TD Desk 5000

Quick Start Guide

For the TD Desk 5000

- Standalone and Semi-Integrated terminals
- With or without PINpads (iPP315 or Desk 1500)

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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 Desk 5000 for both standalone and semi-integrated terminal modes and covers hardware functionality, performing financial transactions, administration features and troubleshooting. For more information regarding its use and available features, please review the ***TD Desk 5000 Configuration and Troubleshooting Guide***.

Welcome kit contents

We are pleased to provide Merchants new to TD Merchant Solutions with the included Welcome Kit. The enclosed information was prepared with you in mind, and includes the following:

- Paper rolls for the terminal
- Cleaning card and instructions
- Card acceptance decals
- Information to help you protect your business and customers from fraud

The TD Desk 5000

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

To learn how to use other cards, please see our online documentation at www.tdmerchantsolutions.com/posresources.

The TD Desk 5000 has two versions: a standalone terminal or a semi-integrated terminal. The only physical difference between the two are the idles screens. Please see the following to help you identify which terminal you have.

Standalone Terminal

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

For more information on the standalone terminal, see page 2.

Semi-integrated terminal

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

- For more information on the semi-integrated terminal see page 4.
- For more information on changing modes see page 20.

Standalone

Semi-integrated

Hardware

Standalone Terminal

1. **Command keys**
   - Application key
   - Cancel
   - Correction
   - OK or Enter
2. **Touchscreen**

   All terminal navigation is performed through the touchscreen.
3. **Paper advance key**
4. **Paper chamber panel**
5. **Card readers**
   - **a)** Insert chipped cards
   - **b)** Swipe cards
   - **c)** Contactless cards

Home screen and icons

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

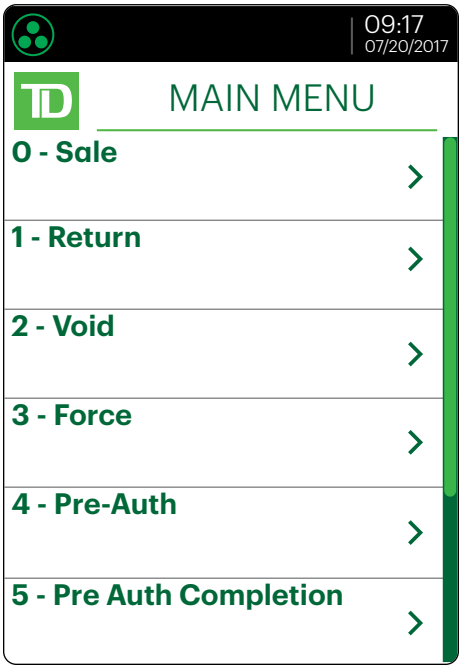
1. **Communication icon**
   This icon indicates whether the terminal is connected to the network. It will be one of two colours:
   - Green (connected) or
   - White (disconnected)
2. **Admin**
   This icon will open the ***Admin Menu***.
3. **Language**
   This icon will open the ***Language Menu***.

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

Main menu screen

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

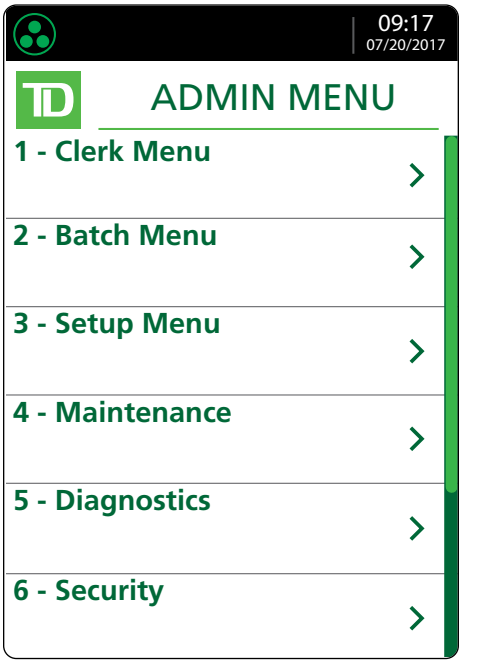
- Sale
- Return
- Void
- Force
- Pre-Auth
- Pre-Auth Completion
- Settlement
- Reprint Menu
- Reports Menu / Log In
- Miscellaneous



Admin menu screen

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

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



Semi-Integrated Terminal

Home screen and icons

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

1. **Communication icon**

   This icon indicates whether the terminal is connected to the network. It will be one of two colours:
   - Green (connected) or
   - White (disconnected)

2. **Mode**

   This icon will switch the mode that the semi-integrated terminal is in (standalone or semi-integrated).

3. **Admin**

   This icon opens the ***Admin Menu***.

4. **Language**

   This icon opens the ***Language Menu***.

The Stylus

A stylus is provided with each terminal. It is located on the back of the terminal. It can help you select screen elements more accurately and keep your touchscreen clean by limiting finger contact. To find the stylus:

1. Turn over the terminal so that the back is facing you.
2. Along the left edge, in a groove, there is a dark grey stylus.
3. Pull the stylus out of the groove and use it instead of your finger to touch the screen.

   If you are concerned about losing the stylus, it has a small hole on its head so that you can connect it to the terminal.

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.

Accessibility features

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

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

Web applications

Adding web applications

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

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

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

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

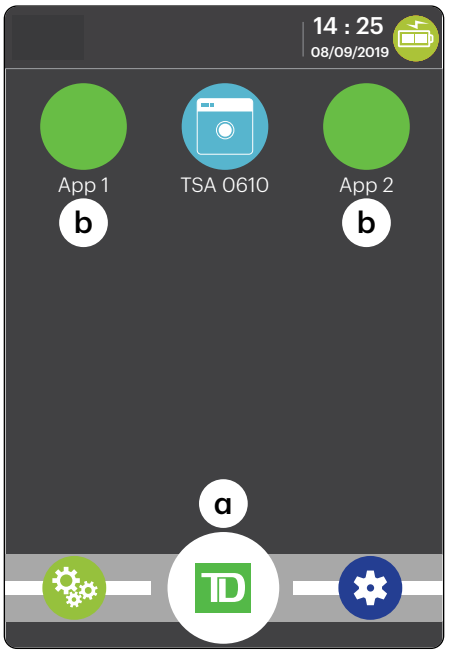
Accessing web applications

To access your applications:

1. Press the silver **Application** key (above the red **Cancel** key).
   - a) **Core Financial application**

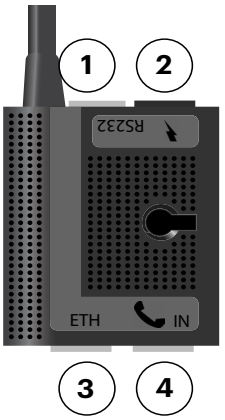
     This is the default application when you power on your terminal. To change your default application, review the ***Configuration and Troubleshooting Guide***.
   - b) **Third Party applications**

     Any available third-party applications will appear.
2. Select the desired application.
3. Follow the instructions provided by the application creator.



The Communications Adapter

The communication adapter is the bridge between your terminal and its power and data in one connection.



Ports

The adapter has four ports, and they are:

1. Data In
2. Power In
3. Internet In
4. Phone/RS232 In

Standalone terminals support an Ethernet connection. Semi-integrated terminals support the following connection options:

- RS232 to Ethernet
- RS232 to RS232
- RS232 to USB

The PINpads (Desk 1500 and iPP315)

These are an optional piece of hardware. When a PINpad is connected to your terminal the customer uses it to enter information and select options regarding the transaction. If you do not have a PINpad, the customer will use the terminal to enter information.

> If you use a PINpad, you must process all card transactions on it except manual which are processed on the terminal.

1. **Function keys**

   The **left dash or F1** and **right dash or F4** keys can be used to select onscreen options.

2. **Navigation keys**

   Use the **arrow** keys to navigate the screens and menus.

3. **Command keys**

   - **Cancel** (Left key)
   - **Correction** (Middle key)
   - **OK** (Right key)

4. **Card readers**
    - Insert chipped cards
    - Swipe cards
    - Contactless cards
      (tap the card on the screen)

Cardholder Privacy and Security

Terminal security

It is the Merchant's responsibility to secure the terminal, any user IDs, or passwords and to prevent unauthorized use. In any event the Merchant will be liable for any unauthorized use of the terminal or any user IDs or passwords. There are four available user settings:

Admin
No access restriction to terminal functionality; assign this level of access with extreme caution.

Manager
Access is restricted to certain features by a manager ID and password.

Supervisor
Access is restricted to certain features by a supervisor ID and password.

Clerk
Access is restricted to certain features by a clerk ID.

The following functions can be individually protected:

- Financial transactions
- Settlement / Day close
- Reprinting receipts
- Reports
- Manual transactions

- Standalone mode
- Various menus on the terminal

For more information, please refer to the ***Configuration and Troubleshooting Guide***.

Fraud prevention

Please refer to the ***How to Help Prevent Fraud*** pamphlet in your Merchant Welcome Kit. The following information will help you protect yourself from fraudulent transactions.

Manually entered credit card transactions

There is an inherent risk associated with these transactions as they have an increased rate of fraud. If you do manually enter a credit card transaction which is deemed fraudulent, you will be held responsible for any chargebacks associated with it. Manually entered credit card transactions include mail order and telephone order transactions.

If you are uncomfortable manually entering a credit card it is within your rights as a business owner to request another form of payment (debit, cash, etc.).

Force post transactions are disabled by default

The Force Post function allows prior authorization numbers to be manually keyed in. For your protection, this capability is disabled by default on your terminal. If you need to process a Force Post, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163** to enable the capability after being authenticated. It is strongly recommended that you protect the Force Post function with a password. Please see the ***TD Desk 5000 Configuration and Troubleshooting Guide*** for more information.

Call for authorization

Sometimes, due to a communication or security issue, a transaction cannot or should not be completed. See the list of messages and events below that will cause you to call for authorization.

Note: You must call for authorization for ***every*** force post transaction performed on your terminal.

Whenever	Action
...the card number on the screen does not match the number embossed on the card.	**1.** Press the **Cancel** key and call for a voice authorization immediately. **2.** Request a **CODE 10** authorization. In this situation, you may be dealing with a fraudulent card and **CODE 10** will alert the financial institution to this possibility.
...the cardholder signature on the receipt does not match the signature on the reverse of the card.	**1.** Call for a voice authorization. **2.** Request a **CODE 10** authorization. The financial institution will be able to advise whether the correct individual is using the card. They will also tell you how to proceed.

Whenever	Action
...you have any doubts about the validity of a card or a transaction.	**1.** Call for a voice authorization. **2.** Request a **CODE 10** authorization. The financial institution will be able to advise whether the correct individual is using the card. They will also tell you how to proceed.

Financial Transactions (Standalone)

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

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

* These transactions and others, such as cashback, credit / debit surcharge, and tips are covered in the ***Configuration and Troubleshooting Guide***.

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

Accepted card types

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

Sale (credit card)

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

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

Tips (optional)

If you do not use tips, you will not see these steps.

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

Payment method

If you have enabled credit surcharge on the terminal, the customer will see a message informing them that a surcharge will be applied. For more information on credit surcharge, please see the ***Configuration and Troubleshooting Guide***.

6. Perform one of the following payment methods: **Insert**, **Swipe**, **Tap** or **Key** (**Manual Entry)**. If you accept gift cards the payment option will appear here.

Insert card

a) The customer inserts their credit card.

b) The customer enters their **PIN** and presses **OK**.

c) The screen shows that authorization number, the transaction total, and the receipts print. Go to step 7.

Swipe card

a) Swipe the credit card.

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

> If you do not accept UnionPay cards, you will not see step b. Go to step c.

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

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

c) Perform a fraud check on the card and signature.

d) Verify the card info with what is on the terminal screen and press **OK**. Go to step 7.

Tap

a) The customer **taps** their contactless-enabled credit card on the contactless card reader. The customer may be required to insert or swipe their card in some cases. Go to step 7.

Manually enter card

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

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

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

c) Enter the **CVD number** and press **OK**. This number is generally located on the back of the credit card. This can be an optional step depending on your settings.

d) If prompted, indicate if the card was present for the transaction (**Yes** or **No**). Go to step 7.

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

   a) The receipt will print showing how much was applied to the sale.

   b) The screen shows a balance owed.

   c) 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.

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

   If the cardholder signature field appears on the merchant copy of the receipt, the customer **must** sign it.

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

Sale (debit card)

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

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

Tips (optional)

If you do not use tips, you will not see these steps.

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

Payment method

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

Insert card

a) The customer inserts their debit card. Go to step 11.

Tap

a) The customer **taps** their contactless-enabled debit card on the contactless card reader. The customer may be required to insert or swipe their card in some cases. Go to step 13.

Cashback (optional)

If you do not use cashback, you will not see these steps.

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

Debit surcharge (optional)

If you do not use debit surcharge, you will not see these steps. For more information on surcharge, please see the ***Configuration and Troubleshooting Guide***.

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

Account selection

11. The customer selects which account they want to use (**Chq** or **Sav**).
12. The customer enters their **PIN** and presses **OK**.

    If this is a UnionPay transaction, the customer may not be required to enter a PIN and can bypass this step. If the customer bypasses the step, and the terminal requests a PIN again, then the customer must enter their PIN.
13. The screen shows that authorization number, the transaction total, and the receipts print.
    a) If cashback was requested and authorized, ensure that the correct amount is provided to the customer.
    b) If this is a UnionPay transaction, the customer may be required to sign the receipt. Review the receipt to see if a signature is requested.

Sale (phone or mail)

These instructions are used for sales where the card is **not** present. If the card is present at sale, see ***Sale (credit card***). If you use the incorrect sale transaction you could incur extra charges.

> There are risks performing transactions when the credit card is not present. Ensure that you perform all the available security checks for phone / mail sale.

1. Press **Sale**.
2. Enter the **dollar amount** and press **OK**.

   If you have enabled credit surcharge on the terminal, the customer will see a

message informing them that a surcharge will be applied. For more information on credit surcharge, please see the ***Configuration and Troubleshooting Guide***.

3. Enter the **account number** and press **OK**.
4. Enter the **expiry date** and press **OK**.
5. Indicate the order type, a **phone**, or a **mail order**.
6. If it is a phone order, enter the three or four-digit **CVD number** and press **OK**.
7. The screen shows that authorization number, the transaction total, and the receipts print.

Return (credit)

You use this option to fully or partially return any sale transaction that is in a settled batch. If this is a correction, you must perform a void for the full amount of the transaction (see page 16).

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

   Insert card

   a) Verify the card info with what is on the screen and press **OK**.

   b) The customer may be required to enter their PIN. Go to step 4.

   Swipe card

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

   Manually enter card

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

   b) Enter the **expiry date** and press **OK**. This is four digits in length. Go to step 4.
4. The transaction is approved, and the receipts are printed.

Return (debit)

You use this option to fully or partially return any sale transaction that is in a settled batch. If the transaction is in an open batch, you must perform a Void (see page 16).

> Debit returns are disabled by default. If you wish to activate debit returns on your terminal, please call the TD Merchant Solutions Contact Centre at **1-800-363-1163**.

1. Tap the **Return** icon or press **1** on the keypad.
2. Enter the **total return** amount.

3. Customer selects to method to read the card that the initial sale was done on (Insert or Swipe).

   Insert / swipe card

   a) Customer confirms amount (**Yes** or **No**).

   b) Customer selects account (**Chq** or **Sav**).

   c) Customer enters **PIN** and taps **Enter**.

4. The transaction is approved, and the receipts are printed.

Force post (sale or phone / mail)

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

> Before you can perform this transaction, you must call the TD Merchant Contact Centre at **1-800-363-1163** and receive an authorization number.

1. Press **OK** → Force Post → Force Sale or Force Ph/Mail.
2. Enter the **dollar amount** and press **OK**.

   If you have enabled credit surcharge on the terminal, the customer will see a message informing them that a surcharge will be applied. For more information on credit surcharge, please see the ***Configuration and Troubleshooting Guide***.
3. Perform one of the following payment methods for the credit card in question: **Swipe** or **Manual entry**.

   Swipe card

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

   Manually enter card

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

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

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

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

Void / Transaction Recall

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

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

1. **Void**: Tap the **Void** icon or press **2** on the keypad and go to step 2.

   Transaction Recall: Press **4** on the keypad and go to step 3.
2. Verify if you are voiding a pre-authorization (**Yes** or **No**). This will filter the transaction records to make it easier to search. This will be visible only if pre-authorizations are enabled on this terminal.
3. Select how you wish to look up the transaction (**All**, **Reference #**, **Clerk #**, **Invoice #**, **Account #**, **RRN** or **Approval Code**).
   a) **All** displays every transaction on the terminal.
   b) **Reference #** displays a transaction by its reference number. You can find this information on the receipt.
   c) **Clerk #** displays every transaction performed by a specific clerk number in the open batch on this terminal.
   d) **Invoice #** displays a transaction by its invoice number. You can find this information on the receipt.
   e) **Account #** displays every transaction by the last four numbers on the card that was used. You can find this information on the receipt, or this can be provided by the customer.
   f) **RRN** displays a transaction by its RRN number. You can find this information on the receipt.
   g) **Approval Code** displays a transaction by its approval code. You can find this information on the receipt.
4. Enter the information you wish to use to search for a transaction and press **OK**.
5. If multiple transactions are displayed, use the arrow keys on the screen to scroll to the desired one and press **OK**.
6. The transaction is displayed with all the information. Press **OK** to void this transaction.
7. Confirm this selection (**Yes** or **No**). The transaction is voided.

Receipts

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

Printing receipts

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

Receipts options (semi-integrated mode only)

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

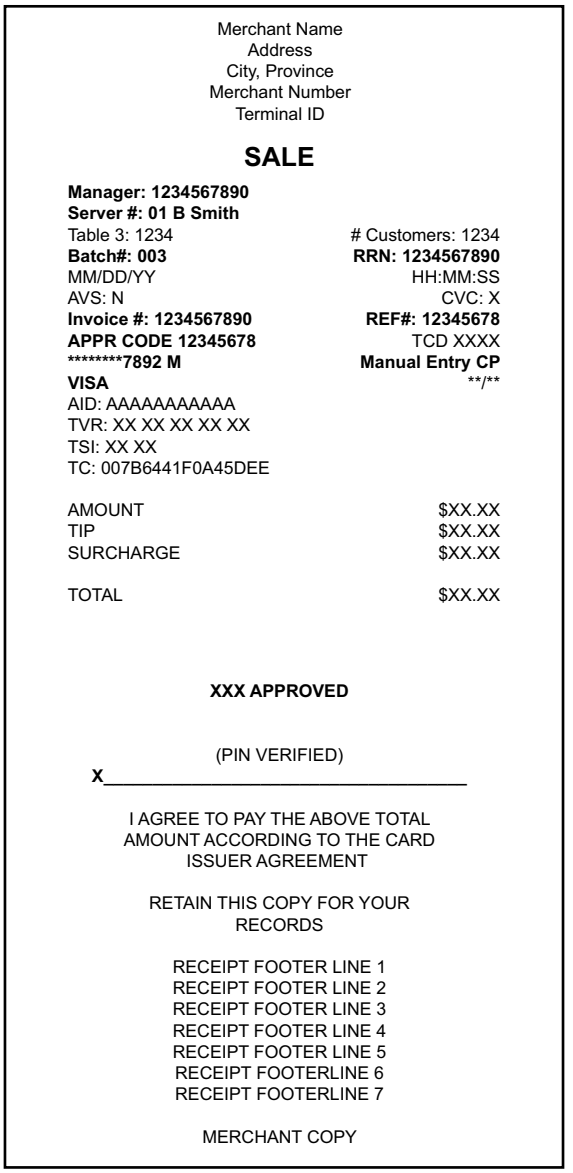
1. Press the **Admin** key, select **Misc. Options**, select **Semi-Integrated** and then **Receipt Options**.
2. Select how you want to print receipts (**ECR**, **Terminal** or **Both**) and press **Enter**.

    ECR means receipts are only printed on the electronic cash register.

    Terminal means receipts are only printed on the terminal.

Receipt example

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



Merchant Name
Address
City, Province
Merchant Number
Terminal ID

SALE

Manager: 1234567890
Server #: 01 B Smith
Table 3: 1234 — # Customers: 1234
Batch#: 003 — **RRN: 1234567890**
MM/DD/YY — HH:MM:SS
AVS: N — CVC: X
Invoice #: 1234567890 — **REF#: 12345678**
APPR CODE 12345678 — TCD XXXX
**********7892 M** — **Manual Entry CP**
VISA — **/**
AID: AAAAAAAAAAA
TVR: XX XX XX XX XX
TSI: XX XX
TC: 007B6441F0A45DEE

AMOUNT $XX.XX
TIP $XX.XX
SURCHARGE $XX.XX

TOTAL $XX.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	
Manager	Manager ID
Clerk	Clerk ID
Batch#	Batch number the transaction is 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 signature is required for a transaction
Host Response	Always ensure that the transaction was **APPROVED** as it could be **DECLINED** or **NOT COMPLETED**

Business Day Functions

Performing a settlement (day close)

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

- closes all open batches,
- prints selected reports,
- checks for and downloads available updates, and
- starts a new business day on the terminal by opening a new batch.

There are three 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 will receive same or next business day deposit for credit and debit card totals. Otherwise, they will be forwarded to the next business day.
- **Forced settlement** occurs if a manual settlement is not performed on a terminal every three business days. Forced settlements will incur a higher cost per transaction so it is in your best interest to manually settle your terminal every day.

To perform a manual settlement:

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

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

Reporting

For more information on reports, please refer to the online ***Configuration and Troubleshooting Guide***.

Configuration

Changing terminal mode (semi-integrated terminals only)

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

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

More features and functionality

There are more ways to configure your terminal such as:

- user management,
- software downloads,
- communication options,
- terminal settings, and
- transaction options.

For more information, please refer online to the ***Configuration and Troubleshooting Guide*** at www.tdmerchantsolutions.com/resourcecentre.

Troubleshooting

If you are unable to resolve the problem after performing the following steps, please refer to the ***Configuration and Troubleshooting Guide*** for more troubleshooting tips.

What problems can I easily resolve?

Problem	Action Required
Bad Communication	**1.** There was a communication failure after the transaction was initiated. **2.** Verify your connections. **3.** Press **Cancel** and try again.

Problem	Action Required
Chip cards cannot be processed	**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.
Connection icon is grey	**1.** Is your Internet connection working properly? Verify this with another device. **2.** Is your modem / router working correctly? Unplug and plug it back in and wait for three to four minutes. **3.** Ensure the terminal is securely plugged into the communication adapter. **4.** Ensure the communication adapter is securely plugged into the modem / router.
Display screen is blank	**1.** Ensure that the power cable is firmly connected to the power port and the electrical outlet.
Magnetic stripe card reader will not read cards	**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	**1.** Is there paper in the device? If there is, ensure that the paper is loaded correctly.
Printer jam	**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 is not powering on	**1.** Ensure that the terminal's power cord is properly inserted into the communication adapter. **2.** Ensure that the communication adapter power cord is properly inserted into an electrical outlet.
Transaction is not going through	**1.** Ensure that the data cables are connected to the terminal. **2.** Check your Internet connection to ensure that it is working.

Error codes

For more information, please refer to the online ***Configuration and Troubleshooting Guide***.

Reference

Admin menu structure

Please refer to the online ***Configuration and Troubleshooting Guide***.

Maintaining your terminal

- Do not place it on a magnetized pad — this will cause it to malfunction.
- Routinely clean it with a damp cloth so that spills do not 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.

Call Centre 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/ResourceCentre.