Your eftpos training checklist

1. Switching your EFTPOS terminal on

Countertop eftpos terminals are always 'on', as long as they are plugged in at the wall

1. For mobile terminals hold down green button for 5 seconds ☐

2. Putting through a purchase:

1. Select '**Menu**' button ☐
2. Select '**Purchase**'
3. Enter the purchase amount and '**Enter**' key ☐
4. Hand the terminal to your customer ☐
5. Your customer presents their card, selects their account, and enters their PIN ☐
6. Ensure the transaction has been approved ☐
7. Keep/file the printed merchant receipt for reconciliation ☐
8. Select whether a customer receipt is required (Yes/No) ☐

3. How to change the paper roll

1. Gently pull the lid release (above paper cutter bar) up on the terminal ☐
2. Remove the old roll ☐
3. Place the new paper roll inside. Ensure the paper is pulling towards you from underneath the roll ☐
4. Leave a small amount of paper out past the cutter bar ☐
5. Close the lid firmly ☐
6. Press # key to auto feed the paper ☐

4. How to do a settlement inquiry for reconciliation

1. Select '**Menu**' from terminal idle screen ☐

2. Scroll down. Select '**Settlement**' ☐

3. Select '**Inquiry**' ☐

4. Select the current date. A receipt will print displaying EFTPOS totals for that day, separated by transaction and card type ☐

Important:

- Leave your terminal plugged in or on its charging base and powered on overnight. The terminal will automatically complete a cutover overnight, resetting all settlement totals to $0.00 ready for the next day's trading.

5. Offline mode

Offline mode allows you to continue taking payment even when your terminal cannot connect to the payment network.

Some limits apply in Offline Mode:

Per transaction while in offline mode	Per offline session
$300 maximum amount per offline transaction	$5000 maximum amount per terminal
1 offline transaction per card, per account, per offline session on each terminal	Up to 200 offline transactions can be stored

Important:

- If your terminal starts transacting in offline mode, remember to make sure that your customers sign the merchant receipt. Your terminal will prompt you to confirm the signature so that you know you need to get your receipt signed. Make sure you collect these receipts so your manager can keep them in a safe place.

6. Troubleshooting

1. Turn off and on: Turn countertop models off at the wall and on mobile models hold down the red '**cancel**' or '**back**' button for 5 seconds until the terminal stops beeping and powers down.

2. Wait 10 seconds and then turn countertop models back on at the wall, or hold down the green '**enter**' button on your mobile terminal until it powers back on.

Attempt a logon to check the terminal has connected to the payment network successfully:

1. Select '**Menu**' on the idle screen

2. Scroll down and select '**Logon**'

3 If the receipt displays '**Approved**' your terminal is ready to use. If a declined message or other error is printed contact Technical Support on **0800 EFTPOS (0800 338 767)**, option 2

24/7 Customer Support:

Need help? Our technical helpdesk is available 24/7, every day of the year and our customer service team are available Mon–Fri, 8am to 5pm.

Technical support:
0800 EFTPOS (0800 338 767), option 2.

Accounts, billing, enquiries:
customerservices@eftpos.co.nz, **0800 EFTPOS (0800 338 767)**, option 4.