TD Generation

Quick Start Guide

For the TD Generation:

- Portal 2 with PINpad

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 Portal 2 with PINpad 1
The Terminal 2
The PINpad 2
Screens 3
Icons *3*
Idle screens *4*
Home screens *4*
Navigation *4*
The Communications Hub 5

Cardholder Privacy and Security 5
Terminal security 5
Administering the terminal *6*
Terminal functionality and security *7*
Fraud prevention 9
Manually entered credit card transactions *9*
Call for authorization *9*
Storing cardholder receipts *10*

Financial Transactions 10
Accepted card types 11
Credit card purchase 11
Debit card purchase 12
Void 13
Refund 14
Transaction recall 14
Phone or mail purchase 15
Force post purchase 16
Force post phone / mail purchase 16
Receipts 17
Receipt print options *17*
Reprinting receipts *17*
Receipt examples *18*
Business Day Functions 20
Performing day close *20*
Reprinting the day close report *20*

Reporting 21
Business day reports 21
Batch reports 22
Customized reports 22

Configuration 22
Adjusting terminal volume 22
Adjusting PINpad volume 23

Troubleshooting 23
What problems can I easily resolve? 23
Why isn't my terminal powering on? 24
Why do I see the Internet disconnected icon? 24
Why do I see the PINpad disconnected icon? 24
What do I do if the terminal displays a security alert? 24
Error codes 24

Reference 25
Storing the terminal and PINpad 25
Maintaining the terminal and PINpad 25
Changing the paper 25

About this Guide

This Guide provides an introduction to your TD Generation solution, hardware functionality, performing financial transactions, configuration, 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 Portal 2 with PINpad

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

Please note, there are two versions of this terminal: the Portal with PINpad and Portal 2 with PINpad. Below are examples of the terminal screens to help you determine which version you use. This document covers the Portal 2. If you have the previous hardware version, please ensure that you download the Portal with PINpad documentation.

Portal with PINpad

Portal 2 with PINpad

The Terminal

1. **Paper chamber button**
2. **Touchscreen**
   All navigation and merchant data entry is done through the touchscreen.

The PINpad

The PINpad is used by the customer to make transaction selections and entries.

1. **Dash keys**
   Use the — **/ dash** keys to navigate the screens and menus.
2. **Command keys**
   - X = **Cancel**
   - < = **Correction**
   - O = **OK** or **activate**
3. **Volume key**
   Use this key to adjust the PINpad volume.
4. **Card readers**
   - **a)** Insert chip cards
   - **b)** Contactless cards
   - **c)** Swipe cards

Screens

Icons

The icons on the terminal change from screen to screen. Below are the most common icons that you will use in your day-to-day business and which screen(s) they are available on. The PINpad has no interface icons.

Icon	Name	Description	Idle Screen	Home Screen
	Home	Tap this to access the ***Home*** screen(s).	Yes	Yes
	Control panel	Tap this icon to access configuration settings. This menu functionality is covered in our online Configuration and Troubleshopoting Guide.	No	Yes
	Help	Tap this to access the ***Help*** screen.	Yes	Yes
	Lock / Log off	Tap this to log out the current user or, if you don't use login IDs, tap this icon to return to the ***Idle*** screen.	No	Yes
	Internet status	These icons indicates if your terminal is connected to the Internet or not.	Possible	Possible
	Dial-up status	This icon indicates that your terminal is connected via dial-up.	Possible	Possible
	PINpad disconnected	This icon indicates your PINpad is disconnected from the terminal. Please verify the PINpad is securely connected to the terminal.	Possible	Possible
	Speaker volume	Tap to access terminal's speaker volume.	Yes	Yes
	Screen brightness	Tap this to change terminal's screen brightness.	Yes	Yes
	Paper Advance	Tap this to advance the paper roll.	No	Yes
	Service menu	This icon is only used by TD technicians.	Yes	No

Idle screens

The default screen is called the ***Idle*** screen. It displays a lot of important information and different ways to access your terminal's functionality. If you require users to log on to use the terminal, your ***Idle*** screen will be the one on the left. After the terminal is unlocked, or if it doesn't require a login, it will appear as the screen on the right.

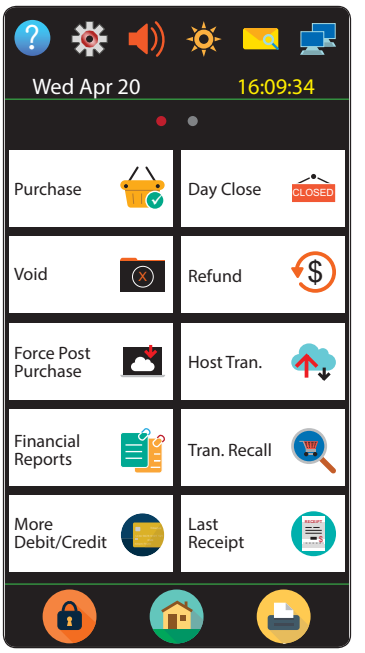
Terminal (locked)

Terminals (unlocked)

Home screens

The ***Home*** screen displays three or more icons that always include: **Purchase**, **Void** and **Day Close**.

- If your business requires more than 10 transaction types, there will be a second screen with the remaining icons.
- The **Service Menu** icon is replaced with the **Control Panel** icon.



Navigation

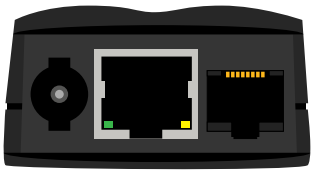
- The terminal uses a touchscreen for navigation. You can navigate screens by swiping left / right or tapping an onscreen option.
- Only use your finger when using the touchscreen as objects may damage it.

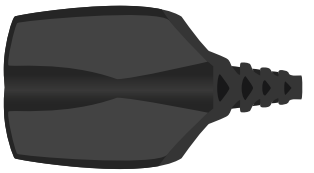
- If you have more than one ***Home*** screen you can tell which screen you're on by looking at the two dots at the top of the screen. The red dot indicates the active screen. Place your finger on the touchscreen and swipe left or right to navigate to the desired screen.
- If an icon has sub-menus, swipe up and down the screen to navigate.

The Communications Hub

The TD Generation terminal comes with an hub to allow for easy power and Internet connectivity. It includes:

- A power cable
- A power port
- A dialup port
- An Ethernet port
- Dual connection communications hubs are available upon special request.





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 enable a login for supervisors and operators with an ID and password or just ID login. The supervisor setup requires you to create a password. You can activate this by tapping the **Home** icon → Control Panel icon → Logon Method.

Override Passcode

This option allows the business owner to setup a passcode to bypass certain functionality. See page 7 for the list of functionality that can be bypassed with this passcode.

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 download after a settlement request. Please contact the TD Merchant Solutions Help Desk to make any permanent changes to your terminal.

Administering the terminal

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 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 funtions 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	No	No
Financial Transactions			
Call for authorization	Yes	Yes	Yes
Cash transaction	Yes	Yes	Yes
Cashback prompt	Yes	No	No
Force post	Yes	Yes	Yes
Force post purchase	Yes	No	No
Gift card balance	Yes	No	No
Loyalty award	Yes	No	No
Manual entry (credit card)	Yes	Yes	No
Manual entry (gift card)	Yes	No	No
Payment	Yes	No	No
Phone/mail purchase	Yes	No	No
Pre-auth (completion)	Yes	No	No
Pre-auth (open)	Yes	No	No
Purchase	Yes	No	No
Purchase with tip	Yes	No	No
Refund	Yes	No	No
Split bill	Yes	No	No
Transaction recall sub-menu	Yes	No	No
Void	Yes	No	No
Receipt settings			
Cash transaction receipts	Yes	No	No
Last receipt	Yes	No	No

Functionality	Enable/Disable	Supervisor ID	Override Passcode
Print operator name	Yes	No	No
Day close			
Access day close	No	Yes	No
Close batch with open pre-authorizations	Yes	No	No
Day close	Yes	No	No
Terminal auto-close	Yes	No	No
Reporting			
Access batch reports	No	Yes	No
Access business day reports	No	Yes	No
Access customized reports	No	Yes	No
Access gift card reports	No	Yes	No
Access override passcode menu	No	Yes	No
End of day reports			
Cash back totals report	No	Yes	No
Gift card host details report	No	Yes	No
Gift card host totals report	No	Yes	No
Host balancing report	No	Yes	No
Open pre-auth report	No	Yes	No
Operator balancing report	No	Yes	No
Operator detail report	No	Yes	No
Pre-auth status report	No	Yes	No
TD discount report	No	Yes	No
Terminal balancing report	No	Yes	No
Terminal details report	No	Yes	No
Tip totals report	No	Yes	No

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.).

Transaction type	Default Setting
Manually entering a credit card number on the terminal This is the ability to manually enter a credit card number into the terminal for a purchase transaction when a customer is performing a ***card-present*** purchase.	Disabled and, if enabled, protected with supervisor ID and password.
Mail order / Telephone order purchase This is the ability to manually enter a credit card number into the terminal for a purchase transaction when a customer is performing a ***card-not-present*** purchase.	Disabled
Force post purchase This is the ability to perform a transaction with a manually entered authorization number versus the transaction being authorized automatically through the terminal.	Disabled and, if enabled, protected with supervisor ID and password.

We understand that the default settings that come with this terminal may not fully meet your businesses' needs. Should you wish to amend these default settings, please contact the TD Merchant Solutions Help Desk at **1-800-363-1163** to learn about your options.

Call for authorization

Sometimes, due to a communication or a 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

The TD Generation terminal can perform the following transactions:

- Purchase
- Purchase (Phone / Mail)
- Force post
- Refund
- Void
- Pre-authorizations*
- Gift card*
- Loyalty card / More Rewards® / Air Miles®*
- UnionPay*

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

- 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.

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, use the ***Phone or mail purchase*** instructions. If you use the incorrect purchase transaction you could incur extra charges.

1. Tap the **Home** icon → 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**.

   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**.
5. Perform one of the following payment methods: **Insert, Swipe**, **Contactless** or **Manual Entry**.

   Insert

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

Swipe

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

Contactless

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.

Manual entry

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. Tap the **Home** icon → 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.

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)**.

Payment method

4. 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 5.

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 5.

5. 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.

6. 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 made prior to the day close and you must do a refund, not a void.

1. Tap the **Home** icon → Void.

2. Enter the **trace #** from the receipt of the transaction to be voided and tap **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. Go to step 2.

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. Tap the **Home** icon → 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 or tab. 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 and tab transactions are covered in our online documentation at www.tdmerchantsolutions.com/posresources.

1. Tap the **Home** icon → Transaction Recall.
2. Select one of the following:

   Recall all

   This recalls the details all of transactions in the open batch.

   a) A list of all transactions currently available on the terminal appear. Go to step 2.

Recall by trace #

This only recalls the transaction connected to the trace # in the open batch.

a) Enter the **trace number** that you want to recall and tap **OK**. Go to step 4.

Recall by amount

This recalls any transaction for the entered dollar amount in the open batch.

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

Recall by account #

This recalls any transaction for the entered card account number in the open batch.

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

Recall by invoice #

This recalls the transaction for the entered invoice number.

a) Enter the invoice number that you want to recall and tap **OK**. Go to step 4.

3. If there are multiple transactions, scroll to the desired one and tap **OK**.
4. Select **Void** to cancel the transaction. Tap **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. Tap the **Home** icon → 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 due to communication problem or that the force post is requested via the terminal.

1. Tap the **Home** icon → Force Post Purchase.
2. Enter the **dollar amount** and tap **OK**.
3. Then enter the authorization number and tap **OK**. Please note, authorization numbers can include letters.
4. Select one of the following payment methods: **Insert**, **Swipe,** or **Manual Entry**.

   Insert credit or debit card / swipe credit card

   a) Insert the card into the PINpad. Go to step 5.

   Manual credit card

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

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

   c) Enter the **CVD number** and tap **OK**. Go to step 5.
5. The screen shows that the transaction is approved and the receipts print.
6. You can **REPRINT** the receipt or **FINISH** the transaction.

Force post phone / mail purchase

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.

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

1. Tap the **Home** icon → Force Phone / 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. Tap the **Home** icon → Reprint and select one of the following:

   Last Receipt

   a) Confirm that you want to reprint the last receipt (**NO** or **YES**).

   b) The most recent receipt will reprint with the word **DUPLICATE** on it.

   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 tap **OK**.

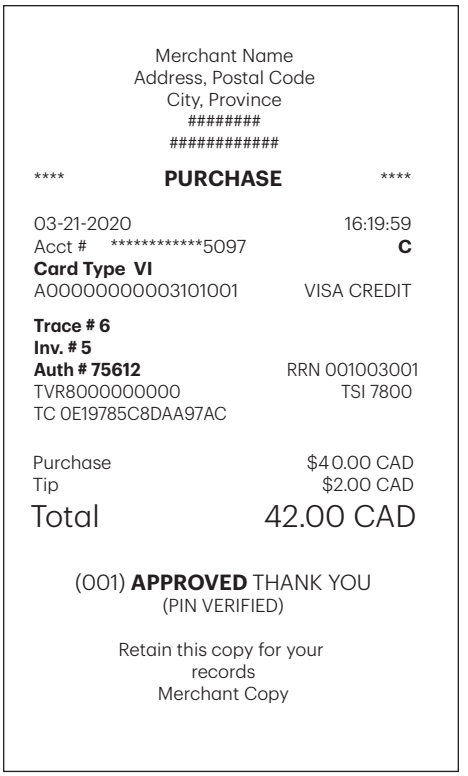
   c) Select **PRINT** if this is the correct transaction.

   d) The selected receipt will reprint with the word **DUPLICATE** on it.

Receipt examples

The information that you will use the most is noted on the receipts 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

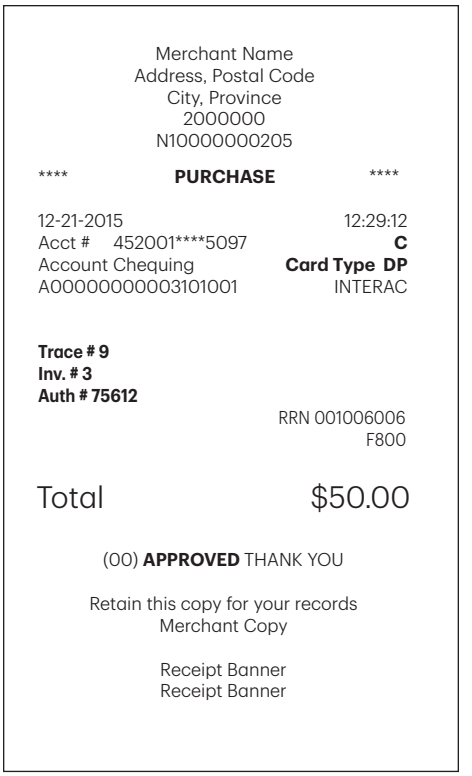
Trace # 6
Inv. # 5
Auth # 75612 RRN 001003001
TVR8000000000 TSI 7800
TC 0E19785C8DAA97AC

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

Transaction type	
C	Online chip card transaction
CN	Chip card No Signature Required transaction
CO	Off-line chip card transaction
M	Manually entered mag card transaction
MC	Manually entered fall back of a chip card transaction
RF	Contactless transaction
S	Swiped mag card transaction
SC	Swiped chip card fall back transaction
SN	Swiped No Signature Required transaction

Card type	
AM	American Express
DP	Debit
DS	Discover / Diners
JC	JCB
MC	Mastercard
MD	Mastercard Debit
PV	Visa Debit
RC	RCS
UP	Union Pay*
VI	Visa

* Union Pay transactions are covered in our online documentation at www.tdmerchantsolutions.com/posresources.

Important information	
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 so ensure that the client signs these receipts.

Important information	
Approved	Always ensure that the transaction was approved as it could be **Declined**.

Business Day Functions

Depending on the logon method, it may be as simple as a user performing transactions to entering a logon ID and password.

Performing day close

You have a deadline to perform a 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. Tap the **Home** icon → Day Close.
2. Confirm that you want to close your business day (**NO** or **YES**). 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, certain reports will print.
4. When it is completed you will see the ***Business Day Closed*** message.

Reprinting the day close report

1. Tap the **Home** icon → Reprint.
2. Select **Day Close Report**.
3. Confirm that this is correct (**NO** or **YES**).

Reporting

The following reporting options are split into two different groups, **business day** and **customized**. You have access to all of the business day reports, and these will be covered in this document.

Business day reports

Tap **Home** icon → Financial Reports → Business Day Reports and select a report.

Report	Provides ...	Instructions
Terminal Detail	...transactions by operator ID and for the current business day.	**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.	Select whether the report is for a individual ID (Operator ID) or all IDs (0) and press **OK**. **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. Tap **Home** icon → Reports → Batch Reports and select a report.

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

Customized reports

1. Tap **Home** icon → Reports → Customized Reports and select a report.

Report	Provides...	Instructions
Tran Detail	...transaction details by card type for a maximum of 10 days	Select whether the report is for a individual ID (Operator ID) or all IDs (0) and press **OK**.
Totals	...transaction totals by transaction type and card type for a maximum of 45 days	Enter the From **Date**/**Time** and press **OK**. Enter the To **Date**/**Time** and press **OK**.
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.	**DISPLAY** or **PRINT** your report.

Configuration

Adjusting terminal volume

1. Tap the / **Terminal Volume** icon.
2. Drag the volume bar to the desired level and tap **TEST**.
3. When you are satisfied with the new volume level tap the / **back arrow** to exit.

Adjusting PINpad volume

1. Press / **PINpad Volume** key.
2. Select **-** or **+** to adjust the PINpad volume by 10%.
3. When you're satisfied with the new volume level press **cancel** to exit.

For further 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	**1.** 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	Please try the following: **1.** Press any button on the terminal to see if it is in power saving mode. **2.** Ensure that the power cable is properly seated in the terminal's power port and the electrical outlet.
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?

1. Ensure that the electrical outlet has power.
2. Ensure that the power cord is fully inserted into the outlet.
3. Ensure the power cord is correctly connected to the communication hub.
4. Power on the terminal.

Why do I see the Internet disconnected icon?

The Internet disconnected icon will only appear 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 3 to 4 minutes.

Why do I see the PINpad disconnected icon?

The PINpad disconnected icon will only appear when there is an communication problem between the PINpad and the terminal.

1. Is your PINpad disconnected from the terminal?
2. Reboot your terminal and see if this resolves the problem.

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

Storing the terminal and PINpad

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

Maintaining the terminal and PINpad

- Don't place the terminal or PINpad on a magnetized pad — this will cause them to malfunction.
- Ensure that the Portal and PINpad are cleaned routinely 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.

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.

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.