

# Quick reference guide



## O1 – Credit sale

1. Enter the **Transaction Amount** and tap **Enter**.
2. Tap **YES** on the confirmation screen (you can remove the Non-Cash fee by tapping **Remove Fee Icon**).
3. **Swipe/ Insert/ Tap** card on display. For Manual Key Entry, select the **Enter Manually** option and enter the card number.
4. Enter **tip amount**, if enabled.
5. Enter the customer's phone number for SMS receipt and select the **Go Green** option.
6. Select **Print Receipt** if a paper receipt is requested.
7. Follow the prompts on screen for the customer copy.

## O2 – Debit sale

1. Tap **Credit** until **Debit** is displayed.
2. Punch in **transaction amount** and tap **Enter**.
3. Tap **YES** on the confirmation screen (you can remove the Non-Cash fee by pressing **Remove Fee Icon**).
4. **Swipe/ Insert/ Tap** card on display. For Manual Key Entry, select the **Enter Manually** option and enter the card number.
5. Enter the customer's phone number for SMS receipt and select the **Go Green** option.
6. Select **Print Receipt** if a paper receipt is requested.
7. Follow the prompts on screen for the customer copy.

## O3 – Credit void

1. Tap **Sale** until **Void** shows.
2. Enter the transaction number from receipt or the last 4 of the Credit Card number and hit Enter.
3. For password enter **last 4 digits of EPI**.
4. Tap on the transaction that needs to be Voided.
5. Enter the customer's phone number for SMS receipt and select the **Go Green** option.
6. Select **Print Receipt** if a paper receipt is requested.
7. Follow the prompts on screen for the customer copy.

## O4 – Credit pre-auth

1. Tap **Sale** until **Pre-Auth** shows.
2. Enter the **Transaction Amount** and tap **Enter**.
3. **Swipe/ Insert/ Tap** card on display. For Manual Key Entry, select the **Enter Manually** option and enter the card number.
4. Enter the customer's phone number for SMS receipt and select the **Go Green** option.
5. Select **Print Receipt** if a paper receipt is requested.
6. Follow the prompts on screen for the customer copy.

## O5 – Credit refund

1. Tap **Sale** until **Refund** is displayed.
2. Enter the **Transaction Amount** and tap **Enter**.
3. Tap YES on the confirmation screen.
4. **Swipe/ Insert/ Tap** card on display.
5. Sign on the screen and tap the **OK** button.
6. Enter the customer's phone number for SMS receipt and select the **Go Green** option.
7. Select **Print Receipt** if a paper receipt is requested.
8. Follow the prompts on screen for the customer copy.

## O6 – Credit capture

1. Tap **Sale** until **Ticket** shows.
2. Enter the **Transaction Amount**.
3. **Enter the password** (last 4 of EPI) hit **Enter**.
4. Enter the customer's phone number for SMS receipt and select the **Go Green** option.
5. Select **Print Receipt** if a paper receipt is requested.
6. Follow the prompts on screen for the customer copy.

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## O7 – Pre-sale ticket

1. Tap the **triple lines** (≡) at the bottom left of the terminal.
2. Scroll down and tap on the **PreSale** option.
3. Enter the **amount**.
4. You will be prompted if you would like to Scan & Pay, tap Yes if you would like to use a QR code to scan for payment, if not then tap No. The receipt will print afterwards.

## O8 – Re-print ticket

1. Tap the **triple lines** (≡) at the bottom left of the terminal.
2. Tap the **Reprint** option.
3. Enter either the **transaction number or last 4 digits of the card number** to find the transaction and tap **Enter**.
4. Tap **Confirm** and the receipt will print.

## O9 – Settlement

1. Tap the **triple lines** (≡) at the bottom left of the terminal.
2. Tap **Settlement**.
3. Enter the **password** which is the **last 4 digits of your EPI number**.
4. The settlement summary report will be printed.
5. The settlement summary report will be printed. The terminal prompt for a detailed report - select **Yes** or **No**.
6. A confirmation prompt for settling the batch will be displayed. Tap **Yes** to settle the batch.

## O10 – Tip adjust

1. Tap the **triple lines** (≡) at the bottom left of the terminal.
2. Tap **Tip Adjust**.
3. Enter the **transaction number** or **last 4 digits of the card number** to find the transaction you would like to tip adjust.
4. Confirm the transaction details by tapping the **Confirm** button.
5. Either select one of the **predefined tip percentages** or enter in a **tip manually**.
6. Press the **Enter** button to confirm.
7. Choose option to print merchant copy.
8. Select **Yes** if you want to perform more tip adjusts.

## O11 – Download application

1. Tap the **triple lines** (≡) at the bottom left of the terminal.
2. Tap **Download Package**.
3. The screen will show your EPI, tap **Enter**.

## O12 – Change password

1. Tap the **triple lines** (≡) at the bottom left of the terminal.
2. Tap **Change Password**.
3. Tap **General Password** to change the password for Voids, Settlements and Custom Fee Removal.
4. When prompted for the current password, enter in the **last four digits of your EPI number** and tap **Enter**.
5. Enter the new password and tap **Enter**.