

# **Worldline Edge (EP2)**

## Terminal Guide

# Contents

1.	Worldline Edge (EP2) Electronic Terminal.....	4
1.1	Electronic Terminal Features .....	4
1.2	Worldline Edge (EP2) Basic Functions .....	4
1.3	Powering the Electronic Terminal On/Off .....	4
1.4	Upgrading the software .....	5
1.5	Card Reader .....	5
1.6	USB Type-C .....	6
1.7	How to load Printer Paper .....	6
1.8	Battery .....	6
1.9	Accessibility Features .....	7
1.10	Safety .....	7
1.11	Terminal Faults Self-Help .....	8
1.12	Terminal Security .....	8
2.	Processing a Sale .....	8
2.1	Processing a Standard Sale .....	8
2.2	Processing a Purchase through QR Code .....	8
2.3	Processing a Sale with Cash Out .....	9
2.4	Processing a Cash Out Transaction .....	9
3.	Refund .....	10
3.1	Processing a Reversal Transaction .....	10
3.2	Processing a Referenced Refund Transaction .....	10
3.3	Processing a Standard Refund Transaction .....	11
3.4	Processing a Refund Transaction through QR Code .....	11
4.	DCC Transactions .....	12
4.1	Processing a DCC Purchase Transaction .....	12
4.2	Processing a DCC Reversal Transaction .....	12
4.3	Processing a DCC Refund Transaction .....	13
4.4	Applying DCC – Prohibited for MOTO .....	13
4.5	DCC Receipt .....	14
5.	Pre-Authorisation .....	14
5.1	Processing a Pre-Authorisation Transaction .....	14
5.2	Processing a Pre-Authorisation Completion .....	15
5.3	Processing a Pre-Authorisation Adjustment Transaction .....	15
5.4	Processing a Pre-Authorisation Cancel Transaction .....	16
6.	Mail Order Telephone Order (MOTO) .....	16
6.1	Processing a Mail Order Transaction (Scheme Cards Only) .....	16
6.2	Processing a Telephone Order Transaction (Scheme Cards Only) .....	16
7.	Shift Mode and Shift Totals .....	17
7.1	Start Shift .....	17
7.2	End Shift .....	17
8.	Settlement .....	17
8.1	Daily Closing Balance / Final Balance / Daily Settlement .....	17

9.	Print Reports .....	18
9.1	Print Last Ticket .....	18
9.2	Daily Totals .....	18
10.	Change Merchant Password .....	18
11.	Communication Options .....	18
12.	Configuring Communication Type.....	18
12.1	Set Up the Electronic Terminal for Internet via Wi-Fi Communication .....	18
13.	Electronic Terminal Configuration.....	19
14.	Electronic Terminal Initialisation .....	19
15.	Software Update .....	19
16.	Changing Volume Settings on Electronic Terminal .....	20
17.	Common Electronic Terminal Error Messages .....	20

# 1. Worldline Edge (EP2) Electronic Terminal

This Terminal Guide provides important information you need to know about processing debit and credit transactions using your Worldline Edge (EP2) Electronic Terminal. This Electronic Terminal is designed to accept payments using contactless, magnetic stripe and chip cards, as well as smartphones and wearables. Please take time to read it thoroughly and ensure that your staff read it too.

## 1.1 Electronic Terminal Features

The Worldline Edge (EP2) Electronic Terminal incorporates a large colour touch screen, a magnetic stripe card reader, a chip card reader, a built-in contactless reader and a fast thermal 'easy loading' printer.

## 1.2 Worldline Edge (EP2) Basic Functions

- The Electronic Terminal has three virtual keys at the bottom of the screen: Menu, Home and Back.
- The Electronic Terminal has one physical key on the left side, a power button.
- The Electronic Terminals has a USB-C connector on the left-hand side which is used to charge the Electronic Terminal

## 1.3 Powering the Electronic Terminal On/Off

### Powering on the Electronic Terminal

**To power on:** Make sure the Electronic Terminal battery is correctly installed and press the **Power** button on the left-hand side for approximately 3 seconds and the display screen will turn on.

Once powered on, the Electronic Terminal will complete its start-up routine. Upon completion, the Electronic Terminal will be ready to use.

**Note:** When the terminal is plugged into a power cable and connected to AC power, it will remain powered on.

### Powering off the Electronic Terminal

**To power off:** Remove charger, then press the **Power** button for approximately 3 seconds until the display shows the power off button, then press **Power off**.

If the battery is empty, the Electronic Terminal automatically shuts off.

### Screen saver mode

Short-press the power button for about 0.5 seconds, the Electronic Terminal display will be turned on or off.

## 1.4 Upgrading the software

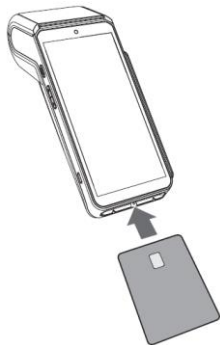
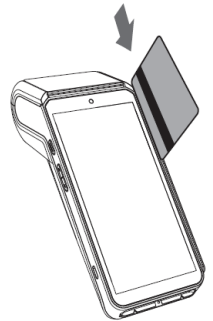
The Electronic Terminal will automatically download software updates. However, in the instance where it does not download an update, or you have been advised to download an update by our Merchant Servicing agent you can follow the below steps.

1. Tap on the gear icon located at the top right of the screen to open the settings
2. Enter your Merchant Password and tap on the green tick button
3. Tap on **Software Upgrade**
4. Tap **Yes** to perform the software upgrade

## 1.5 Card Reader

### Magnetic stripe card reader

- A card can be read via the magnetic stripe card reader located on the right-hand side of the Electronic Terminal.
- A card can be read by swiping from the top to the bottom of the Electronic Terminal with the magnetic stripe facing down towards the Electronic Terminal. Use a regular movement to ensure a reliable card reading.

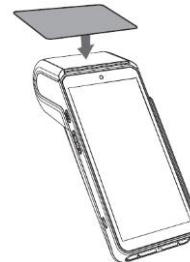


### Chip card reader

- Insert the chip card horizontally into the bottom of the Electronic Terminal with the metal chip facing upwards. Leave the chip card in this position throughout the transaction.
- The chip card can be removed from the Electronic Terminal when signature verification is required or as instructed by the Electronic Terminal.

### Contactless reader

- Bring the card firmly up to the active zone.
- Keep the card close to the reader during the transaction.
- On the front, LEDs are displayed to indicate transaction processing.



## 1.6 USB Type-C

There is a USB type-C connector on the left side of the Electronic Terminal which can be used to charge the Electronic Terminal battery



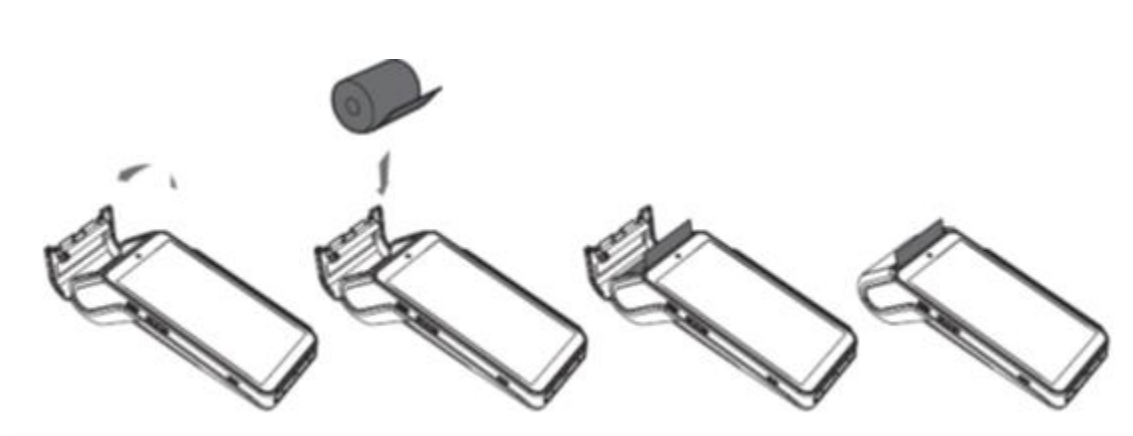
## 1.7 How to load Printer Paper

1. Open the paper compartment by lifting the lid located at the top of the Electronic Terminal and pull the cover to the rear to open
2. Insert the paper roll into the compartment
3. Pull the paper up to the top of the Electronic Terminal
4. Maintain the paper and close the cover
5. Press simultaneously on both upper corners of the paper compartment until it clips into position.

### Note:

Do not tamper with or remove the Electronic Terminal housing.

Switch off the Electronic Terminal prior to installing the paper roll.



## 1.8 Battery

When does the battery need to be charged?

- On initial start-up, it is important to charge the battery until it is fully charged
- Before using the Electronic Terminal, make sure the battery is completely charged to ensure the maximum number of transactions can be completed
- When used daily, the Electronic Terminal recharges its battery each time the power adapter is connected.

## How to Charge the Battery

- Connect the Electronic Terminals power supply unit to the USB Type-C connector located on the left-hand side
- Connect the power supply unit to the power supply mains network
- Check the charging status on the top of the screen

## 1.9 Accessibility Features

Our Electronic Terminals offer a wide range of built-in accessibility features to enhance usability for users with disabilities. These features include screen readers, voice control, and more, designed to make interacting with the Electronic Terminal easier

1. Tap on the gear icon located at the top right of the screen to open the settings
2. Enter your Merchant Password and tap on the green tick button
3. Tap on **Android Settings**
4. Enter the device password and tap ok
5. Tap on **Accessibility**
6. All of the Accessibility options will now be available to you to choose from

## 1.10 Safety

You should note the following important warnings and always exercise caution in operating, storing and transporting your Worldline Edge (EP2) Electronic Terminal.

### During air travel

Before boarding any aircraft:

- Turn off your Electronic Terminal
- Remove the battery from the Electronic Terminal

### Potentially explosive atmospheres

Some regulations restrict the use of radio equipment in chemical plants, fuel depots and any site where blasting is carried out. You are urged to comply with these regulations. The Electronic Terminal should be protected by a specially fitted and certified cover enabling use in proximity to a fuel pump.

### Thunderstorm weather

Do not use your Electronic Terminal(s) in thunderstorm weather.

### Medical electronic equipment

Your Electronic Terminal is a radio transmitter which may interfere with health appliances, such as hearing aids, pacemaker, hospital equipment, etc. Please consult your doctor or the manufacturer of any personal medical devices such as pacemakers or hearing aids, to determine if they are

adequately shielded from any external radio frequency energy. You must turn off your Electronic Terminal in health care facilities if instructed by any signs in the area.

## 1.11 Terminal Faults Self-Help

- If your terminal is experiencing technical issues:

### Restart the Terminal

Hold down the Power Button on the left hand side of the Electronic Terminal until the option side panel is shown on screen, then select **Restart**.

If you are still experiencing issues after the Electronic Terminal has been restarted, please contact ANZ Worldline Payment Solutions on 1800 039 025 for further assistance.

## 1.12 Terminal Security

Please ensure that the terminal is placed in a secure location enabling the cardholder to use the touchscreen without being observed by security cameras, CCTV devices or by any other person.

Only authorised ANZ Worldline Payment Solutions employees or contractors are permitted to install or perform maintenance of your terminal.

## 2. Processing a Sale

### 2.1 Processing a Standard Sale

1. From the on screen menu, select **Transactions**, then select **Purchase**
2. Key in the purchase amount and tap **<OK>**
3. If Tipping is enabled, the Electronic Terminal will prompt to enter a Tip amount or select a tip %. Ask the customer to select a tip % or key in a custom amount. If the customer does not want to tip, they can bypass by tapping **<No Tip>**
4. Verify the purchase + tip amount is correct
5. Ask the customer to tap, insert, or swipe their card on the PRESENT CARD screen. For Swipe or Insert card processing, ask the customer to select their account type  
**Note:** If prompted, have the customer enter their PIN
6. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been declined, notify the customer, advise them to contact their card issuer and provide an alternative form of payment
7. Transaction is approved and merchant receipt is printed
8. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen

### 2.2 Processing a Purchase through QR Code

1. From the on screen menu, select **Transactions**, then select **Purchase**
2. Key in the purchase amount and tap **<OK>**



3. If Tipping is enabled, the Electronic Terminal will prompt to enter a Tip amount or select a tip %. Ask the customer select a tip % or key in a custom amount. If the customer does not want to tip, they can bypass by tapping **<No Tip>**
4. Verify the purchase + tip amount is correct
5. The final purchase amount and the QR code is displayed. Have the customer scan this QR code using the customer's chosen mobile payment application, which has also been enabled in your Electronic Terminal.
6. The customer's mobile payment application will display the relevant payment details (e.g. Purchase Amount, Exchange Rate, etc). Have the customer confirm these details, and then proceed by pressing the relevant button(s) in the mobile payment application.
7. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been declined, notify the customer, advise them to contact their card issuer and provide an alternative form of payment.
8. Transaction is approved and merchant receipt is printed
9. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen

## 2.3 Processing a Sale with Cash Out

1. From the on screen menu, select **Transactions**, then select **Purchase with Cash Out**
2. Key in the total amount (purchase + Cash Out) and tap **<OK>**
3. Key in Cash Out amount and tap **<OK>**
4. Verify the amount is correct and have the customer insert or swipe their card. Chip cards are to be inserted and left in the chip card reader. Magnetic stripe cards are to be swiped through the magnetic stripe card reader
5. Ask the customer to select their account, **CHQ** or **SAV**
6. Ask the customer to enter their PIN then tap **<OK>**
7. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and provide an alternative form of payment
8. Transaction is approved and merchant receipt is printed
9. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

## 2.4 Processing a Cash Out Transaction

1. From the on screen menu, select **Transactions**, then select **Cash Out**
2. Key in the amount and tap **<OK>**
3. Verify the amount is correct and have the customer insert or swipe their card. Chip cards are to be inserted and left in the chip card reader. Magnetic stripe cards are to be swiped through the magnetic stripe card reader
4. Ask the customer to select their account, **CHQ** or **SAV**
5. Ask the customer to enter their PIN then tap **<OK>**
6. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and provide an alternative form of payment

7. Transaction is approved and merchant receipt is printed
8. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

## 3. Refund

Refunds are transactions that will allow you to give a customer back money for returned goods purchased from you, or for services terminated or cancelled. Before performing any refunds or reversals please refer to the Merchant Operating Guide for further information.

### 3.1 Processing a Reversal Transaction

A reversal allows you to refund the last transaction completed, however this functionality is not possible if the Electronic Terminal has performed settlement.

1. From the on screen menu, select **Transactions**, then select **Reversal**
2. The Electronic Terminal will prompt to enter the Merchant password. Enter the Password and tap **<OK>**
3. The Electronic Terminal will display the amount of the last transaction, including any tips and surcharges if they were applied as part of the previous transaction.
4. Verify the amount is correct and tap **<OK>** to confirm or **<STOP>** to return to the home screen
5. The Electronic Terminal will display a **Reversal OK** or **Reversal DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and hand the customer their copy of the Transaction Record.
6. Reversal is approved and merchant receipt is printed
7. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

### 3.2 Processing a Referenced Refund Transaction

Before performing a refund please ensure you have the original transaction receipt available as you will be required to enter information from the original transaction into the Electronic Terminal to successfully process the refund.

1. Calculate the correct amount of refund to be applied, taking into consideration tipping and surcharge amounts as part of the original transaction. If the full transaction amount is to be refunded, then ensure that the (transaction amount including tipping and surcharge) has been factored fully into the refund. If the merchant is only partially refunding (i.e. few items were refunded but not the whole transaction), then the merchant has to calculate and ensure the correct amount of surcharge is included in the refund.
2. From the on screen menu, select Transactions, then select **Refund**
3. The Electronic Terminal will prompt to enter the Merchant password. Enter the Password and tap **<OK>**
4. Key in the refund amount and tap **<OK>**

5. The Electronic Terminal will prompt to enter the transaction date, tap **<OK>** to bypass
6. Tap on **<REF>** located at the bottom of the screen
7. Select the Acq-Id  
**Note:** The Acq-Id is located on the transaction receipt
8. Key in the Trx. Ref-No and tap **<OK>**  
**Note:** The Trx. Ref-No is located on the transaction receipt
9. The Electronic Terminal will display a **Refund OK** or **Refund DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and hand the customer their copy of the Transaction Record.
10. Refund is approved and merchant receipt is printed
11. The Electronic Terminal prints a customer copy with a line for a merchant signature.

### 3.3 Processing a Standard Refund Transaction

Before performing a refund please ensure you have the original transaction receipt available as you will be required to enter information from the original transaction into the Electronic Terminal to successfully process the refund.

1. Calculate the correct amount of refund to be applied, taking into consideration tipping and surcharge amounts as part of the original transaction. If the full transaction amount is to be refunded, then ensure that the (transaction amount including tipping and surcharge) has been factored fully into the refund. If the merchant is only partially refunding (i.e. few items were refunded but not the whole transaction), then the merchant has to calculate and ensure the correct amount of surcharge is included in the refund.
2. From the on screen menu, select **Transactions**, then select **Refund**
3. The Electronic Terminal will prompt to enter the Merchant password. Enter the Password and tap **<OK>**
4. Key in the refund amount and tap **<OK>**
5. The Electronic Terminal will prompt to enter the transaction date, tap **<OK>** to bypass
6. Ask the customer to tap, insert, or swipe their card on the 'PRESENT CARD' screen – For Swipe or Insert card processing ask the customer to select their account type.
7. The Electronic Terminal will display a **Refund OK** or **Refund DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and hand the customer their copy of the Transaction Record.
8. Refund is approved and merchant receipt is printed
9. The Electronic Terminal prints a customer copy with a line for merchant signature.

### 3.4 Processing a Refund Transaction through QR Code

Before performing a refund please ensure you have the original transaction receipt available as you will be required to enter information from the original transaction into the Electronic Terminal to successfully process the refund.

1. Calculate the correct amount of refund to be applied taking into consideration any tip paid as part of the transaction. If the full transaction amount is to be refunded, then ensure that the (transaction amount and any tip amount) has been factored in.

2. From the on screen menu, select **Transactions**, then select **Refund**
3. The Electronic Terminal will prompt to enter the Merchant password. Enter the Password and tap **<OK>**
4. Key in the refund amount and tap **<OK>**
5. The Electronic Terminal will prompt to enter the transaction date, tap **<OK>** to bypass
6. The Electronic Terminal displays the relevant QR code. Have the customer scan this QR code using the mobile payment application that the customer used for the original Purchase transaction, that is now being refunded.
7. The Electronic Terminal will display a **Refund OK** or **Refund DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card / mobile payment application issuer and hand the customer their copy of the Transaction Record.
8. Refund is approved and merchant receipt is printed
9. The Electronic Terminal prints a customer copy with a line for merchant signature.

## 4. DCC Transactions

Before performing any DCC transaction please refer to the DCC section in the Merchant Operating Guide for further information.

### 4.1 Processing a DCC Purchase Transaction

1. From the on screen menu, select **Transactions**, then select **Purchase**
2. Key in the purchase amount and tap **<OK>**
3. If Tipping is enabled, the Electronic Terminal will prompt to enter a Tip amount. Ask the customer to key in a tip amount in AUD. If the customer does not want to tip, they can bypass by tapping **<OK>**.  
**Note:** If surcharges apply, they will show here
4. Verify the purchase + tip amount is correct (without the surcharge)
5. Ask the customer to tap, insert, or swipe their card on 'PRESENT CARD' screen – For Swipe or Insert card processing allow the customer to select account type.
6. The **Choose Currency** screen appears which will show the exchange rate including mark-up for processing the payment. Ask the customer to select between their home currency or AUD.
7. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been declined, notify the customer, advise them to contact their card issuer and provide an alternative form of payment.
8. Transaction is approved and merchant receipt is printed
9. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

### 4.2 Processing a DCC Reversal Transaction

A reversal allows you to only refund the last transaction completed, however this functionality is not possible if the Electronic Terminal has performed settlement.

1. From the on screen menu, select **Transactions**, then select **Reversal**

2. The Electronic Terminal will prompt to enter the Merchant password. Enter the Password and tap **<OK>**
3. The Electronic Terminal will display the amount of the last transaction, including any tips and surcharges if they were applied as part of the previous transaction.
4. Verify the amount is correct and tap **<OK>** to confirm or **<STOP>** to return to the home screen
5. The Electronic Terminal will display a **Reversal OK** or **Reversal DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and hand the customer their copy of the Transaction Record.
6. Reversal is approved and merchant receipt is printed
7. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

### 4.3 Processing a DCC Refund Transaction

Before performing a refund please ensure you have the original transaction receipt available as you will be required to enter information from the original transaction into the Electronic Terminal to successfully process the refund.

1. Calculate the correct amount of refund to be applied, taking into consideration tipping and surcharge amounts as part of the original transaction. If the full transaction amount is to be refunded, then ensure that the (transaction amount including tipping and surcharge) has been factored fully into the refund. If the merchant is only partially refunding (i.e. few items were refunded but not the whole transaction), then the merchant has to calculate and ensure the correct amount of surcharge is included in the refund.
2. From the on screen menu, select **Transactions**, then select **Refund**
3. The Electronic Terminal will prompt to enter the Merchant password. Enter the Password and tap **<OK>**
4. Key in the refund amount in AUD and tap **<OK>**
5. Key in the transaction date and tap **<OK>**
6. Ask the customer to tap, insert, or swipe their card on the 'PRESENT CARD' screen – For Swipe or Insert card processing ask the customer to select their account type.
7. The **Choose Currency** screen appears which will show the exchange rate including mark-up for processing the refund. Ask the customer to select between their home currency or AUD.
8. The Electronic Terminal will display a **Refund OK** or **Refund DECLINED** message. If the transaction has been declined, please notify the customer, advise them to contact their card issuer and hand the customer their copy of the Transaction Record.
9. Refund is approved and merchant receipt is printed
10. The Electronic Terminal prints a customer copy with a line for merchant signature.

### 4.4 Applying DCC – Prohibited for MOTO

You cannot process MOTO Transactions using DCC.

## 4.5 DCC Receipt

### DCC Purchase – Merchant Copy

XYZ MERCHANT 000 XXX ST MELBOURNE 3000	
<b>Purchase</b> <b>VISA</b> XXX Visa XXXX XXXXXXXXXXXXXXXXXXXX Account Type:	
	Credit
23.02.2023	11:57:58
Accounting period:	XX
Tmm-Id:	XXXXXX
Act-Id:	XXXX
AID:	XXXXXXXXXXXXXXXXXXXX
Trx Seq-Cnt:	XXXXXX
TRX REF-Nr:	XXXXXXXXXX
Auth Code:	XXXXXX
Acq-Id:	XXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	XXXXXXXX
XXXXXX	XXXXXX
<b>TOTAL EFT AUD: 17.00</b>	
Exchange Rate	EUR 1.00 = AUD 1.5135123
Transaction Amount	
<b>TOTAL EFT EUR:</b>	<b>11.23</b>
Mark-up incl.:	3.5%
I have been offered a choice of currencies and accept the final amount in transaction currency	
Currency conversion provided by Worldline	
Transaction OK ANZ Worldline	

### DCC Purchase – Customer Copy

ANZ WORLDLINE Payment Solutions	
XYZ MERCHANT 000 XXX ST MELBOURNE 3000	
***Cardholder Receipt***	
<b>Purchase</b> <b>VISA</b> XXX Visa XXXX XXXXXXXXXXXXXXXX Account Type: Credit	
23.02.2023	11:57:58
Tmm-Id:	XXXXXX
AID:	XXXXXXXXXXXXXXXXXXXX
Trx Seq-Cnt:	XXXXXX TRX
REF-Nr:	XXXXXXXXXX
Auth Code:	XXXXXX
Acq-Id:	XXXXXXXXXX
XXXXXXXXXX	XXXXXXXXXX
<b>TOTAL EFT AUD: 17.00</b>	
Exchange Rate	EUR 1.00 - AUD 1.5135123
Transaction Amount	
<b>TOTAL EFT EUR:</b>	<b>11.23</b>
Mark-up incl.:	3.5%
I have been offered a choice of currencies and accept the final amount in transaction currency	
Currency conversion provided by Worldline	
Transaction OK ANZ Worldline	

## 5. Pre-Authorisation

Before performing any Pre-Authorisation transactions please refer to the Pre-Authorisation section in the Merchant Operating Guide for further information.

### 5.1 Processing a Pre-Authorisation Transaction

1. From the on screen menu, select **Transactions**, then select **Reservation**
2. Key in the amount and tap **<OK>**
3. Ask the customer to tap, insert, or swipe their card on the 'PRESENT CARD' screen – For Swipe or Insert card processing ask the customer to select their account type.

4. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been declined, notify the customer, advise them to contact their card issuer and provide an alternative form of payment.
5. Transaction is approved and merchant receipt is printed
6. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

## 5.2 Processing a Pre-Authorisation Completion

The Pre-Authorisation Completion option looks up the original Pre-Authorisation transaction, confirms the transaction value, and puts the pre-authorisation transaction through as a payment. Before performing this transaction please ensure you have the original transaction receipt available as you will be required to enter information from the original transaction into the Electronic Terminal.

1. From the on screen menu, select **Transactions**, then select **Pre-Authorisation Completion**
2. Key in the amount and tap **<OK>**
3. Select the Acq-Id  
**Note:** The Acq-Id is located on the transaction receipt
4. Key in the **Trx. Ref-No** and tap **<OK>**  
**Note:** The Trx. Ref-No is located on the transaction receipt
5. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been rejected, please notify the customer, advise them to contact their card Issuer and seek an alternative form of payment.
6. Transaction is approved and merchant receipt is printed
7. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

## 5.3 Processing a Pre-Authorisation Adjustment Transaction

The Pre-Authorisation Adjustment option allows you to adjust the original Pre-Authorisation amount. For example, a customer calls to increase the number of rooms booked from one to two. Before performing this transaction please ensure you have the original transaction receipt available as you will be required to enter information from the original transaction into the Electronic Terminal.

1. From the on screen menu, select **Transactions**, then select **Pre-Authorisation Adjustment**
2. Key in the amount and tap **<OK>**
3. Select the Acq-Id  
**Note:** The Acq-Id is located on the transaction receipt
4. Key in the **Trx. Ref-No** and tap **<OK>**  
**Note:** The Trx. Ref-No is located on the transaction receipt
5. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message. If the transaction has been rejected, please notify the customer, advise them to contact their card Issuer and seek an alternative form of payment.
6. Transaction is approved and merchant receipt is printed
7. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

## 5.4 Processing a Pre-Authorisation Cancel Transaction

A Pre-Authorisation reduces the available funds in a cardholder's account. If a customer does not proceed with a sale after a Pre-Authorisation has been obtained, you should cancel the Pre-Authorisation as soon as possible to release the funds back to the customer.

1. From the on screen menu, select **Transactions**, then select **Pre-Authorisation Cancel**
2. Key in the amount and tap **<OK>**
3. Select the Acq-Id  
**Note:** The Acq-Id is located on the transaction receipt
4. Key in the **Trx. Ref-No** and tap **<OK>**  
**Note:** The Trx. Ref-No is located on the transaction receipt
5. The Electronic Terminal will display a **Reversal OK** or **Reversal DECLINED** message. If the transaction has been rejected, please notify the customer, advise them to contact their card Issuer and seek an alternative form of payment.
6. Transaction is approved and merchant receipt is printed
7. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

## 6. Mail Order Telephone Order (MOTO)

This feature is only available for merchants specifically authorised by ANZ Worldline Payment Solutions.

Before performing any transaction with MOTO, please refer to the MOTO section in the Merchant Operating Guide for further information.

### 6.1 Processing a Mail Order Transaction (Scheme Cards Only)

1. From the on screen menu, select **Transactions**, then select **Mail Order**
2. Key in the amount and tap **<OK>**
3. Key in the card number, the expiry date, and the CCV and tap **<OK>**
4. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message.  
If the transaction has been declined, notify the customer, advise them to contact their card issuer and provide an alternative form of payment.
5. Transaction is approved and merchant receipt is printed
6. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.

### 6.2 Processing a Telephone Order Transaction (Scheme Cards Only)

1. From the on screen menu, select **Transactions**, then select **Phone Ordered**
2. Key in the amount and tap **<OK>**
3. Key in the card number, the expiry date, and the CCV and tap **<OK>**
4. The Electronic Terminal will display a **Transaction OK** or **Transaction DECLINED** message.  
If the transaction has been declined, notify the customer, advise them to contact their card issuer and provide an alternative form of payment.
5. Transaction is approved and merchant receipt is printed
6. Tap **<Copy>** to print the customer copy or **<No Copy>** to return to the home screen.



## 7. Shift Mode and Shift Totals

For businesses operating shifts, the shift report can provide information on the transactions performed during each shift. The shift report is separate to the settlement report and does not settle your terminal. When you close off a shift, the shift total report will automatically print. You can print a running total of your current shift at any time.

**Note:** This feature is only available when your Electronic Terminal is operating in standalone mode

### 7.1 Start Shift

1. From the on screen menu, select **Balances**, then select **Start user shift**
2. The Electronic Terminal will print a **Start user shift** report that includes the date, time, Terminal ID (Trm-Id)

### 7.2 End Shift

1. From the on screen menu, select **Balances**, then select **End user shift**
2. The Electronic Terminal will print a **End user shift** report that includes the date, time, Terminal ID (Trm-Id) and a shift summary.

## 8. Settlement

For ANZ business account holders ANZ Worldline Payment Solutions offers same day settlement, every day for Visa, Mastercard and UnionPay transactions. For ANZ business account holders, funds are available on the same day for these transactions settled before **9.30pm (Melbourne Time)**. For non-ANZ business account holders, ANZ Worldline Payment Solutions transfers the funds to the merchant's bank on the following business day and the availability of the funds will be determined by the merchant's bank. The proceeds from any Alipay or WeChat Pay transactions will generally settle on two Business Days' following the date the purchases Transaction was originally processed, unless deferred further under the Agreement Settlement times (including settlement times for same-day settlement into an ANZ bank account) will be the same or slightly later in the day than your current settlement time.

There will be additional requirements for your Electronic Terminal to settle. For settlement to occur, you must ensure that your Electronic Terminal(s) is switched on and that communications are active from your settlement time.

### 8.1 Daily Closing Balance / Final Balance / Daily Settlement

This is the final balance of the day and initiates the transmission of all transactions to the host system to perform settlement. Once settlement is performed, a settlement report with the daily totals will print from the Electronic Terminal. If you want to receive same day settlement, then you must perform the end of day settlement process outlined below.

1. From the on screen menu, select **Balances**, then select **Daily Closing**
2. The Electronic Terminal displays **Data transmission PMS is running**
3. The Electronic Terminal prints the final balance.

4. To receive same day settlement (where applicable) you must ensure that your Electronic Terminal(s) is switched on and that communications are active.

## 9. Print Reports

### 9.1 Print Last Ticket

This functionality provides a copy of the last receipt /report that was printed. i.e. if the last functionality performed on the Electronic Terminal was a purchase, then this will allow you to print a copy of that purchase receipt. If the last functionality performed on the Electronic Terminal was to print a report e.g. Final Balance, then this will allow you to print a copy of that report.

1. From the on screen menu, select **Queries**, then select **Print Last Ticket**
2. The Electronic Terminal prints a copy of the last receipt or report

### 9.2 Daily Totals

The Daily Totals report lists the Purchases, Cash Out, Refund and Totals of the settlement by card scheme (excluding AMEX, JCB & Diners) for the current settlement period.

**Note:** This functionality does not perform settlement.

1. From the on screen menu, select **Queries**, then select **Daily counter**
2. The Electronic Terminal prints the daily the Counter report

## 10. Change Merchant Password

If you need to change your password, contact Merchant Services on 1800 039 025.

## 11. Communication Options

Worldline Edge (EP2) supports the following communications:

- Wi-Fi
- 4G
- Ethernet

## 12. Configuring Communication Type

### 12.1 Set Up the Electronic Terminal for Internet via Wi-Fi Communication

1. From main menu, select **<Settings>**
2. Select **<Network Setup>**
3. Enter the terminal password

4. Select **<WLAN>**
5. Select **<Android Settings>**
6. Select **<Network & Internet>**
7. Toggle WiFi on (if it is already on select WiFi)
8. Select an available WiFi network.
9. Use the onscreen keypad to enter the password for the selected WiFi network and tap the green tick
10. When the password is entered correctly. The WiFi symbol in the status header of the terminal will turn white.

## 13. Electronic Terminal Configuration

If a merchant needs to perform configuration on their Electronic Terminal based on advice from ANZ Worldline Payment Solutions, they can do so by following these steps:

1. From the on screen menu, select **Setup**
2. The Electronic Terminal will prompt to enter the merchant password. Enter the Password and tap **<OK>**
3. Tap **Configuration**
4. The Electronic Terminal will perform a **Configuration**

## 14. Electronic Terminal Initialisation

If a merchant needs to perform initialisation on their Electronic Terminal based on advice from ANZ Worldline Payment Solutions, they can do so by following these steps:

1. From the on screen menu, select **Setup**
2. The Electronic Terminal will prompt to enter the merchant password. Enter the Password and tap **<OK>**
3. Tap **Initialisation**
4. Tap **All**
5. The Electronic Terminal will perform an **Initialisation**
- 6.

## 15. Software Update

If a merchant needs to perform a software update on their Electronic Terminal based on advice from ANZ Worldline Payment Solutions, they can do so by following these steps:

1. From the on screen menu, select **Setup**
2. The Electronic Terminal will prompt to enter the merchant password. Enter the Password and tap **<OK>**
3. Tap **SW update**
4. The Electronic Terminal will perform a **SW update**

## 16. Changing Volume Settings on Electronic Terminal

If a merchant needs to increase or decrease the volume on the Electronic Terminal, they can do so by following these steps:

1. From the on screen menu, select **Settings**, then select **Accessibility Settings**
2. Tap **Volume**
3. Increase or decrease the volume as required

## 17. Common Electronic Terminal Error Messages

Please contact ANZ Worldline Payment Solutions (24 hours a day, 7 days a week) on 1800 039 025 if you are unable to resolve an issue or encounter a decline



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