Merchant Guide

TD Axium DX8000

For the TD Axium DX8000 series:
- DX8000 4G/WiFi version shown

Table of Contents

Introduction

Welcome to TD Merchant Solutions

The following materials will provide helpful information about the equipment, its features, and TD Merchant Solutions. Please ensure you read this guide so that you become familiar with the capabilities of the TD Axium DX8000 terminal and how it can support your business needs.

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

Who should use this guide?

You would use this guide if you use the TD Axium DX8000 at your business.

Terminal features

1. Paper chamber
2. Power key - Press and hold one second (ON) or hold two seconds and select **Power Off**.
3. Volume keys
4. Card readers
    a) Contactless/Tap
    b) Swipe
    c) Chip & PIN Card
5. Charging port on the left-side of the terminal.
6. Menu, Home, and Back icons.

Idle screen and admin menu

Idle screen

The idle screen (seen to the right) displays date, time, and TD logo and is split into three zones: the green information bar (along the top), the green transaction bar, and black navigation bar (along the bottom).
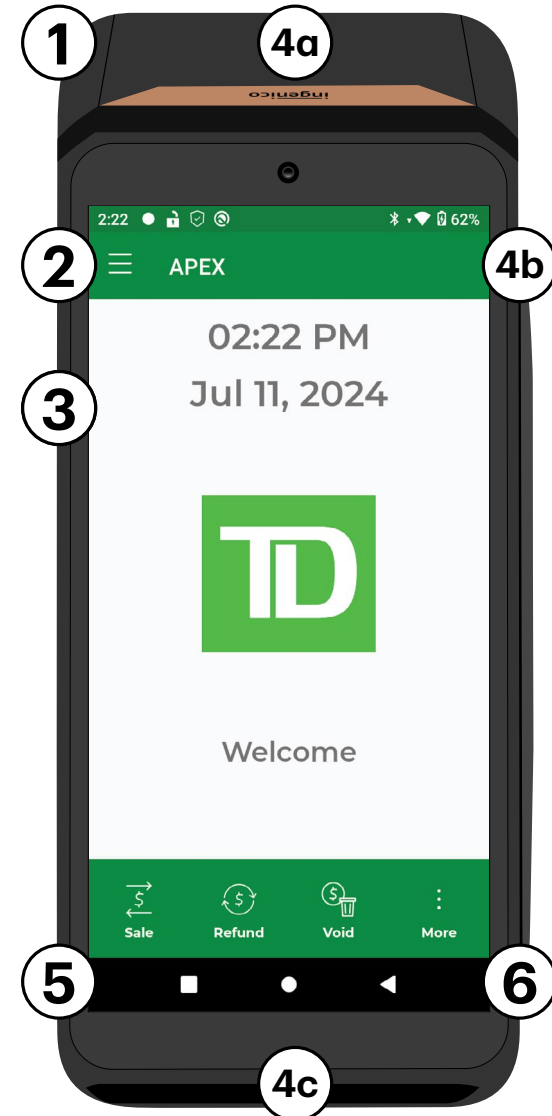
Information bar

The information icons along the top of the screen are very similar to a mobile phone icons and some that are exclusively used by the Axium financial application.

Axium financial application icons

 NUA Secure

 Payment Core Service

 NAR Secure Device Service

 USB Debugging connected

Mobile phone icons

 The **WiFi** icon has a number indicating connection strength (1 to 4).

 The **4G** icon with a bar indicating signal strength. WiFi and 4G comms are discussed in more detail in the *Configuration* section of this document.

 The Bluetooth icon indicates that Bluetooth is enabled on the terminal.

The **battery** icon indicates the battery life percentage ranges (100%, 75%, 50%, 15%, 5%, charging).

 The **Admin menu** icon offers configuration options for your terminal's financial application and are discussed in *Configuration* section.

Do you want the battery as a percentage?

1. Tap the **Home** icon ● → **Settings** → Battery.
2. Tap **Battery percentage** to enable.

Transaction bar
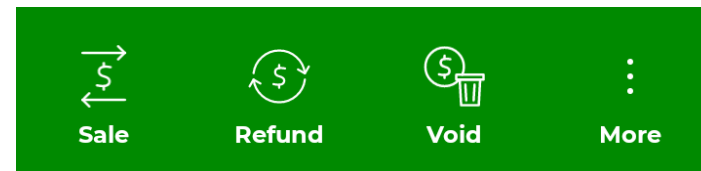
This area contains the transactions that you can perform on your terminal. The default will be **Sale**, **Refund**, **Void** unless you have disabled any of these. If you have any other transactions enabled on your terminal, such as pre-authorizations, they will be located under the **More** icon ⋮.

Navigation bar

This area has the Menu icon ■, Home icon ●, and Back icon ◀ for navigating the terminal.

Admin menu

The *Admin menu* contains your financial application's settings such as:

- Reports,
- Reprint receipts,
- Settlement,
- Clerk,
- Batch,
- Host management,
- Security setup,
- Terminal info, and
- Language.

Please only use the above menu options. There are some settings such as **Setup** that can make changes to your terminal, but those changes will be overwritten the next time you perform a settlement/day close.
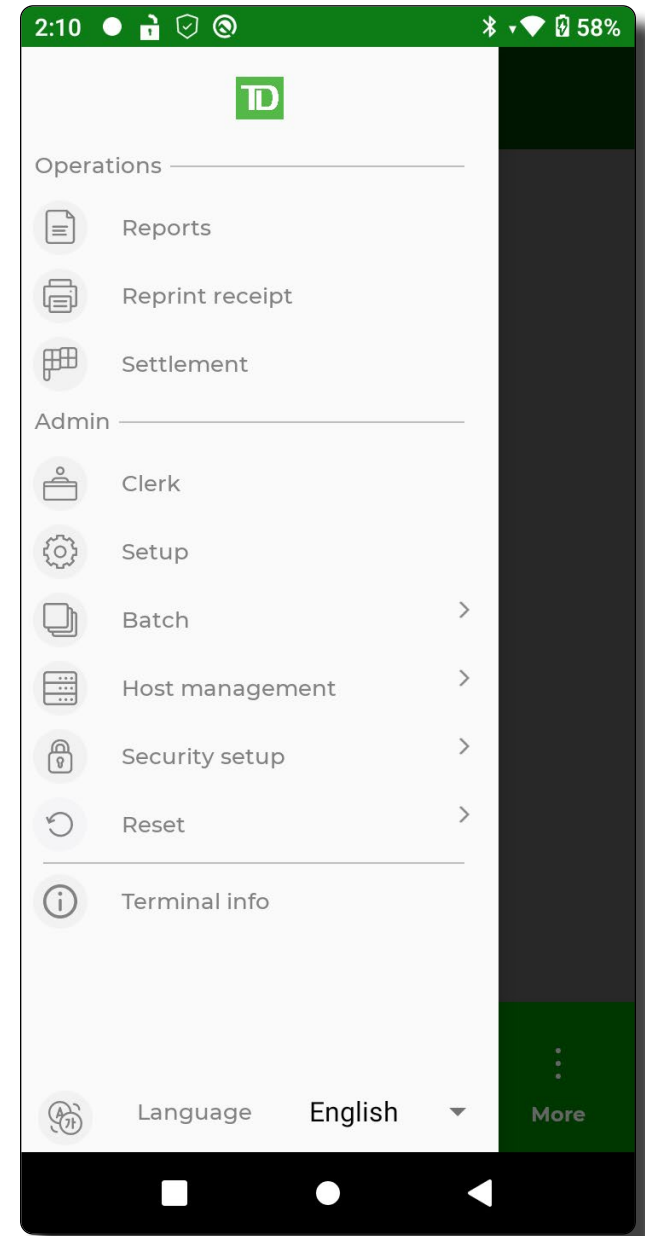
To learn more about the **Admin menu** functionality, please refer to the *Configuration* section.

Navigation

To go to the *Admin menu*:

1. Tap the **Admin menu** icon ☰ in the top-left of the *Idle screen*.

Application screen and settings menu

Application screen

The Application screen holds your APEX app, Apex Tem app, Settings menu, and any other third-party applications that your business subscribes to.

Note: In the image to the right, the background is set to white for clarity and yours may appear differently.

Axium icon - This is the core financial application of the terminal and allows you to perform transactions.

Axium TEM icon - This is used to download any updated parameters for your terminal.

Settings icon - This accesses the **Settings menu** for the physical terminal and is very similar to the menu/settings that you would find on a mobile phone.

Navigation

To go to the *Application screen*:

1. Tap the **Home** icon ⬤ in the black bar at the bottom of the *Idle screen*.
2. Swipe the screen to the right. The *Application screen* appears.

   Tap the **Axium** icon to return to the *Idle screen* and perform financial transactions.
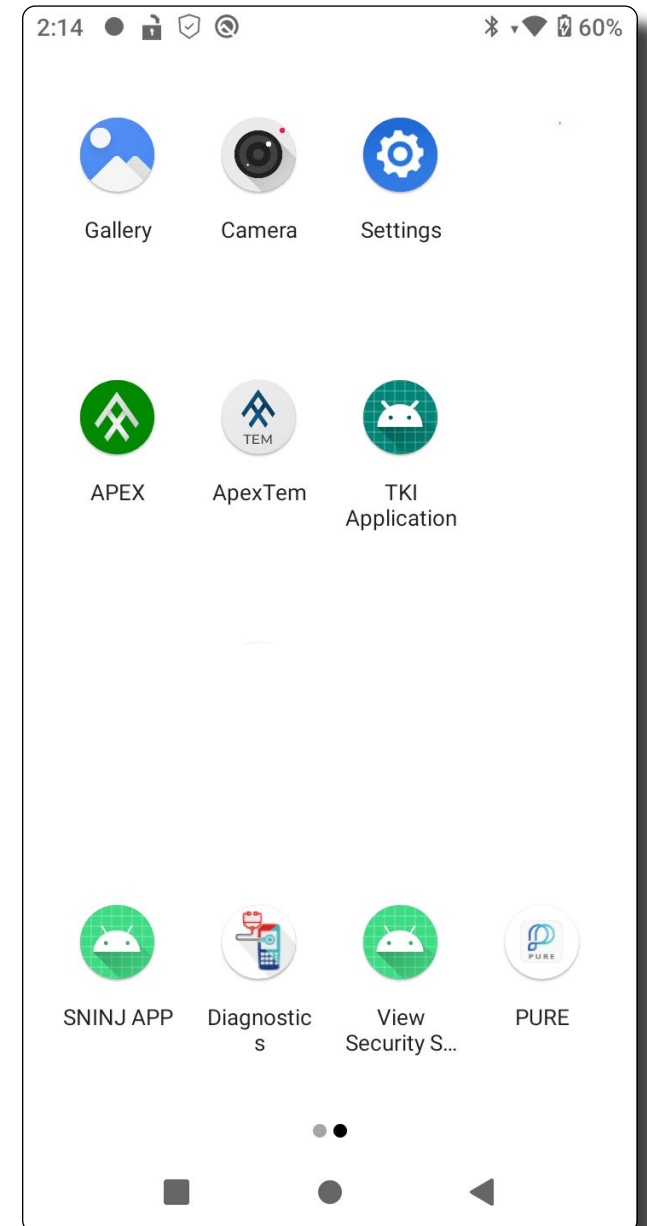
Settings menu

This menu is very similar to a settings menu on a mobile phone. The settings that you can modify from this menu are:

- Network & internet,
- Battery,
- Display, and
- Sound.

Please only use the above menu options. There are some settings in other menus that can interfere with your terminal's functionality.

Navigation

1. From the *Application screen*, tap the **Settings** icon . The *Settings menu* appears. You may be required to enter your **Settings menu password** to access any of the settings on this menu. This password is provided to you by the TD Technician.

To learn more about the *Settings menu*, please refer to the *Configuration* section.

16:12

Network & internet
Wi-Fi, mobile, data usage, and hotspot

Connected devices
Bluetooth, NFC

Base
Wi-Fi Base

Payment Device Management
Epay Information

Apps & notifications
Recent apps, default apps

Battery
93% - More than 2 days remaining

Display
Wallpaper, sleep, font size

Sound
Volume, vibration, Do Not Disturb

Storage
19% used - 25.89 GB free

Privacy
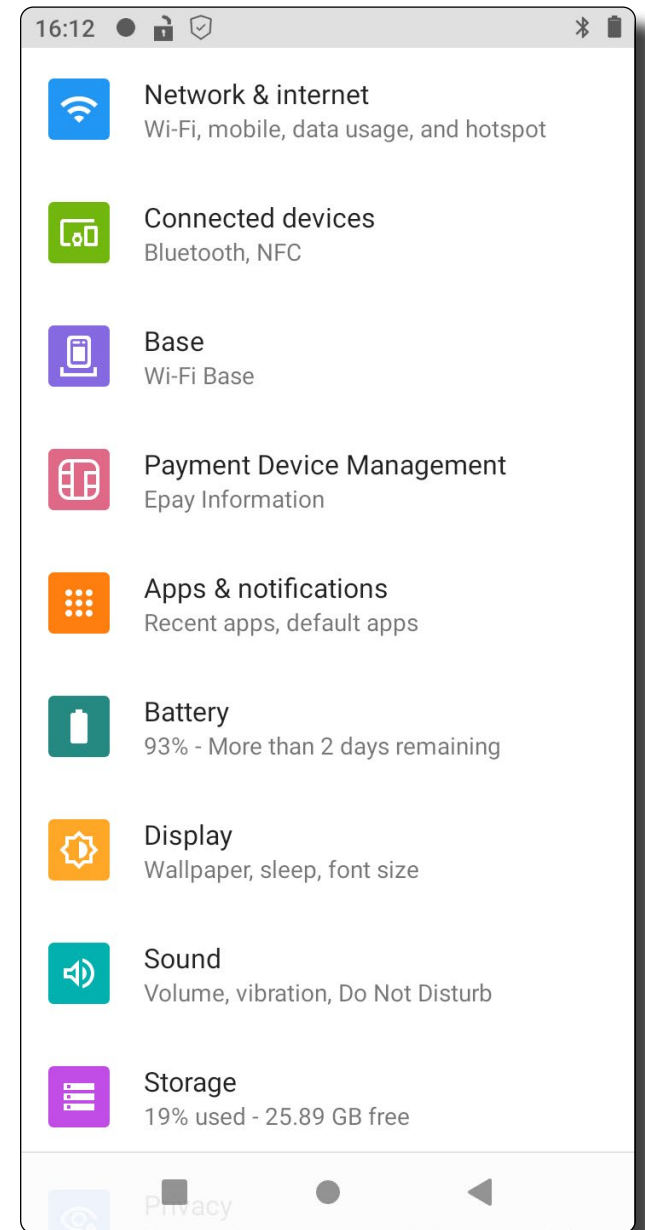
Financial Transactions

Financial Transactions

Accepted card types

Your terminal will accept whatever cards you indicated when you signed up with TDMS. If you wish to modify your accepted card list, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

Available transactions

Your terminal can perform the following transactions:

- Sale (Credit: CHIP & PIN, Contactless, Swipe, Manual Entry)
- Sale (Debit: CHIP & PIN, Contactless, Swipe)
- Refund (Credit, Debit)
- Void

The following transaction options can be enabled on your terminal if you call the TD Merchant Solutions Contact Centre at **1-800-363-1163**:

- Tips
- Cashback
- Surcharge (Credit and Debit)

Other transactions

If you wish to enable or modify any of the following, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163**:

- Mail or Phone Sale/Mail or Phone Force Sale
- Pre-authorization/Pre-authorization Completion
- Gift card
- Loyalty

Partial authorizations

If the payment type used has insufficient funds to pay the entire sale amount you may see the following:

- The receipt will print showing how much was applied to the sale.
- The screen shows a balance owed.
- The customer decides the how they will pay the balance (Cash or Card).
- If the customer selects card, follow the appropriate steps for the selected card type: **credit** or **debit**.
- If the customer selects cash the transaction will end. Ensure that you receive the correct cash amount for the balance.

Sale (Debit - Chip & PIN, Tap, Swipe)

This transaction is used when performing a debit purchase using Chip & PIN, Tap, or Swipe.

For a UnionPay debit card purchase, refer to Sale (UnionPay).

Instructions

1. Merchant: Tap **Sale**.
2. Merchant: Enter **User ID** and taps **CONFIRM**. (optional)
3. Merchant: Enter **amount** and taps **CONFIRM**.
4. Customer: Enter **tip amount**. (optional)
5. Customer: Confirms **total amount** and taps **YES**. (optional)
6. Customer: Select a debit card payment method.

   Tap

   a) Tap the debit card.
   b) Customer: Confirm **debit surcharge** and taps **YES**. (optional)
   c) Confirm **total amount** and tap **YES**.

   Insert

   a) **Insert** the debit card.
   a) Confirm **Cashback** and tap **YES**. (optional)
   b) Enter **cashback amount** and tap **CONFIRM**. (optional)
   c) Customer: Confirm debit surcharge and tap **YES**.(optional)
   d) Confirm **total** and tap **YES**.
   e) Select the **CHEQUING ACCOUNT** or **SAVINGS ACCOUNT**.
   f) Enter the **PIN** and tap **OK**.

7. Receipt(s) print.

```
           Merchant Name
          Merchant Address

             DEBIT SALE

Batch#:                          RRN:
001                        0010030100
08/01/24                      12:31:29
 Invoice No.: 2          REF#: 00000002
APPR CODE:                     477474 B
 DEBIT/DEFAULT              Proximity
**** **** **** 3418                **/**

 Interac
AID: A0000002771010

AMOUNT                         $25.00
TIP                             $5.00
CASH BACK                      $20.00
SURCHARGE                       $0.25
TOTAL                          $50.25


            001 APPROVED
        00 APPROVED THANK YOU

           VERIFIED BY PIN


           MERCHANT COPY
```

Sale (Credit - Chip & PIN, Tap, Swipe)

This transaction is used when performing purchases where the credit card is present, and it is **not** manually entered.

For a UnionPay credit card purchase, refer to Sale (UnionPay).

Instructions

1. Merchant: Tap **Sale**.
2. Merchant: Enter **User ID** and tap **CONFIRM**. (optional)
3. Merchant: Enter **amount** and tap **CONFIRM**.
4. Customer: Select **tip option**. (optional)
5. Customer: Confirm **total amount** and tap **YES**. (optional)
6. Customer: Select a credit card payment method.

   #### Tap

   a) **Tap** the credit card.
   b) Confirm **credit surcharge** and tap **YES**. (optional)
   c) Confirm **total amount** and tap **YES**.

   #### Insert

   a) **Insert** the credit card.
   b) Confirm **credit surcharge** and tap **YES**. (optional)
   c) Confirm **total** and tap **YES**.
   d) Enter the **PIN** and tap **OK**.

   #### Swipe

   a) **Swipe** the credit card.
   b) Confirm **credit surcharge** and tap **YES**. (optional)
   c) Confirm **total** and tap **YES**.

7. Receipt(s) print. Ensure that the entire balance was paid as it may have been a **partial authorization (page 8)**.

```
              Merchant Name
             Merchant Address

                   SALE

Batch#: 001              RRN: 0010010050
07/01/24                       19:07:42
Invoice No.: 2           REF#:00000002
APPR CODE: 868675             TCD: 124
┌MASTERCARD┐              ┌Proximity┐
**** **** **** 0471               **/**

┌Mastercard┐
AID: A0000000041010
TTQ: 8040008001

AMOUNT                          $5.00
TIP                             $0.75
TOTAL                           $5.75


            001 APPROVED
             AUTH 868675


   X_____

 I agree to pay the above total amount
     according to the card issuer
              agreement.

     Retain this copy for your
              records

          MERCHANT COPY
```

Sale (Credit - Manual Entry)

This transaction is only used when performing a sale where the credit cardholder is present, and the Tap and Chip & PIN payment methods have failed. **We strongly urge you to ask for another form of payment (another credit card, debit, cash, etc.).**

Instructions

1. Merchant: Tap **Sale**.
2. Merchant: Enter **User ID** and tap **CONFIRM**. (optional)
3. Merchant: Enter **amount** and tap **CONFIRM**.
4. Customer: Select **tip option**. (optional)
5. Customer: Confirm **total amount** and tap **YES**. (optional)
6. Customer: Select **manual entry** credit card payment method.
7. Customer: Enter the **card number**, and **expiry date** and tap **CONFIRM**.
8. Merchant: Enter the **security code/CVC** and tap **CONFIRM**. This code is found on the back of the credit card.
9. Merchant: The receipt(s) print. Ensure that the entire balance was paid as it may have been a **partial authorization (page 8)**.

```
            Merchant Name
           Merchant Address

                SALE

Batch#: 001              RRN: 0010010050
07/01/24                        19:07:42
 Invoice No.: 2          REF#:00000002
 APPR CODE: 868675              TCD: 124
 MASTERCARD              Manual CP
 **** **** **** 0471             **/**

 Mastercard

 AMOUNT                          $5.00
 TIP                             $0.75
 TOTAL                           $5.75


           001 APPROVED
           AUTH 868675


   X_____

I agree to pay the above total amount
    according to the card issuer
            agreement.

     Retain this copy for your
             records

          MERCHANT COPY
```

Sale (UnionPay)

UnionPay transactions potentially have different and/or added steps in the transaction process compared to North American cards. There are also UnionPay co-branded cards that follow unique process steps.

Instructions

1. Merchant: Tap **Sale**.
2. Merchant: Enter the **User ID** and tap **CONFIRM**. (optional)
3. Merchant: Enter the **amount** and tap **CONFIRM**.
4. Customer: Select a **tip option**. (optional)
5. Customer: Confirm the **total amount** and tap **YES**. (optional)
6. Customer: Select a card payment method.

   Tap

   a) **Tap** the UnionPay credit card.
   b) Confirm **credit surcharge** and tap **YES**. (optional)
   c) Confirm **total amount** and tap **YES**.

   Insert

   a) **Insert** the UnionPay credit card.
   b) Confirm **credit surcharge** and tap **YES**. (optional)
   c) Confirm Total and tap **YES**. (optional)
   d) Enter the **PIN** and tap **OK**.

   Swipe

   a) Swipe the UnionPay credit card.
   b) The payment method appears (**Co-brand** or **UnionPay**). Select **UnionPay**. (optional)
   c) Confirm **credit surcharge** and tap **YES**. (optional)
   d) The terminal may request the customer to enter their **PIN** for any transaction.

7. Merchant: The receipt(s) print.

PIN requirements

For credit cards, the customer can bypass this PIN request, but if they do and the PIN is requested again, they must enter their PIN.

Co-branded cards

Some UnionPay cards are co-branded with a North American issuer. When these cards are swiped, the customer must choose which issuer to use for the transaction: Co-brand (usually Visa or Mastercard) and UnionPay.

Transaction declined

If the transaction is declined by the issuer, retry and ask the customer to select the other payment method option (co-brand or UnionPay).

Receipt

It is identical to a credit card sales receipt except that UNIONPAY and UICSDEBIT will be displayed.

If it is a co-branded card, it will show whichever is selected at payment method.

Signature requirements

The customer **may** be required to sign the receipt even if a PIN was entered. Review the receipt to see if a signature is required.

Force Sale (Credit)

This option is only used when you can't process a credit card purchase normally through the network whether due to a communication problem or a Call for Auth response is returned. A Force Sale is initiated on the terminal and you must have already received verbal authorization.

DO NOT PROCEED UNTIL YOU READ THIS

Force post transactions are considered high risk with an increased chance of fraud and merchant liability. To avoid exposure to force post transactions merchants should request alternative forms of payment (another credit card, debit card, cash, etc.).

If you do perform a force post:

- you **must** call for authorization/approval code (**1-800-363-1163**),

  AND

- you **must** perform all of the available security checks.

Authorizations do not eliminate risk. If you manually enter a fraudulent credit card transaction you will be held responsible for any chargebacks associated with it.

We strongly re commend that you protect the force post function with a password or an override passcode.

Instructions

1. Merchant: Tap the **More** icon ⋮ then **Sale**.
2. Merchant: Enter the **User ID** and tap **CONFIRM**. (optional)
3. Merchant: Enter the **amount** and tap **CONFIRM**.
4. Customer: Select a **tip option**. (optional)
5. Customer: Confirm the **total amount** and tap **YES**. (optional)
6. Customer: Select **manual entry** credit card payment method.
7. Customer: Enter the **card number** and **expiry date** and tap **CONFIRM**.
8. Merchant: Enter the **security code/CVC** and tap **CONFIRM**.
9. Merchant: Tap **Card Present**.
10. Merchant: Enter the approval code provided by TDMS and tap **CONFIRM**.
11. Merchant: The receipt(s) print.

```
        Merchant Name
        Merchant Address

        FORCE SALE

Batch#: 007            RRN: 0010070130
08/13/24                       10:05:13
 Invoice No.: 8        REF#:00000008
APPR CODE: 943BY3
MASTERCARD                    Manual CP
**** **** **** 0448                **/**

AMOUNT                         $13.20

        000 APPROVED
        AUTH 943BY3

   X_____

I agree to pay the above total amount
   according to the card issuer
            agreement.

      Retain this copy for your
              records

        MERCHANT COPY
```

Refund (Credit and Debit)

A refund transaction cancels an amount originating from a sale that has already been settled (a sale in a closed batch). If the sale transaction is still within an open batch, you must perform a Void.

Instructions

1. Merchant: Tap **Refund**.

2. Merchant: Enter the **User ID** and tap **CONFIRM**. (optional)

3. Merchant: Enter the **amount** and tap **CONFIRM**.

4. Customer: Select a card payment method.

   Tap

   a) **Tap** the card. Go to step 5.

   Insert

   a) **Insert** the card.

   b) Select the **CHEQUING ACCOUNT** or **SAVING ACCOUNT**. (debit only)

   c) Enter the **PIN** and tap **OK**.

5. Merchant: The receipt(s) print.

Merchant Name
Merchant Address

CREDIT REFUND

Batch#: 003   RRN: 0010070210
08/13/24   11:04:49
Invoice No.: 13   REF#: 000000013
APPR CODE: 819418   TCD: 124
VISA   Chip
**** **** **** 4832   **/**
Visa Credit
AID: A00000031010

AMOUNT   **$36.29**

001 APPROVED
AUTH 819418

Retain this copy for your
records

MERCHANT COPY

Merchant Name
Merchant Address

DEBIT REFUND

Batch#:   RRN:
003   0010030140
08/01/24   13:38:07
Invoice No.:   REF#:
5   00000005
APPR CODE: TCD:
455290 B   124
DEBIT/CHEQUING   Chip
**** **** **** 3418   **/**
Interac
AID: A0000002771010
TVR: 0280008000
TSI: F800
TC : 150E5F427E9D346A

AMOUNT   **$6.25**

001 APPROVED
00 APPROVED THANK YOU

VERIFIED BY PIN

MERCHANT COPY

If you are concerned about the risk of inappropriate refunds (whether due to errors, employee fraud, etc.) you should consider adding a supervisor password to these transactions.

To have a supervisor password requirement added to refund transactions, please contact the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

Void (Credit and Debit)

This option recalls a transaction so that you can void it. The following instructions can access any transactions that were performed in the current open batch. If a day close has been completed, you must perform a Refund.

Instructions

1. Merchant: Tap **Void**.

2. Merchant: Enter the **User ID** and taps **CONFIRM**. (optional)

3. Merchant: Select a filter option: **All records**, **Last record**, by number/code (**Invoice**, **Reference number**, or **Approval code**).

   ### All records

   a) Tap **SHOW**.

   b) Select the **desired record**.

   c) Review the transaction and tap **CONFIRM**.

   ### Last record

   a) Tap **SHOW**.

   b) Review the transaction and tap **CONFIRM**.

   ### By number/code

   a) Enter the search information and tap **CONFIRM**.

4. Customer: Select a card payment method:

   ### Tap the card on the reader

   a) Confirm the void and tap **YES**. Go to step 5.

Insert the card in the reader

a) Select the **CHEQUING ACCOUNT** or **SAVING ACCOUNT**. (debit only)

b) Enter the **PIN** and tap **OK**.

c) Confirm the void and tap **YES**. Go to step 5.

Swipe the card in the reader

a) Confirm the void and tap **YES**. Go to step 5.

5. Merchant: The receipt(s) print.

> Cashback amounts will not be included in a *Debit Void Sale* receipt as they have already been paid out to the customer.

```
            Merchant Name
           Merchant Address

           DEBIT VOID SALE

Batch#:                           RRN:
003                         0010030160
08/02/24                      11:01:30
Invoice No.:                     REF#:
2                              0000002
APPR CODE:                        TCD:
752195 B                           124
DEBIT/CHEQUING                    Chip
**** **** **** 3418               **/**
Interac
AID: A0000002771010
TVR: 0280008000
TSI: F800
TC :8A131CCDDCC59694

AMOUNT                         $12.20
TIP                             $1.83
SURCHARGE                       $0.25
TOTAL                          $14.28


          001 APPROVED
       00 APPROVED THANK YOU

          VERIFIED BY PIN
```

Pre-authorization (Open)

A Pre-authorization transaction is typically used in a restaurant, car rental, hotel industry where a product or service is requested. The authorized amount is placed on hold on the cardholder's account until the product is fulfilled or the service is completed, and the final amount is processed.

Instructions

1. Merchant: Tap the **More** icon ⋮ then **Pre-Auth**.

2. Merchant: Enter a **User ID** and tap **CONFIRM**. (optional)

3. Merchant: Enter the **amount** and tap **CONFIRM**.

4. Customer: Select a credit card payment method.

   Tap

   a) **Tap** the credit card.

   Insert

   a) **Insert** the credit card.

   b) Confirm Total and tap **OK**.

   c) Enter the **PIN** and tap **OK**.

   Swipe

   a) **Swipe** the credit card.

   Manual

   a) Enter **Card Number** and **Expiry Date** and then tap **CONFIRM**.

   b) Enter **Security Code** (CVC) and tap **CONFIRM**.

5. The screen will show whether the transaction was approved or not. No receipt will be printed at this point in time.

- If you currently perform pre-authorization transactions that include a tip, you should use the sale transaction type with tips enabled. There is no tip option for pre-authorizations.

- No receipt prints for a pre-authorization until it is completed.

```
              Merchant Name
             Merchant Address

             PREAUTHORIZATION

Batch#: 009              RRN: 0010090010
08/13/24                        13:58:26
Invoice No.: 1              REF#: 0000001
APPR CODE: 996744              TCD: 124
VISA                           Proximity
**** **** **** 4832                 **/**
VISA CREDIT
AID: A0000002771010
TTQ: 32A04000


AMOUNT                          $25.00


             000 APPROVED
              AUTH 996744

          Retain this copy for your
                  records

             MERCHANT COPY
```

Pre-authorization (Close/Completion)

A Pre-authorization completion transaction is initiated after a product or service is fulfilled and releases the hold amount on the cardholder's account for the final payment.

Instructions

1. Merchant: Tap the **More** icon ⁝ then **Pre-Auth Completion**.

2. Merchant: Enter the **User ID** and taps **CONFIRM**. (optional)

3. Merchant: Select a filter option: **All records**, **Last record**, by number/code (**Invoice**, **Reference number**, or **Approval code**).

   #### All records

   a) Tap **SHOW**.

   b) Select the **desired record**.

   c) Review the transaction an tap **CONFIRM**.

   #### Last record

   a) Tap **SHOW**.

   b) Review the transaction and tap **CONFIRM**.

   #### By number/code

   a) Enter the search information and tap **CONFIRM**.

   a) Confirm the void and tap **YES**. Go to step 5

4. Customer: Tap **ACCEPT**. The customer receipt prints.

5. Merchant: Tap **CONFIRM**. The Merchant receipt print.

> You cannot charge more than the original amount. To charge more than the original you must void the existing pre-authorization and then create a sale for the new higher amount.
>
> We also recommend the following:
> - Complete all pre-authorization transactions daily or as frequently as your business allows.
> - If you do not complete pre-authorization transactions daily, we recommend that you print open pre-authorization reports once a day.

```
            Merchant Name
           Merchant Address

         PRE-AUTH COMPLETE

Batch#:                      RRN:
003                    0010030210
08/02/24                 13:29:29
Invoice No.:                REF#:
4                        0030001
APPR CODE:                   TCD:
259079                       124
VISA                     Proximity
**** **** **** 3418          **/**
VISA CREDIT
AID: A0000002771010


AMOUNT                     $25.00


           000 APPROVED
           AUTH 259079


        Retain this copy for your
                records

           MERCHANT COPY
```

Force Pre-authorization

This option is only used when you can't process a credit card pre-authorization normally through the network due to communication problems.

DO NOT PROCEED UNTIL YOU READ THIS

Force post transactions are considered high risk with an increased chance of fraud and merchant liability. To avoid exposure to force post transactions merchants should request alternative forms of payment (another credit card, debit card, cash, etc.).

If you do perform a force post:

- you **must** call for authorization (**1-800-363-1163**),

    AND

- you **must** perform all of the available security checks.

Authorizations do not eliminate risk. If you manually enter a fraudulent credit card transaction you will be held responsible for any chargebacks associated with it.

We strongly recommend that you protect the force post function with a password or an override passcode.

Instructions

1. Merchant: Tap the **More** icon ⋮ then **Force Pre-Auth**.
2. Merchant: Enter a **User ID** and tap **CONFIRM**. (optional)
3. Merchant: Enter the **amount** and tap **CONFIRM**.
4. Customer: Enter the **card number**, and **expiry date** and tap **CONFIRM**.
5. Merchant: Tap **MAIL ORDER**.
6. Merchant: Enter the **customer's address** and **postal code** and tap **CONFIRM**.
7. Merchant: Enter the **security code/ CVC** and tap **CONFIRM**.
8. Merchant: *Call for Auth?* message appears. Tap **YES**.
9. Merchant: Call the TDMS Contact Centre for an approval code.
10. Merchant: Enter the approval code provided by TDMS and tap **CONFIRM**.
11. Merchant: The receipt(s) print.

```
          Merchant Name
         Merchant Address

        FORCE PRE-AUTH

Batch#: 007          RRN: 0010030210
08/06/24                     11:28:14
Invoice No.:  3         REF#: 00300003
APPR CODE: 729F37T
VISA                       Manual CNP
**** **** **** 4832               **/**

AMOUNT                    $100.00


         000 APPROVED
         AUTH 729F37T

  X_____

I agree to pay the above total amount
   according to the card issuer
          agreement.

     Retain this copy for your
            records

      MERCHANT COPY
```

If a signature is required, ensure that customer signs the merchant copy.

Sale (Mail or Telephone Order)

These instructions are used for purchases where the card is not present, and the transaction is done via mail or telephone. If the card is present at purchase, see Credit purchase. If you use the incorrect purchase transaction you could incur extra charges.

DO NOT PROCEED UNTIL YOU READ THIS!

Mail/Telephone transactions are considered high risk with an increased chance of fraud and merchant liability.

As there are risks performing transactions when the credit card is not present, ensure that you perform all of the available security checks.

If you manually enter a fraudulent credit card transaction you will be held responsible for any chargebacks associated with it.

Instructions

1. Merchant: Tap **Sale**.

2. Merchant: Enter **User ID** and taps **CONFIRM**. (optional)

3. Merchant: Enter **amount** and taps **CONFIRM**.

4. Merchant: Select **manual entry** credit card payment method.

5. Merchant: Enter the **card number**, and **expiry date** and tap **CONFIRM**.

6. Merchant: Select which type of transaction types it is (**PHONE ORDER** or **MAIL ORDER**).

7. Merchant: Enter the **customer address** and the **postal code** and then tap **CONFIRM**. (optional)

8. Merchant: Enter the **security code/ CVC** and tap **CONFIRM**. If you do not have the CVC, press **Enter/OK** and select the reason for not entering the CVC. (Phone only)

9. Merchant: The receipt(s) print.

If **AVS** is enabled on the terminal, you **must** enter the customer's Home Address and Postal Code (no spaces in the postal code).

```
            Merchant Name
           Merchant Address

                SALE
             MAIL ORDER

Batch#: 007              RRN: 0010070170
08/13/24                       10:35:01
                               CVC: N
 Invoice No.: 1          REF#:000000010
APPR CODE: 751006
 MASTERCARD              Manual CNP
**** **** **** 0398            **/**

 AMOUNT                       $11.00
 SURCHARGE                     $0.22

            001 APPROVED
            AUTH 751006

         Retain this copy for your
                records

            MERCHANT COPY
```

Force Sale (Mail or Telephone Order)

This option is only used when you can't process a credit card purchase Mail or Telephone Order when the card is not present normally through the network whether due to a communication problem or Call for Auth response is returned. A Force Sale Mail or Telephone Order is initiated on the terminal.

DO NOT PROCEED UNTIL YOU READ THIS

Force post transactions are considered high risk with an increased chance of fraud and merchant liability. To avoid exposure to force post transactions merchants should request alternative forms of payment (another credit card, debit card, cash, etc.).

If you do perform a force post:

- you **must** call for authorization (**1-800-363-1163**),

    AND

- you **must** perform all of the available security checks.

Authorizations do not eliminate risk. If you manually enter a fraudulent credit card transaction you will be held responsible for any chargebacks associated with it.

We strongly re commended that you protect the force post function with a password or an override passcode.

Mail/Telephone transactions are considered high risk with an increased chance of fraud and merchant liability.

As there are risks performing transactions when the credit card is not present, ensure that you perform all of the available security checks.

If you manually enter a fraudulent credit card transaction you will be held responsible for any chargebacks associated with it.

If *AVS* is enabled on the terminal, you **must** enter the customer's Home Address and Postal Code (no spaces).

Instructions

1. Merchant: Tap the **More** icon : then **Sale**.

2. Merchant: Enter the **User ID** and tap **CONFIRM**. (optional)

3. Merchant: Enter the **amount** and tap **CONFIRM**.

4. Customer: Select **manual entry** credit card payment method.

5. Merchant: Enter the **card number**, and **expiry date** and tap **CONFIRM**.

6. Merchant: Tap **MAIL ORDER**.

7. Merchant: Enter the **customer's address** and **postal code** and tap **CONFIRM**.

8. Merchant: Enter the **security code/CVC** and tap **CONFIRM**.

9. Merchant: Enter the approval code provided by TDMS and tap **CONFIRM**.

10. Merchant: The receipt(s) print.

```
            Merchant Name
            Merchant Address

             FORCE SALE
             MAIL ORDER

Batch#: 007              RRN: 0010070170
08/13/24                        10:35:01
AVS: 0
Invoice No.: 10          REF#:000000010
APPR CODE: 24789A
MASTERCARD                    Manual CNP
**** **** **** 0448                 **/**

AMOUNT                            $30.00

            000 APPROVED
            AUTH 24789A

        Retain this copy for your
                records

            MERCHANT COPY
```

Settlement

You have a deadline/balancing window (set on the TD system) to perform the settlement on **each terminal**.

If you close before your balancing window ends, you will receive the same or next business day deposit for credit and debit card transactions. Otherwise, they will be forwarded to the next business day.

Manual settlement

To perform a manual day close:

1. Tap the **Admin menu** icon ▤.
2. Tap **Settlement**.
3. Tap **CONFIRM** and then **ACCEPT** to proceed.
4. The terminal will process the day close and print a *Settlement Report* when finished.

```
            Merchant Name
            Merchant Address

08/06/24                     10:15
TID: APEX########    Batch#: 0003

         SETTLEMENT RPT

Sales           7        $186.00
Tips                      $15.59
Cashback                  $10.75
Refunds         2        -$12.25
Surcharge                  $0.00
Voids           1        -$12.20
Tips                      -$1.83
Cashback                   $0.00
Total          10        $185.86

      SETTLEMENT SUCCESSFUL

         END OF REPORT
```

Auto settlement

You can have your settlement occur at a specific time daily. Please call the TDMS Contact Centre to have this set up.

- 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.
- During this process, your terminal will download any updates or changed parameters to your terminal and install them.
- 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.
- Depending on your settings, a *Summary Report* may also be printed when a settlement is performed. See *Reports* for more information.

```
            Merchant Name
            Merchant Address

08/06/24                     10:15
TID: APEX########    Batch#: 0003

        SUMMARY REPORT

            CREDIT

Visa
Sales           4        $141.00
  Tips                     $7.20
Refunds         0          $0.00
Voids           0          $0.00
  Tips                     $0.00
Total           4        $148.20

TOTAL CREDIT
Sales           4        $141.00
  Tips                     $7.20
Refunds         0          $0.00
Voids           0          $0.00
  Tips                     $0.00
Total           4        $148.20

             DEBIT

Sales           3         $45.00
  Tips                     $8.39
  Cash Back                $0.05
  Surcharge                $0.75
Refunds         2        -$12.25
Voids           1        -$12.20
  Tips                    -$1.83
  Cashback                 $0.00
  Surcharge                $0.25
Total           6         $27.66
```

Receipts

Each transaction has a different receipt and most of the information is for record keeping.

There are some points of important information you need to be aware of to ensure that your transactions have completed correctly.

Receipt information

Auth#/Approval Code

This is the authorization number to show that the transaction has been approved and completed.

Code	Card Entry Method
Chip	Chip and PIN
Proximity	Contactless/Tap
Swipe	Swiped card
Manual CP	Card present manual credit card entry (Not MOTO)
Manual CNP	Card not present manual credit card entry (MOTO)

Reporting

Available reports

Your terminal can create reports that can be viewed on the terminal screen and/or printed: These reports are:

Terminal Batch Summary

This report will show all transactions by card type showing the grand total transaction amount, number of transactions, and the number of transactions and amount by card type.

Terminal Batch Detailed

This report provides the same information as the Summary report but each transaction is displayed with the pertinent details.

Open Pre Auth

This report provides the same information as the Summary report but each transaction is displayed with the pertinent details for any open pre-authorization transactions.

Terminal Parameters

This report displays all terminal parameters and their settings. This is a very long report and will use more paper than a receipt would. It is better to call the TDMS Contact Centre to enquire about your terminal settings.

Clerk

This report will display all the existing Clerk IDs that are active on your terminal.

Recent Error Report

This report option has a number of printable reports to show any recent error messages on a specific terminal. These reports may be requested by the TDMS Contact Centre to help troubleshoot.

EMV Last Transaction, EMV Parameters, EMV Key Report, EMV Statistics Report

These reports may be requested by the TDMS Contact Centre to help troubleshoot.

Last Batch Summary

This report will show all transactions by card type showing the grand total transaction amount, number of transactions, and the number of transactions and amount by card type in the previous batch.

Last Batch Detailed

This report provides the same information as the Summary report but each transaction is displayed with the pertinent details in the previous batch.

Report	View on terminal	Paper report
Terminal Batch Summary	Yes*	Yes
Terminal Batch Detailed	Yes*	Yes
Open Pre Auth	Yes*	Yes
Terminal Parameters**	No	Yes
Clerk	Yes	Yes
Recent Error Report**	No	Yes
EMV Last Transaction**	No	Yes
EMV Parameters**	No	Yes
EMV Key Report**	No	Yes
EMV Statistics**	No	Yes
Last Batch Summary	No	Yes
Last Batch Detailed	No	Yes

* Filters are available for this report.

** These reports are only used when contacting the TDMS Contact Centre for troubleshooting.

Terminal Batch Summary

This report will show all transactions by card type showing the **grand total transaction amount**, **number of transactions**, and the **number of transactions and amount by card type**.

Instructions

1. Tap the **Admin menu** ☰ icon → Reports → Summary (default).
2. You will see transactions listed by card type. Tap a card type to view more information or tap the ⋮ icon (top-right corner of the screen) to display the following options **Filter**, **Expand All** or **Print**.

    a) Tap **Filter** and use the following options to filter your search: **Clerk ID**, **Type of Card**, and/or **Transaction Type**.

    b) Tap **APPLY**. The transaction summary (with applicable filters) is displayed on the screen.

    c) Tap **EXIT** to return to the *Idle screen*.

    OR

    a) Tap **Print** and the report will immediately print (see example to the right).

| Merchant Name |
| Merchant Address |

| 08/06/24 | | 10:15 |
| TID: APEX######## | | Batch#: 0003 |

SUMMARY REPORT

CREDIT

Visa		
Sales	4	$141.00
Tips		$7.20
Refunds	0	$0.00
Voids	0	$0.00
Tips		$0.00
Total	4	$148.20

TOTAL CREDIT		
Sales	4	$141.00
Tips		$7.20
Refunds	0	$0.00
Voids	0	$0.00
Tips		$0.00
Total	4	$148.20

DEBIT

Sales	3	$45.00
Tips		$8.39
Cash Back		$0.05
Surcharge		$0.75
Refunds	2	-$12.25
Voids	1	-$12.20
Tips		-$1.83
Cashback		$0.00
Surcharge		$0.25
Total	6	$27.66

GRAND TOTALS

Terminal Batch Detail

This report provides transaction details by card type for the current batch.

Instructions

1. Tap the **Admin menu** ☰ icon → Reports → Summary (default).
2. You will see transactions listed by card type. Tap a card type to view more information or tap the ⋮ icon (top-right corner of the screen) to display the following options **Filter**, **Expand All** or **Print**.

   a) Tap **Filter** and use the following options to filter your search: **Clerk ID**, **Type of Card**, and/or **Transaction Type**.

   b) Tap **APPLY**. The transaction summary (with applicable filters) is displayed on the screen.

   c) Tap **EXIT** to return to the *Idle screen*.

   OR

   a) Tap **Print** and the report will immediately print (see example to the right).

```
              Merchant Name
             Merchant Address

08/09/24                       11:59
TID: APEX########    Batch#: 0007

           DETAIL REPORT

ACCT#        CLRK#       AUTH#
REF#        RET/VOID      SALE
FEE         CSHBACK        TIP
TF          INV#/PO#        EM
CTYP                      TOTAL


************4832            508520
00000004       $0.00      $25.00
$0.00          $0.00       $4.50
CSALE            4            P
VI                        $29.50


************4832            449071
00000005       $5.00       $0.00
$0.00          $0.00       $0.00
CRTN             4            P
VI                         $5.00

              CREDIT

Visa
Sales            1         $25.00
   Tips                     $4.50
Refunds          1         -$5.00
Voids            0          $0.00
   Tips                     $0.00
Total            2         $24.50

TOTAL CREDIT
Sales            1         $25.00
```

Open Pre Auth

This report will show all open pre-authorized transactions by card type, operator ID for the current business day sorted by date/time, invoice number, or card type.

Instructions

1. Tap the **Admin menu** ☰ icon → Reports → ⋮ icon (top-right corner of the screen).

2. You will see the following options **Filter**, **Expand All**, or **Print**.

   a) Tap **Filter** and use the following options to filter your search: **Clerk ID**, **Type of Card**, and/or **Transaction Type**.

   b) Tap **Batch** and then select **Preauths**.

   c) Tap **APPLY**. All open pre-authorizations (with other applicable filters) are displayed on the screen.

   OR

   a) Tap **Print**.

   b) Tap **OPEN PRE AUTH**.

   c) The report prints.

```
          Merchant Name
         Merchant Address

08/06/24                      10:28
TID: APEX########    Batch#: 0007

         OPEN PREAUTH
            REPORT

ACCT#             EM         AUTH#
MM/DD/YY  HH:MM  CTYP          INV#
REF#              CLRK#    AUTH AMT

************4832   P        157017 B
08/06/24   11:00  VI             1
00300001                   $120.00

************5016   C        8675309
08/06/24   11:08  VI             2
00300002                   $125.00

************9725   CHP      04U812 C
08/06/24   11:28  VI             3
00300003                   $100.00

TOTAL             3         $345.00

         END OF REPORT
```

Last Batch Summary

This report will show all transactions by card type showing the **grand total transaction amount**, **number of transactions**, and the **number of transactions and amount by card type** for the previous batch.

Instructions

1. Tap the **Admin menu** ☰ icon → Reports → → ⋮ icon (top-right corner of the screen) → Print → Last Batch Summary.

2. The report prints.

Merchant Name
Merchant Address

08/06/24   10:15
TID: APEX########   Batch#: 0003

LAST SUMMARY REPORT

CREDIT

Visa		
Sales	4	$141.00
Tips		$7.20
Refunds	0	$0.00
Voids	0	$0.00
Tips		$0.00
Total	4	$148.20

TOTAL CREDIT		
Sales	4	$141.00
Tips		$7.20
Refunds	0	$0.00
Voids	0	$0.00
Tips		$0.00
Total	4	$148.20

DEBIT

Sales	3	$45.00
Tips		$8.39
Cash Back		$0.05
Surcharge		$0.75
Refunds	2	-$12.25
Voids	1	-$12.20
Tips		-$1.83
Cashback		$0.00
Surcharge		$0.25
Total	6	$27.66

GRAND TOTALS

Last Batch Detailed

This report provides transaction details by card type for the previous batch.

Instructions

1. Tap the **Admin menu** ☰ icon → Reports → → ⋮ icon (top-right corner of the screen) → Print → Last Batch Detailed.

2. The report prints.

```
              Merchant Name
             Merchant Address

08/09/24                          11:59
TID: APEX########    Batch#: 0007

          LAST DETAIL REPORT

ACCT#        CLRK#        AUTH#
REF#         RET/VOID      SALE
FEE          CSHBACK        TIP
TF           INV#/PO#        EM
CTYP                       TOTAL


***********4832            508520
00000004      $0.00       $25.00
$0.00         $0.00        $4.50
CSALE           4              P
VI                         $29.50


***********4832            449071
00000005      $5.00        $0.00
$0.00         $0.00        $0.00
CRTN            4              P
VI                          $5.00

              CREDIT

Visa
Sales           1          $25.00
   Tips                     $4.50
Refunds         1          -$5.00
Voids           0           $0.00
   Tips                     $0.00
Total           2          $24.50

TOTAL CREDIT
```

Terminal Parameter

This report provides the current parameter settings on a terminal.

Instructions

1. Tap the **Admin menu** ☰ icon → Reports → ⋮ icon (top-right corner of the screen).
2. You will see the following options **Filter**, **Expand All**, or **Print**.
   a) Tap **Print**.
   b) Tap **TERMINAL PARAMETER**.
   c) The report prints.

Clerk report

This reports provides transactions by card type User ID and for the current open batch.

1. Tap the **Admin menu** ☰ icon → Clerk → CLERK LIST.
2. The lists of clerks will appear on the screen.

   OR

1. Tap the **Admin menu** ☰ icon → Reports → ⋮ icon (top-right corner of the screen).
2. Tap **Print**.
3. Tap **CLERK**.
4. The report prints.

Report codes and explanations

The following codes are used in the previously mentioned reports and shown at the top of the report as a legend. Some of the codes have multiple entries, such as CTYP (Card Type) that could contain any of the listed card types.

Code	Description
ACCT#	Account number - The credit or debit card number with masking.
AUTH#	Authorization number - The authorization number for the transaction.
AUTH AMT	Authorized transaction amount - The amount that was authorized by the card company.
CLRK#	Clerk's ID number - The clerk's ID number that performed the transaction.
CTYP	Card type. - The specific card brand that was used for the transaction.
EM	Entry method - The payment method that was used.
FEE	Surcharge fee amount - The surcharge amount applied to the transaction.
INV#	Invoice number - The invoice number assigned to the transaction.
PO#	Purchase order number - The purchase order number assigned to the transaction.
REF#	Reference number - The reference number assigned to the transaction.
RET/VOID	Return/void amount - The return/void amount for the transaction.
TIP	Tip amount - The tip amount for the transaction.
TT	Transaction type. - The transaction code.

CTYP
AM - American Express
DP - Debit
DI - Discover
JCB - JCB
MC - Mastercard
UP - UnionPay
VI - Visa

EM
CHP - Chip and PIN transaction
Manual CNP - Card not present manual entry (MOTO)
Manual CP - Card present manual entry (non-MOTO)
P - Proximity/Tap
S - Swipe

TT
CSALE - Credit sale
DSALE - Debit sale
CRTN - Credit return
DRTN - Debit return

Configuration

Configuration

The TD Axium DX8000 offers you a variety of options to personalize the terminal while helping you to administer your business. Some standard administration features are:

- User Management (creating and managing users)
- Parameter Updates (updating your settings on the terminal to reflect new information such as new accepted payment types)
- Communications (changes to your terminal's communication settings)
- Training Mode (enable/disable this setting to train new employees on how to use the terminal)
- Receipts (changes to how and when they are printed)

Security

Transactions

Merchants have the option to protect specific transactions by password as well as setting a dollar limit or a time frame on sale/refund transactions, flag duplicate transactions, and mask card information. The following settings can be enabled on your terminal.

Disable refunds

This option turns off refunds on your terminal.

Enable maximum sale amount

This option limits sale amounts on your terminal for credit cards. This is useful for merchants who want an upper limit on transaction amounts for their business and can help reduce fraudulent high-value transactions.

Enable maximum refund amount

This option designates the maximum dollar amount for a refund transaction limit on this terminal for credit cards. This option can help reduce fraudulent high value transactions.

Duplicate transaction warnings

Use this option to enable duplicate transaction warning messages on this terminal for credit or debit. This option will only work with Automatic Invoice Number enabled.

Screen lock

Much like a mobile phone, you can add a screen lock to your Axium terminal so that when it goes into sleep mode, a user must enter screen password to access the terminal. To enable this:

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Security → Screen lock.

2. Select one from the following: **None**, **Swipe**, **Pattern**, **PIN**, or **Password**. Whatever you currently have as your setting will show as *Current screen lock*.

None

a) You will be asked to confirm that you wish to *Remove device protection?*

b) Tap **YES, REMOVE**. You current protection is now removed.

Swipe

This setting provides **no security benefit** as there is no Pattern, PIN, or Password associated with it. It requires a user to swipe upward to access the financial application *Idle screen*.

Pattern

a) Set your **password pattern** and tap **NEXT**. This is a security feature similar to a password pattern on your mobile phone.

b) Re-enter the **password pattern** and tap **CONFIRM**.

c) Select one of the following options: **Show all notification content**, **Show sensitive content only when locked**, or **Don't show notifications at all** (default).

d) Tap **DONE**.

PIN or Password

a) Set your **PIN/Password** and tap **NEXT**.

b) Re-enter the **PIN/Password** and tap **CONFIRM**.

c) Tap **DONE**.

Patterns and PIN/passwords

If you forget your lock pattern or PIN/password, **TDMS cannot reset them** as they are stored on the terminal in the Android OS.

If you use these security features, we strongly suggest you use an easily remembered pattern or PIN/password.

User management

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

- Administrator (highest),
- Manager,
- Supervisor, and
- Clerk/Server/Cashier (lowest).

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

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

User Type	Capabilities	Special Notes
Administrator[1]	• Can access all features and functions, including transaction processing, reports, and menus • Can set up manager, supervisor, and clerk IDs • Only administrators have access to the Activity Log	• A maximum of 3 administrators are allowed per terminal • IDs are 1 to 10 alpha-numeric characters in length (#) • Passwords are 7 to 12 characters in length using at least one number and one upper-case or lower-case letter. (######A)
Manager	• Can access features and functions, including transaction processing, all reports, and all menus • Can set up supervisor, and clerk IDs	• A maximum of 9 managers are allowed per terminal • Be aware of who you grant Manager access to • IDs are 1 to 7 alpha-numeric characters in length (#) • Passwords are case sensitive, 4 to 7 alpha-numeric characters in length (####)
Supervisor	• Can perform normal transactions • Can set up clerk IDs	• A maximum of 9 supervisors are allowed per terminal • IDs are 1 to 7 alpha-numeric characters in length (#) • Passwords are case sensitive, 4 to 7 alpha-numeric characters in length (####)

---

1 The administrator passcode is also referred to as the Terminal Access Number.

User Type	Capabilities	Special Notes
Clerk/Server/ Cashier	• Can perform normal everyday financial transactions	• A maximum of 50 clerks are allowed per terminal • Clerks (default) can be renamed to Server or Cashier by a manager • IDs are 1 to 6 alpha-numeric characters in length (#) • Passwords are 4 to 7 alpha-numeric characters in length (####) • An optional name can be added (up to 20 alpha-numeric characters in length)

Administrators, managers, and supervisors

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

1. Tap the **Admin menu** ☰ icon → Security setup → Add user.
2. Select which type of user to create: **ADMIN**, **MANAGER**, or **SUPERVISOR**.
3. Enter the **new User name**.
4. Enter the **new password**.
5. Re-enter the **new password** and tap **CONFIRM**.

> Passwords are 7 to 12 characters in length using at least one number *and* one upper- or lower-case letter (######A).

Change password
Use this option to set the number of minutes that a user is locked out after incorrectly entering their password three times (four times for administrators). You must log in as an administrator to initiate this process.

1. Tap the **Admin menu** ☰ icon → Security setup → Change password.
2. Enter the **User name** you wish to change the password for.
3. Enter the **Current password**.
4. Enter the **New password**.
5. Re-enter the **new password** and tap **CONFIRM**.

Delete a user

Use this option to delete one or all existing clerk IDs from a terminal. Repeat these steps on each terminal. You must log in as an administrator to initiate this process.

1. Tap the **Admin menu** ☰ icon ➜ Security setup ➜ Delete user.
2. Enter the **User name** you wish to delete and tap **CONFIRM**.
3. Tap **CONFIRM** again to delete the user.
4. A message appears that the Delete User Operation successful. Tap **DONE**.
5. Do you wish to delete another user? **CANCEL** or **YES**.

Clerks/Servers/Cashiers

User management is your first line of defense in helping you protect your terminal from unauthorized use. The most common users on your terminal will be the clerk. You can:

- Manage clerk users and their capabilities
- Require clerks use an ID and passwords to limit access to the terminal

The following are some scenarios to help you administer clerk users on your terminal(s) to suit your business needs.

Enable clerk auto add

If you wish a clerk to create an ID only or ID and password, you must contact the TDMS Contact Centre to enable this.

Settings

Cashback

You can enable/disable cashback and set a cashback dollar limit.

Tip

You can display the tip options as:

- an entered dollar amount,
- an entered percentage or up to four preset percentages for easy selection (subject to restrictions in Quebec[†]),
- or both.

Surcharge

The Payment Card Networks (PCNs) allow merchants in Canada the ability to apply a surcharge on Credit Card and Debit Card transactions. There are a few restrictions as to how surcharge is enabled for your business:

Credit surcharge

- The surcharge feature cannot be applied to merchants located in the Province of Quebec.
- Surcharging is applicable to Credit Only (No Visa Debit or Mastercard Debit and No Prepaid transactions).
- A merchant may apply a surcharge on in-store (card present), and MOTO (card not present) transactions.
- The maximum surcharge amount is the lower of 2.4% **or** the effective merchant Discount Rate to zero percent. Merchants must not profit from surcharge i.e. surcharging should only offset the cost of acceptance.
- The same surcharge amount will be charged across all credit cards to which the merchant is subscribed.
- Merchants must contact the respective PCNs to determine what is required to opt in for credit surcharge.

Debit surcharge

- The surcharge feature cannot be applied to merchants located in the Province of Quebec.
- A merchant may apply a surcharge on in-store (card present) transactions only (maximum $0.25).

Sales with surcharge

You will only use these steps if surcharge is enabled on your terminal(s).

- The customer will see a message on the terminal informing them that a surcharge will be applied.
- The customer accepts or declines the surcharge.
- If they accept, the transaction proceeds normally.
- If they decline, you can suggest that they use a different payment method (cash or a different card type that doesn't require a surcharge) and re-initiate the sale on the terminal.

Enabling surcharge

To enable surcharge on your terminal, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

Refunds with surcharge

If your business uses credit surcharge, the surcharge portion of the return will be proportionally auto-calculated by the terminal.

Download

Perform a software download

Use this option to initiate a download for updated parameters, applications and software on the terminal.

Note: You must close the current batch before performing a download. If you perform a settlement it will also initiate a download once the batch is closed.

1. Tap the **Home** icon ● → **Apex TEM** icon 🔷.

2. Tap **TEM Call** at the bottom-left of the screen.

3. Tap **CALL**.

4. Tap **Check for updates**. The download starts.

5. Any new software updates will download and install. Once complete the terminal will reboot and return to the *Idle screen*.

Communications

All of your communication settings are located under the Network & internet menu and will allow you to update any WiFi or 4G settings on your Axium terminal.

Connect to a WiFi network

If you add WiFi connectivity to your Axium terminal, or change Internet Service Providers (ISPs), you will have to change your network settings. To do this:

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Network & internet → Wi-Fi.

    If this your first time adding a WiFi connection on your terminal, tap **Use Wi-Fi** and list of available WiFi networks appears.

2. Tap the **WiFi network** that you want to connect the terminal to.

3. If your Internet connection is DHCP:

    a) Enter the **Password** and tap **CONNECT**. Go to Step 4.

    If your Internet connection is Static:

    a) Scroll down to *IP Settings* and change it to **Static**.

    b) Enter the following information: **IP address**, **Gateway**, **Network prefix length**, **DNS 1**, and **DNS 2**. This information is provided by your ISP.
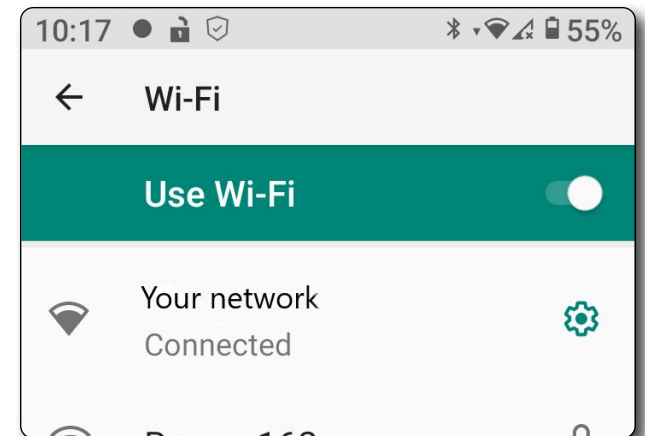
    c) Enter the **Password** and tap **CONNECT**.

Network & internet icon

WiFi network security

We strongly suggest that you secure your WiFi network with a network password. A secured WiFi network will have a **lock** icon 🔒 beside it.

Ensure that you are connecting your terminal to **your secured** WiFi network.

4. The terminal will authenticate and connect to the WiFi network.

   When connected to a WiFi network, it will appear at the top of the list of available networks with a **green cog** icon ⚙ instead of the **lock** icon 🔒.

Forget a WiFi network

This is works much like your mobile phone.

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Network & internet → Wi-Fi.
2. Tap the **WiFi network** that you want the terminal to forget.
3. Tap **FORGET**. The terminal will disconnect from it and you will return to the list of available WiFi networks.

4G

Do not change any mobile/4G terminal settings as this could prevent you from performing financial transactions. If you have any questions, please contact the TD Merchant Solutions Contact Centre.

Switching communication mode

If you have both WiFi and 4G available on your terminal, WiFi is the primary communication mode. If the terminal cannot connect to the network via WiFi, it will switch to 4G and reattempt the connection.

Accessibility

There a number of accessibility features available to you in the **Settings** menu. The following are available to you:

Display settings

Font size

Use this option to adjust the font size on the terminal.

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Accessibility → Font size.

   OR

   Tap the **Home** icon ● → **Settings** icon ⚙ → Display → Font size.

Accessibility icon

Display icon

Sound icon

2. Adjust the **slider** at the bottom of the screen to change the font size. There is sample text so you can judge what font size works best for you.

3. Tap the **back arrow** in the top-left corner of the screen when you have made your adjustments.

Brightness

Use this option to adjust the screen brightness on the terminal.

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Accessibility → Brightness level.

   OR

   Tap the **Home** icon ● → **Settings** icon ⚙ → Display → Brightness level.

2. Adjust the **slider** at the top of the screen to change the brightness level until you are satisfied.

3. Tap the **back arrow** in the top-left corner of the screen when you have made your adjustments.

Magnification

There are two magnification options for the terminal.

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Accessibility → Magnification.

2. You will see two magnification options: **Magnify with triple-tap** and **Magnify with shortcut**. You can enable none, one, or both. However, the triple-tap option is usable anywhere on the device versus the Accessibility shortcut.

3. Select your option:

   <u>Magnify with triple tap</u>

   a) Tap **Magnify with triple-tap** and enable the option.

   Now, whenever a user wishes to magnify the screen, they can triple-tap the screen to magnify, scroll with two fingers, and triple-tap again to exit magnification. Once enabled, you will see an orange bar in the top-right of the screen indicating that a visual accessibility tool is enabled.

   OR

   <u>Magnify with shortcut</u>

   a) Tap **Magnify with shortcut** and enable the option. An Accessibility icon 🧍 appears in the **Navigation bar** at the bottom-right corner of the screen.

Now, when a user wishes to magnify the screen, they just tap the **Accessibility** icon to magnify, scroll the screen with two fingers, and tap the icon again to exit magnification.

You will only be able to access this icon if you can see the **Navigation bar**.

Display size

Use this option to adjust the sizing of information on the terminal.

1. Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Accessibility → Display size.

   OR

   Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Display → Advanced → Display size.

2. Adjust the **slider** at the bottom of the screen to change the display size. There is an example so you can judge what font size works best for you.

3. Tap the **back arrow** in the top-left corner of the screen when you have made your adjustments.

Dark theme

Use this option to change the screen background colour to black.

1. Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Accessibility.

   OR

   Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Display.

2. Tap **Dark theme** to enable/disable this.

> **Dark theme** does not affect the APEX financial application. It only affects the **Settings menu**.

Dwell timing

If you are using a mouse, you can set the cursor to take action automatically when it stops moving for a certain amount of time.

1. Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Accessibility → Dwell timing.

2. Tap **Use service** to enable this.

3. Adjust the slider to set the **Delay before click**.

Touch & hold delay

When this feature is enabled, your finger must stay in the same place for longer before the terminal will consider it a tap.

1. Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Accessibility → Touch & hold delay.
2. Select the desired delay: **Short**, **Medium**, or **Long**.
3. Click the **back arrow** in the top-left corner to exit the screen.

Time to take action

This feature allows you to take the selected amount of time before you have to take action.

1. Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Accessibility → Time to take action.
2. Select the delay you wish to use: **Default**, **10 seconds**, **30 seconds**, **1 minute**, and **2 minutes**.
3. Click the **back arrow** in the top-left corner to exit the screen.

Audio settings

Adjust terminal volume

1. Use the **volume buttons** on the left-side the of terminal to adjust the volume.

   OR

   Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Sound.
2. Use the Media volume slider to adjust the volume to your preferred level.
3. Click the **back arrow** in the top-left corner to exit the screen.

Sound feedback on the touchscreen

This feature indicates that the touchscreen accepted your selection with a preset sound. To enable this:

1. Tap the **Home** icon ⬤ → **Settings** icon ⚙ → Sound.
2. Tap **Touch sounds** to enable/disable this.
3. Click the **back arrow** in the top-left corner to exit the screen.

Charging sound

This feature indicates that the charging cord is properly inserted into the terminal or the terminal is properly seated in the charging base with a preset sound. To enable this:

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Sound.

2. Tap **Charging sounds and vibration** to enable/disable this.

3. Click the **back arrow** in the top-left corner to exit the screen.

Screen lock sounds

This will indicate that the terminal screen is locked with a preset sound. To enable it:

1. Tap the **Home** icon ● → **Settings** icon ⚙ → Sound.

2. Tap **Screen locking sounds** to enable/disable this.

3. Click the **back arrow** in the top-left corner to exit the screen.

Touch settings

Accessibility overlay (optional accessory)

The accessibility overlay provides tactile feedback for customers with visual disabilities to navigate the touchscreen. It is inserted into the card swipe strip on the right of the device and aligned with the on-screen keyboard.

You must enable this on the terminal to use the overlay. Please call the TDMS Contact Centre if you would like to enable this on your terminal.

When the overlay is enabled on the terminal, you will see a gold bar along the right side of the screen with the word *Accessibility* in it. Tap the gold bar to enable/disable the overlay. When the overlay is enabled, the word Accessibility is white; when disabled, it is black.

When the overlay is not in use, you can store it in the battery compartment on the back of the terminal.

Third party applications

What is a third party application?

A third party app is a software application made by someone other than Ingenico® (the manufacturer of the terminal) and TD Merchant Solutions.

What third party applications are available?

Currently TD Merchant Solutions offers the following authorized third party apps:

- DataCandy
- Givex

How do I load an app onto my terminal?

1. First, you must contact the third party app provider to create an account with them. We have provided the following links to help you get into contact with app providers:

   - https://datacandy.com/contact
   - https://web.givex.com/contact-us/

2. After you have created your account with the provider, you must call the TD Merchant Solutions Contact Centre with the account information. The Contact Centre will add the application to your account so that the application can then be downloaded onto your terminal(s).

What do these third party applications offer?

DataCandy is a gift card/loyalty application. Check out their website for more information: https://datacandy.com/

Givex is a gift card/loyalty application. Check out their website for more information: https://web.givex.com

Demo mode

This option allows a new user to be trained on the functions of the terminal without impacting any live transactions or totals.

Note: You cannot enter demo mode if the terminal has an open batch.

1. Tap the **Admin menu** ▤ icon → Setup.

2. Swipe left on the upper menu until you get to **DEMO** and tap it.

   OR

   Tap the search bar at the top of the screen and enter **demo**. You will see the **DEMO** option appear. Tap it to go to the Demo screen.

3. Tap **Demo mode enabled**.

4. Tap **EXIT** to return to the *Idle screen*. The terminal will update and the screen will show the word *Demo* in it whenever you tap on the screen.

While in Demo Mode the user can perform manual entry or swiped card transactions, but no chip card transactions or configuration changes.

Troubleshooting

Troubleshooting

With any equipment, sometimes problems occur. With the TD Axium DX8000, error messages are displayed on screen with a short description. Below is a list of error messages that you could see on the terminal screen and the actions required.

General error codes

"A" Error codes	Explanation	Action required
Acceptable letters are: 0-9, A-z, a-z	An Invoice # or PO# is entered with space.	Do not enter a space when entering an Invoice # or PO #.
Amount Exceeds Limit	The sale amount exceeds the maximum amount for the transaction.	Reduce the transaction amount.
Application Blocked Press Exit	All applications on an EMV card are blocked and magnetic swipe is not permitted.	Tap **EXIT** and the terminal will return to the *Idle screen*.
Application blocked Remove card	All applications on an EMV and magnetic stripe transactions are blocked on this card.	Remove the card and follow the on screen prompts.
Application not supported Swipe allowed Remove card	EMV transactions are blocked on this card.	Swipe the card to process the transaction.
Application not supported Use another card or swipe the card	Fallback when EMV fails.	Swipe the card or use another form of payment.

"B" Error codes	Explanation	Action required
Batch is Open, parameters not updated"	This is an Estate Manager Download Error: The host refused a scheduled download because an open batch exists.	Close the open batch and retry the download.
Batch almost full	The batch has reached 95% of its maximum capacity.	Consider closing the current batch. If the terminal batch reaches 100% capacity you will be unable to perform new transactions.

"B" Error codes	Explanation	Action required
BATCH LIMIT REACHED	The terminal's current batch has reached 100% capacity. New transaction cannot be created.	Close the current batch.

"C" Error codes	Explanation	Action required
Card data error	An error has occurred with a contactless transaction.	Select **CONFIRM** button to return to *Idle screen* to restart the transaction.
Cless Fail	Multiple contactless cards are tapped quickly. This may occur when a customer is holding other cards in their hand when tapping their card.	User must ensure only one card is tapped.

"D" Error codes	Explanation	Action required
Decline 213	The transaction was declined.	Another form of payment or correct reason for decline (card/host).

"I" Error codes	Explanation	Action required
Interac Flash: Host Response Code 89	The terminal will not accept the debit card via the attempted payment method.	The Chip Card must be inserted
Invalid Card XXXX	After entering a wrong 4 digits on Fraud Control screen on MSR transaction, terminal displays the error message "Invalid Card/xxxx".	Select **TRY AGAIN** and enter the correct number
Invalid Password	This message appears when an invalid password is entered (exp: New Password different to Confirm Password or incorrect Current Password).	Select **TRY AGAIN** to return to button to return to the **CHANGE PASSWORD** screen.

"M" Error codes	Explanation	Action required
Mastercard PayPass: Host Response Code 65	The terminal will not accept the card via the attempted payment method.	The Chip Card must be inserted

"M" Error codes	Explanation	Action required
Missing Digit	This message appears when no Digit is entered Password. The Passwords could contain between 7 and 12 alphanumeric characters (min=7, max=12). At least one alpha and one numeric character must be used.	Select **TRY AGAIN** to return to button to return to the **CHANGE PASSWORD** screen.
Must settle batch	An Estate Manager Download Error: Host refused download because an open batch exists.	Close the batch and retry the function.

"P" Error codes	Explanation	Action required
Password Already Used	This error message appears when already used password (same password or old one) is entered.	Tap **TRY AGAIN** to return to the *Change Password screen*.
Password too Short	This message appears when the password's length is less than the 7 characters. The Passwords could contain between 7 and 12 alphanumeric characters (min=7, max=12). At least one alpha and one numeric character must be used.	Tap **TRY AGAIN** to return to the *Change Password screen*.
Password too Long	This message appears when the password's length is longer than 12 characters. The Passwords could contain between 7 and 12 alphanumeric characters (min=7, max=12). At least one alpha and one numeric character must be used.	Tap **TRY AGAIN** to return to the *Change Password screen*.
Please insert card	A contactless transaction has been declined.	Insert the card.
Please present one card only	Multiple contactless cards are tapped quickly. This may occur when a customer is holding other cards in their hand when tapping their card.	User must ensure only one card is tapped.
Please Tap Card Again	The contactless card was tapped too quickly.	Tap **CONFIRM**. Wait for the *Card Capture screen* to appear. The customer will tap the card again.

"P" Error codes	Explanation	Action required
Please see the phone	Direction Message – not a true error	Refer to phone screen.
PIN is Too Short, At Least 4 Digits Required	The PIN entered was under four characters.	Enter the correct PIN.
Pre-auth limit reached	The terminal has reached 100% capacity for pre-authorizations. New pre-authorizations transaction cannot be created.	You must close existing pre-authorizations to open new ones.
Pre-auth near max	The number of the pre-authorization transactions has reached 95% of maximum capacity on the terminal.	If this reaches 100% you will not be able to open any new pre-authorizations. Consider closing existing pre-authorizations.

"R" Error codes	Explanation	Action required
Read chip card failed Use another card or swipe the card	The terminal could not read the chip.	The card must be swiped or the customer must use another form of payment.
Read chip card failed Swipe allowed Please remove card	Device could not read the chip	Remove the card and follow the on screen prompts.
Read Card Failed. Please try again.	The card was tapped too quickly for the terminal to read.	Tap **CONFIRM**. Wait for the *Card Capture screen* to appear. The customer will tap their card again.

"T" Error codes	Explanation	Action required
This is a chip card. Please insert/tap card.	An EMV card is swiped.	The card must be must inserted or tapped .
Timeout	Data entry was not entered quickly enough, and the screen timed out	Select Confirm, retry function.
Too many taps	Too many attempts to tap a contactless transaction.	Provide another form of payment or insert the card.

FAQs

Why isn't my terminal connecting to the network?

WiFi

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

1. Is WiFi enabled on your terminal? To check this:

    a) Tap the **Home** icon ● → **Settings** icon ⚙ → Network & internet → Wi-Fi.

    b) **Use Wi-Fi** should be enabled. If it is not, review *Connect to a WiFi network*.

2. Have you made physical changes to your location? New walls or electronic devices near the terminal may prevent a connection.

3. Is your router/modem powered? Ensure that the electrical outlet has power.

4. Is your Internet connection working properly? Verify this with another device.

5. Is your modem/router working correctly? Unplug and plug back the power cord to your modem/router and wait for three to four minutes.

4G

If you don't see the 4G icon, you can quickly check the following:

1. Is 4G enabled on your terminal? To check this:

    a) Pull down from the top of the screen twice and you will see a **Mobile data** icon.

    b) Ensure that it is enabled ⇅.

2. 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.

3. Is there an issue with the wireless phone network? Your terminal uses the Bell network.

Signal Strength

The signal strength is represented differently for each communication method (WiFi and 4G).

WiFi interference

The Axium terminal can connect to two different WiFi frequencies: 2.4 GHz and 5 GHz. There are steps that you can take that will minimize 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**

   The following can interfere with the 2.4 GHz and 5 GHz frequencies:

   - Microwaves

   - WiFi devices (routers, VoIP phones, wireless cameras)

   - Fluorescent office lighting

   - Some cordless phones and baby monitors

   - Human bodies in between the wireless router and the terminal

   To avoid connectivity and data issues, avoid going near these devices when using the TD Axium DX8000 solution. Of course, you can't always avoid sources of interference.

   To accommodate this, 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 terminal may not be able to adapt and could lose connectivity.

Signal Strength	Icon
100%	
75%	
50%	
15%	
0%	

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.

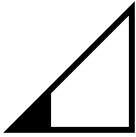### What do I do if there's a power outage?

The terminal may not be able to process transactions without power.

WiFi

You may need to reboot your modem/router to reconnect. If a transaction was interrupted due to battery/power failure, please perform the transaction again when power is restored.

4G

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

Signal Strength	Icon
100%	
50%	
15% (Minimum level to process, but there could be issues completing transactions.)	
0%	
4G Disabled	

Third party applications

What do I do if my application isn't working?

You must contact the application provider directly.

What do I do if I don't see my application on my terminal?

Call the TDMS Contact Centre to ensure that the application has been added to your account and is available for download.

Lost or stolen equipment

If your device has been lost or stolen, please:

1. Contact the TD Merchant Solutions Contact Centre immediately to report the incident. (stolen or lost)

2. Contact the police to file a report. (stolen only)

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

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

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

The officer should provide you with a **report number**. After obtaining the above from the officer, please contact the TD Merchant Solutions Contact Centre and provide this information so that you can receive a replacement device. See below for an easy to use information card to record the required information.

Police information

Name: _____

Jurisdiction: _____

PH #: _____ *EXT #:* _____

FAX #: _____

Email: _____

Stolen device serial #: _____

Contact Information

Please call the TD Merchant Solutions Contact Centre 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/posresources