

# EFTPOS Air Quick Reference Guide

A Quick Reference Guide to help you get started with EFTPOS Air.

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# Before you begin

To use the EFTPOS Air App, you will need to have been approved for an EFTPOS Air merchant facility with Westpac, which you may apply for through [westpac.com.au/eftposair](https://westpac.com.au/eftposair)

## Access the App

Should your application be approved, you will receive an email (Welcome Email) from Westpac with a link to download the EFTPOS Air App.

1. Download the app to accept your offer of an EFTPOS Air facility.
2. To sign into the app for the first time, enter your sign in email address.
3. You will receive an email with a One-Time Password (OTP). Enter this into the app when signing in.
4. Follow the on-screen prompts to create your own password, which you'll use for subsequent logins.



Your username and password are your key to accessing the EFTPOS Air App. You must ensure your password is kept secure at all times and that you do not disclose it to anyone. If you suspect that your password has been compromised, you should change it immediately through the [EFTPOS Air Merchant Portal](#)

## Forgot your password?

If you've forgotten your password or would like to change your password using the EFTPOS Air App.

1. Select **Forgot password** on the sign in screen.
2. Enter your email to receive a password reset email containing an OTP.
3. Once you sign in using this OTP you'll be prompted to reset your password, which you'll use for subsequent logins.

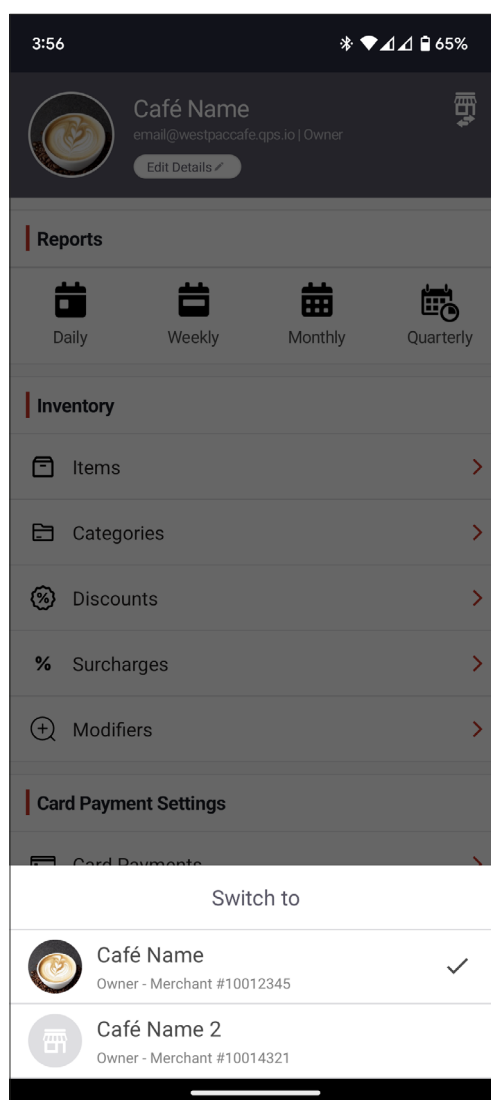
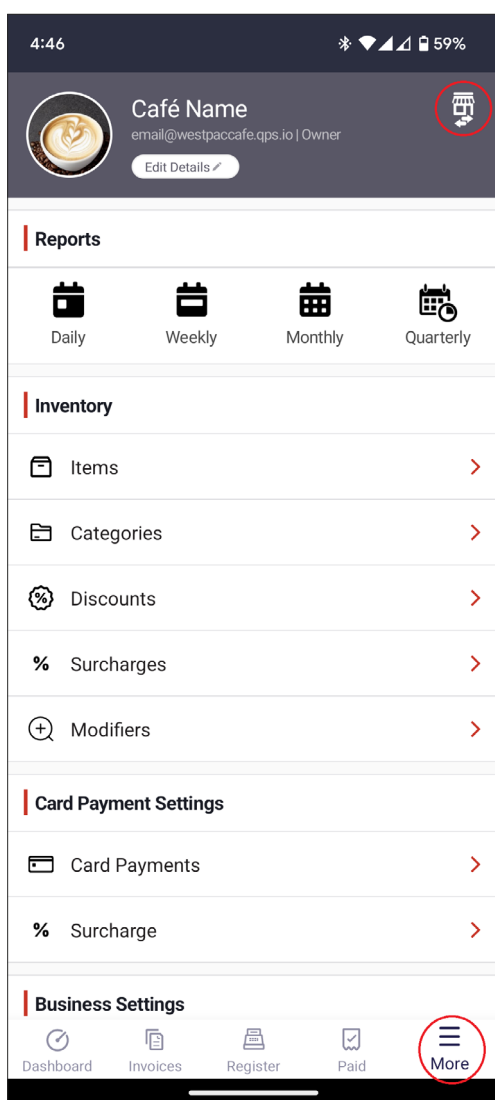
Alternatively, you can also change your password using the [EFTPOS Air Merchant Portal](#).

## Manage multiple businesses

If you have multiple businesses, you will be able to select the business to use upon sign in.



You can also switch businesses at any time by going to the **More** tab and selecting the switch business button in the top right corner.



## EFTPOS Air Merchant Portal

The EFTPOS Air Merchant Portal is a web-based portal for EFTPOS Air. The portal allows you to manage all aspects of your EFTPOS Air App, along with additional features.

- The **Account Security** page allows you to change your account password and sign out of EFTPOS Air on all devices.
- The **Data Management** page allows you to import and export your EFTPOS Air usage data.
- The **Roles & Features** page allows the business owner to create new roles and employ features relevant for the role.

You will be able to access the EFTPOS Air Merchant Portal using the same user credentials we have issued to you for EFTPOS Air App.



You must keep your sign on credentials secure in accordance with the terms and conditions that govern your use of EFTPOS Air App.

You can access the EFTPOS Air Merchant Portal here: [portal.eftposair.westpac.com.au](https://portal.eftposair.westpac.com.au)

# Set up your Device

There are a few actions you need to take before starting to take sales.

## Set up your Business Mode.

EFTPOS Air supports different business modes to better tailor the app to your business needs.

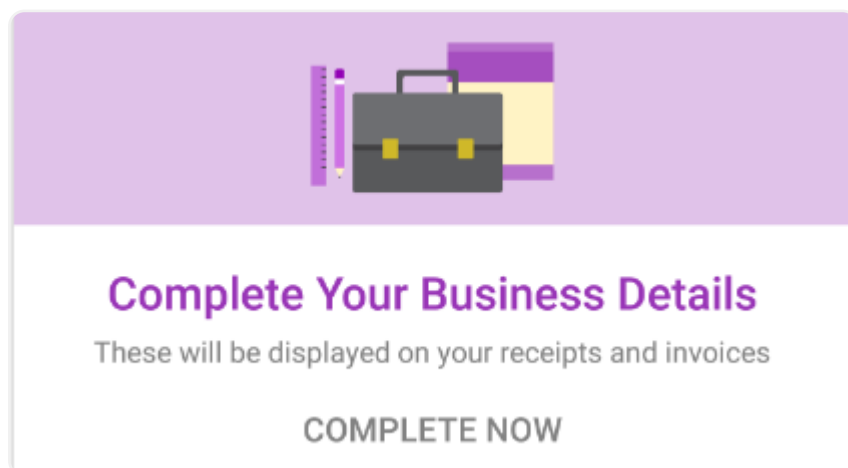
When you first sign into the app you will be required to select your business mode. You can change modes later via the **More** tab.

- **Retail mode** offers a register-based point of sale. It is recommended for businesses that make sales on the spot, such as retailers.
- **Invoicing mode** offers the ability to create and share quotes and invoices with your customers. It is recommended for businesses that operate by raising quotes and invoices before taking payments against them.
- **Retail & Invoicing mode** offers you all the features of both above modes. It may suit businesses that require the ability to do direct sales as well as invoicing customers.
- **Hospitality mode** is designed for restaurants and cafés that have a range of products to sell. It provides slightly different behaviour to the other modes by offering orders and tables.

This guide offers assistance on how to process a transaction in **Retail mode only**. For more information on the other business modes, visit: [help.eftposair.westpac.com.au/app/modes/](http://help.eftposair.westpac.com.au/app/modes/)

## Set up your Business Details.

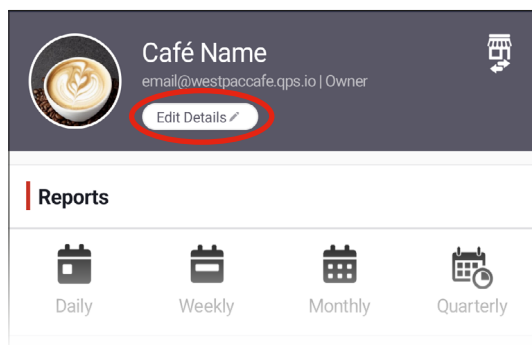
When you first sign in, you'll see a 'Complete Your Business Details' card on the **Dashboard**. Select **Complete Now** to provide additional details about your business. These details will be visible to your customers in any invoices and receipts that you may share with them, so completion of this section is highly recommended.



You can set your:

- Business logo
- Business name (required)
- ABN or ACN
- Business address
- Business phone number
- Business email
- Business website

To change or update these details, navigate to the **More** tab, and select **Edit Details** under the business header at the top of the page.



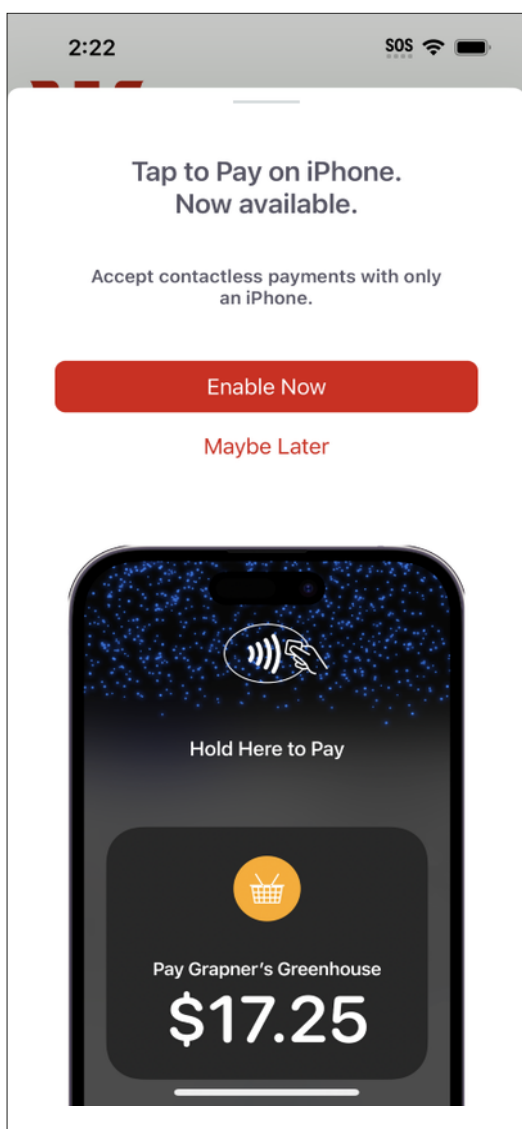
## Set up Card Payments.

Tap to Pay on iPhone or Airpay TAP enables you to accept card payments on your mobile device.

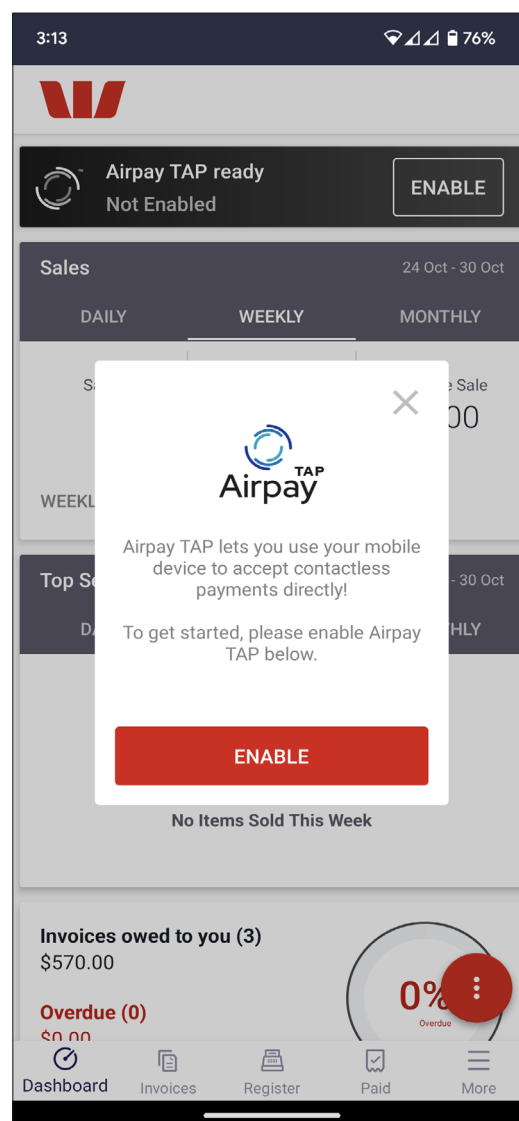
This feature on your app must be enabled in order to take payments via card. You can do this by tapping **Enable** from the pop-up on your dashboard tab, or by navigating to **More > Card Payments** and selecting **Enable**.



Enabling card payments may take up to 90 seconds



iPhone



Android


To accept payments simultaneously, you will need to be approved for additional payment devices.



You can request to accept payments across multiple devices by calling 1800 029 749 (8am-8pm Sydney time, Mon-Fri)

You can see the total number of payment devices allocated to your business by going to **More > Card Payments**.

SERIAL - 4YEE-00WG



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Devices available 5

Status **Ready**

**DISABLE**

**TOOLS MENU**

## Tap to Pay on iPhone.

After you enable **Tap to Pay on iPhone**, you'll be prompted to choose the following required permissions for this feature to operate:

- Device location access - Your device location helps to minimise transaction fraud.
- Passcode, Touch ID or Face ID to be enabled -Your iPhone must have Passcode, Touch ID or Face ID enabled to lock it for security.
- Signed into iCloud - To use EFTPOS Air, you need to be signed into iCloud. To sign in, go to your iPhone's Settings > Your Name > iCloud

## Airpay TAP (Android)

After you enable **Airpay TAP**, you'll be prompted to choose the following required permissions for this feature to operate:

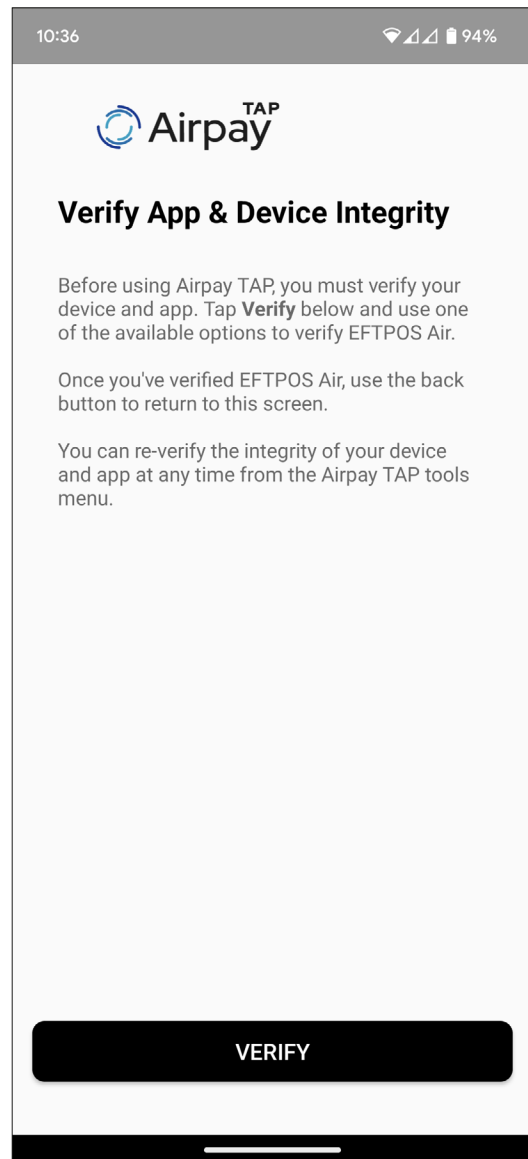
- *Do not disturb access* - ensures that your personal notifications are not visible to customers whilst taking a transaction.
- *Device Location access* - helps us to minimise transaction fraud.

You'll also be prompted to enable the following device settings if you haven't already:

- *Device Location enabled* - device location must be turned on for EFTPOS Air App.
- *NFC enabled* - must be enabled for your device to register when a customer taps their card or payment-enabled smart device.
- *Google Play Protect enabled* - Google Play Protect helps protect from malicious apps on the Play Store.

Once you've allowed these permissions, you will need to undergo additional security verification if it's your first time enabling this feature on your device.

1. A pop-up titled **Verify App & Device Integrity** will appear.
2. Tap **Verify**.
3. Tap **Verify Now**. A website will launch in your mobile device's web browser and will tell you if your device and app are secure and ready to start taking payments.
4. A confirmation will display **Device Verified** to let you know that your device is secure.



Android



If your device or app is identified as not being secure, please call the Merchant Helpdesk. 1800 029 749 (available 24/7).



## Set up your Refund Passcode.

To set your refund passcode:

1. Go to the **More > Business Settings > Set Refund passcode**.
2. Enter your EFTPOS Air account password to verify that you're the account owner.
3. Once you've successfully authenticated you can set a new refund passcode by entering a numeric code between 4 and 8 digits.



Your refund passcode is set at a business level, and is the same for all nominated business users.

## Set up Accessibility.

### iPhone


To read more about the accessibility features on iPhone, refer to this link:

[support.apple.com/en-au/guide/iphone/iph3e2e4367/ios](https://support.apple.com/en-au/guide/iphone/iph3e2e4367/ios)

### Android

EFTPOS Air has in-built accessibility features to assist cardholders and merchants with accessibility requirements.

To enable additional accessibility features for cardholders with vision impairment:

1. Enable accessibility mode by selecting the accessibility button  on either the card presentation screen or the PIN entry screen.
2. The cardholder may choose:
  - High contrast – the transaction flow shown is simplified and in high-contrast.
  - Audio & haptic feedback – feedback is read out during the transaction and the cardholder can enter their PIN using a keypad that provides haptic feedback.
3. For more information on how cardholders can utilise these features, please access the in-app EFTPOS Air training and complete the training titled **Assisting cardholders with vision impairment**.

To accept payments as a merchant with vision impairment:

1. If you use any of Android's accessibility services (such as a screen reader or password manager), configure an accessibility shortcut through your device's settings so you can quickly turn these accessibility services on and off.
2. When processing a card transaction, use your configured accessibility shortcut to temporarily disable your accessibility services in order to securely protect the cardholder's PIN during PIN entry.
3. When you are ready, use your configured accessibility shortcut to reenable your accessibility services.
4. For more information on how you as a merchant can utilise accessibility features, please access the in-app EFTPOS Air training and complete the training titled **Accepting payments as a merchant with vision impairment**.

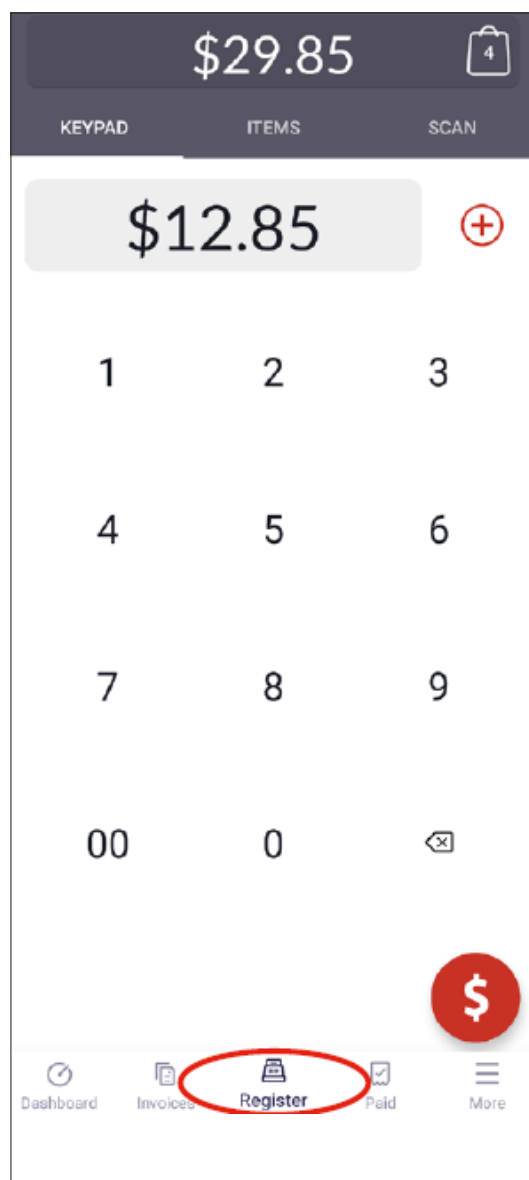




Please note that if you don't have an accessibility shortcut configured, you'll be unable to proceed with the card transaction.

# Processing a Transaction

## Create a Sale.

1. Select the **Register** tab at the bottom of your screen to view your register.



2. Enter the transaction amount by using one of the following methods:
  - **Keypad:** select **Keypad** from the top menu and use the on-screen keypad to type the purchase amount, e.g. \$25 = 2500. To change the quantity of this item or its details, tap the amount in the grey background.
  - **Items:** select **Items** from the top menu, then select the item you want to add in your basket. The quantity displays a 1 in the top corner of the item image. To increase the quantity, select the item again to add 1 more, or select the quantity indicator number to set a specific quantity. (Note: you must add your own list of items before using this functionality. For more information on adding items, visit: [help.eftposair.westpac.com.au/app/register/#item](http://help.eftposair.westpac.com.au/app/register/#item)).
3. If you need to add more items to the transaction, tap  and repeat step 2 to choose the method and amount.
4. Select the total transaction amount (indicated by the bag icon ) at the top right of the screen to view the active basket.
5. On the active basket screen, you can delete an item by swiping left, or tap to modify. You can also add notes or clear the sale entirely to start over.

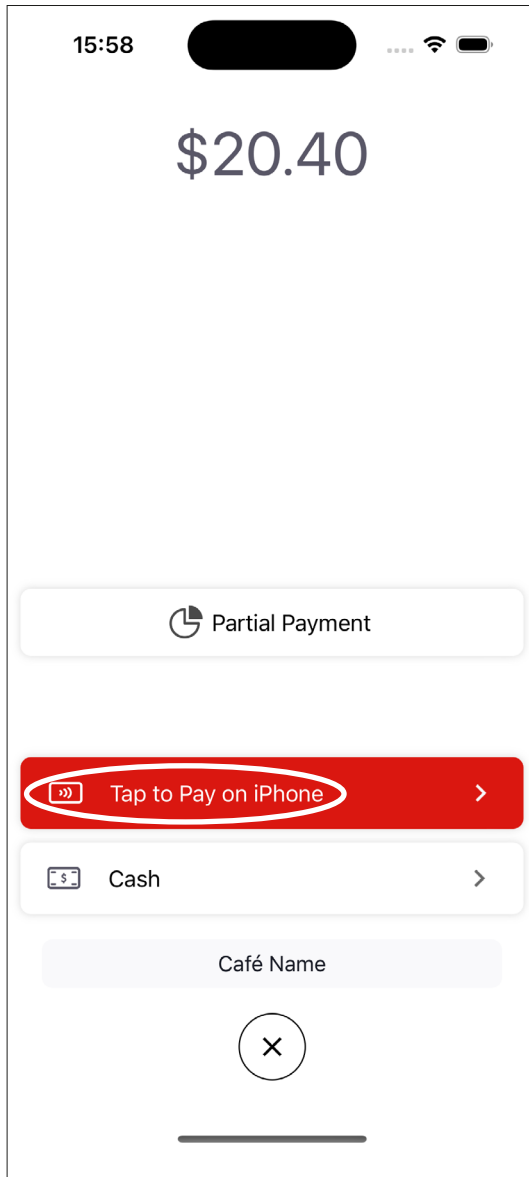
Once you've created a sale, you may take payment via card or cash.



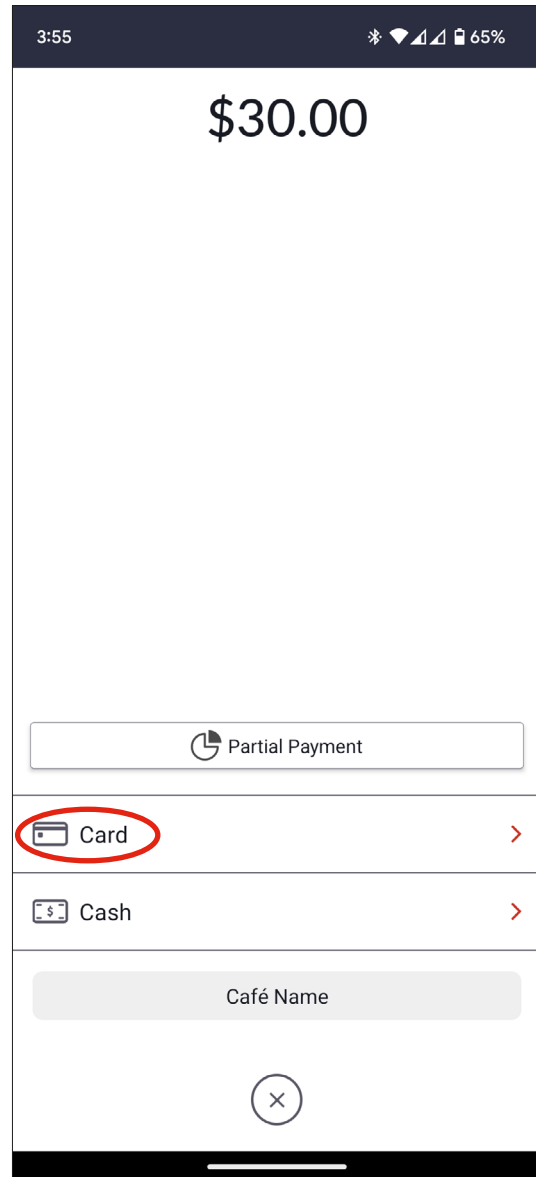
You can also create a sale by scanning a barcode on your items. For more information on how to set up the scanner functionality, visit: [help.eftposair.westpac.com.au/app/register/](http://help.eftposair.westpac.com.au/app/register/)

## Take a Card Payment.

1. After you've created a sale, tap the **dollar sign button** **\$** on the bottom right of the screen.
2. Select **Tap to Pay on iPhone** or **Card** (for Android) as the payment type.



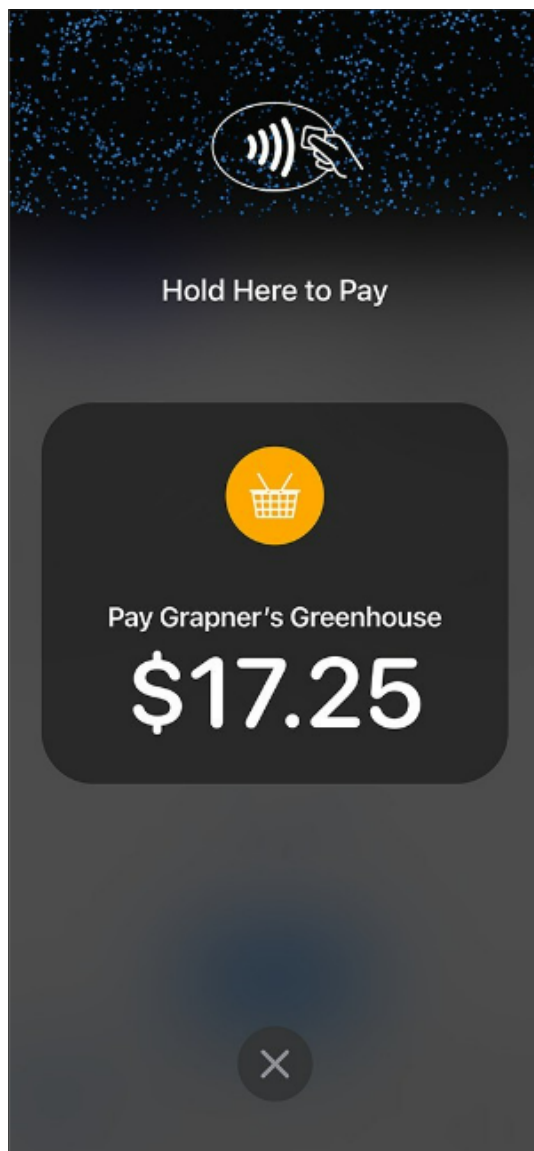
iPhone



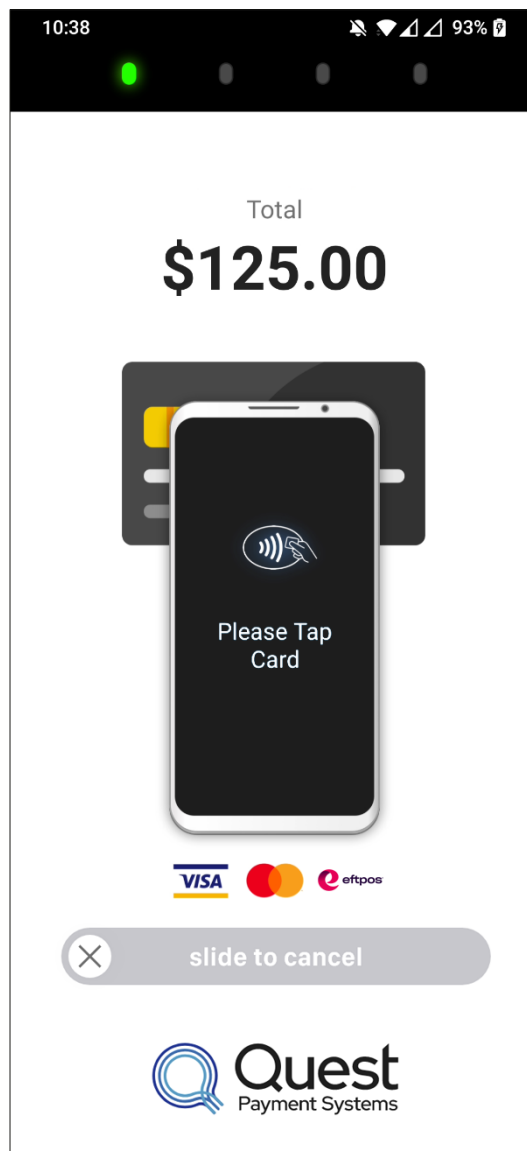
Android

3. **For iPhone:** the cardholder must place the card horizontally on the top edge of the iPhone and hold for a few seconds.

**For Android:** the cardholder must tap their card or payment-enabled smart device on the back of the phone.

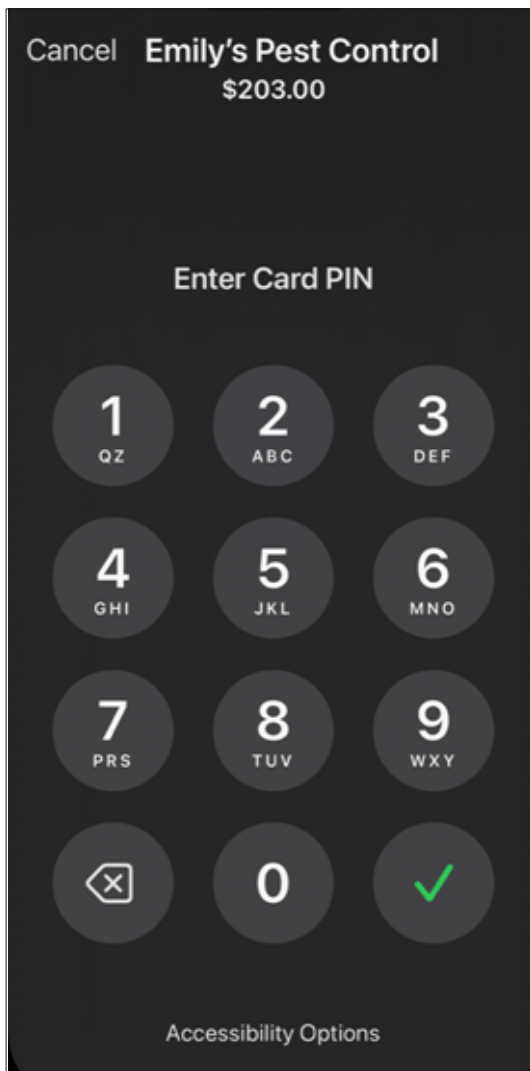


iPhone

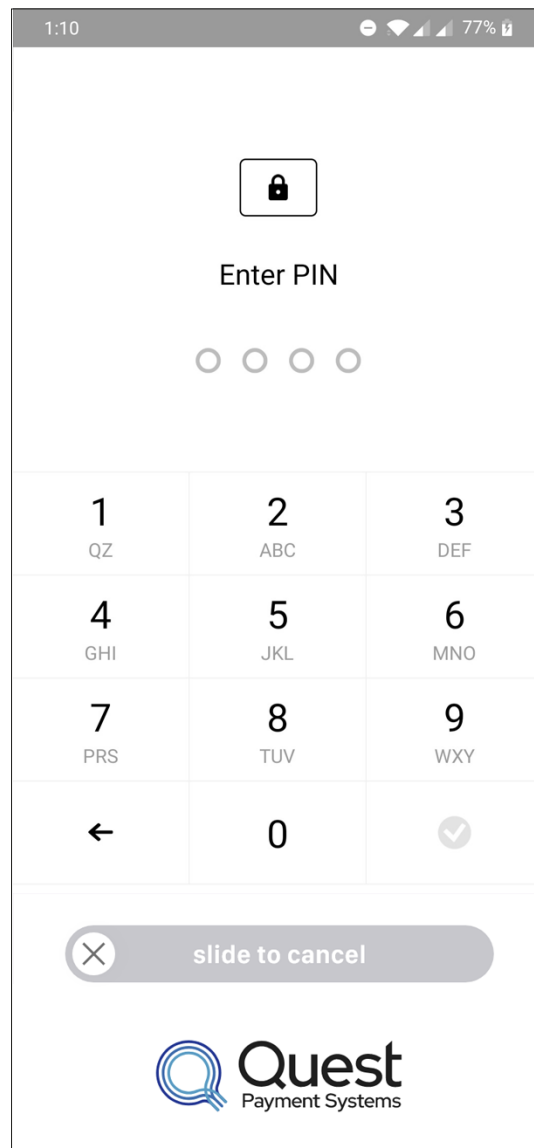


Android

4. If prompted, the cardholder must enter their PIN to complete the transaction.




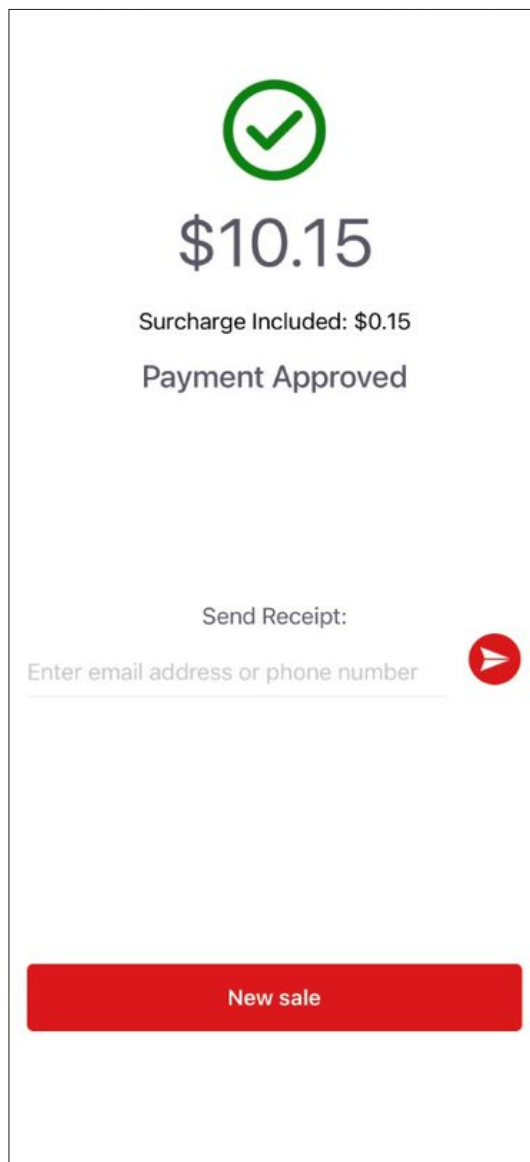
**iPhone**



**Android**

5. The phone will display the transaction result.

6. The EFTPOS Air App will prompt for a customer copy of the receipt to be sent to the customer via SMS or email. Enter this information, and select the **send icon** .





7. Select **New Sale** to end the transaction.

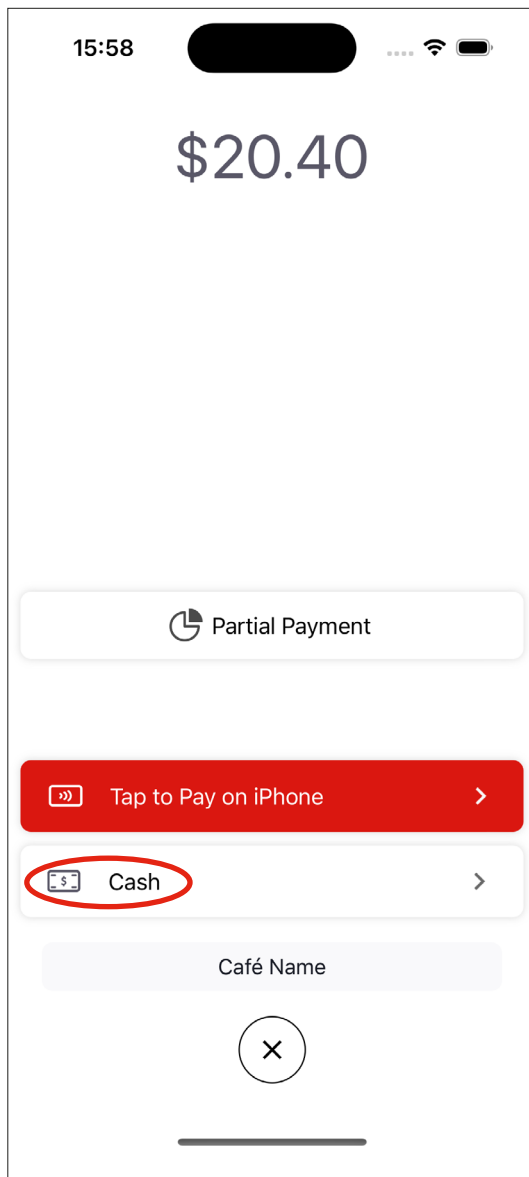


Your device has a hotspot where cardholders should tap to pay. Access the in-app training titled **Tap to Pay on iPhone Training**, or **Using your device's contactless reader** (for Android) to find where this hotspot is on your device.

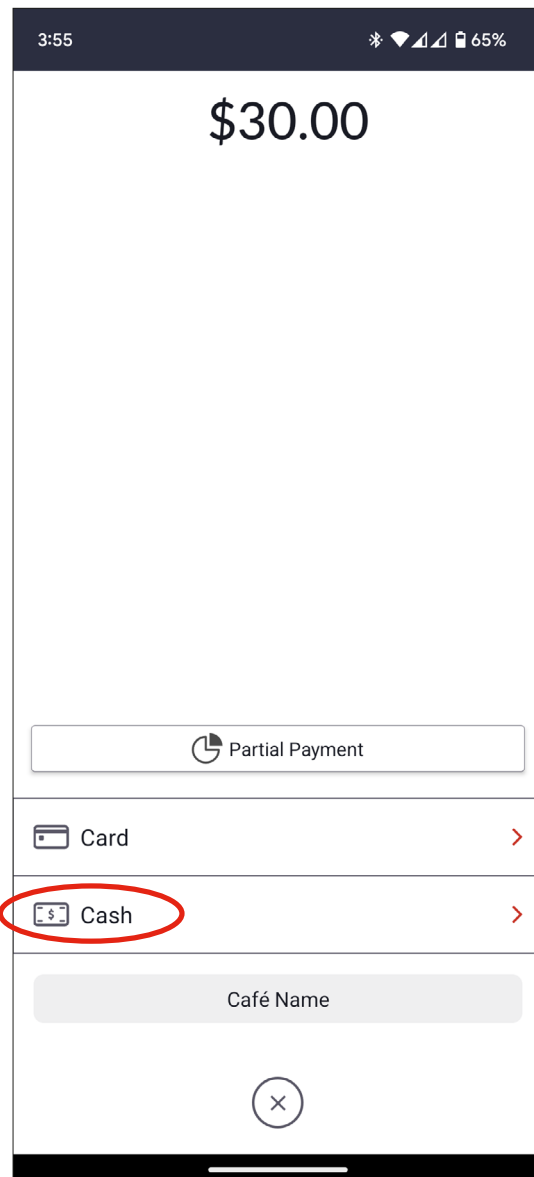
## Take a Cash Payment.

1. After you've created a sale, tap the dollar sign button  on the bottom right of the screen.
2. Select **Cash** as the payment type.
3. Select a suggested amount button or use the keypad to enter the exact amount of cash received, then select **Tender**.
4. The phone will display the transaction result and how much change you need to give back to the customer.
5. The EFTPOS Air App will prompt for a customer copy of the receipt to be sent to the customer via SMS or email. Enter this information, and select the **send icon** .
6. Select **New Sale** to end the transaction.

For more information on accepting payments, visit: [help.eftposair.westpac.com.au/payments/](http://help.eftposair.westpac.com.au/payments/)





iPhone



Android

## Process a Refund.

1. Select the **Paid** tab at the bottom of your screen to view your past transactions.
2. Locate the relevant sale and select it.
3. Tap the three dots  at the bottom right of the screen.
4. Tap **Refund**.
5. A new refund that is pre-populated with all the line-items from the original sale will be created.
6. If necessary, you can further modify the refund by adding and removing line-items.
7. Select the **refund button**  at the bottom right of the screen.
8. Enter the refund passcode (Note: if you have not yet set a refund password, you will be prompted to do so before you can continue).
9. Select the original payment method.
10. Select **Confirm Refund**.
11. The phone will display the transaction result.
12. The EFTPOS Air app will prompt for a customer copy of the refund receipt to be sent to the customer via SMS or email.

*Important:* Please note that the following must apply in order to process Card refunds through EFTPOS Air:

- The card number must match the original payment's card number;
- The refund amount must be less than or equal to the original purchase amount; and
- The original purchase must be within the last 500 transactions taken by the business.



Please contact the Merchant Helpdesk if you require any support on refunds.  
1800 029 749 (available 24/7).

For more information on refunds, visit: [help.eftposair.westpac.com.au/app/refunds/](https://help.eftposair.westpac.com.au/app/refunds/)

## Settlement Totals

Settlement is the process where the transactions completed via the App are sent to your nominated Westpac business transaction account.

EFTPOS Air will automatically settle every day at 8:50pm (Sydney time), Westpac will deposit your settled funds to your nominated Westpac business transaction account shortly after this time. EFTPOS Air cut-off time is fixed for all businesses. Transactions processed after 8:50pm (Sydney time) will be included in next day settlement.

## Transaction Reports

The Reports section gives you a detailed break-down of your sales history over a range of time frames:

- Daily
- Weekly
- Monthly
- Quarterly

To view a report:

1. Go to **More > Business Settings**.
2. Select the period that you want to view.
3. The report screen will appear and shows a range of information for the selected period.
  - The 'Sales Summary' section shows your sales information based on accrual accounting for the period.
  - The 'Collected' section shows a break-down of totals collected for each payment type.
  - You can view a complete list of tenders (payments) for that period using the 'Tender List'.


For more information on reporting, visit: [help.eftposair.westpac.com.au/app/more/reports/](https://help.eftposair.westpac.com.au/app/more/reports/)

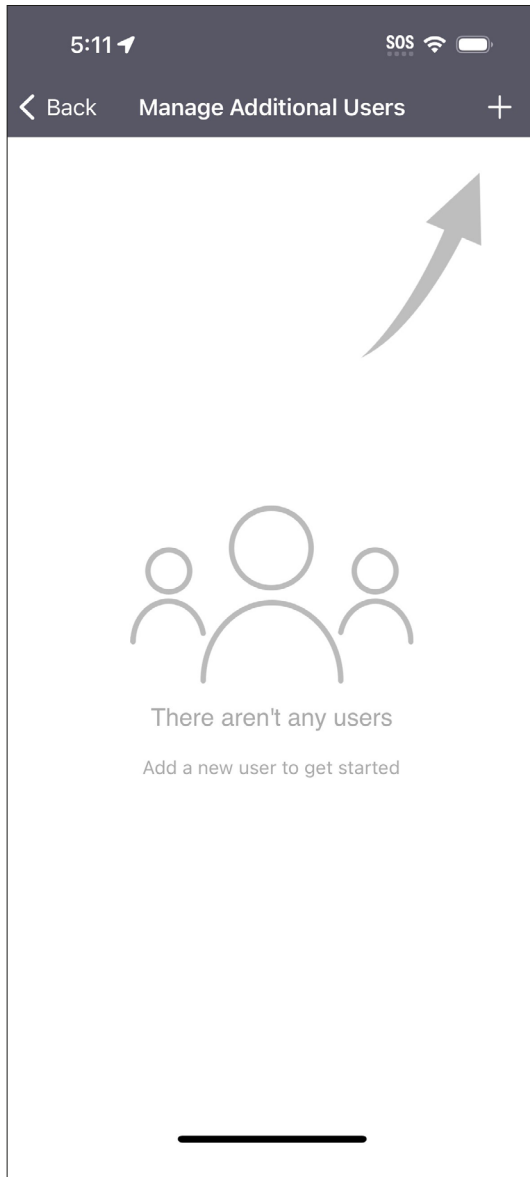


# Adding Nominated Business Users

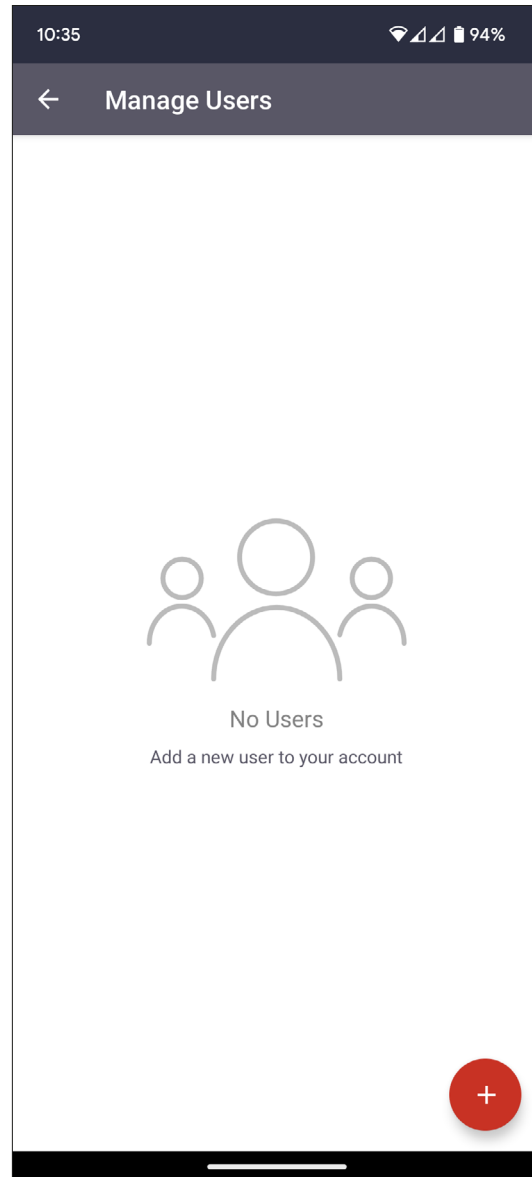
EFTPOS Air allows you to add additional users to your EFTPOS Air account. New users can sign into the EFTPOS Air app on their own compatible device and create and process invoices and sales on your behalf.

To add a new business user:

1. Go to the **More > Users**.
2. Tap .

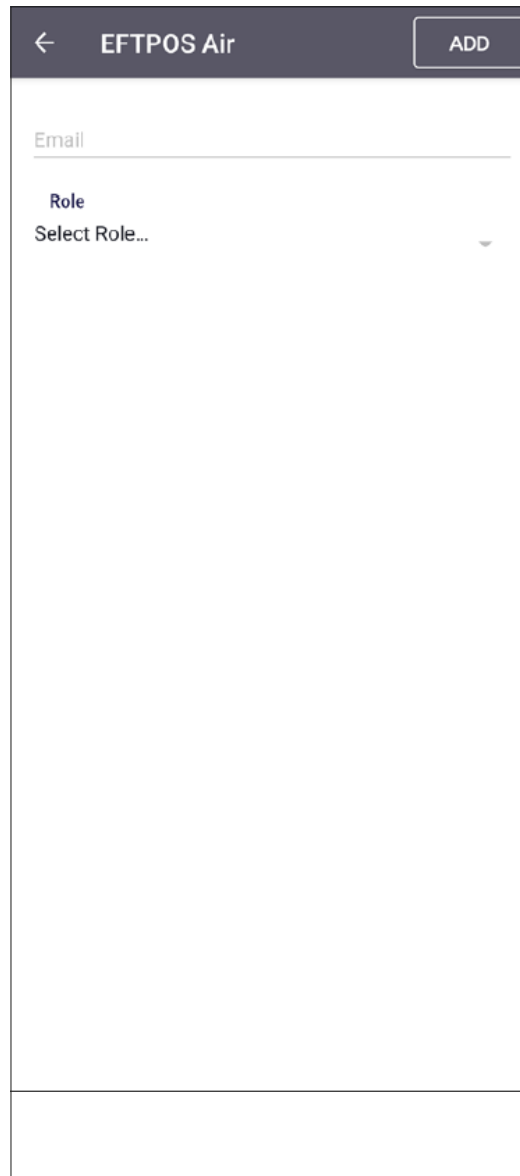


iPhone



Android

3. Enter the user's email address and choose their role to restrict their capabilities.
- **Managers** have the same access as the main user *except* for modifying Business Settings.
  - **Operators** have access to creating and processing invoices and sales. Operators are unable to make any changes via the **More** tab, except for configuring card payments.



The screenshot shows a mobile application interface for adding a new user. At the top, there is a dark header bar with a back arrow on the left, the text "EFTPOS Air" in the center, and an "ADD" button on the right. Below the header is a form with two main sections. The first section is labeled "Email" and contains a text input field. The second section is labeled "Role" and contains a dropdown menu with the text "Select Role..." and a small downward-pointing arrow on the right side. The form is set against a light gray background.

4. Select **Add**. The new user is now added to the list of users.

If you want to change the permissions for the Manager and Operator roles, or create New roles, you can do so via the [EFTPOS Air Merchant Portal](#).



Use **Roles & Features** in the EFTPOS Air Portal to create your own role types and apply the business features to go with the role. You can then apply the role type to your nominated users.

For more information on User Management, visit [help.eftposair.westpac.com.au/app/more/settings/](http://help.eftposair.westpac.com.au/app/more/settings/)

# Troubleshooting

## EFTPOS Air is returning an error when I try to enable payments.

1. Try any actions suggested in the error message you received.
2. Try to restart EFTPOS Air by bringing up the iPhone or Android task switcher and swiping the app away then reopening.
3. Ensure your device is running the most current Operating System available.
4. Go to **More > Card Payments** and disable and reenable EFTPOS Air.
5. Please contact the Merchant Helpdesk on 1800 029 749 and let us know the error code you're receiving so we can provide more detailed help.

## I can't clear the register sale.

You can clear the Register basket via either one of the following methods:

- Select the price display on the **Register** tab to bring up the register detail page, then tap the delete button in the top right corner.
- Make sure the **Register** tab is selected, and then tap the **Register** tab again.

## I've forgotten my password.

If you've forgotten your password, on the app sign in page select **Sign In > Forgot Password**. Follow the on-screen prompts to enter your email and reset your password.

## I've forgotten my email address.

The email address you use to sign into your EFTPOS Air app was provided to you in the Welcome Email you received from us.

If you are unable to locate your Welcome Email, please call the Merchant Helpdesk on 1800 029 749.

## My device has been lost or stolen.

If your device has been lost or stolen:

- Login to the [EFTPOS Air Merchant Portal](#) using your email and password provided in the Welcome Email.
- Use the **Sign Out Everywhere** option to log out from your lost/stolen device.
- You will be signed out of all devices where you have logged into EFTPOS Air.

If one of your nominated business users has their device lost or stolen or their access is no longer required:

- Go to **More > Users** and delete the nominated user's profile.
- You can add the user back at any time when feasible.

# We're here to help

## Merchant Support Centre

🖥️ [westpac.com.au/merchantsupport](https://westpac.com.au/merchantsupport)

## Merchant Helpdesk

Technical, service and sales support.

☎️ 1800 029 749 (Available 24/7)

**Handy hint:** Have your Merchant and Terminal numbers ready so we can assist you promptly.

🖥️ [westpac.com.au/eftposair](https://westpac.com.au/eftposair)

## Accessibility support.

At any time, you can inform us how you would prefer to be contacted. If you are deaf and/or find it hard hearing or speaking with people who use a phone, you can reach us through the National Relay Service (NRS). To use the NRS you can register by visiting [infrastructure.gov.au/national-relay-service](https://infrastructure.gov.au/national-relay-service)

Visit [westpac.com.au/web-accessibility](https://westpac.com.au/web-accessibility) for further information on our accessible products and services for people with disability.



*Westpac acknowledges the traditional owners as the custodians of this land, recognising their connection to land, waters and community. We pay our respects to Australia's First Peoples, and to their Elders, past and present.*

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