TD Generation

Quick Start Guide

For the TD Generation:

- All-In-One
- HSPA
- and Wi-Fi

** Image shown is the HSPA terminal*

COPYRIGHT © 2026 by The Toronto-Dominion Bank

This publication is confidential and proprietary to The Toronto-Dominion Bank and is intended solely for the use of Merchant customers of TD Merchant Solutions. This publication may not be reproduced or distributed, in whole or in part, for any other purpose without the written permission of an authorized representative of The Toronto-Dominion Bank.

NOTICE

The Toronto-Dominion Bank reserves the right to make changes to specifications at any time and without notice. The Toronto-Dominion Bank assumes no responsibility for the use by the Merchant customers of the information furnished in this publication, including without limitation for infringements of intellectual property rights or other rights of third parties resulting from its use.

MERCHANT INFORMATION

Merchant Name . . . . . .

Merchant Number . . . . . .

Contents

About this Guide 1
Welcome kit contents 1

The TD Generation Terminals 1
The terminals 1
Differences between the terminals *2*
Navigating the different screens *2*
Changing the paper *2*
Adjusting the screen brightness and terminal volume *3*
Accessibility features *3*
Communications 3
All-in-One terminal *3*
HSPA terminal *3*
Wi-Fi terminal *4*
Terminal screens 4
Idle screen and icons *4*
Desktop screen *5*
Supporting hardware 5
Charger base (HSPA and Wi-Fi) *5*
Generation Hub (All-in-One) *6*
Terminal security 7
User Management *7*
Terminal functionality and security *8*
Fraud prevention 10
Manually entered credit card transactions *10*
Force post transactions are disabled by default *10*
Call for authorization *10*
Storing cardholder receipts *10*

Financial Transactions 11
Accepted card types 11
Credit card purchase 12
Debit card purchase 13
Void 14
Refund 14
Transaction recall 15
Phone or Mail purchase 16
Force post purchase 16
Force post phone / mail purchase 17
Receipts 18
Receipt print options *18*
Reprinting receipts *18*
Receipt examples *19*

Business Day Functions 21
Performing the day close 21
Reprinting the day close report 21

Reporting 22
Business day reports 22
Batch reports 22
Customized reports 23

Configuration 23

Troubleshooting 24
What problems can I easily resolve? 24
Why isn't my terminal powering on? 25
Why do I see the Internet disconnected icon? (All-in-One and Wi-Fi) 25
Why is my terminal signal strength low? (HSPA and Wi-Fi) 25
Why won't my terminal connect? (HSPA) 26
What do I do if the terminal displays a security alert? 26
Error codes 26

Reference 27
Entering letters and special characters 27
Transaction shortcuts 27
Charging terminals (HSPA and Wi-Fi) 28
Storing terminals 28
Maintaining terminals 28

About this Guide

This Guide provides an introduction to your TD Generation solution, hardware functionality, performing financial transactions, administration features and troubleshooting. For further information regarding its use and available features, please review our online documentation at www.tdmerchantsolutions.com/posresources.

Welcome kit contents

We are pleased to provide Merchants new to TD Merchant Solutions with the included Welcome Kit from. 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 (Visa®, MasterCard®, Discover®, American Express®, Interac® Direct Payment, etc.)
- Information to help you protect your business and customers from fraud

The TD Generation Terminals

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

The terminals

1. **Paper chamber button**
2. **Dash keys and direction pad**

   Use the — keys and the direction pad to navigate the screens and menus.
3. **Paper advance key**

   Press ◈ or *◈ to advance the paper roll in the terminal.
4. **Power key**

   Press ⏻ or #⏻ to power the terminal on.

   Press and hold for 3 seconds to power the terminal off.
5. **Command keys**
   - X = Cancel
   - < = Correction

- = OK or activate

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

Differences between the terminals

The following are the differences between the All-in-One, HSPA and Wi-Fi terminals.

#	Name	All-in-One	HSPA	Wi-Fi
3	Paper advance key			
4	Power key			
—	Access Point / Repeater	No	No	Yes / Optional
—	Charger Base	No	Optional	Optional
—	Communications	Hub via phone line or Ethernet	Cell towers	Access point

Navigating the different screens

There are three ways to navigate screens and select icons. They are:

- **Dash keys**: the two keys are used to:
  - Move between the ***Idle***, ***Main Menu*** and the ***Desktop*** screens.
  - Quickly take you to the top or bottom menu option.
  - Select an on screen option.
- **Direction pad**: use the direction pad to navigate screens and menus. Once you find the desired icon or menu option, highlight it and press **OK**.
- **Icon number**: press the number assigned to the icon on the screen. For example, press **1** to select **Purchase** in the image to the right.

Changing the paper

1. Press the **paper chamber button** on the top-left corner of the terminal to open the panel and remove the empty paper roll tube.
2. Unwrap a new paper roll and place it in the paper chamber so that the loose end of the paper feeds up from under the paper roll towards you.
3. Press down on the panel until it clicks shut and ensure there is a bit of paper sticking out from the chamber that it touches the top of the terminal screen.

Adjusting the screen brightness and terminal volume

1. Press the left — → Desktop → Main Menu → **Control Panel** → Backlight or Speaker Volume.
2. Press the appropriate — to increase or decrease the brightness / volume by 5% / 10%.

Accessibility features

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

- Backlit keypad and adjustable screen brightness to create visual contrast
- Adjustable font size
- Adjustable key stroke sound when a key is pressed
- A raised identifier on the:
  - **5** key,
  - **Cancel** key,
  - **Correction** key, and
  - **OK** key

Communications

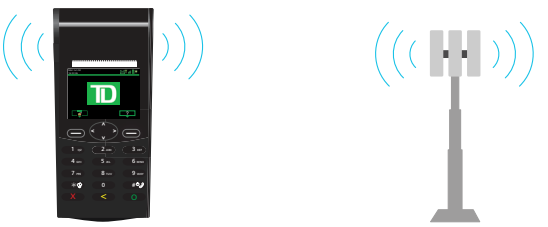
All-in-One terminal

The All-In-One terminal communicates via a phone line or an wired ADSL Internet connection. The image shown is the phone line version of the hub.

> The hub shown is the dual phone line hub. Depending on your installation, you may have an Ethernet hub with a single line.

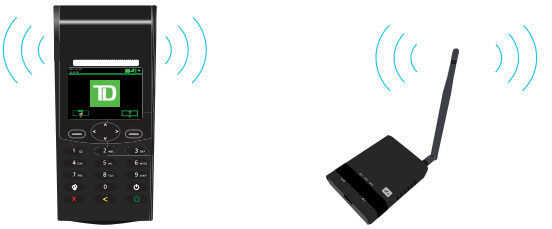
HSPA terminal

The HSPA terminal communicates via the same cell towers that your mobile phone uses. The HSPA terminal must be within a tower's range in order to function.



Wi-Fi terminal

The Wi-Fi terminal communicates via a router called an access point. The access point is connected to your Internet connection and receives financial transactions wirelessly from your terminal. You must have an active Internet connection in order to use the Wi-Fi terminal.



Terminal screens

Idle screen and icons

The default screen is called the Idle screen. It displays important information and different ways to access your terminal's functionality. If your terminal has a blank screen it has gone to sleep mode. Press any key to wake it and the ***Idle*** screen will display.

All-in-One

HSPA

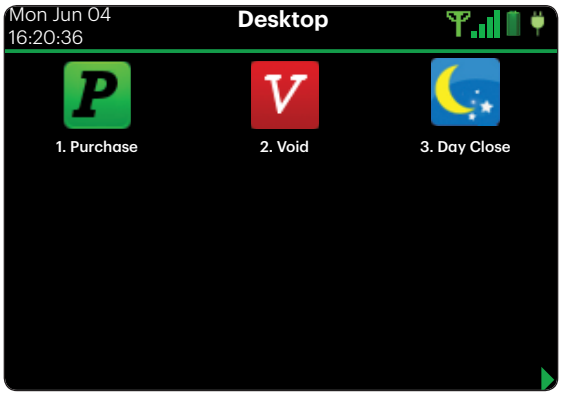
Wi-Fi

Icon	Name	All-in-One	HSPA	Wi-Fi
	Battery charging	No	Yes	Yes
	Battery level	No	Yes	Yes
	Internet status	Yes	No	Yes
	Signal	No	Yes	No
	Signal strength	No	Yes	Yes

Desktop screen

This screen displays three icons: **Purchase**, **Void** and **Day Close**. Any other icons that you will use will be displayed on the ***Main Menu*** screen.

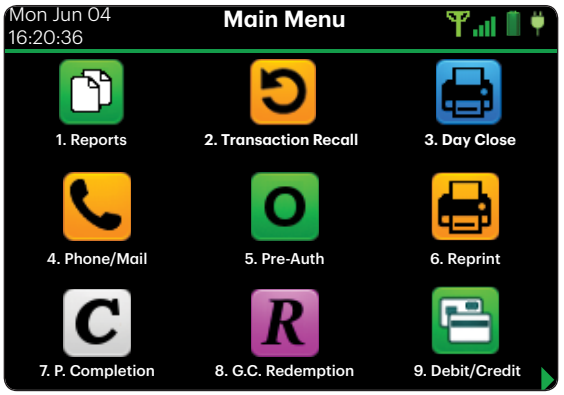
- Only the HSPA and Wi-Fi terminals can have more than three icons on this screen.
- The icon bar along the top will show different icons for each terminal type.



Main menu screen

There may be more than one ***Main Menu*** screen on your terminal. The number of screens depend n the number of available icons.

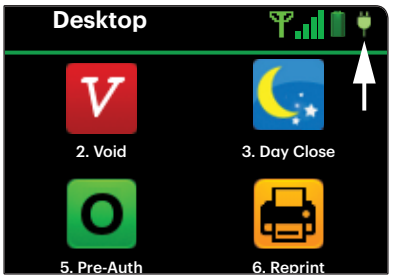
The icon bar along the top will show different icons for each terminal type.



Supporting hardware

Charger base (HSPA and Wi-Fi)

This is an option that allows you to recharge a HSPA or Wi-Fi terminal by placing it in the charger base. The charger base has four connection points near the top. The charging icon will appear when the terminal is properly seated.



Access point / Repeater (Wi-Fi)

The access point acts like a router that connects your Wi-Fi terminal to the network. Repeaters are additional routers extend the terminal's range over larger areas.

Light	Activity	Explanation
PWR	Solid blue	The access point / repeater is powered.
WAN	Solid blue	The access point has a connection.
Access Point WPS	Quick flashing blue light and a pause.	The access point is searching for a connection.
	Slow flashing blue light.	The access point is connected.
Repeater WPS	Slow flashing blue light and a pause	The number of flashes indicates the strength of the signal reaching the repeater. Five flashes is the strongest and one is the weakest.

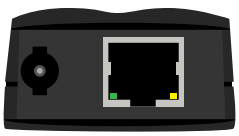
Generation Hub (All-in-One)

The All-In-One terminal comes with a hub to allow for easy power and Internet connection. It includes:

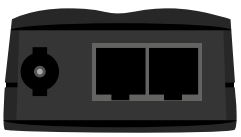
- A power cable
- A power port
- One or more comm ports (Ethernet or phone line)

There are two different hubs available; each with their own port configurations. They are the:

Single Ethernet
This configuration has a connection which allows you to connect an Ethernet cable from your Internet connection to the hub.



Dual Phone Line
This configuration has two ports which allows you to connect to a phone line and to connect to your phone.



Cardholder Privacy and Security

Terminal security

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

No security (Default)

This setting does not use user IDs and passwords. Merchants that choose to use no security still have the option to setup a store/manager override ID and password to access areas of the terminal that have a mandatory requirement for supervisor password.

Security

This option allows the user to setup supervisors and operators with an ID login. The supervisor setup requires you to create a password. You can activate this by going to Desktop → Main Menu → **Control Panel** → Logon Method.

Override Passcode

This option allows the business owner to setup a passcode to bypass certain functionality. See page 8 for the list of functionality that can be bypassed with this passcode.

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.

Note: There is a user hierarchy that determines who can access certain functionality:

- Administrator (TD Technician only),
- Manager,
- Supervisor, and
- Operator.

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

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

> TD Merchant Solutions strongly suggests that when you create your manager IDs that you record and store them in a safe place for future reference.

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

- User Management (creating, editing, deleting and unlocking locked user IDs)

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

> Any changes that you make on the terminal will be overwritten the next time that you perform a Host 1 or Host 2 download after a settlement request. Please contact the TD Merchant Solutions Help Desk to make any permanent changes to your terminal.

Terminal functionality and security

The following is a list of terminal functions that can be enabled or disabled (on or off), protected by supervisor ID or protected by an override passcode.

Functionality	Enable/Disable	Supervisor ID	Override Passcode
Generic settings			
Voice prompts	Yes		
Financial Transactions			
Call for authorization	Yes	Yes	Yes
Cash transaction	Yes	Yes	Yes
Cashback prompt	Yes		
Force post	Yes	Yes	Yes
Manual entry (credit card)	Yes	Yes	
Manual entry (gift card)	Yes		
Purchase with tip	Yes		
Split bill	Yes		
Transaction recall	Yes		
Void	Yes		
Receipt settings			
Cash transaction receipts	Yes		
Print operator name	Yes		

Functionality	Enable/Disable	Supervisor ID	Override Passcode
Day close			
Access day close		Yes	
Close batch with open pre-authorizations	Yes		
Terminal auto-close	Yes		
Reporting			
Access batch reports		Yes	
Access business day reports		Yes	
Access customized reports		Yes	
Access gift card reports		Yes	
Access override passcode menu		Yes	
End of day reports			
Cash back totals report		Yes	
Gift card host details report		Yes	
Gift card host totals report		Yes	
Host balancing report		Yes	
Open pre-auth report		Yes	
Operator balancing report		Yes	
Operator detail report		Yes	
Pre-auth status report		Yes	
TD discount report		Yes	
Terminal balancing report		Yes	
Terminal details report		Yes	
Tip totals report		Yes	

Fraud prevention

The following information will help you protect yourself from fraudulent transactions.

Manually entered credit card transactions

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

> If you are uncomfortable manually entering credit card information, as a business owner, you can request another form of payment (another credit card, debit, cash, etc.).

Force post transactions are disabled by default

The force post function allows prior authorization numbers to be manually keyed in. For your protection, this capability is disabled by default on your terminal. If you need to process a force post transactions, please call the TD Merchant Solutions Help Desk at **1-800-363-1163** to enable the capability after being authenticated. It is strongly recommended that you protect the Force Post function with a password.

Call for authorization

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

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

Whenever	Action
...the card number on the screen does not match the number embossed on the card. **OR** ...the cardholder signature on the receipt does not match the signature on the reverse of the card. **OR** ...you have any doubts about the validity of a card or a transaction.	**1.** Call for a voice authorization immediately. **2.** Request a **CODE 10** authorization. In this situation, you may be dealing with a fraudulent card and **CODE 10** will alert the financial institution to this possibility.

Storing cardholder receipts

Merchants are responsible for retaining all receipts to respond to cardholder inquiries. The following are guidelines you should use when storing them. Store receipts:

- ...in a dark, secure area with limited access for at least 18 months.

- ...in envelopes arranged by date in a secured filing cabinet works well. If you have several terminals use a separate envelope(s) for each terminal.
- ...as long as you retain cash register tapes for direct payment transactions.

Your receipts could become unreadable if you store receipts in plastic coated containers or expose them to direct heat or cold sources.

- If TD needs a receipt copy, please send it within eight days and retain a copy for your records.
- The required storage and response times are for TD Merchant Solutions only and may vary by financial institution.

Financial Transactions

- Depending how you have set up your terminal, you may be required to enter a supervisor ID and password to proceed with any transaction.
- If the customer's receipt has a signature line on it, the customer **must** sign it.

The TD Generation terminal can perform the following transactions:

- Purchase
- Purchase (Phone / Mail)
- Force post
- Refund
- Void
- Cash*
- Pre-authorization*
- Gift card*
- Loyalty card / Air Miles®*

* These optional transactions and others are covered in our online documentation at www.tdmerchantsolutions.com/posresources.

Accepted card types

The terminal will accept whatever cards you indicated when you signed up. If you wish to adjust your accepted card list, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

Credit card purchase

This transaction flow is used for credit card purchases where the credit card is present. If the purchase is via phone or mail, see ***Telephone order*** or ***Mail order***. If you use the incorrect purchase transaction you could incur extra charges.

1. Press the left ⟵ → Desktop → **Purchase**.
2. Enter the **dollar amount** on the terminal and press **OK**.
3. Select **SPLIT** or **PAY**. If the customer is paying the entire amount with one payment select **PAY**. Otherwise, select **SPLIT**.

   <u>Split payment (optional)</u>

   a) Enter the **payment amount** and press **OK**. Enter the partial payment amount.

   b) Select the **back arrow** or **OK**. If correct, select **OK**. Otherwise, select the **back arrow.**

   c) Select the payment method and press **OK**. The customer selects how they are paying for the partial amount. Gift card appears only if you accept them.

   d) Select the **back arrow** or **YES**. If the amount and payment type are correct select **YES**. Otherwise, select the **back arrow.** Go to step 4.
4. The customer confirms the amount: **back arrow** or **OK**.

   <u>Tip (optional)</u>

   If you have tips enabled on your terminal you will follow these steps:

   a) The customer selects / enters one of the **tip options** offered on screen.

   b) The customer confirms the amount: **NO** or **YES**.
5. Perform one of the following payment methods: **Insert, Swipe**, **Contactless** or **Manual Entry**.

   <u>Insert</u>

   a) The customer enters their **PIN** and presses **OK**. Go to step 6.

   <u>Swipe</u>

   a) Verify the card info with what is on the screen and press **OK**. Go to step 6.

   <u>Contactless</u>

   a) The customer **taps** their contactless-enabled credit card on the contactless card reader. In some cases the customer may be required to **swipe** or **insert** their card. Go to step 6.

   <u>Manual entry</u>

   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**. This number is generally located on the back of the credit card. Go to step 6.

6. The screen shows that the transaction is completed with an authorization number or approved message. The receipts will print. If the customer's copy has a signature line on it, the customer **must** sign the receipt. You can **REPRINT** the receipt or **FINISH** the transaction.

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

Debit card purchase

1. Press the left ⟷ → Desktop → **Purchase**.

2. Enter the **dollar amount** and press **OK**.

3. Select **SPLIT** or **PAY**. If the customer is paying the entire amount with one payment select **PAY**. Otherwise, select **SPLIT**.

   Split payment (optional)

   a) Enter the **payment amount** and press **OK**. Enter the partial payment amount.

   b) Select the **back arrow** or **OK**. If correct, select **OK**. Otherwise, select the **back arrow.**

   c) Select the payment method and press **OK**. The customer selects how they are paying for the partial amount. Gift card appears only if you accept them.

   d) Select the **back arrow** or **YES**. If the amount and payment type are correct select **YES**. Otherwise, select the **back arrow.** Go to step 4.

4. The customer confirms the amount: **back arrow** or **OK**.

   Tip (optional)

   If you have tips enabled on your terminal you will follow these steps:

   a) The customer selects / enters one of the **tip options** offered on screen.

   b) The customer confirms the amount: **NO** or **YES**.

   Cashback (optional)

   You will only see these steps if you have cashback enabled on your terminal.

   a) The customer indicates whether they want cashback (**NO** or **YES**).

   b) The customer enters or selects the cashback amount and presses **OK**.

   c) Customer confirms that the amount is correct (**NO or YES)**.

5. Perform one of the following payment methods: **Insert** or **Tap**.

   Insert

   a) The customer inserts their debit card.

   b) The customer selects the account to use: **CHEQUING** or **SAVINGS**.

c) The customer enters their **PIN** and presses **OK**. Go to step 6.

Contactless

a) The customer **taps** their contactless-enabled debit card on the screen. In some cases the customer may be required to enter their **PIN**. Go to step 6.

6. The screen shows that the transaction is completed with an authorization number or approved message and the receipts print. You can **REPRINT** the receipt or **FINISH** the transaction.
7. If there is a balance left owing, go to the **Split Payment** instructions in step 3.

Void

This option recalls a transaction so that you can void it. The following instructions can access any transactions that were performed in the current open batch. If a day close has been completed you cannot recall transactions prior to the day close. If a day close has been performed you must do a refund, not a void.

1. Press the left ⟷ → Desktop → **Void**.
2. Enter the **trace #** from the receipt of the transaction to be voided and press **OK**.
3. Confirm that the transaction is to be canceled (**NO** or **YES**).
4. If this is a debit card, the customer inserts their card, enters their **PIN** and presses **OK**.
5. The screen shows that the transaction is completed with an approved message and the receipts print.
6. You can **REPRINT** the receipt or **FINISH** the transaction.

Refund

You can only perform a refund on a transaction that has already been submitted for reimbursement.

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

1. Press the left ⟷ → Desktop → **Debit / Credit** → Refund.
2. If refunds have been password protected on your device, or this is a debit card refund, you must:
   a) Enter a **Supervisor ID** and press **OK**.
   b) Enter the **Supervisor Password** and press **OK**.
3. Enter the **dollar amount** and press **OK**.
4. Select one of the following payment methods: **Insert**, **Swipe**, **Contactless** or **Manual Entry**.

Insert credit or debit card / swipe credit card

a) The customer enters their **PIN** and presses **OK**. Go to step 5.

Contactless credit or debit card

a) The customer **taps** their contactless-enabled card on the screen. Go to step 5.

Manual credit card

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

b) Enter the **expiry date** and press **OK**. This is four digits in length.

c) Is a manual imprint required (**NO** or **YES**)? If you select **NO**, the transaction will be canceled.

d) Enter the **CVD number** and press **OK**. This can be up to four digits in length. Go to step 5.

5. You can **REPRINT** the receipt or **FINISH** to complete the refund and the receipts print.

Transaction recall

This option recalls a transaction so that you can view, void or complete / close it if it is a pre-authorization. The following instructions access any transactions that were performed in the current open batch.

If a day close has been completed you cannot recall transactions prior to the day close. Pre-authorization transactions are covered in our online documentation at www.tdmerchantsolutions.com/posresources.

1. Press the left ⟵ → Desktop → Main Menu → **Transaction Recall**.
2. Select one of the following:

Recall by trace #

a) Enter the **trace number** that you want to recall and press **OK**. Go to step 3.

Recall all

a) A list of all transactions currently available on the terminal appear. Go to step 3.

Recall by amount

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

Recall by account #

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

Recall by invoice #

a) Enter the **invoice number** that you want to recall and press **OK**. Go to step 3.

3. If there are multiple transactions, scroll to the desired one and press **OK**.
4. Select **Void** to cancel the transaction or select **Completion** to close a pre-authorization. Press **Cancel** to leave this screen without making a selection.

Phone or Mail purchase

- There are risks performing transactions when the credit card is not present. Ensure that you perform all of the available security checks for phone / mail purchases.
- These transactions can be password protected.

These instructions are used for purchases where the card is **not** present. If the card is present at purchase, see ***Credit card purchase***. If you use the incorrect purchase transaction you could incur extra charges.

1. Press the left ⟶ →Desktop → Main Menu → **Phone / Mail Purchase.**

   If you have both Phone Orders and Mail Orders enabled, you will have the option to select which one you want to use: **PHONE** or **MAIL**.
2. Enter the **invoice number** (if enabled).
3. Enter the **dollar amount** and press **OK**.
4. Enter the **account number** and press **OK**.
5. Enter the **expiry date** and press **OK**.
6. If this is a phone order, enter the **CVD** and press **OK**.
7. Enter customer's **house number** and press **OK** (if enabled).
8. Enter the customer's **postal code** and press **OK** (if enabled).
9. The screen shows that the transaction is completed with an authorization number and the receipts print.
10. You can **REPRINT** the receipt or **FINISH** the transaction.

Force post purchase

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

This option is only used when you can't process a credit card purchase normally through the network whether due to communication problem or that the force post is requested via the terminal.

1. Press the left ⟶ → **Debit / Credit** → Force Post → Purchase.
2. Enter the **dollar amount** and press **OK**.
3. Enter the authorization number and press **OK**.
4. Confirm the authorization number and press **OK**.

   Insert credit or debit card / swipe credit card

   a) The customer enters their **PIN** and presses **OK**. Go to step 5.

Manual credit card

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

b) Enter the **expiry date** and press **OK**. This is four digits in length.

c) Is a manual imprint required (**NO** or **YES**)? If you select **NO**, the transaction will be canceled.

d) Enter the **CVD number** and press **OK**. This can be up to four digits in length. Go to step 5.

5. You can **REPRINT** the receipt or **FINISH** the transaction.

Force post phone / mail purchase

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

This option is only used when you can't process a credit card purchase normally through the network whether due to communication problem or that the force post is requested via the terminal.

1. Press the left ⟵ → **Debit / Credit** → Force Post → Phone Purchase or Mail Purchase.
2. Enter the **dollar amount** and press **OK**.
   a) Enter the **account number** and press **OK**.
   b) Enter the **expiry date** and press **OK**.
   c) If this is a phone order, enter the **CVD** and press **OK**. This can be up to four digits in length.
3. Enter the authorization number and press **OK**.
4. Confirm the authorization number and press **OK**.
5. You can **REPRINT** the receipt or **FINISH** the transaction.

Receipts

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

Receipt print options

You can select which receipts print and when by calling the TD Merchant Solutions Help Desk. The options available to you are:

Customer receipts:

- Print for every transaction (default)
- Individual receipts can be declined by the Merchant
- Do not print any customer receipts

Merchant receipts:

- Print for every transaction (default)
- Print for every approved transaction
- Print for transactions over a set amount
- Print only for a transaction that requires a signature

Reprinting receipts

1. Press the left ⟵ →Desktop → Main Menu → **Reprint** and select one of the following:

Last Receipt

a) Confirm that this is co rrect (**NO** or **YES**). The most recent receipt will reprint.

Past Receipt

a) Swipe the card that the transaction was performed on. Any transactions that were done on the terminal by the swiped card will appear on the screen.

b) Select the **transaction** that you want to reprint the receipt for and press **OK**.

c) Select **PRINT** if this is the correct transaction.

Receipt examples

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

Credit card

Merchant Name
Address, Postal Code
City, Province
########
############

**** **PURCHASE** ****

03-21-2020 16:19:59
Acct # **********5097 **C**
Card Type VI
A00000000003101001 VISA CREDIT

Trace # 6
Inv. # 5
Auth # 75612 RRN 001003001
TVR8000000000 TSI 7800
TC 0E19785C8DAA97AC

Purchase $40.00 CAD
Tip $2.00 CAD
Total 42.00 CAD

(001) **APPROVED** THANK YOU
(PIN VERIFIED)

Retain this copy for your records
Merchant Copy

Debit card

Merchant Name
Address, Postal Code
City, Province
2000000
N10000000205

**** **PURCHASE** ****

12-21-2015 12:29:12
Acct # 452001****5097 **C**
Account Chequing **Card Type DP**
A00000000003101001 INTERAC

Trace # 9
Inv. # 3
Auth # 75612
RRN 001006006
F800

Total $50.00

(00) **APPROVED** THANK YOU

Retain this copy for your records
Merchant Copy

Receipt Banner
Receipt Banner

Card Type	
AM	American Express
DP	Debit
DS	Discover / Diners
JC	JCB
MC	MasterCard
MD	MasterCard Debit
PV	Visa Debit
RC	RCS
UP	UnionPay
VI	Visa

Card entry method	
C	Chip card transaction
CN	Chip card NSR transactions
CO	Off-line chip card transaction
M	Manually entered transaction and the card was present.
MC	Manually entered fallback of a chip card transaction
RF	Contactless transaction
S	Swiped mag card transaction
SC	Swiped chip card fall back transaction
SN	Swiped NSR transaction

Important Information	
Transaction Type	This shows what type of transaction was done (Purchase, Void, etc.) and whether it is a duplicate receipt.
Card Type	This shows what kind of card was used for the transaction.
Trace #	The trace number associated with the transaction.
Inv #	The invoice number associated with the transaction.
Auth #	The authorization number associated with the transaction.
Signature	The card issuer determines when a signatures is required for a transaction.
Approved	Always ensure that the transaction was approved as it could be **DECLINED**.

Business Day Functions

To start a business day, log onto a terminal that has had the day close function performed on it. Depending on the logon method, it may be as simple as a user performing transactions to entering a logon ID and password.

Performing the day close

You have a deadline to perform the day close. This is called your balancing window and it is set on the system. If your day close is done before your balancing window ends, you'll receive same or next business day deposit for credit and debit card totals. Otherwise, they will be forwarded to the next business day.

> A day close is automatically performed on your terminal every three to five business days if one isn't performed sooner by you.

You must close your business day on **each terminal** in order to maintain accurate records and balance your accounts. Closing the business day is important as it:

- Sends any stored transactions (SAFs)
- Closes all open batches
- Prints selected reports
- Checks for mail, and downloads
- Downloads available updates
- Starts a new business day on the terminal by opening a new batch

1. Press the left ⟷ →Desktop → **Day Close**.
2. Confirm that you want to **Continue**. Once the process is started ensure that the terminal is not used until the day close is completed.
3. Select your report delivery method (**DISPLAY** or **PRINT**). Depending on how you have set up your day close process, certain reports will print.
4. When it is completed you will see the ***Business Day Closed*** message.

Reprinting the day close report

1. Press the left ⟷ →Desktop → Main Menu → **Reprint**.
2. Select **Day Close Report** and press **OK**.
3. Confirm that this is correct (**NO** or **YES**).

Reporting

The following reporting options are split into **business day**, **batch** and **customized**.

Business day reports

1. Press the left ⟶ →Desktop → Main Menu → **Reports** → Business Day Reports and select a report.

Report	Provides...	Instructions
Terminal Detail	...transactions by operator ID and for the current business day.	2. **DISPLAY** or **PRINT** your report.
Terminal Balancing	...transactions by operator ID and for the current business day.	
Business Day Subtotals	...transactions by operator ID and for the current business day.	
Outstanding SAF	...all stored transaction details that have not been sent for settlement.	
Cashback Totals	...a total of all cashbacks for the current business day.	
Operator Detail	...transactions by card type (including gift card totals and details) operator ID and for the current business day.	2. Select whether the report is for a individual ID (Operator ID) or all IDs (0) and press **OK**. 3. **DISPLAY** or **PRINT** your report.
Operator Balancing	...transactions by card type (including gift card totals and details) operator ID and for the current business day.	
Tip Totals	...all tips obtained from transactions (including gift cards and cash) in the current business day on the terminal by operator ID.	

Batch reports

1. Press the left ⟶ →Desktop → Main Menu → **Reports** → Batch Reports and select a report.

Report	Provides...	Instructions
Batch Detail	...transaction details by card type and for current or previous batch.	2. Select which batch you want to review (**PREV** or **CURRENT**). 3. **DISPLAY** or **PRINT** your report.
Batch Balancing	...transaction details by card type and for current or previous batch.	

Customized reports

1. Press the left ⟵ → Desktop → Main Menu → **Reports** → Customized Reports and select a report.

Report	Provides...	Instructions
Tran Detail	...transaction details by card type for a maximum of 10 days	2. Select whether the report is for a individual ID (Operator ID) or all IDs (0) and press **OK**. 3. Enter the From **Date**/**Time** and press **OK**. 4. Enter the To **Date**/**Time** and press **OK**. 5. **DISPLAY** or **PRINT** your report.
Totals	...transaction totals by transaction type and card type for a maximum of 45 days	
Tips Totals	...all tips obtained from transactions (including gift cards and cash) in the current business day or up to 45 days in the past on the terminal by operator ID.	

Configuration

For more information regarding its use and available features, please review our online documentation at www.tdmerchantsolutions.com/posresources.

Troubleshooting

If you're unable to resolve the problem after performing the following steps, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163**.

What problems can I easily resolve?

Problem	Action Required
Bad Communication Press CANC key And Try Again	**1.** There was a communication failure after the transaction was initiated. **2.** Press **Cancel** and try again.
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 card reader.
Display is too bright or too dark	**1.** Adjust the brightness setting to work with the lighting at the terminal location.
Display screen is blank	**1.** Press any button on the terminal to see if it is in power saving mode. **(All)** **2.** Ensure that the power cable is properly seated in the terminal's power port and the electrical outlet. **(All-in-One)** **3.** Place the terminal in the charger base in case the battery is drained. **(HSPA** and **Wi-Fi)**
Magnetic stripe card reader won't 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 is 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 loaded correctly. **2.** Ensure the printer lid is closed completely.

Why isn't my terminal powering on?

All-in-One	HSPA and Wi-Fi
1. Ensure that the electrical outlet has power. 2. Ensure that the power cord is properly inserted into the outlet. 3. Re-insert the power cable into the hub's power port and twist it gently to the right until it clicks. 4. Ensure that the power cord is inserted properly into the terminal. 5. Power on the terminal.	1. Ensure that the terminal's power cord is properly inserted into the electrical outlet. 2. Ensure that the power cord is properly inserted into the terminal / charging base. 3. Verify that the charging icon appears on the terminal screen.

Why do I see the Internet disconnected icon? (All-in-One and Wi-Fi)

The Internet disconnected icon will only appear on the **All-in-One** and **Wi-Fi** terminal screen when there is an Internet communication problem.

1. Is your Internet connection working properly? Verify this with another device.
2. Is your Internet cable connected properly? Unplug it and plug it back in again.
3. Is your modem / router working correctly? Unplug and plug back in your modem / router and wait for three to four minutes.

Why is my terminal signal strength low? (HSPA and Wi-Fi)

Your **HSPA** and **Wi-Fi** terminal should always show at least one bar in order to be able to complete transactions, but it should be a minimum two bars to complete transactions reliably.

Ideal signal strength	Low signal strength	No signal

Check the following to troubleshoot the issue:

1. Has your environment changed? **(HSPA and Wi-Fi)**

   Changes to your place of business, such as adding a new wall or installing an electronic device near your terminal or between the access point and terminal, could reduce its wireless signal strength.

2. Is your access point / repeater working? **(Wi-Fi only)**

   a) Ensure the access point is securely plugged into an electrical outlet.

   b) Finger tighten the antenna into the antenna port on the back of the access point / repeater.

   c) Adjust the antenna angle to see if this provides a better signal to the terminal.

Why won't my terminal connect? (HSPA)

The **HSPA** wireless network signal is represented by the in the top-right corner of the screen. If the icon is red it means it can't connect to the network.

Has your environment has changed?

1. Physical changes to your place of business, such as adding a new wall or installing an electronic device, may reduce the wireless signal strength and prevent the connection.
2. Physical changes outside your place of business may impact the signal strength such as a new building or infrastructure. Try moving your terminal in your place of business to see if it can connect in a new location. The icon will turn green when it's connected.

What do I do if the terminal displays a security alert?

If your terminal displays the message **Security Alert**, it means that your terminal has been damaged and must be replaced. Please contact the TD Merchant Solutions Help Desk immediately at **1-800-363-1163**.

Error codes

Error codes are explained on our documentation portal at www.tdmerchantsolutions.com/posresources.

Reference

Entering letters and special characters

Whenever you have are requested to enter a letter or special character, such as a receipt banner or creating a user ID, follow these steps. Press the **correction** key to change any entry.

Entering...	Steps	
Letters	**1.**	Press the **number key** that has the desired letter on it. For example, press **2** to enter C.
	2.	Scroll to **desired letter** and press **OK**.
Spaces	**1.**	Press the **left** ⟵ to create a space.
Special characters	**1.**	Press the **right** ⟶.
	2.	Scroll to the desired character and press **OK**.

Transaction shortcuts

Action	Icon	Navigation
Logon / Logoff		Desktop → **Log Off**
Purchase (Credit / Debit)		Desktop → **Purchase**
Purchase (Phone / Mail)		Desktop → Main Menu → **Phone / Mail Purchase**
Force Post		Desktop → Main Menu → **Debit / Credit** → Force Post and then: • Purchase, • Pre-Authorization, • Phone Purchase, or • Mail Purchase
Refund		Desktop → Main Menu → **Debit / Credit** → Refund
Void		Desktop → **Void**

Action	Icon	Navigation
Start Pre-Authorization		Desktop → **Pre-Authorization**
Charge Pre-Authorization		Desktop → **Pre-Auth Completion**
Reporting		Desktop → Main Menu → **Reporting** and then: • Business Day Reports, • Batch Reports, • Customized Reports, or • Gift Card Reports
Day Close		Desktop → **Day Close**

Charging terminals (HSPA and Wi-Fi)

At the end of the day, it's a good idea to do a quick inspection of the terminal to ensure that it will be ready for the next business day.

1. Ensure that the battery has sufficient charge, or that it's charging if the battery icon turns red.

2. When recharging the terminal, ensure that:
   - the charging cord is fully inserted into the back of the charger base or terminal

     OR

   - the terminal is seated properly in the optional charging base.
3. When the terminal is charging, you will see an icon in the top-right corner.

Storing terminals

- They must be stored in temperatures between 0° and 50° Celsius.
- Do not leave them outdoors overnight, especially in the winter.

Maintaining terminals

- Don't place them on a magnetized pad — this will cause them to malfunction.
- Routinely clean them with a damp cloth so that spills don't get into the inner workings.
- Use TD-approved cleaning cards for the chip and magnetic card readers.

Contact Information

Please call the TD Merchant Solutions Help Desk at **1-800-363-1163**. We would be happy to answer any questions you may have.

Authorization:

24 hours a day, seven days a week

Terminal Inquiries:

24 hours a day, seven days a week

General Merchant Inquiries:

Monday – Friday, 8 a.m. – 8 p.m. ET

Printer / Stationery Supplies:

Monday – Friday, 8 a.m. – 5 p.m. ET

Documentation Portal

This guide covers the most commonly used information in order to get you started. Your terminal has more features and functionality to explore on our documentation portal which you can find at www.tdmerchantsolutions.com/posresources.