Smart Terminal FAQs

Product

What's included with my Smart Terminal?
The Terminal app, Calculator, Help app, and Settlement tools are available with purchase during pre-launch. A printer is included directly in the device.

Where are my settings located on the terminal? How do I adjust my settings?
Find and adjust your settings by swiping down from the top of the screen. A drop-down menu will appear, then simply tap 'settings.'

What are my connectivity options?
The device needs the Internet to make its magic, and is designed to work with both old and new connection types.
1. WiFi: When it powers on for the first time, the device automatically asks you to connect to WiFi. You can manage your WiFi from "Settings" (just swipe down to access). Be sure to connect to a private and password-protected network (WPA or WPA2).
2. Ethernet: There's an Ethernet port on the back of the power dock. To use it, the device must remain in its dock.

How do I set up my WiFi?
1. Turn on your device, and with a finger from the top of the screen, swipe down.
2. Select WiFi button.
3. You will see a list of WiFi options. Please select your secure password protected WiFi connection only with WPA or WPA2.
   Note: This must be a secure network for security reasons. If this is a non secure WiFi network (open networks and WEP encrypted networks), your device will not be able to process payments.

If the network connection is wired through ethernet and the terminal is removed from the dock, can processing still occur?
No, it won't work without the dock unless you've also connected it to WiFi. If you've set up Ethernet and WiFi, then it will work off the docking station.

Can the device print a receipt while the terminal is removed from the dock?
In order to print the receipt while the terminal is removed from the dock, it needs to be *charged at a minimum of 60%*.

Is it possible to set up limited roles and privileges for each user?
There are two types of terminal users, which are Owner and Employee. The Owner is the first user, created when the terminal is activated. The Owner can create new Employee users directly from the terminal. Aside from that, there are no other differences in permissions except for the non-reference credits feature, which can only be accessed by the Owner.

How do I update my address on the printed receipt?
1. Go into Poynt.net
2. Business Tab
3. Manage Business
4. Change Business Display Name

How do I reset my PIN?
1. Log into Poynt.net
2. Select Business and click Terminal users on the left tab.
3. Click into your user name. Click the Edit icon. You will have the option to reset your PIN.

How do I add a new user from my terminal device?
1. Please go to Settings on the device
2. Click on Business User
3. Add New User

How do I switch a user?
1. On launcher, there is a "Log out" icon.
2. Tap "Log out" and the Switch Users screen will appear.
3. Select a user to login and enter passcode and login.

If the terminal loses network connection, how does the merchant know if the transaction processed?

Please follow the following steps to check if a transaction processed after a network connection error:

On the web:
1. Log in to poynt.net
2. Click on Sales & Reports tab
3. Click on Transactions on the left tab
4. Check and see if most recent transaction appears

On the terminal:
1. Go to Terminal App
2. Tap on left menu and select Transactions
3. Swipe down from top to bottom to refresh the Transaction List
4. Check and see if most recent transaction appears. If no transaction appears, then the connection was likely lost prior to the transaction being successfully processed. You may proceed and re-attempt another transaction.

Payment Processing & Terminal App

How do I start processing payments?
1. Go into your Terminal app
2. Enter the amount
3. Click on Charge
Mag Stripe & NFC for the pre-launch. These card types are accepted: Visa, Mastercard, Discover, and Amex (processed as credit). EBTs aren't currently accepted.

Customer can choose to pay the following ways:
• By inserting credit card
• Over the phone: Click on terminal screen and select manual entry
• With NFC (Apple Pay, Samsung Pay, Google Wallet): Tap card or a phone on the center of the customer screen
• Using cash

How do I enable the tips option?
Tip-enablement is a merchant configuration setting. If you want to use this option, contact support to request Tip Enablement.

How does my customer add a tip?
Tips are automatically prompted when somebody pays with a credit card.

How do I process a refund?
From Terminal app, Transactions list:
1. Open the Terminal app
2. Tap drawer menu icon on the far left corner in the top navigation bar.
3. Open transactions screen and select the transaction you would like to refund.
4. Tap the transaction.
5. Tap the transaction.
6. Tap the "REFUND" button.

How do I void a transaction?
Because funds immediately authorize/capture, once you 'complete' the transaction, the only way to undo it is to initiate a refund transaction. Just tap the Terminal menu on the left side and choose Transactions. Once you've pulled up a specific transaction, you'll see the option to "Refund".

How do I reprint a receipt?
1. Log into the Terminal
2. Go to Transactions
3. Search for the specific transaction and tap the transaction.
4. Tap the option menu button.
5. Then you can reprint.

How do I access and print a receipt with signature?
You can find the actual captured signature on Poynt.net. Steps:
1. Log into Poynt.net
2. Click on Sales & Reports tab
3. Tap Transactions.
4. Click on Transaction ID. At this stage, you can email the receipt with signature. In order to print, simply print the browser window.

What do the icons mean on the Terminal Transaction List and on the poynt.net/transactions list?

Transaction status	on the device	on Poynt.net/transactions
Completed	✓	✓
Authorized	⊘(AUTH)	•••
Canceled/voided	✕	✕
Declined	⊘	⊘
Refunded	↩	↩

Settlement & Reports

How does settlement work for a batch of transactions?

Merchants will need to go into the Settlement app and manually settle their transactions daily/nightly.

Here is how the settlement process works:

1. Please tap into the Settlement app on the device.
2. Tap into the "Transactions" button, which shows all of the open transactions for the day in these 3 categories: "open batch" and "pending tip" and "auth-only".

   • **Open Batch:** these transactions require no further action from the merchant and will be settled once the batch is closed. You may "Void" a transaction from this tab if necessary.

   • **Pending Tips:** these transactions indicate transactions which no tip was collected at the time of swipe and may need to have Tip Amounts entered (if customer wrote a tip on a paper receipt) or No Tips added to all.

   • **Auth-Only:** these transactions indicate those which the merchant chose to perform authorization-only at the time of swipe (ie delayed inventory), and require merchants to manually indicate when the Auth-Only is ready to be captured (also known as force-post).

3. If there is a tip amount, tap directly into the transaction edit button, and add the appropriate tip amount. Tap on the "Add to Batch" button. All of these tip-adjusted transactions are added to the Open Batch tab.

4. If there are no tips to add to the Pending-Tips transactions on this tab, then you can select "No tip to all". Alternatively, once you tip-adjust the transactions which have tip amounts, for the remaining transactions in the Pending Tips tab which have no tips, then you can tap "No tip to all" (this makes it easier than entering $0 tip amounts for a long list of pending tips transactions).

5. If there is an Auth-Only ready to be captured, then tap the "Close" button which indicates merchant would like to mark the transaction as ready to be captured. (For tip-enabled merchants, you can also enter Tip-Adjust at the time of tapping "Close".) Confirming will then add the transaction to the Open Batch tab. Note: if there are other auth-only transactions not-yet-ready to be captured, then leave those transactions in the Auth-Only tab.

6. Once you have reviewed all of the transactions in "Pending Tips" or "Auth-Only", tap on "Review" which is the option on the top right hand side.

7. If there are any pending open transactions (either in the Pending Tips or Auth-Only tabs), a warning message will be presented at the bottom of the screen with the total amount that is pending and this amount will not be included in the settlement batch and processed.

Only those transactions in the Open Batch tab will be submitted for processing once the batch is closed.

8. Once you have reviewed all transactions, please tap on the green "Settle Open Batch" button

9. Once you tap on "Settle Open Batch", the terminal will display a batch Settlement Report summary after a short period of time.

Where can I find my previous batch history on the terminal?

1. Please tap on the dark blue "Batch History" button.
2. Please tap on "Detail" to see the report in pdf.
   Note: If you log into the batch history report via the web, you can access individual transactions via csv file hosted on google spreadsheets.

Where can I find my reports? Which reports do I have access to?

1. Log into Poynt.net via the web
2. Go to the "Sales & Reports" tab
3. Click "Reports"
4. As a merchant, you have access to generate a Transaction report and a Settlement report.

What is the difference between the Transaction report & the Settlement report?

• **Transactions report:** A Transaction report includes all card and cash transactions for that day in addition to merchant specific information like Invoice ID & Notes. Transaction reports allow merchants to manage their business, and is automatically generated by at the end of each day.

• **Settlement report:** The Settlement report provides settled credit card transaction information split by credit card type. The purpose of this report is to provide you with which credit card transaction have been processed and paid out. This report will provide you with the ability to reconcile credit card transactions with bank deposits.The Settlement report is only generated when you settle your batch.
   Note: Cash transactions is not included in settlements report as it is only applicable to credit card.
   Both types of reports can be accessed as pdf, excel, csv files.

Where can I review a list of Transactions?

You can view a list of transactions in the terminal by tapping on the left menu and then going into "Transactions" where you can see all of your transaction details.
Note: Transaction updates aren't available at this time. But you do have access to Transaction History. For Search, this is viewable only, and you must enter the full transaction ID to locate it.

What is a non referenced credit?

A non-referenced credit is a refund transaction that does not use the credit card information from an existing payment transaction.

How do I perform a non referenced credit?
Non-reference credits is an Owner-permissioned feature.
You can find it by clicking the menu of options on the left-
hand side and selecting 'non-referenced credit.'

How does a merchant perform an auth-only transaction?
1. Go to Terminal App
2. Tap on right side
3. Tap on 'AuthOnly' option
4. Enter amount and swipe card as you normally would
5. When an 'AuthOnly' transaction is ready to be captured/
   closed, please go to the Settlements App >
   Transactions > AuthOnly tab and mark the transaction
   as Closed

Printer & Printer Rolls

How do I add in a printer roll?
The terminal comes with three rolls of thermal printer
paper (2 1/4" x 16'). To load the paper, lift the latch
on the printer compartment, and make sure to insert the
roll with the paper hanging down.

How do I troubleshoot the printer?
• Make sure your paper roll is inserted properly
• Check that your paper roll is wound tightly and not
  crumpled in the printer chamber (Tip: tear off any wrinkled
  portions as this may cause jamming.).
• Pull a small length of paper through the slot to ensure it
  feeds out of the slot.
• Make sure the printer door is properly shut.
• Confirm battery level as the printer has an auto-disable
  function if the battery is too low. You can also fix this by
  simply redocking the terminal.
• If still unable to print, report any error messages
  displayed and/or additional diagnostic information at
  support@poynt.com.

What if I need to order additional printer rolls?
If you'd like to order more paper, you can purchase
additional rolls from POS suppliers through
www.pospaper.com/portableprinter01.html and
also through Amazon at www.amazon.com/
Poynt-Payment-Terminal-Receipt-Printer/dp/
B01IO6AR68/