TD Generation

Configuration and Troubleshooting Guide

For the TD Generation

- All-in-One,
- HSPA,
- Wi-Fi, and
- Portal with PINpad.

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Who should use this guide?

You would use this guide if you use a TD Generation (All-in-One, HSPA, Wi-Fi, and Portal with PINpad) terminal and wish to configure or troubleshoot it.

Configuration

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)

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:

- Manager,
- Supervisor, and
- Operator.

User Type	Capabilities	Special Notes
Manager	• Can access features and functions, including transaction processing, all reports and all menus • Can set up supervisor and operator IDs	• A maximum of 10 manager IDs are allowed per terminal • Be aware of who you grant Manager access to • IDs are 1 to 7 digits in length (#) • Passwords are case sensitive, 4 to 7 characters (alpha-numeric) in length (####)
Supervisor	• Can perform normal transactions • Can set up operator IDs	• A maximum of 10 supervisor IDs are allowed per terminal • IDs are 1 to 7 digits in length (#) • Passwords are case sensitive, 4 to 7 characters (alpha or numeric) in length (####)
Operator	• Can perform normal everyday financial transactions	• A maximum of 200 operator IDs are allowed per terminal • Operator (default) can be renamed to Clerk, Server or Cashier by a manager • IDs are 1 to 6 digits in length (#) • Passwords are 4 to 7 digits in length (####) • An optional name can be added (up to 20 alpha or numeric characters in length)

Create a new user

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

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → User Management → Add User.

   For the Portal with PINpad terminal: **Control Panel** → User Management → Add User.
2. Enter the **User ID** and press **OK**. The User ID can be up to 5 digits in length.
3. Enter the **Password** and press **OK**. The password can be up to 7 digits in length.
4. Re-enter the **Password**.
5. Select **OPERATOR** or **SUPER**. This determines what level of access the user will have. Be cautious about who you assign Supervisor level access to.

Change user password

Use this option change a user's password.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → User Management → Change Password.

   For the Portal with PINpad terminal: **Control Panel** → User Management → Change Password.
1. Desktop → Main Menu → **Control Panel** → User Management → Change Password.
2. Enter the **User ID** that you want to change the password for and press **OK**.
3. Enter the **old password** and press **OK**.
4. Re-enter the **new password** and press **OK**.
5. Enter the **new password** and press **OK**.

Remove user

Use this option to have a Supervisor delete an existing user IDs from a terminal. You cannot delete the user that is currently logged into this terminal.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → User Management → Remove User.

   For the Portal with PINpad terminal: **Control Panel** → User Management → Remove User.
2. Select the User ID that you wish to delete.
3. Confirm that you want to remove the user (**NO or YES).**
4. Confirm how many administrator IDs you wish to delete (**All** or **One**).

   All

   a) Confirm this action (**Yes** or **No**). Select **Yes** if you wish to delete all operators from this terminal.

   All administrator IDs are now deleted from the terminal except the original administrator ID that came with the terminal. This can never be deleted by you.

   One

   a) Enter the **User ID** to be deleted.

   b) Confirm your decision (**Yes** or **No**).

   c) You will be offered the option to delete another ID if one exists.

Display existing user IDs

Use this option to display a list of existing IDs on the terminal.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → User Management → User List.

   For the Portal with PINpad terminal: **Control Panel** → User Management → User List.
2. Select **DISPLAY** or **PRINT**. A list of all User IDs, User Names and their Authority Level will appear on the terminal or be printed off.

Change login method

Use this optionto select the user logon method. The logon method will determine what sort of information is required for users to logon to the terminal. This can only be done by a Supervisor.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Logon Method.

   For the Portal with PINpad terminal: **Control Panel** → Logon Method.
2. Select one of the following options:
   - **ID And Password**
   - **ID Only**
   - **No Logon**
3. The most secure is ID and Password and the least secure is No Logon.

General customization

Adjust speaker volume

Use this option to increase or decrease the volume by 10% increments using the left or right Dash keys.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Speaker Volume.

   For the Portal with PINpad terminal: **Control Panel** → Speaker Volume.
2. Select one of the following (+ or -). With each press of the button the volume will change by 10%. You will hear a beep to indicate you how loud the new volume setting is.

Adjust backlight level

Use this option to increase or decrease the backlight intensity.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Backlight.

   For the Portal with PINpad terminal: **Control Panel** → Backlight.
2. Select one of the following (+ or -). With each press of the button the screen brightness will change by 5% The screen will change to the new lighting level to indicate what the new setting will look like.

Change screen language

Use this option to change the language of a terminal to English or French. Only Supervisors may change the language settings.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Language.

   For the Portal with PINpad terminal: **Control Panel** → Language.
2. Select the desired **language (ENGLISH or FRENCH)**.

Sync the time on the terminal

Use this option to sync the date and time on the terminal by communicating with the TD host.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Date/Time Sync.
   For the Portal with PINpad terminal: **Control Panel** → Date/Time Sync.
2. The terminal creates a connection to the server and syncs date and time information.

Reset invoice number

This option allows you to reset your invoice number that will be displayed on your receipts. If you select this option the invoice number is reset to "1".

1. For all terminals: Desktop → Main Menu → **Admin** → Reset Invoice #.
2. Confirm that you want to reset the invoice number (**NO** or **YES)**.

Enable training mode

This option allows a supervisor to sign in and train another user on the functions of the terminal without impacting any live transactions or totals on the terminal. While in this mode the word DEMO will be displayed in the background of the terminal screen and a Training Mode banner will be printed on all receipts and reports.

While in Training Mode you will be unable to:

- Perform any configuration changes
- Perform any transactions with chip cards
- Print accurate gift card reports as you can't modify this data

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Training Mode.
   For the Portal with PINpad terminal: **Control Panel** → Training Mode.
2. Select one of the following (**NO** or **YES**).
   To exit Training Mode, repeat the above steps. The message ***Training Mode Ended*** will appear and word **DEMO** will be removed from the background on the ***Desktop*** and ***Main Menu*** screens.

Receipts

Reprint receipt

Use this option to reprint an existing receipt.

1. For all terminals: Desktop → Main Menu → **Reprint** and select one of the following:
2. Select one of the following options (**Last Receipt, Past Receipt** or **Day Close Report)**.

Last Receipt

a) Confirm that this is correct (**NO** or **YES**).

b) The last receipt is reprinted.

Past Receipt

a) To reprint a receipt, **swipe the credit / debit card** that the transaction was performed on.

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

c) Select **BACK** or **PRINT**. If you select **PRINT**, the receipt is reprinted.

Day Close Report

a) Confirm that this is correct (**NO** or **YES**).

b) The day close report is reprinted.

Receipt banner (HSPA and Wi-Fi)

Use this option to add a short slogan or advertising to the bottom of all receipts printed from a terminal. The banner can be up to nine lines in length. The character options are alpha-numeric with a single or double font-size option.

- It is your responsibility to ensure that the content of any banner message complies with all applicable laws. By using this feature, you agree that you are solely responsible for any advertising messages displayed on the terminal.
- The receipt banner must be added to each terminal that you want to use it on.
- The more lines you add to the banner, the more paper will be used when you print a receipt.
- If you print a large number of receipts daily, your paper usage may increase.

1. For all terminals: Desktop → Main Menu → **Admin** → Receipt Banner.

2. Do you wish to set your receipt banner? (**NO** or **YES**).

3. Enter the number of lines and press **OK**. Set the number to zero if you wish to remove the banner.

Line #

a) Select the font size for this line (**SINGLE** or **DOUBLE).** The single font has a 26 character limit per line while the double-sized font has a 20 character limit.

b) Enter your **receipt banner message** and press **OK** when finished.

c) This step will repeat as many times as you selected receipt banner lines. Once you're finished entering the receipt banner, press **OK**, without entering a new character to complete the entry.

Downloads

Software download

This function allows the terminal to download a new software application from the TD remote host without the need for a technician on site.

- The device must remain powered on for the entire process.
- You must close your business day on the terminal before downloading software.
- A software download can also be initiated via a notification. In this case, the software may be downloaded in the background within a defined time frame (scheduled download).
- A software download must be done separately for each terminal.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Software Download.

For the Portal with PINpad terminal: **Control Panel** → Software Download.

2. Select **CONTINUE** to proceed.

a) The download begins. Do not interrupt the download once it has begun as this may cause your terminal to stop working.

b) The terminal will print out a report.

c) When the terminal reboots, and the Idle screen appears, the download is complete.

Parameter download

Use this option downloads parameters from the TD Hosts for the operation of the terminal.

1. For the All-in-One, HSPA, and Wi-Fi terminals: Desktop → Main Menu → **Control Panel** → Parameter Download → Host 1 Download or Host 2 Download.

   For the Portal with PINpad terminal: **Control Panel** → Parameter Download → Host 1 Download or Host 2 Download.

2. Select one of the following options (**Host 1 Download** or **Host 2 Download)**.

   Host 1 Download updates anything dealing with financial information such as (card types, transaction types, Interac keys).

   Host 2 Download updates anything dealing with non-financial information such as (gift cards and loyalty cards).

Host 1 Download

a) Confirm that this is correct (**NO or YES).**

Host 2 Download

a) Select one of the following options (**FULL or PARTIAL)**. You have an option to do a full or partial download.

Full: Pulls down all information to the terminal.

Partial: Only pulls down information changed by Help Desk.

Other functionality

Any other functionality 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 other permanent changes to your terminal.

Troubleshooting

With any equipment, sometimes problems occur. With the TD Generation, 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.

Error codes

"A" Error codes	Explanation	Action required
Already In Training Mode	The user tried to enter Training mode when they were already in it.	Either proceed with Training Mode or repeat the steps and exit Training Mode.
Amount $0.00 Not Allowed	An amount higher than 0.00 must be entered.	Please enter a new amount and press **OK**.

"B" Error codes	Explanation	Action required
Bad Communication	Terminal detected a communication failure after the transaction is initiated.	Check your connections and retry the transaction. If the problem persists call the Help Desk. If there is no signal strength, reboot the access point by disconnecting and reconnecting the power cord. Wait 2 minutes and check then check the signal strength again. If the problem persists call the Help Desk.
Bad Communication Press CANC key And Try Again	Terminal detected a communication failure after the transaction was initiated (to Bell Mobility Tower / host).	Press **Cancel** and try again.
Batch Cannot Be Closed With Open Pre-Auths	The terminal is configured so that pre-authorization transactions must be completed before a Batch Close can be performed.	Please complete all open pre-authorization transactions, then close the batch.
Business Day Full Close Business Day Now	The terminal has reached the maximum number of transactions that can be accumulated for a business day.	A Day Close must be processed to allow the terminal to continue processing. Once this message is displayed only administrative transactions and pre-authorization completions transactions can be performed.

"C" Error codes	Explanation	Action required
Cannot Reset Invoice # to 1 When Set to Manual	The terminal has invoice number entry set to manual entry, and this option is not allowed in this mode.	Please call the Help Desk if you wish to change the entry mode to automatic.

"C" Error codes	Explanation	Action required
Card Error Please Try Again	The terminal failed to read the chip on the inserted card.	Remove the card and try reinserting it, ensuring that it is entered correctly. If the problem persists, please ask the card holder for another form of payment.
Card Error Please Try Again	The terminal failed to read the chip on the inserted card.	Remove the card and try inserting it again.
Card Error Use Magnetic Stripe	The terminal failed to read the chip on the inserted card.	Remove the card from the chip reader and swipe it through the magnetic strip reader.
Card Removed Too Soon Try Again	The chip card was removed from the terminal before the transaction was completed.	Process the transaction again, while instructing the cardholder not to remove the card until instructed by the terminal.
Cashback Amount Exceeds Limit	The cashback amount entered exceeds the maximum allowed for this terminal.	Please enter another amount within the cashback limit.
Check Printer	The printer is not ready for printing.	Verify that the printer has paper and that the cover is closed properly.
Close Batch Failed End Of Business Day Not Complete	The terminal failed to complete a Batch Close transaction during the Day Close.	Retry the Day Close transaction. If the problem persists please call the Help Desk.
Close Batch Soon	The terminal has almost reached the maximum number of transactions that can be accumulated for a batch.	A Batch Close must be processed before the next 20 transactions to allow the terminal to continue processing.
Close Business Day Soon	The terminal has almost reached the maximum number of transactions that can be accumulated for a business day. **OR** The Day Close transaction has reached the maximum number of days that it can be left open.	A Day Close must be processed as soon as possible to allow the terminal to continue processing.
Customer to Insert Chip Card	The cardholder attempted to swipe a chip card on the terminal.	Please insert the card into the chip reader on the terminal.

"D" Error codes	Explanation	Action required
Day Cannot Be Closed With Open Pre-Auths	The terminal is configured so that Pre-authorized Transactions must be completed before a Day Close can be performed.	Please complete all open Pre-Auths transactions, then close the day.
Download Host 1 Parameter First	The terminal requires a Host 1 Parameter Download to be performed.	Download the Host 1 Parameter.
Download Full Host 2 Params First	The terminal requires a full Host 2 Parameter Download to be performed.	Download the Host 2 Parameter.

"E" Error codes	Explanation	Action required
End of Business Day Already Completed	The Day Close transaction has already been completed successfully.	—
End of Day Process Cancelled	The Day Close transaction was cancelled.	—

"F" Error codes	Explanation	Action required
Faulty Card	The card was swiped too slowly.	Try swiping the card faster.
Function Not Allowed	The function selected is not setup for this terminal.	If you require the function, please call the Help Desk.

"H" Error codes	Explanation	Action required
Host 1 Download Not Completed	The terminal attempted a Host 1 Download and it was not completed successfully.	Try the Host 1 Download again. If the problem persists, please call the Help Desk.
Host 2 Download Not Completed	The terminal attempted a Host 2 Download and it was not completed successfully.	Try the Host 2 Download again. If the problem persists, please call the Help Desk.

"I" Error codes	Explanation	Action required
ID Already Exists	The ID entered already exists on the terminal.	Please enter another ID.
ID Table Empty	There are no IDs defined in the terminal.	—
Inbox Empty	There are no messages in the Mail Inbox.	—
Input Must Be At Least 1 Character	No data was entered in a required field.	Please enter at least 1 character.

"I" Error codes	Explanation	Action required
Input Must Be At Least 3 Characters	Less than 3 characters were entered.	Please enter at least 3 characters.
Input Must Be At Least 9 Characters	Less than 9 characters were entered.	Please enter at least 9 characters.
Input Must Be Greater Than Zero	Value entered must be greater than zero.	Please enter a value greater than zero.
Input Not In Valid Range	The data entered was not within the required values.	Please reenter the data.
Internal Error Call Help Desk AAAAAAAAAAAA NNNNNNNNNNNN CCCCCCCCCCCC	The terminal has encountered a fatal error. AA..... stands for component name NN..... stands for application information CC.....stands for error code	Please call the Help Desk and provide the information on the screen.
Invalid Account #	The card used failed a security check or the card number length is invalid for the card type.	Enter the card again, if the problem persists ask the cardholder for another form of payment.
Invalid Date	The date entered on the terminal is not valid or occurs in the future.	Please enter a valid date.
Invalid Expiry Date	The expiry date on the card is invalid.	Please enter a valid expiry date. **OR** Ask the customer for a different payment method.
Invalid ID	The user ID was not found on the terminal.	Enter a valid ID.
Invalid ID/Password	The ID/Password combination entered does not match any in the terminal's record.	Re-enter or try another ID/password.
Invalid Password	The password is not valid for the User ID entered.	Re-enter the password or try another ID.
Invalid Time	The time entered is not valid.	Please enter a valid time.
Invoice Tab First	The Close Tab transaction has been attempted on a Tab that hasn't been invoiced.	Process an Invoice Tab transaction for the invoice number entered.

"M" Error codes	Explanation	Action required
Maximum # of Entries Reached	The maximum number of User IDs (100) has been reached.	To enter additional IDs, some IDs will have to be deleted.

"N" Error codes	Explanation	Action required
No Match	A match cannot be found for the data entered or selected.	Please retry or enter new data.
No Response From Host	Terminal times out the host response.	Press CANC (X) key And Try Again. If the problem persists call the Help Desk.
No Transactions Found	A transaction cannot be found with the criteria entered.	Please enter new data.
Not Accepted	The card type entered is not supported on this terminal.	Please select another card.
Not Accepted Use Magnetic Stripe	The card was inserted, but the terminal does not have the card type defined for chip.	Swipe the card on the terminal. If the card type is supposed to be setup for chip, please call the Help Desk.
Not Allowed	The transaction selected is not setup for this terminal or it is not allowed with the card being used.	Try another card type. If the transaction is supposed to be setup for the terminal, please call the Help Desk.
Not Allowed To Reset Inv# with Open Batch	An attempt was made to reset the invoice number, however the batch was open.	Please close the batch and then Reset the Invoice #.
Not Allowed To Reset Invoice # With Open Pre-Auths	An attempt was made to reset the invoice number however there are open pre-auths in the terminal.	Please complete the pre-auths and then Reset the Invoice #.
Not Allowed With Trans Outstanding	A function cannot be run if there are any transactions outstanding (pre-auth, transactions in the open batch, etc.).	Please process the outstanding transactions then try the function again.
Not Available	The item requested is not available.	Please make another selection.
Not Completed	The attempted transaction or function did not complete successfully.	Re-attempt the transaction or function. If the problem persists please call the Help Desk.
Number Not In The Range 1 – 9	The input # does not fall in the range of print lines allowed for the receipt banner.	Please enter a valid number.
Number Not In The Range 1 — 65535	The entered host port number is not in a valid range.	Please enter a valid number.
Not In Training Mode	If the user is not in training mode and tries to exit it.	—

"P" Error codes	Explanation	Action required
Passwords Do Not Match	The password confirmation does not match the original password entered.	Please re-enter the password confirmation.

"P" Error codes	Explanation	Action required
PIN pad Has Been Replaced! Host 1 Parameter Download Is Required!	The terminal has detected that the PIN pad has been replaced.	If a technician has not been on-site to replace the PIN pad, please call the Help Desk to report suspected tampering.
Processing Error	The terminal encountered an error when trying to process a chip transaction.	Try the action again. If the problem persists ask for another form of payment. If the problem occurs on multiple chip cards, please call the Help Desk.

"R" Error codes	Explanation	Action required
Receipt Not Printed! Imprint Card and Complete Sales Draft Manually	The transaction was approved however the terminal is unable to print a receipt.	Manually imprint the card, record the authorization code and have the customer sign the receipt.
Reset Date And Time From Main Menu	The terminal requires the date to be synchronized with the host date and time.	Perform the Date/Time Sync function on the terminal.

"S" Error codes	Explanation	Action required
System Error Contact Help Desk	The terminal has encountered a system error.	Please call the Help Desk immediately to have your terminal replaced.

"T" Error codes	Explanation	Action required
Tab Already Closed	Close Tab transaction is attempted on an open tab transaction that has already been closed.	—
Tab Already Invoiced	Invoice Tab transaction is attempted on a transaction that has already been invoiced.	—
Transaction Already Voided	Void transaction is attempted on a transaction that has already been voided.	—
Transaction Already Completed	Pre-auth completion is attempted on a pre-auth that has already been completed.	—
Transaction Cancelled	The transaction has been cancelled by the user.	—
Transaction Not Allowed	The transaction type is not supported for the card entered.	Please select another card type or transaction.

Lost or stolen equipment

If your device has been lost or stolen, please:

1. Contact the TD Merchant Solutions Help Desk immediately to report the incident. (stolen or lost)
2. Contact the police to file a report. (stolen only)

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

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

- Officer's name
- Officer's 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 Help Desk 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: _____

Juridiction: _____

PH #: _____ ***EXT #:*** _____

FAX #: _____

Email: _____

Stolen device serial #: _____

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.

Authorizations:

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.