	Setting
		Brightness Settings	Setting
	IdleMsg	Setting	
	Clock Display	Setting	
	Font Size	Normal / Large	
	Screen Saver	Setting	
	Set Date and Time	Setting	
	24HR Reset	Setting	
	Reset new	Setting	
	Display Params	Setting	

Setup Menu		
Demo	Demo DemoAmt	On/Off Setting
Display Params	Info	

Maintenance			
Download	Setup	Ethernet	Primary URL/IP Primary Port Secondary URL/IP Secondary Port
		Mobile Data	Host URL Host Port Mobile Data APN Login Password
		WiFi	Primary URL/IP Primary Port Secondary URL/IP Secondary Port
	Start Download		
Schedule Download	Setting		
Last Download	Info		
Display Params	Info		

Diagnostics	
Ping	Setting

Security		
Admin Setup	Add Admin	Setting
	Delete Admin	Setting
	Edit Admin	Setting
	PWExpire	Setting
	PW Lock	Setting
Supervisor Manager	Add user	Setting
	Delete User	Options
	Unlock User	
	User List	Info

## Security

<b>Main Menu PWs</b>	PWSale	Setting
	PWReturn	Setting
	PWVoid	Setting
	PWForce	Setting
	PWPreAuth	Setting
	PWCompletion	Setting
	PWSettle	Setting
	PWReprint	Setting
	PWReports	Setting
	PWManual	Setting
	PWStandalone	Setting

<b>Admin Menu PWs</b>	PWClerkMenu	Setting
	PWBatch	Setting
	PWSetup	Setting
	PWMaintenance	Setting
	PWDiagnostics	Setting
	PWSecurity	Setting
	PWTermInfo	Setting
	PWHostMgmt	Setting
	PWMisc	Setting

<b>Reports Menu PWs</b>	PWDetail	Setting
	PWSummary	Setting
	PWClerkRpt	Setting
	PWRecent Error	Setting
	PWPreAuthRpt	Setting
	PWEMVRpt	Setting

<b>Activity Log</b>	Display	Info
	Print	
	Save	

<b>Display Params</b>	Info
-----------------------	------

## Terminal Info

<b>Terminal Info</b>	Info
----------------------	------

<b>Display Params</b>	Clerk Params	Info
	Comms Params	Info
	Receipts Params	Info
	Trans Option Params	Info
	Term Setting Params	Info
	Demo Params	Info
	Security Params	Info
	Setup Params	Info
	Download Only	Info
	Other	Disabled
	TD Parameters	Info
	Display All	Info

## Host Management

Host 1 Param.DL	Download
Host 2 Param.DL	Download
EMV Public Key DL	Download
BIN Ranges Report	Print

## Misc. Options (Semi-integrated terminals only)

Semi-Integrated	Communication Type	RS232 USB Ethernet	COM0	Setting
	Receipt Options	ECR Terminal Both		



# 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](http://www.TDMerchantSolutions.com/ResourceCentre).

