

iPay@Table

Quick Start Guide



For the TD Move 5000



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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 with the iPay@Table application. This guide 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

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

Information sheets

- *What you need to know about chargebacks*

Miscellaneous

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

Glossary

The following are terms used throughout this document. By understanding these terms you will be better able to use the iPay@Table application.

Electronic Point of Sale (EPOS)

This is an electronic cash register package or computer that houses your Restaurant Management Software.

Restaurant Management Solution or Software (RMS)

This is the software that resides on your EPOS that manages your restaurant's food and drink orders.

Terminal

This is the physical device that the customer uses to pay their bill. In this case, it is called a TD Move 5000 semi-integrated terminal.

iPay@Table application

This is the application that connects the terminal to your RMS. The application pulls the check and table information to the terminal so that customers can pay for their bill.

Core Financial application

This is the application that connects the terminal to the Payment Card Network so that customers can pay their bill with their credit or debit cards. For more information on TD Core Payment application settings, please refer to the *TD Move 5000 Merchant Guide*.

The Terminal

You will use the terminal to initiate transactions for customers using credit, debit, or gift cards. Depending on your settings, some card types may not be accepted by your terminal.

1. Command keys

- Web Applications (silver)
- Cancel (red)
- Correction (yellow)
- OK / Enter (green)

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.)



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 raised identifier on the:
 - **5** key,
 - **Main Menu** key,
 - **Cancel** key,
 - **Correction** key, and
 - **OK** key.

Screens

Home screen

This is the first screen that you will see when you start the terminal. It is called the **Core Financial Home screen**. It displays important information 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.
- 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*.

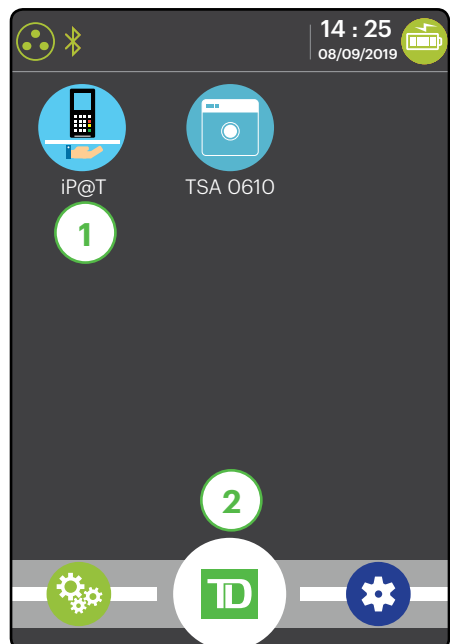


Web applications screen

Press the **Web Applications** key to view the available applications on your terminal. You will always see the following icons:

- 1. iP@T application**
Tap this icon to access the **iPay@Table** application. You would use this application to allow customers to pay their checks.
- 2. Core Financial application**
Tap this icon to access the **Core Financial** application. You would use this application to change certain settings and perform payment transactions if the iP@T application is not communicating with your RMS for some reason, but the terminal is still connected to the payment card network.

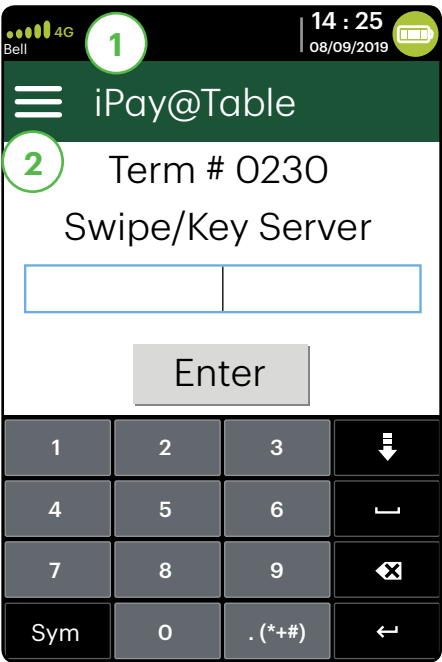
For information on any third-party applications, please refer documentation provided by the application developer.



iPay@Table Home screen

The default screen is called the *iPay@Table Home* screen. It displays important information, 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. **Settings menu**
This icon will open the **iPay@Table Settings** menu.



Terminal communication modes

The terminal has up to three different communication modes and their explanations are described below.

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

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 — in this case it's Bell®.



Applications

Loading applications onto the terminal

The terminal can accept a wide range of third-party applications to meet your business needs and are similar very to the applications on your smart phone. For example, if you want to accept gift cards, you would have to:

1. Sign up for the appropriate program with the application provider.
2. Contact the TD Merchant Solutions Help Desk to enable it and have the application downloaded to your terminal.
3. Access these applications via the *Web Application* screen. If you accept gift cards, they are automatically offered as a tender option during the transaction.

Accessing applications

To access an application:

1. Press the silver **Web Applications** key. The *Web Application* screen appears.
2. Select the desired application.
3. Follow the instructions provided by the application vendor.



Peripherals

The Bluetooth base

The Bluetooth base is used with the terminal when a wired Internet connection 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

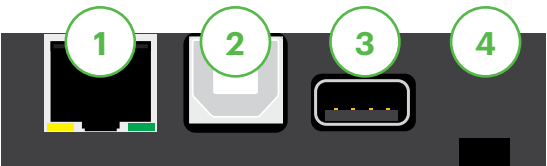
The base has four ports on the back but you are only using the Ethernet port and the power port:

- 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 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 pages 4 and 5.



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. For more information on TD Core Financial application settings, 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 and refer to the www.TDMerchantSolutions.com/ResourceCentre. 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.

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.).

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

Available transactions

The iPay@Table solution can perform the following transactions:

- Payment*
- Refund

* Gift card transactions are only possible on the terminal if you have enrolled in a gift card program, and installed their application on your terminal.

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.

Payment method options

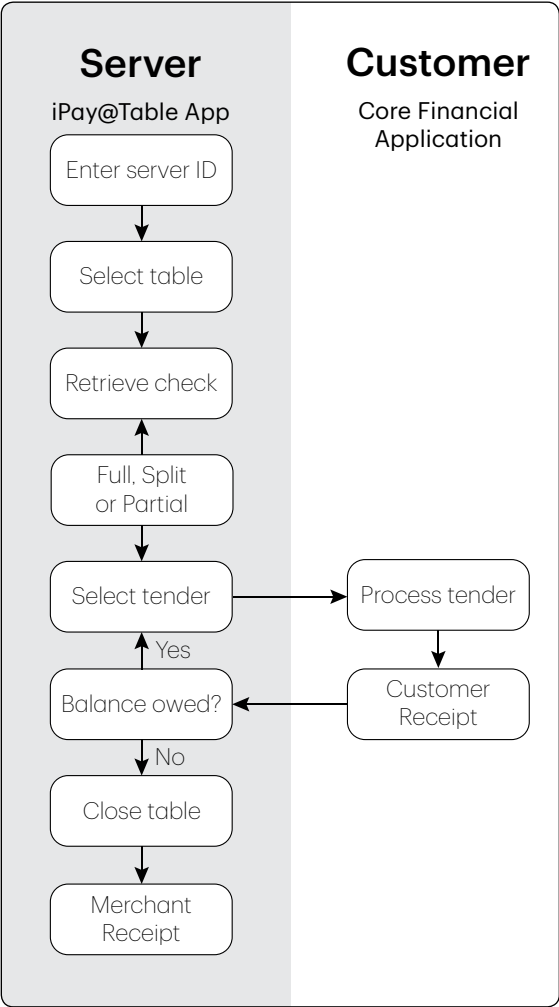
There are three types of payments that the server can accept:

Option	If this type is selected...
Full	<p>...the bill will be paid in full by one payment.</p> <p>For example, if a table of three is paying a \$15.01 bill, and customer A decides to pay the entire bill, customer A pays the entire bill of \$15.01.</p>
Split	<p>...the bill will be paid in full by X number of equal payments with the last covering any rounded amounts. Once selected, all payments must be completed by split payments.</p> <p>For example, if a table of three is paying a \$15.01 bill, and they split it three ways, customer A pays \$5.00, customer B pays \$5.00 and customer C pays the balance of \$5.01.</p> <p>Note: If a split payment is declined for any reason, the iPay@Table application will take it as paid. After all of the other payments are completed, you must leave the application and reselect the table. This will pull the unpaid amount from the RMS and then the customer can reattempt their payment.</p>
Partial	<p>...the bill is paid in full by X number of payments where each payment is determined by each customer. Once selected, all payments must be completed by partial payments.</p> <p>For example, if a table of three is paying a \$15.01 bill, and they each pay their share, customer A pays \$5.01, customer B pays \$2.00 and customer C pays the balance of \$8.00.</p>

Payment

Use these instructions to process a bill.

1. Enter your **Server ID** and tap **Enter**.
2. Select the **table** that is to be paid out. You may be required to select it from a list of available tables or entering the table number depending on your RMS and/or settings. If you don't enter a table or check number and just tap **Continue**, a list of open tables under your server ID will appear.
3. Select the payment method: **Full**, **Split** or **Partial**.
 - a) If you selected **Full**, go to step 4.
 - b) If you selected **Split**, enter the number of customers to split the bill between and press **OK**. Go to step 4.
 - c) If you selected **Partial**, enter the **Partial amount** without a decimal and press **OK**. Go to step 4.
 - d) Select the appropriate tender payment option (**Cash** (below), **Credit card** (page 11), **Debit card** (page 12) or **Gift card** (page 13)).



If a split payment is declined for any reason, the iPay@Table application will take it as paid. After all of the other payments are completed, you must reselect the table. This will pull the unpaid amount from the RMS and then the customer can complete the payment.

Cash

4. Select **Cash**.
 5. The terminal will print the receipt for the cash transaction. You must collect the cash, any tip, and note it on the customer's receipt.
 6. If there is a balance remaining, please go to step 3.
- If the bill has been paid in full, the transaction is completed. The Merchant copy prints and the table is closed.

Credit card

4. Select **CR/DB**.
5. The customer confirms the total amount (**Yes** or **No**).

Tips (optional)

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

Payment method

8. If you have gift cards enabled on your terminal, you must select **CR/DB** one more time. Otherwise, go to step 9.
9. Perform one of the following payment methods: **Insert, Swipe, Tap** or **Key (Manual Entry)**.

Insert credit card

- a) The customer inserts their credit card.
- b) The customer enters their **PIN** and presses **OK**. Go to step 10.

Swipe credit card

- a) Swipe the credit card.
- b) UnionPay co-branded cards only - The customer indicates if the card is **<Other Card>** or **UnionPay**. Other Card can be Visa, Mastercard, American Express, etc.
- c) Press **OK**.
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.
If **<Other Card>** is selected, go to step d.
- d) Perform a fraud check on the card and signature.
- e) Verify the card info with what is on the terminal screen and press **OK**. Go to step 10.

Tap credit card

- 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 10.

Manually enter credit card

There is an inherent fraud risk for manually entered transactions. Please see page 8 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 10.
- 10. The screen shows that authorization number, the transaction total and the customer receipts print. The screen will show how much has been applied to the bill.
If there is still a balance remaining, go to step 3.
If the bill has been fully paid, the transaction is completed. The Merchant copy prints and the table is closed.
Note: If a UnionPay card is used in this transaction, the customer may be required to sign the receipt. Review the receipt to see if a customer signature is requested.

Debit card

- 4. Select **CR/DB**.
- 5. The customer confirms the total amount (**Yes** or **No**).

Tips (optional)

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

Payment method

- 8. If you have gift cards enabled on your terminal, you must select **CR/DB** one more time. Otherwise, go to step 9.
- 9. Perform one of the following payment methods: **Insert** or **Tap**).

Insert debit card

- a) The customer inserts their debit card.
- b) The customer selects which account they want to use (**Chq** or **Sav**).

If it is a UnionPay debit transaction, you will not see step b.
- c) The customer enters their **PIN** and presses **OK**. Go to step 10.

Tap debit card

- a) The customer **taps** their contactless-enabled debit card on the contactless card reader. The customer may be required to insert their card in some cases. Go to step 10.
- 10. The screen shows that authorization number, the transaction total and the customer receipts print. The screen will show how much has been applied to the bill.
If there is still a balance remaining, please go to step 3.
If the bill has been fully paid, the transaction is completed. The Merchant copy prints and the table is closed.

Gift card

This tender option is only available through the terminal if you have downloaded a gift card web application to your terminal. See page 6 for more information.

4. Select **CR/DB**.

Tips (optional)

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

Payment tender

7. Select **Gift**.

Payment method

8. Perform one of the following payment methods: **Swipe** or **Key (Manual Entry)**.

Swipe gift card

- a) Swipe the gift card. Go to step 10.

Manually enter gift card

- a) Enter the **account number** and press **OK**. Go to step 9.
9. The screen shows the transaction total and the customer receipts print. The screen will show how much has been applied to the bill.

If there is still a balance remaining, please go to step 3.

If the bill has been fully paid, the transaction is completed. The Merchant copy prints and the table is closed.

Refund

You must create check with a negative amount in your RMS as settle it with the customer.

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.

You cannot reprint cash receipts.

Receipt examples

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

Merchant Name
Address
City, Province
Merchant Number
Terminal ID

SALE

Server #: 01 B Smith
Table #: 1234
Check #: 1234567890
Batch #: 1234567890
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

XXX.XX
XXX.XX
XXX.XX
XXX.XX

XXX APPROVED

(PIN VERIFIED)

X

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

Server #	Clerk ID
Table #	The table number associated with the check
Check #	The check number
#Customers	The number of customers associated with the check
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 APPROVED as it could be DECLINED or NOT COMPLETED

Settlement

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.

To perform a manual settlement:

1. Go to the iPay@Table Setting menu.
2. Tap the **Settlement** menu option.
3. Enter Manager ID and password.
4. Confirm that you want to close the business day (**Yes** or **No**).
5. Confirm that you want to print the settlement reports (**Yes** or **No**).
6. 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 processed during the day.


Do not process any transactions, press any buttons, or disconnect your Internet service, until the settlement process is complete.

Reporting

For more information on TD Core Financial application reports, please refer to the *TD Move 5000 Merchant Guide*.

Administration

There are various options and settings available for the iPay@Table solution. They are all contained within the *iPay@Table Settings* menu. To access this menu:

- At the *Home Screen*, the Merchant presses the three horizontal bars icon () to open **Settings** menu. From here you have the following menu options:
 - **Comms Setup**
 - **iPAY@Table Setup**
 - **Change password**
 - **Settlement**
- Some settings are either enabled or disabled. This is indicated by a sliding button to the right of the setting.

Enabled



Disabled



- To leave any screen you can press the red Cancel button on the terminal or tap the back icon (<<) in the top-left corner of the screen.

Comms setup

This menu allows you to set the communications settings for iPay@Table application in order to configure the RMS IP addresses and Ports.

1. Enter the following information: the **RMS Client IP Address**, and the **RMS Client Port**. Entering the **Secondary Client IP Address**, and the **Secondary Client Port** is optional.
2. Click **Continue**. You may quit without saving the changes by pressing the back icon or pressing the red **Cancel** key.

iPAY@Table setup

This menu allows you to set the desired options for your iPay@Table application. The following settings are available.

RMS Type

This setting determines how the terminal will communicate with your restaurant management system (RMS). Depending on which RMS you use, functionality may change on the terminal. Do not change these settings unless instructed to do so.

1. Tap the **RMS Type** menu option.
2. Select the appropriate option from the list below:
 - **Type 1** – Other (Aloha, Silverware, ProfitTek, etc.)
 - **Type 2** – Micros
 - **Type 3** – Squirrel
3. Tap the back icon or press the red **Cancel** key.

Serial # Type

This setting identifies which serial number will be used to communicate with the Restaurant Management System (RMS). Do not change these settings unless instructed to do so.

1. Tap the **Serial # Type** menu option.
2. You have two options: **Use Injected S/N** and **Use Device S/N**. The default setting is **Use Injected S/N**.
3. Tap the back icon or press the red **Cancel** key.

Sort order

This setting is only available if RMS Type is set to Type 3 (Squirrel). This setting indicates how the tables and checks are sorted for display.

1. Tap the **Sort Order** menu option.
2. Set the sort option to **Alpha/Numeric** or **Numeric/Alpha**. The default setting is **Alpha/Numeric**.
3. Tap the back icon in the header or press the **Cancel** key.

Demo Options

This setting allows iPay@Table to pull tables from RMS when you enter Demo Mode from the Core Financial application. Otherwise, this setting will be ignored.

1. Tap the **Demo Options** menu option.
2. Select **Enable** or **Disable**. The default setting is **Enabled**.

If **Enabled**, the iPay@Table solution connects to the RMS to retrieve table/check list while in demo mode. This will allow a more realistic demo mode to help train new employees, but it carries some risks.

If you retrieve an actual table in demo mode, and select **Cash** to make a payment on it, the live check will be modified by the demo cash amount. We suggest that you **Disable** this feature to avoid accidental check modifications.

If **Disabled**, the iPay@Table solution doesn't connect with RMS so get tables and get checks from RMS are simulated while in demo mode.

3. Tap the back icon or press the red **Cancel** key.

Font Size

This settings controls the iPay@Table font.

1. Tap the **Font Size** menu option.
2. Select the desired font size (**Large** or **Normal**). The default setting is **Large**.
3. Tap the back icon or press the red **Cancel** key.

Refund Setup

This setting allows the ability to perform a Refund transaction from the RMS by entering a negative amount. When this option is enabled and the table amount received from RMS is negative, iPay@Table will initiate a Refund transaction to be processed by the Core Payment Application. **Note:** This does not override *Core Payment Application* refund settings.

1. Tap the **Refund Setup** menu option.
2. Select **Enable** or **Disable**. The default setting is **Disabled**.
3. Tap the back icon or press the red **Cancel** key.

Enable RMS Polling

This setting controls how often the RMS and terminal with the iPay@Table application try to communicate with one another when the terminal is idle.

1. Tap the **Enable RMS Polling** menu option.
2. Enter the polling interval and press **OK**. The default interval is **15 minutes** (and minimum setting) and the maximum is 60 minutes.
3. Tap the back icon or press the red **Cancel** key.

Table Name

This setting is only available if the RMS Type (see page 16) is set to Type 1 (Other). This setting allows you to name your tables versus using a table number. If your RMS uses table names this option **must** be set to **On**.

Aloha RMS: If **Table Name** is enabled, and alpha-numeric tables are selected, only the Table Name will print on the receipt.

For all other RMS, both Table Number and Table Name are printed on the transaction receipt.

1. Tap the **Table Name** menu option.
2. Select **Enable** or **Disable**. The default setting is **Disabled**.
3. Tap the back icon or press the red **Cancel** key.

Prompt Table

This setting will automatically prompt the server for a table when a server enters their ID.

1. Tap the **Prompt Table** menu option.
2. Select **Enable** or **Disable**. The default setting is **Enabled**.
3. Tap the back icon or press the red **Cancel** key.

Prompt Check

This setting will automatically prompt the server for a check number when a server enters their ID. This will not appear if **Prompt Table** is disabled.

1. Tap the **Prompt Check** menu option.
2. Select **Enable** or **Disable**. The default setting is **Enabled**.
3. Tap the back icon or press the red **Cancel** key.

SSL

This setting enables/disables SSL security between the terminal and the RMS. Do not change these settings unless instructed to do so.

1. Tap the **SSL** menu option.
2. Select **Enable** or **Disable**. The default setting is **Enabled**.
3. Tap the back icon or press the red **Cancel** key.

Change password

This allows you to change the iPay@Table password. This password provides access to the *Settings*, *Communications*, and *Settlement* menus.

1. Tap the **Change Password** menu option.
2. Enter your **current password** to access this menu and tap **Enter**.
3. Enter your **Old Password**.
4. Enter your **New Password**. The new password must be 7 to 10 alpha-numeric characters in length. This password can be numbers only if you like.
5. Re-enter your **New Password**.
6. Tap **Continue** when finished.

Settlement

This settings option allows you to start a manual settlement in the payment application.

1. Enter your **password** to proceed.
2. The iPay@Table application will close and take you to the payment application and the settlement process begins.

This does not settle gift card transactions. You must settle these through the gift card application.

3. Once completed, you will be returned to the iPay@Table *Home* screen.

Core payment application settings

To change the following settings you must:

1. Press the silver **Application** key (above the red **Cancel** key).
2. Select the **TD Core Payment** application.
3. Follow the instructions for the desired setting.
Note: Depending on your settings, you may have to enter the Admin password to change the functionality.

The following settings can be modified on your terminal as well. To make any of changes to these settings permanent, you must call TD Merchant Solutions Help Desk and then perform a parameter download. For more information on TD Core Payment application settings, please refer to the *TD Move 5000 Merchant Guide*.

Setting	Explanation
Clerk Wording	Set this option to add or change an existing clerk tile (server or clerk for example). It requires a higher level user to change it. For example, it would take a manager or supervisor to affect a clerk's name. You must enable ClkPrompt to use this feature.
Communications Priority	Use this option to set your terminal's communication priority list. This list determines the order in which the terminal connects to the RMS solution. Do not change these settings unless instructed to do so.
RMS Cash	Enable or disable this option to allow cash tender within iPay@Table.
RMS Type	This sets the desired Restaurant Management System (RMS) for iPay@Table Web application. Do not change these settings unless instructed to do so.
Terminal Language	Set the language settings on the terminal.
Tip Settings	Enable, disable or change the tip settings on the terminal.

RMS Cash

This enables or disables the support of cash tender within the iPay@Table application.

Troubleshooting

Who do I call?

You must contact the correct help desk to resolve any issues with the iPay@table solution. Below are some issues and the appropriate help desk to contact.

You would contact the RMS vendor for the following issues:

- RMS software issues
- Communication issues between iPay@Table application and RMS such as entering a server ID and receiving a comms error

You would contact the third party application vendor for the following issues:

- Any issues encountered when using the third party application such as gift cards, loyalty cards, etc.

You would contact TD Merchant Solutions Help Desk for the following issues:

- Hardware issues such as blank screen, batteries not holding a charge, malfunctioning Bluetooth / charging bases
- Reconciliation issues on the TD Core Financial Application
- Communication issues with debit or credit financial transactions
- Any changes to terminal functionality that require a Host 2 download such as tip settings

Terminal error messages

If you're unable to resolve the problem after performing the following steps, please refer to the *TD Move 5000 Merchant Guide* for more troubleshooting tips.

Error codes	Explanation	Action required
Apply Failed: \$99999.99	The RMS cannot apply the approved amount to the check.	<ul style="list-style-type: none"> Press OK. Close the transaction manually in the RMS.
Apply Payment Failed Please Retry 1-Yes 2-No	The system cannot apply the approved amount to the check.	<p>If you select:</p> <ul style="list-style-type: none"> Yes, the terminal resends the payment info to restaurant system. No, the transaction will not be posted to the RMS, and will need to be closed manually.
Apply Payment Check/Table Already Closed	The Apply Payment was not successful because the Check or Table is already closed.	<ul style="list-style-type: none"> The server needs to update the RMS as required.
Apply Payment Comm Error OK	There is a communication issue while applying the payment of an approved transaction.	<ul style="list-style-type: none"> Reprocess the payment. The server must manually close the ticket on the RMS.
Applied: \$99999.99 Apply Failed: \$99999.99	Not all payment records have been successfully applied in a multi-record transaction.	<ul style="list-style-type: none"> The server needs to open any outstanding checks and accept payment from the customer(s). If the transaction is approved, the server must close the ticket manually on the RMS.
Comm Error	There has been a communication error.	<ul style="list-style-type: none"> Press OK to return to the <i>iPay@Table Home</i> screen. Verify that the network is working. Verify that the comm icons are connected / green. Check the Comms Setup in the iPay@Table settings menu to make sure valid IPs and Ports are entered.

Error codes	Explanation	Action required
Connection failed, please retry	The terminal failed to retrieve the check details from the RMS due to a communication issue.	<ul style="list-style-type: none"> Try to pull the check details again.
Function not available	The selected function is not enabled or available.	<ul style="list-style-type: none"> Change the settings to enable the function.
Get Tables Communication Error	The terminal is unable to retrieve a table from the RMS.	<ul style="list-style-type: none"> Confirm that the communication icons on the terminal are green and try to retrieve the table again.
Get Tables Get Tables Not Available	<p>There could be a number of possible reasons:</p> <ul style="list-style-type: none"> The RMS returned a table count of 0. The RMSType does not match the POS system. The terminal does not have an injected serial # and <i>Use Injected Serial #</i> is enabled. The user cannot retrieve any tables from RMS. 	<ul style="list-style-type: none"> Investigate which of the reasons are causing this error.
No Open Table Is Available	There are currently no open tables.	<ul style="list-style-type: none"> Press OK to return to the <i>iPay@Table Home</i> screen.
Payment App Initialization Required	The payment application is not set up or only partially set up to support iPay@Table Web application.	<ul style="list-style-type: none"> Complete the set up setup of the Financial application to support the iPay@Table Web application.
POS System Error	The RMS has returned an invalid response to the terminal.	<ul style="list-style-type: none"> The Merchant must contact the RMS solution provider.
Setup Required	The iPay@Table application is not set up or only partially set up – for example if the RMSType and Comms Setup are not set.	<ul style="list-style-type: none"> Access the <i>iPay@Table Settings Menu</i> and complete set up of the web application.

What problems can I easily resolve?

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

Why isn't my terminal connecting to the network?

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

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 to verify that you have a connection.

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 to verify that you have a connection.

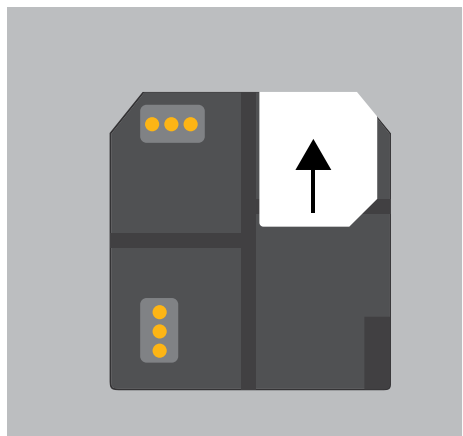
4G

If you see this icon  4G with at least two green bars, 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?
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 the panel unlocks.
 - c) Lift up the 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 to the bottom-right as it is in the diagram, and
 - c) slide it upwards, following the direction of the black arrow.

Signal strength

The signal strength is represented differently for each communication method.

Bluetooth		WiFi	4G	
Connected		100% - 66%		100%  4G
				80%  4G
		65% - 33%		60%  4G
				40%  4G
		32% - 1% (Low)		20%  4G
Not Connected		Zero / None		Zero / None  4G

You can minimize connectivity issues with the following:

Comm Type	Explanation
Bluetooth and WiFi	<p>Ensure that you keep your terminal and base / router in the same room if possible as walls or furniture may weaken or block the signal.</p> <p>The following and can also interfere with the signal:</p> <ul style="list-style-type: none">• Microwaves• Other WiFi devices (routers, VoIP phones, wireless cameras)• Fluorescent lighting• Building materials (concrete, electrical wiring, metal wall studs, etc.)• Crowds of people
4G	<p>Such things as buildings that have a large amount of concrete or brick and may cause signal strength degradation.</p> <p>As well, any modifications to your workplace (adding brick walls, metal frameworks or electrical wires) may also cause signal interference.</p>

Why isn't my terminal charging?

Bluetooth base or charging base	Charging cord
Ensure that: <ul style="list-style-type: none">the terminal is seated firmly in the base,the base's electrical outlet has power, andthe power pack is fully inserted into the power outlet. <ol style="list-style-type: none">Check to see if the charging icon is visible in the top-right corner of the screen? If it isn't, go to step 2.Plug the charging cord into an electrical outlet and plug the other end into the charging port on the left side of the terminal. Then, check to see if the charging icon appears in the top-right of the screen. If it doesn't, go to step 3.Please contact the TD Merchant Solutions Help Desk for the next steps.	<ol style="list-style-type: none">Ensure that the electrical outlet has power. If it doesn't, go to step 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.Please contact the TD Merchant Solutions Help Desk for the next steps.

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.

Comm type	Explanation
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

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.

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.

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	_____

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

Resource Centre

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.

You will find iPay@table documentation in the *Wireless Terminals* tab under *TD Move 5000*.

