

Worldline Edge (EP2)

Quick Reference Guide

Navigating the Terminal

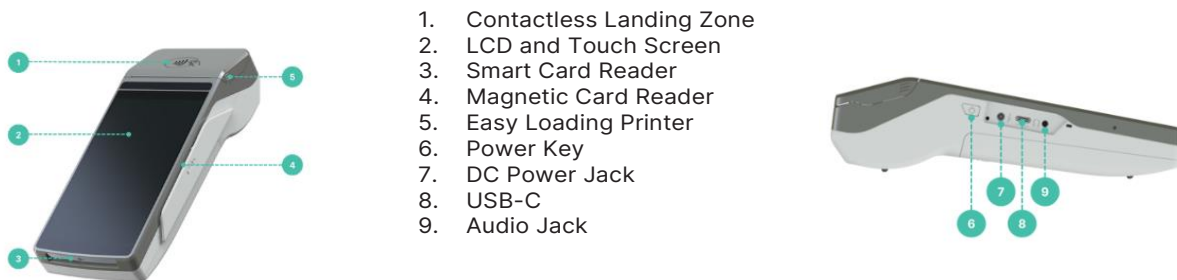
MENU	Tap to enter the application menus
CORR	Deletes entered numbers or letters
STOP	Cancels transactions and returns to home screen
OK	Confirm information that has been typed into the terminal

Basic Functions

POWER ON	Hold down the <Power> button for 3 seconds
POWER OFF	Remove terminal from powered base or direct power and hold down the <Power> button for 3 seconds, then select <Power Off>
WAKE UP	Press the <Power> button

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.



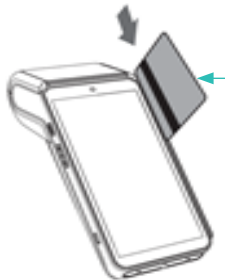
For Support

Merchant Services Support	1800 039 025
Stationery	anzworldline.com.au or 1800 039 025

HOW TO PROCESS PAYMENTS



Insert chip card



Swipe magnetic stripe



Tap contactless card, smartphone or wearables

PROCESSING A PURCHASE

Processing a Standard Purchase

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 (without the surcharge)
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.

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.

Processing a Purchase with Cash Out

Before performing any transaction with Cash Out or Purchase with Cash Out, please refer to the Cash Out and Purchase with Cash Out section in the Merchant Operating Guide - General for further information.

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.

Processing a Cash Out Transaction

Before performing any transaction with Cash Out or Purchase with Cash Out, please refer to the Cash Out and Purchase with Cash Out section in the Merchant Operating Guide - General for further information.

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.

REFUNDS

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.

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.

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.

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.

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.

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.

CONFIGURING COMMUNICATION TYPE

Set up the 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.

MERCHANT PASSWORDS

The Merchant Password is used to process Refunds and (where authorised) MOTO transactions on Worldline Edge (EP2) Standalone terminal. If you need to change your password, contact Merchant Services on 1800 039 025.

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.

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.

PRINT REPORTS

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

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

HOW TO CHARGE THE TERMINAL BATTERY

Using the Base

1. Place the Electronic Terminal on the base by securely connecting the terminal to the docking connector on the base
2. Connect the other end of base power supply to the main power outlet on the wall
3. In the upper right hand corner check that the battery symbol has a small lightning bolt in it. This will indicate that the Electronic Terminal is charging

Using the DC Power Jack Supplies with the Electronic Terminal

1. Connect the power supply unit to the dedicated DC power jack on the left side of the Electronic Terminal
2. Connect the other end of base power supply to the main power outlet on the wall
3. In the upper right hand corner check that the battery symbol has a small lightning bolt in it. This will indicate that the Electronic Terminal is charging

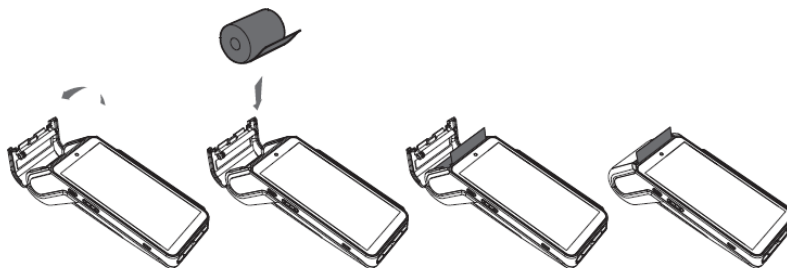
HOW TO LOAD PRINTER PAPER

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.



CHANGING THE VOLUME SETTING ON 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



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