

PC-EFTPOS i5100/i3070 Quick Reference Guide



Westpac Merchant Business Solutions

Service and Sales Support Help Desk (including stationery orders)	1800 029 749
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Authorisations

Manual Credit Card Authorisations (MasterCard/Visa)	132 415
Cardholder Behaving Suspiciously	132 415 Extension 500
American Express Authorisations	1300 363 614
JCB Authorisations	1300 363 614
Diners Club Authorisations	1800 331 112

Getting started

Refer to the i5100/ i3070 PC-EFTPOS User Guide for more detailed instruction and introductory information, including:

- Keypad Layout;
- Transaction procedures;
- Card Inserting/Swiping Hints;

General information

Terms used in this guide	PRESS – Press the key described. SELECT – Press the soft key next to the option displayed on the screen.
Cancelling a terminal operation	To cancel the current operation, press the red CANCEL key. To step back through an operation, press the yellow CLEAR key.

Processing Transactions

If the i5100 terminal is in standalone-lite mode, then the purchase amount is entered on the terminal and not on the POS interface. Settlement and all other functions are done on the i5100 terminal as the terminal is not connected to the POS

<p>Processing a purchase</p> <ul style="list-style-type: none"> • May include cash out (if enabled) 	<ol style="list-style-type: none"> 1. Enter purchase amount on POS interface. 2. Insert/Swipe customer's card. 3. Select account type. 4. Have the customer enter their PIN (if required) and/or press ENTER. 5. If signature is required: Have the customer sign the receipt. If the signature matches the signature on the card, press ENTER. Otherwise select NO or press CANCEL (this will cancel the transaction).
<p>Processing a cash only transaction</p> <ul style="list-style-type: none"> • For cheque/savings accounts only 	<ol style="list-style-type: none"> 1. Enter cash out amount on POS interface. 2. Insert/Swipe customer's card. 3. Select account type. 4. Have the customer enter their PIN (if required) and press ENTER.
<p>Processing a MOTO/ECOM transaction</p> <ul style="list-style-type: none"> • Approved MOTO/ECOM merchants only • Credit or charge cards only 	<ol style="list-style-type: none"> 1. Enter MOTO/ECOM amount and card number on POS interface. 2. Enter CCV value on POS interface and press ACCEPT to proceed, otherwise press CANCEL. 3. Press ENTER to confirm amount.
<p>Processing a refund</p>	<ol style="list-style-type: none"> 1. Enter Refund amount on POS interface. 2. Insert/Swipe the customer's card. 3. Select account type. 4. Have the customer enter their PIN (if required) and press ENTER.
<p>Voiding a transaction</p> <ul style="list-style-type: none"> • Credit or charge cards only 	<ol style="list-style-type: none"> 1. Enter Void amount on POS interface. 2. Key in the void password (if required) and press ENTER. 3. Key in the ROC number on the receipt of the transaction to be voided. 4. Confirm the Inv/ROC no. to be voided by selecting YES, or pressing ENTER.
<p>Processing a pre-authorisation</p> <ul style="list-style-type: none"> • Credit or charge cards only (if enabled) 	<ol style="list-style-type: none"> 1. Select the pre-authorisation transaction function on the POS interface. 2. Insert/Swipe the customer's card. 3. Have the customer enter their PIN (if required) or press ENTER. 4. If signature is required: Have the customer sign the receipt. If the signature matches the signature on the card, select YES or press ENTER. Otherwise, select NO or press CANCEL (this will cancel the transaction).

Processing Transactions continued

<p>Processing a completion</p> <ul style="list-style-type: none"> • Credit or charge cards only (if enabled) • Can be processed using either the Inv/ROC number, or the Authorisation ID, from the Pre-Authorisation receipt 	<ol style="list-style-type: none"> 1. Select the completion transaction function on the POS interface. 2. Key in the ROC number from the Pre-authorisation receipt and press ENTER. 3. If the pre-authorisation details were found on the terminal, select ACCEPT and go to step 5. If not, select ACCEPT and go to step 4 and enter Auth number. 4. Key in the Auth Number from the Pre-Authorisation receipt and press ENTER and go to step 5. 5. The Pre-Authorisation details will appear. Press ENTER to confirm details. 6. Have the customer sign the receipt. If the signature matches the signature on the card, select YES or press ENTER. Otherwise select NO or press CANCEL (this will cancel the transaction).
<p>Completing a tip adjustment</p> <ul style="list-style-type: none"> • Credit or charge cards only (if enabled) 	<ol style="list-style-type: none"> 1. Select the tip adjustment transaction function on the POS interface. 2. Key in the ROC number and select YES. 3. If the ROC number is found on the terminal, go to step 4. 4. The transaction details will display, press YES to perform tip adjustment transaction. 5. If required: Have the customer sign the receipt. If the signature matches the signature on the card, select YES or press ENTER. Otherwise select NO or press CANCEL (this will cancel the transaction).

Transaction Reporting

<p>Reprinting the Last Transaction</p>	<ol style="list-style-type: none"> 1. Select the last receipt on the POS interface.
<p>Reprinting the Last Settlement</p>	<ol style="list-style-type: none"> 1. Select the last settlement report from the POS interface (if enabled).
<p>Auto Settlement</p> <ul style="list-style-type: none"> • Not available between 21:30 and 23:00 Sydney time 	<ol style="list-style-type: none"> 1. Settlement pre-scheduled from the POS interface or TMS. 2. Settlement report will print on POS if printing is enabled and totals will be reset.
<p>Manual terminal settlement</p> <ul style="list-style-type: none"> • Not applicable for auto settlement • Not available between 21:30 and 23:00 Sydney time 	<ol style="list-style-type: none"> 1. Select settlement from the POS interface. 2. Settlement report will print on POS and totals will be reset.

Glossary of Terms

CCV Number	The 3 digit CCV number is printed in the signature panel of the back of MasterCard and Visa cards immediately following the 16 digit card number. This is an additional security feature that should be used in transactions where the cardholder is not present (MOTO or eCommerce).
Charge Card	American Express (AMEX), Diners Club or Japanese Credit Bureau (JCB) cards.
Credit Card	May be either a MasterCard or Visa card (also known as the "Card Schemes").
Debit (EFTPOS) Card	Gives the customer access to either a cheque or savings account. The customer must be present when accessing these account types, i.e. details cannot be manually entered into the terminal.
Inv/ROC Number	This is the Invoice or 'Record of Charge' number, printed on each transaction receipt.
Manual Transaction	Performed using the manual back-up 'click clack' imprinter when the electronic terminal is not working. It is important that a manual authorisation be obtained for all credit card transactions which are greater than your floor limit.
Merchant (ID) Number	An 8 digit number used to obtain an authorisation code for credit card transactions. This number is unique to your business and site, and can be located on any of the following: <ul style="list-style-type: none"> • A receipt from your terminal • Your merchant statement • The metal plate on your manual imprinter (the last 8 digits)
MOTO Transactions	Any transaction that is initiated by mail or over the telephone and the card is not present to swipe through the terminal. This functionality is only available to approved merchants. eCommerce transactions are those initiated over the internet.
POS	Point of sale is the PC or cash register where the i3070/i5100 terminal is connected to.
Terminal ID	An 8 digit number assigned to your EFTPOS terminal by Westpac. This number identifies your terminal to the bank. The terminal ID can be found on a receipt from your terminal, including the Settlement docket.
TMS	Terminal management system is where the terminal parameters are stored and configured.