FD150 Quick Reference Guide

Getting started with your First Data terminal

Step 1: Getting connected

Using your terminal requires an Internet connection, such as DSL, cable or dial up connection. If you chose a dialup connection, a dedicated phone line is recommended.

- Telephone port (Blue)
- Ethernet port (Yellow)
- USB ports (Black)
- RS-232 port (Green)

Step 2: Add an (optional) device

If you have another device(s) to connect to the terminal, such as the RP10 PIN pad or MagTek® MiniMICR Check Reader, you can now connect them to either the USB or RS-232 port. Please see the device-specific installation instructions.

Step 3: Load printer paper

To load a roll of paper, open the printer cover's latch as shown below. Insert the roll of paper into the printer. and make sure that the roll has the leading edge of the paper exiting the bottom edge of the printer. Close the cover and tear off any excess paper.

Step 4: Connect to a power supply

To assemble the power supply, plug to assemble the power supply. Plug the power cord into the power adapter. Next, connect the small end of the power plug to the terminal. Rotate the plug so that the cord is pointed toward the back of the terminal and ensure it lies flat and underneath the terminal. Plug the AC power cord into a surge protector (recommended) or a standard electrical outlet. Your terminal should all be connected and power up. The screen will light up and display the home screen.

Wi-Fi (optional)

To support Wi-Fi (wireless) connectivity, you'll need a wireless access point, modem or router supporting 802.11 b/g/n; and Broadband Internet Service. To set up your terminal for connectivity to your Wi-Fi system, touch the Tool icon displayed on the home screen. Touch Wi-Fi then Security

Security

Verify the security mode matches your Wi-Fi system's settings (That is, WPA1-TKIP,WPA1-AES or WPA2-AES).To change, touch the drop-down arrow and select a new option. SSID is the name assigned to your Wi-Fi network. It is a case sensitive text string up to 32 bytes long. All devices in the network must use the SSID to communicate over Wi-Fi, and you will also need your password (key). Ensure that the key and SSID match your Wi-Fi system settings. A USB keyboard may be connected to the terminal to enter this information.

Signal strength

To test signal strength, return to the home screen, touch the Tool icon, then Wi-Fi and View Status.

Basic operations

The following operations are meant to cover the most common transactions.

SETTLEMENT

To settle the batch on your terminal and clear it of all transaction information, you can set the device to auto-close or manually manage the close.

For auto-close settings, please call the help desk (see sticker on the side of your device).

To settle the batch manually:

1. From the home screen, select “Other.”
2. Depending on your specific terminal model, select “CLOSE” or “Close Batch.”
3. Select OK via the touch screen (or press 3 for non-touch screen terminals.)
4. The terminal will now complete the batch settlement.

SALE

To begin a sale select "Sale". Your customer may then offer a card for payment in one of three ways:

1. By inserting a “chip card” into the slot at the front of the terminal or PIN pad, called the “dip slot.” Reminder: the chip card must remain in the dip slot until the device prompts the customer to remove it.
2. By swiping the card through the magnetic stripe reader.
3. By tapping a contactless card or phone.

Then

- Follow the on-screen prompts
- If prompted, your customer will enter their PIN or can press Cancel X to bypass
- The device will automatically print a receipt or prompt for customer receipt. To skip this step, press ENTER or CANCEL (red button).

REFUND

To issue a refund to the cardholder:

1. From the home screen, Select “Other.”
2. Select Refund.
3. Enter the amount.
4. Instruct your customer to insert, swipe or tap their card.
5. Select Credit.
6. The device will automatically print a receipt or prompt for customer receipt. To skip this step, press ENTER or CANCEL (red button).

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PRE SALE TICKET

1. Punch in **Transaction Amount**. Then **press OK**.
2. **Confirm Amount**. You can remove the Non-Cash Charge on this screen.
3. Swipe / Insert / Tap card on display. For **Manual Key Entry** type the card number on the screen.
4. Sign on the screen. **Enter Tip** if enabled.
5. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
6. Select **Print Receipt** if a paper receipt is requested.
7. Follow the prompts on screen for the customer copy.

RE-PRINT TRANSACTION RECEIPT

1. Tap **CREDIT** until **DEBIT** shows.
2. Punch in **Transaction Amount**. Then **press OK**.
3. **Confirm Amount**. You can remove the Non-Cash Charge on this screen.
4. Swipe / Insert / Tap card on display. For **Manual Key Entry** type the card number on the screen.
5. **Enter Pin**. **Enter Tip** if enabled.
6. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
7. Select **Print Receipt** if a paper receipt is requested.
8. Follow the prompts on screen for the customer copy.

TIP ADJUST

1. Tap **SALE** until **PREAUTH** shows.
2. Punch in **Transaction Amount**. Then **press OK**.
3. **Confirm Amount**. The Non-Cash Charge will NOT be calculated for PreAuth transactions.
4. Swipe / Insert / Tap card on display.
5. Sign on the screen.
6. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
7. Select **Print Receipt** if a paper receipt is requested.
8. Follow the prompts on screen for the customer copy.

SETTLEMENT

1. Tap **SALE** until **VOID** shows. Then **press OK**.
2. **Enter Password**. The default password is the **Last 4 Digits of the EPI number.**
3. Tap **Tran Number** to enter the transaction number or tap **Card Number**.
4. Enter the transaction number or last 4 digits of customer's card number.
5. Select transaction to be voided.
6. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
7. Select **Print Receipt** if a paper receipt is requested.
8. Follow the prompts on screen for the customer copy.

CONNECTING YOUR DEVICE TO THE INTERNET

EvolvPay100

Method 1 & 2

Flip the device so that the bottom is facing up. Power off the device before plugging in your connection type.

- **Ethernet:** Labeled as LAN. Power down, plug in your Ethernet cable, power back on and tap the connection icon on the home screen.
- **Dial:** Labeled with a Phone Icon. Power down and plug in the phone line. Power back on and when prompted for WiFi, press cancel. When prompted For the Dial setting select cancel to be brought to your home screen to begin transacting.

Method 3

Power on the device, Select "yes, Connect" for Wifi, Select your SSID, Enter password and select the Green Ok Button. If you're on another connection type and want to switch to Wifi, Tap the Connection Icon on the top of the touch screen and select WiFi. If this is your first time connecting, follow the instructions above. Otherwise, you will connect automatically.

EvolvPay110

Method 1

Flip the device so that the bottom is facing up (as shown in the picture). Insert the SIM card on the bottom right. Once inserted, put the cover back on the device. Turn the device over and tap connection icon at the top of your touch screen and select GPRS.

Method 2

If you are connecting to WiFi, press 'Yes, Connect', select the SSID (network name), enter the password, and press the OK button on the keypad.

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CREDIT SALE

1. Punch in **Transaction Amount**. Then **press OK**.
2. **Confirm Amount**. You can remove the Non-Cash Charge on this screen.
3. Swipe / Insert / Tap card on display. For **Manual Key Entry** type the card number on the screen.
4. Sign on the screen. **Enter Tip** if enabled.
5. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
6. Select **Print Receipt** if a paper receipt is requested.
7. Follow the prompts on screen for the customer copy.

DEBIT SALE

1. Tap **CREDIT** until **DEBIT** shows.
2. Punch in **Transaction Amount**. Then **press OK**.
3. **Confirm Amount**. You can remove the Non-Cash Charge on this screen.
4. Swipe / Insert / Tap card on display. For **Manual Key Entry** type the card number on the screen.
5. **Enter Pin**. **Enter Tip** if enabled.
6. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
7. Select **Print Receipt** if a paper receipt is requested.
8. Follow the prompts on screen for the customer copy.

CREDIT VOID

1. Tap the **Menu** icon (≡)
2. Tap **Option 1 (Payment)**, tap **Card** then tap **Void**.
3. Select **Tran Number** or **Card Number**. If **Tran Number**, enter transaction number. If **Card Number**, enter last 4 digits of card.
4. Transaction will appear on screen. Press **OK** to void transaction.
5. Select receipt delivery method.

CREDIT PREAUTH

1. Tap **SALE** until **PREAUTH** shows.
2. Punch in **Transaction Amount**. Then **press OK**.
3. **Confirm Amount**. The Non-Cash Charge will NOT be calculated for PreAuth transactions.
4. Swipe / Insert / Tap card on display.
5. Sign on the screen.
6. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
7. Select **Print Receipt** if a paper receipt is requested.
8. Follow the prompts on screen for the customer copy.

CREDIT REFUND

1. Tap **SALE** until **REFUND** shows.
2. Punch in **Transaction Amount**. Then **press OK**.
3. Confirm Amount. The Non-Cash Charge will NOT be calculated for Refund transactions.
4. **Enter Password**. The default password is the **Last 4 Digits of the EPI number.**
5. Swipe / Insert / Tap card on display.
6. Sign on the screen and confirm.
7. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
8. Select **Print Receipt** if a paper receipt is requested.
9. Follow the prompts on screen for the customer copy.

CREDIT CAPTURE

1. Tap **SALE** until **TICKET** shows.
2. Punch in **Transaction Amount**. Then **press OK**.
3. Enter Password. The default password is the **Last 4 Digits of the EPI number.**
4. Tap **Tran Number** to enter the transaction number or tap **Card Number**.
5. Enter the transaction number or last 4 digits of customer's card number.
6. Select transaction to be captured.
7. Punch in the customer's phone number for SMS receipt. Then select the **Go Green** option.
8. Select **Print Receipt** if a paper receipt is requested.
9. Follow the prompts on screen for the customer copy.

Transactions

Credit Sale

1 Enter **Transaction Amount** and tap **Enter**.
2. **Swipe/Insert/Tap card** on **Present Card** screen. For **Manual Key Entry**, select the Enter Manually option.
3. **Sign** and **Tip** if prompted.
4. Select receipt delivery method.

Credit Void

1. Tap **Sale** until **Void** is displayed.
2. Enter the **Transaction Number** from the receipt or the **last 4 of the card number** and tap **Enter**.
3. When prompted enter **Password.**
4. Tap to confirm the transaction that needs to be voided.
5. Select receipt delivery method.

Credit Preauth

1. Tap **Sale** until **Preauth** is displayed.
2. Enter **Transaction Amount** and tap **Enter**.
3. **Swipe/Insert/Tap** card on **Present Card** screen. For **Manual Key Entry**, select the **Enter Manually** option.
4. Select receipt delivery method.

Debit Sale

1. Tap **Credit** until **Debit** is displayed.
2. Enter **Transaction Amount** and tap **Enter**.
3. **Swipe/Insert/Tap** card on **Present Card** screen. For **Manual Key Entry**, select the Enter Manually option.
4. Enter **PIN** and **Tip** if prompted.
5. Follow prompts until receipt prompt-select receipt delivery method.

Credit Refund

1. Tap **Sale** until **Refund** is displayed.
2. Enter **Transaction Amount** and tap **Enter**.
3. **Swipe/Insert/Tap** card on **Present Card** screen. For **Manual Key Entry**, select the **Enter Manually** option.
4. Select receipt delivery method.

Capture Preauth

1. Tap **Sale** until **Ticket** is displayed.
2. Enter **Transaction Amount**, tap **Enter** and enter **Password**.
3. Enter the **Transaction Number** from the receipt or the **last 4 of the card number** and tap **Enter**.
4. **Sign** and **Tip** if prompted. 5. Select receipt delivery method.

Pre-Sale Ticket

1. Tap the **Main Menu** icon-tap the **Page Down** icon and select **Pre Sale.**
2. Enter the **Transaction Amount,** press the **Enter** Button and the pre-sale ticket will be printed.

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EvolvPay550 Quick Reference Guide

Main Menu Options

Report

See summary reports for current open batch, the last settled batch, and the detailed reports of the last 5 batches settled.

Settlement

Option to settle the current batch.

Tip Adjustment

Adjust the tip amount on transactions performed within current batch.

Reprint Receipt

Prints the receipt for last transaction performed.

Pre Sale

Generates a Pre-Sale ticket.

Reprint

Option to print receipt for the last transaction or any transaction receipt from current open batch selected by using the Tran No. or Last 4 digit of the card number.

Updates

Used to apply parameter changes or update the version on the device.

Settings

Configure settings on the device such as Server/Clerk, Change Password, Wifi Config, SIM Config, and Utilities.

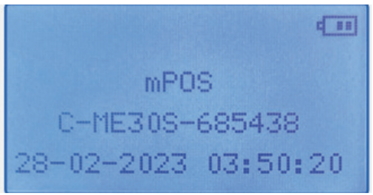
Connect to WiFi

1. From the **Home Screen**, tap the **Main Menu icon.**
2. Tap **Settings**, then **WiFi Config**
3. Tap **SSID**
4. Enter **WiFi Password** (Password is case sensitive)
5. Tap **Connect**

EvolvPay RCKT Quick Reference Guide

Connecting the RCKT to your Smartphone

1. Press and hold the **Power** icon to turn on the device.
2. If powered on fully the screen will read like the example below



3. Open the **EvolvPay App** on your smartphone.
4. Select the **Banner** at the bottom of the screen labeled **MPOS.**
5. Select the **Device** that identically matches your C-ME30S-685xxx number.
6. Select **Pair** to connect your smartphone with the **RCKT Mobile POS** via Bluetooth.
7. Once your specific endpoint identifier is loaded, you're ready to start accepting payments

Accepting Payments

1. Your **EvolvPay App** Home screen displays **MERCHANT NAME | RCKT NAME | CREDIT | SALE** buttons.
2. Tap **CREDIT** to select the type of Payment Form being used from the dropdown menu: **CREDIT | DEBIT | EBT FOOD | EBT CASH | CASH.**
3. Tap **SALE** to select the **Transaction Type** to be processed from the dropdown menu: **SALE | VOID | AUTH | TICKET | REFUND | PRESALE.**
4. Then enter the **Transaction Amount** followed by the customer's **Email Address** and **Mobile Number.**
5. Press the right **Arrow** located in the top right corner to continue.
6. A prompt in the **ValorPay App** as well as on the **RCKT Mobile POS** instructs you or the customer to **Please Insert or Tap the Card.**
7. The **RCKT Mobile POS** beeps once after a payment card is swiped, dipped or tapped indicating it was read correctly.
8. If **Tipping** has been activated, select one of the **Smart Tip** options shown or enter a custom **Tip Amount** on the **EvolvPay App** and press the right **Arrow** in the top right corner.
9. If **Cash Discounting** has been activated, the adjusted **Sale Amount** is displayed.
10. If **Surcharging** has been activated, a **Non-Cash Charge Amount** is displayed which your customer must approve by tapping the **Checkbox.**
11. If **Dual Processing** has been activated, **Credit | EBT | Cash** pricing options are displayed for your customer to select from.
12. To review the **Transaction** as entered, select the right **Arrow** in the top right corner of the **EvolvPay App.**
13. Use the **Back Arrow** in the upper left corner of the **EvolvPay App** to fix any errors.
14. When ready to complete the payment transaction, tap **PAY. Approved** is displayed on the on the **EvolvPay App** and **RCKT Mobile POS** screens when done. **Receipts** are emailed and/or sent to customers via SMS text message.