

The Quick Reference Guide provides you with simple, step-by-step instructions of your daily terminal operations.



VeriFone VX820 Duet

PRE AUTHORIZATION (Completion)

Completion of an approved Pre-Auth:

- Must be done within 5 days of obtaining a Pre-Authorization
- Refer to your card acceptance agreement for more information regarding pre-authorizations.

Refer to your card acceptance agreement for more information regarding pre-authorizations. In restaurant environments, pre-authorizations should not be done when CHIP cards are presented by the cardholder. Chip cards in a restaurant environment should be processed as "PURCHASE" transactions. Tip entry is available at the time of the purchase for CHIP and debit cards.

<p>①</p> <p>TIME PURCHASE REFUND SETTLEMENT CORRECTION</p> <p>Touch </p>	<p>②</p> <p>FORCE PREAUTH/COMPLTE SERVER SETUP OTHER SETUP</p> <p>Touch PreAuth/Complete.</p>	<p>③</p> <p>PREAUTH/COMPLTE PREAUTH COMPLETE DELETE PREAUTH PREAUTH REPORT</p> <p>Touch Complete.</p>
<p>④</p> <p>COMPLETE CLRK AMT ACCT RETRIEVE BY: INV#</p> <p>Touch desired option or search method: By Clerk, Amount, Account Number or Invoice Number.</p>	<p>⑤</p> <p>COMPLETE INVOICE NUMBER:</p> <p>Enter the search criteria such as invoice number. The leading zeros in an invoice number are not required.</p>	<p>⑥</p> <p>COMPLETE COMP PREV NEXT INVOICE #: EXIT</p> <p>If your transaction is shown, Touch COMP. If you touch PREVIOUS or NEXT, you will move to the next or previous open pre-auth transaction in the batch.</p>
<p>⑦</p> <p>COMPLETE AMOUNT \$0.00 NEW AMOUNT \$0.00</p> <p>Enter the new amount of the transaction, including adjustments and/or tips. Press green OK key.</p>	<p>⑧</p> <p>PREAUTH - COMPLETE TEAR RECEIPT PRESS OK</p> <p>The completion will occur and a receipt will print. Tear the merchant copy receipt off and then press the green OK key to print the customer copy.</p>	

CORRECTIONS (Voids)

Use this function to delete a transaction that is in the current batch.

<p>①</p> <p>TIME PURCHASE REFUND SETTLEMENT CORRECTION</p> <p>Touch CORRECTION.</p>	<p>②</p> <p>CORRECTION YES NO CORRECT LAST?</p> <p>If you wish to correct the last transaction, touch YES. If you wish to correct any other transaction in the batch, touch NO.</p>	<p>③</p> <p>CORRECTION INV # ACCT# RETRIEVE BY:</p> <p>Touch INV# to search for transaction by invoice number or touch ACCT# to search by account number.</p>
<p>④</p> <p>CORRECTION INVOICE NUMBER:</p> <p>Enter the Invoice number, or if you chose ACCT#, enter the last four digits of the account number, to find your transaction and press the green OK key to continue.</p>	<p>⑤</p> <p>CORRECTION YES NO NEXT INV #</p> <p>Press Clear to return to idle prompt or touch applicable choice to continue.</p>	<p>⑥</p> <p>CORRECTION YES NO TOTAL: \$0.00</p> <p>Touch Yes.</p>
<p>⑦</p> <p>CORRECTION TEAR RECEIPT PRESS OK</p> <p>The correction will reverse the transaction and update the batch. Tear the merchant copy receipt off and then press the green OK key to print the customer copy.</p>		

REPORTS and BALANCING

This will process all sales and credits that have been entered since the last time the terminal was balanced. It will ensure that any charges/credits are applied to the customer's card and that any funds due to you are sent to your account. As part of the balance process, you should print a Totals or Detail report to confirm your batch totals. You must ensure that you balance daily in order to receive timely deposit of your funds.

<p>①</p> <p>TIME PURCHASE REFUND SETTLEMENT CORRECTION</p> <p>Touch </p>	<p>②</p> <p>REPORTS TOTALS REPORT DETAIL REPORT SERVER REPORTS PREAUTH REPORT</p> <p>Select the report you wish to run by touching the corresponding key or touch to move through additional reports. The selected report will print. Additional prompts may appear for options, depending on the report that is selected. Press Cancel to return to main menu.</p>	<p>③</p> <p>TIME PURCHASE REFUND SETTLEMENT CORRECTION</p> <p>Touch SETTLEMENT.</p>
<p>④</p> <p>SETTLEMENT TOTAL: \$0.00</p> <p>Enter the total of the batch from your Totals or Detail reporting and press green OK key.</p>	<p>⑤</p> <p>TIME PURCHASE REFUND SETTLEMENT CORRECTION</p> <p>The batch will settle on the host, the current batch is then deleted from the terminal and returns to the main transaction menu.</p>	



{Retail/Restaurant}



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PURCHASES

Magnetic-stripe credit cards may be swiped or keyed, but if you key a credit card, you must obtain a manual imprint of the card to prove that the card was present. Failure to do so could result in a chargeback. Chip cards are inserted by the cardholder into the card reader and must remain inserted for the duration of the transaction. CHIP Cards may not be embossed for imprinting and should be swiped only if your terminal prompts you to do so. Note: For Debit and CHIP card transactions, you will be prompted to pass the terminal to the customer, who will confirm the amount and enter their PIN to process the transaction.

①

TIME
PURCHASE
REFUND
SETTLEMENT
CORRECTION

Touch PURCHASE.

②

PURCHASE
AMOUNT: \$0.00

Enter the amount of the sale/purchase using the keypad. Press the green OK key when finished.

③

PURCHASE
TOTAL: \$0.00
TAP/INSERT/SWIPE
TAP/INSERER/GLISSER

Verify amount. Tap, Insert, Swipe or manually key account number and press green OK when finished.

④

PURCHASE YES NO
TOTAL: \$0.00

The cardholder should touch YES to process the transaction or touch NO to decline the amount and stop the transaction.

⑤

PURCHASE CHQ SAV
SELECT ACCT

If Debit Select account.

⑥

PURCHASE TOTAL: \$0.00
ENTER PIN

Key pin number and press the green OK key.

⑦

PURCHASE APPROVED
REMOVE CARD

The screen will display status and a merchant receipt will print. The customer should provide the terminal back to you at this time.

⑧

PURCHASE TEAR RECEIPT
PRESS OK KEY

Tear the merchant copy receipt off and then press the green OK key to print the customer copy.

TERMINAL START-UP

When the terminal is first started up, whether at Initial Installation or when electrical power has been removed and then reapplied, the following screen will display. When this screen displays.

①

DATE TIME
COMMSERVER
SOFTPAY-FDCC
[OPTIONAL]

Touch SOFTPAY-FDCC.

REFUND

Use this process to produce a refund to the customer. Use the refund process when:

- The customer returns purchased good
- You want to reverse an incorrect sale, but the terminal has been balanced since the incorrect sale

①

TIME
PURCHASE
REFUND
SETTLEMENT
CORRECTION

Touch REFUND.

②

REFUND
AMOUNT: \$0.00

Enter the amount using the keypad. Press the green OK key.

③

REFUND TOTAL: \$0.00
TAP/INSERT/SWIPE
TAP/INSERER/GLISSER

Verify amount. Tap, Insert, Swipe or manually key account number and press green OK when finished.

④

REFUND YES NO
TOTAL: \$0.00

Confirm the amount by pressing YES. If the amount is incorrect, press NO to decline the amount and stop the transaction.

⑤

REFUND APPROVED
REMOVE CARD

The screen will display status and a merchant receipt will print.

⑥

REFUND TEAR RECEIPT
PRESS OK KEY

Tear the Merchant copy receipt off and then press the green OK key to print customer copy.

REPRINT

Use this process to reprint transactions made since the last balance.

①

TIME
PURCHASE
REFUND
SETTLEMENT
CORRECTION

Touch

②

REPRINT
LAST RECEIPT
ANY RECEIPT

Touch Last Receipt to print last receipt or Touch Any Receipt to print any other transaction in the open batch.

③

REPRINT ANY RCPT
INVOICE NUMBER:

Enter the invoice number for the transaction you would like to reprint and press the green OK key.

PRE AUTHORIZATION

Pre-authorization of a credit card provides you with an approval code confirming that funds are available to the cardholder. It does not charge the card. The customer is charged the transaction amount only upon completion of the pre-authorization transaction. Pre-authorizing a card places a hold on the funds for a period of five days. If you do not complete the pre-authorization within this time, the hold will be released. CHIP cards being used for a Pre-Auth will require the cardholder to be present for PIN entry. In restaurant environments, pre-authorizations should not be done when CHIP cards are presented by the cardholder. Chip cards in a restaurant environment should be processed as "PURCHASE" transactions. Tip entry is optional at the time of the purchase for CHIP cards.

①

TIME
PURCHASE
REFUND
SETTLEMENT
CORRECTION

Touch

②

FORCE
PREAUTH/COMPLTE
SERVER SETUP
OTHER SETUP

Touch PreAuth/Complete.

③

PREAUTH/COMPLTE
PREAUTH
COMPLETE
DELETE PREAUTH
PREAUTH REPORT

Touch PreAuth.

④

PREAUTH
AMOUNT: \$0.00

Enter the amount of the Pre-Authorization using the keypad. Press the green OK key.

⑤

PREAUTH TOTAL: \$ 0.00
TAP/INSERT/SWIPE
TAP/INSERER/GLISSER

Verify amount. Tap, Insert, Swipe or manually key account number and press green OK when finished.

⑥

PREAUTH YES NO
TOTAL: \$0.00

Touch YES to process the transaction or NO to decline the amount and stop the transaction.

⑦

PREAUTH TOTAL \$0.00
ENTER PIN

Key pin number and press the green OK key.

⑧

PREAUTH APPROVED
REMOVE CARD

The screen will display status as the terminal connects and processes the transaction, and the merchant receipt will print.

⑨

TEAR RECEIPT
PRESS OK KEY

Tear the merchant copy receipt off and then press the green OK key to print the customer copy.